
PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce

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PeopleSoft Enterprise Human Resources Administer Workforce Preface

This preface discusses:

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

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

PeopleSoft Products

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

PeopleSoft Enterprise HRMS Application Fundamentals

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

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

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

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "PeopleSoft Enterprise HRMS Application Fundamentals Preface"

PeopleBooks and the PeopleSoft Online Library

A companion PeopleBook called *PeopleBooks and the PeopleSoft Online Library* contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the locally installed PeopleSoft online library, including web site folders.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Application abbreviations found in application fields.

You can find *PeopleBooks and the PeopleSoft Online Library* in the online PeopleBooks Library for your PeopleTools release.

Chapter 1

Getting Started with Administer Workforce

This chapter discusses:

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

Human Resources Administer Workforce Overview

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

The Administer Workforce business process includes five basic steps:

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

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

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

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

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

3. Entering additional data into the record.

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

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

4. Updating the record.

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

5. Viewing and reporting on worker data.

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

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Labor Administration, "Getting Started with Manage Labor Administration"

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Compensation and Budgeting, "Understanding Base Compensation and Budgeting"

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Meet Regulatory Requirements

Human Resources Administer Workforce Business Processes

PeopleSoft Enterprise Human Resources Administer Workforce provides these business processes:

- Administer adding a person to the workforce.

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

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

Human Resources Administer Workforce Integrations

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

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

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

Human Resources Administer Workforce Implementation

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

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

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

<i>Component</i>	<i>Component Interface</i>	<i>References</i>
CHKLST_ITEM_TBL	CI_CHKLST_ITEM_TBL	See Chapter 2, "Setting Up the Administer Workforce Business Process," Creating Checklists, page 75.
CNT_CLAUSE_TABLE	CNT_CLAUSE_TABLE	See Chapter 8, "Entering Additional Data in Human Resources Records," Pages Used to Track Workforce Contracts, page 388.

Component	Component Interface	References
SALARY_PLAN_TABLE	SALARY_PLAN	See <i>PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Compensation and Budgeting</i> , "Setting Up Base Compensation and Budgeting," Setting Up Salary Plans, Grades, and Steps.

Other Sources of Information

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

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "PeopleSoft Enterprise HRMS Application Fundamentals Preface"

Enterprise PeopleTools PeopleBook: PeopleSoft Setup Manager

Enterprise PeopleTools PeopleBook: PeopleSoft Component Interfaces

Chapter 2

Setting Up the Administer Workforce Business Process

This chapter discusses how to:

- Define personnel actions and reasons.
- (USF) Define award actions.
- Set up SmartHire (template-based hires).
- Define roles for hire notifications.
- Define employee identification.
- Set up military rank structure.
- Set up military rank change notification and documentation.
- Define additional employment data.
- Create checklists.
- Set up workforce contracts.
- Set up the Company Directory.

Defining Personnel Actions and Reasons

To set up the Personnel Actions and Reasons tables, use the Actions (ACTION_TBL), Reason Summary (ACTION_TBL), FPS Action (FPM ACTION_PNL2), Action Reasons (ACTION_REASON_TBL), and Action Reason Table (RUN_PER710) components.

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

- Define or review personnel actions.
- Define personnel action reasons.

Understanding Personnel Action Reasons

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

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

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

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

Positions and Action Reasons

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

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

Global Assignments and Action Reasons

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

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

Pages Used to Define Personnel Actions and Personnel Action Reasons

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Actions	ACTION_TBL_GBL	Set Up HRMS, Product Related, Workforce Administration, Actions, Actions	Define or review a personnel action code and its values

Page Name	Definition Name	Navigation	Usage
Reason Summary	ACTION_TBL2	Set Up HRMS, Product Related, Workforce Administration, Actions, Reason Summary	Display the list of reasons for a specific action code
FPS Action	FPMACTION_PNL2	Set Up HRMS, Product Related, Workforce Administration, Actions, FPS Action	(French Public Sector). This page is displayed if you have French Public Sector selected on the Installation table. Use this page to assign the FPS components that can use the action code. This page is discussed in the <i>PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage French Public Sector</i> . See <i>PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage French Public Sector</i> , "Setting Up French Public Sector Tables," Setting Up Actions.
Action Reasons	ACTION_REASON_TBL	Set Up HRMS, Product Related, Workforce Administration, Action Reasons, Action Reasons	Define personnel action reasons or modify existing action reasons.
Action Reason Table	RUN_PER710	Set Up HRMS, Product Related, Workforce Administration, Action Reason Report, Action Reason Table	Run the Action Reason Table report (PER710). This report lists the reason codes for each personnel action code and arranges them alphabetically by action.

See Also

Chapter 8, "Entering Additional Data in Human Resources Records," Entering Temporary Assignments, page 400

Defining or Reviewing Personnel Actions

Access the Actions page (Set Up HRMS, Product Related, Workforce Administration, Actions, Actions).

Actions		Reason Summary		EPS Action	
Action:		HIR			
Action History Find View All First 1 of 1 Last					
*Effective Date:	01/01/1900	*Status:	Active		
*Action Description:	Hire				
*Short Description:	Hire	Owner ID:	HR Core Objects		
Set Status Fields					
☒ Action sets Status Fields					
Payroll Status:	A	Active			
HR Status:	Active				
Set Organizational Instance Dt			Set Assignment Dates		
First Start Date:	JOB.EFFDT		Start Date:	JOB.EFFDT	
Latest Start Date:	JOB.EFFDT		Latest Start Date:	JOB.EFFDT	
Termination Date:	Clear		End Date:	Clear	
			Last Date Worked:	Clear	
			Expected End:	Clear	
			Expected Return Date:	Clear	
Organizational Relationship					
Valid if PER_ORG is:	Employee Only				
Valid if Previous HR Status is:	Inactive				
Valid if Prev Pay Status is:					
Message Set/Number:	1000	15	Action is valid only if HR Status is Inactive.		
Comment:	Used to create a new Organizational Instance for an Employee. Use Rehire (REH) to rehire using this Instance. Use Hire (HIR) to rehire and reset the start and service dates.				

Actions page

Set Status Fields

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

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

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

Set Organizational Instance Dt (Set Organizational Instance Date)

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

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

Set Assignment Dates

Start Date Select the action table value used to determine how to set the date on which an individual assignment starts. The Hire (HIR), Add Contingent Worker (ADD), and Add Person of Interest (POI) actions, as well as the Additional Job (ADL) and Assignment (ASG) actions, set this value
The values are: *JOB.EFFDT* and *No Action*.

Latest Start Date Select the action table value used to determine how to set the date on which an individual assignment is restarted. The Rehire (REH) and Renewal (RNW) actions, as well as all the actions that set the start date, set this value.
The values are: *JOB.EFFDT* and *No Action*.

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

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

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

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

Organizational Relationship

Valid if PER_ORG is	Indicate whether this action is valid only for certain organizational relationships. Values are: <i>Contingent Worker Only</i> , <i>Contingent Worker or POI</i> , <i>EMP</i> , <i>CWR</i> , or <i>POI</i> , <i>Employee Only</i> , <i>Employee or Contingent Worker</i> , or <i>Person of Interest Only</i> .
Valid if Previous HR Status is:	Indicate that this action is only valid if the job assignment is in the selected HR status. For example, an action of HIR cannot be entered if the prior HR Status is Active. The values are: <i>Active</i> and <i>Inactive</i> .
Valid if Prev Pay Status is (Valid if Previous Pay Status is):	Indicate that this action is only valid if the job assignment is in the selected status. For example, a return from leave action can only be entered if the previous pay status in a Leave status. The values are: <i>P/L – Any Leave</i> , <i>P/L – Disability Leave</i> , <i>S – Suspended</i> , and <i>W – Short Work Break</i> .
Message Set/Number	Choose the Message Set Number and Message Number to determine the error message used for the Valid if Previous HR Status is or Valid if Prev Pay Status is settings.

Defining Personnel Action Reasons

Access the Action Reasons page (Set Up HRMS, Product Related, Workforce Administration, Action Reasons, Action Reasons).

Action Reasons

Action:DTA Data Change

Reason Code:STC

Action Reason

Find | View All First1 of 1Last

*Effective Date:01/01/1900

*Status:Active

*Description:Status Change

Short Description:Status Chg

Canada

*ROE Reason:Other

Benefits Employee Status:Active

Benefits Administration Action:DTA

USA

Benefits Employee Status:Active

Benefits Administration Action:DTA

Brazil

*CAGED Action / Reason:00-Not Applicable

*RAIS Action / Reason:Not Applicable

Spain

Social Security Action:

Action Reasons page (1 of 2)

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 Australia Movement Code: 	
 Germany ☐ Spokesmen Committee Approval ☐ Company Doctor's Approval	
 Mexico IMSS Termination Reason:  INFONAVIT Reason:  ☐ Maintain Variable SDI ☐ Inter-Company Transfer	
IMSS Print Form ☒ Employee Register ☐ Employee Termination ☐ Salary Change ☐ N/A	SUA Reason ☐ Employee Register ☐ Employee Termination ☐ Salary Change ☐ Re-enter ☒ N/A
Comment:  	

Action Reasons page (2 of 2)

Note. Effective-dated fields include the description and status as well as country-specific sections for Canada, USA, Brazil, and Spain. Other fields on this page, including the comments and the sections for Australia, Germany, and Mexico are not effective dated.

(CAN) Canada

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

Benefits Employee Status	Select the status associated with this action.
Active	Active
Terminated	Terminated
On Leave	On Leave
On Hold	On Hold
On Probation	On Probation
On Sickness Leave	On Sickness Leave
On Vacation	On Vacation
On Maternity Leave	On Maternity Leave
On Parental Leave	On Parental Leave
On Medical Leave	On Medical Leave
On Disability Leave	On Disability Leave
On Long-Term Care Leave	On Long-Term Care Leave
On Short-Term Care Leave	On Short-Term Care Leave
On Family Care Leave	On Family Care Leave
On Bereavement Leave	On Bereavement Leave
On Jury Duty	On Jury Duty
On Military Leave	On Military Leave
On Unpaid Leave	On Unpaid Leave
On Other Leave	On Other Leave

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

(USA) United States

Benefits Employee Status	Select the status associated with this action.
Active	Active
Terminated	Terminated
On Leave	On Leave
On Hold	On Hold
On Probation	On Probation
On Sickness Leave	On Sickness Leave
On Vacation	On Vacation
On Maternity Leave	On Maternity Leave
On Parental Leave	On Parental Leave
On Medical Leave	On Medical Leave
On Disability Leave	On Disability Leave
On Long-Term Care Leave	On Long-Term Care Leave
On Short-Term Care Leave	On Short-Term Care Leave
On Family Care Leave	On Family Care Leave
On Bereavement Leave	On Bereavement Leave
On Jury Duty	On Jury Duty
On Military Leave	On Military Leave
On Unpaid Leave	On Unpaid Leave
On Other Leave	On Other Leave

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

(BRA) Brazil

CAGED Action / Reason Enter the type of CAGED entry to report for actions with this reason.
(Cadastro Geral de Empregados e Desempregados action/reason)

RAIS Action / Reason Enter the type of action to report to RAIS for actions with this reason.
(Relação Anual de Informações Sociais action/reason)

(ESP) Spain

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

(AUS) Australia

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

(DEU) Germany

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

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

(MEX) Mexico

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

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

INFONAVIT Reason	Select a reason to indicate to INFONAVIT why the INFONAVIT loan payments will stop. Values are: <i>Death, Disability, Disengage, Never Work, Other, Retirement, and Transfer.</i>
Maintain Variable SDI	Select this check box to maintain variable SDI.
Inter-Company Transfer	Select this check box to indicate that the action and reason code combination is valid for processing of inter-company transfers in Global Payroll for Mexico. The Inter-Company Transfer Application Engine process (GPMX_INTERC) triggers for processing only the action and reason code combinations that you indicate by selecting this check box.
IMSS Print Form	Select the reason for a change in a worker's information. This is done to notify IMSS when an person is hired, rehired, terminated, or has a salary change. Values are: <i>Employee Register, Employee Termination, Salary Change, and N/A</i> (not applicable).
SUA Reason	Select the reason that gets printed on the SUA notification. Values are: <i>Employee Register, Employee Termination, Salary Change, Re-enter, and N/A</i> (not applicable).

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Labor Administration, "Setting Up Labor Administration Data"

(USF) Defining Award Actions

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

This section discusses how to set up award actions.

Pages Used to Define Award Actions

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

Defining Award Codes

Access the Award Actions page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Award Actions, Award Actions).

Award Actions

Action: AWD
Reason Code: PER

Award Action information Find | View All First 1 of 1 Last

Effective Date: 10/01/2000 Status: Inactive

*Nature of Action Code: 885

*Award Classification: Award Award Code:

Payroll Data

Earnings Code: FAC

Combination Code: FCB-4476EXTSAL-USA [Edit ChartFields](#)

GL Pay Type:

☐ Pay in Separate Paycheck?
☐ Gross-Up

NFC Populate Amount Indicator

☒ Not Applicable
☐ Populate Amount

Award Actions page

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

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

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

Payroll Data

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

Combination Code and Edit ChartFields Displays the key that defines a combination of ChartFields. Click the Edit ChartFields link to access the ChartFields Details page.

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

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

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

NFC Populate Amount Indicator

Not Applicable or Populate Amount The default selection is Not Applicable.
Select Populate Amount to define a relocation or recruiting bonus that is granted to an employee through a personnel action:

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

Note. These fields are not visible to the user.

See Also

Chapter 18, "(USF) Processing Personnel Action Requests," Granting Performance Awards, page 839

Setting Up SmartHire (Template-Based Hires)

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

This section provides an overview of the SmartHire (template-based hire) process, common elements in this section, and discusses how to:

- Define template records and fields.
- Set up template sections.
- Define template section field configurations.
- Define hire template categories.
- Create a hire template.
- Configure a hire template.
- Set up the hire template pages.
- Identify the Template-Based Hire page names.

- Set up hire template sections.
- Configure the fields for a section.
- Set up hire template person rules.
- Copy a hire template.

Understanding the SmartHire (Template-Based Hire) Process

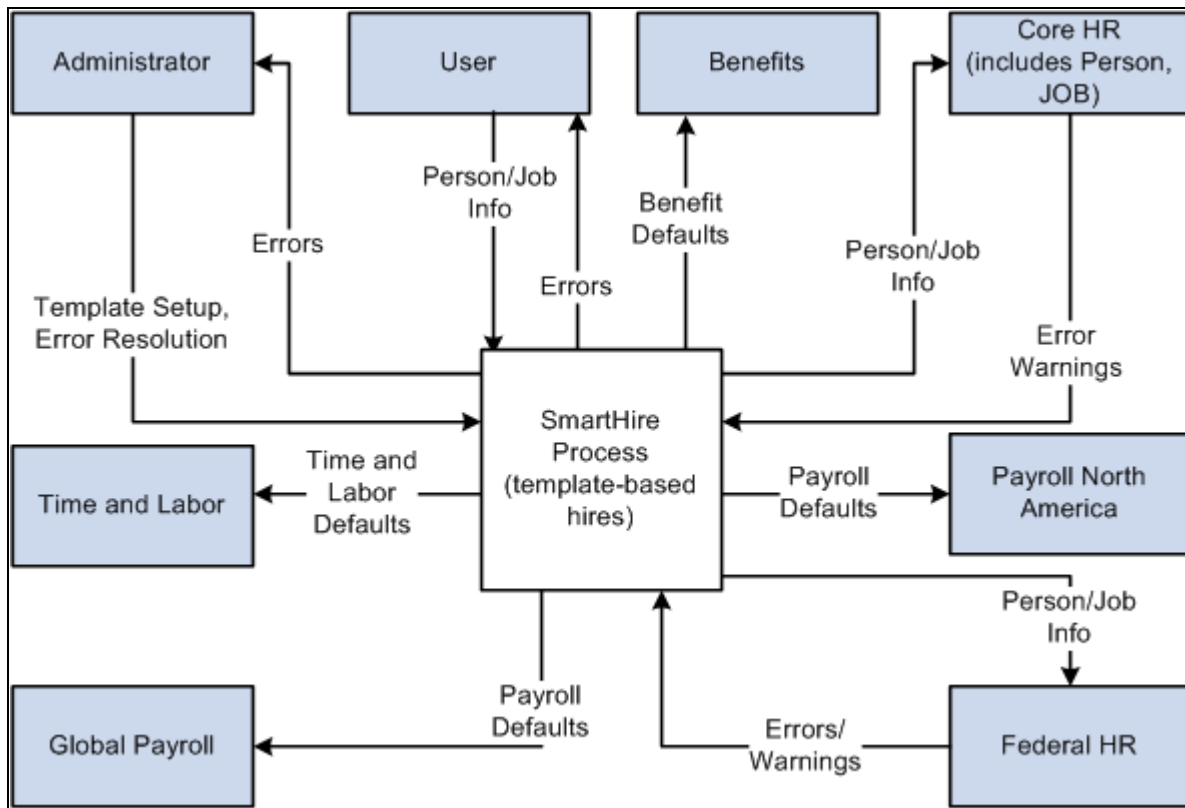
SmartHire, or template-based hiring, is a simplified and streamlined approach to completing the hiring process. Hiring templates are created and configured by a template administrator, someone who is very familiar with your organization's hiring process. After the template administrator has created and tested templates, line managers or human resources (HR) representatives can use these templates for hiring, based on the security rules that you establish.

The template administrator determines the following aspects of each hiring template:

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

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

This diagram shows the integration between the SmartHire (template-based hire) process and other products. Administrators create the template so that users can then enter person and job data. This data populates the person and job records in the core HR and federal HR systems, and it provides default values for the PeopleSoft Enterprise Benefits, Global Payroll, Payroll for North America, and Time and Labor applications:



The SmartHire process collects data and provides data to other PeopleSoft HRMS applications

Template-Based Hire Template Security

Implement security for the template-based hire components using PeopleTools permission lists and roles. This table lists the role, permission list, and components:

Role	Permission List	Components
HR Template Setup	HCCPHR3321	HR_TBH_RECDEFN HR_TBH_SECDEFN

Note. The template setup components have no row-level security.

Implement security for using the SmartHire templates through the existing Human Capital Management row-level security. SmartHires, or template-based hires, use the following fields for security: Template ID, Organizational Relationship(*Employee* or *Contingent Worker*), Country, and Category.

See [Chapter 6, "Increasing the Workforce," Understanding SmartHires \(Template-Based Hires\), page 298.](#)

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Administering HRMS Security."

Delivered Template-Based Hire Sections

The fields available for templates are grouped into sections, like group boxes. For example, you may have a Work Location - Job Fields section that includes fields to enter a company, department, and location code. You can determine which sections and the order in which the sections should be presented to the end user when creating a SmartHire template. Sections and their fields are delivered as system data. Sections are maintained in the Template Section component (Set Up HRMS, Product Related, Workforce Administration, Template-Based Hires, Template Section). These delivered sections can be modified within your templates to suit your organization's needs for hiring.

The following table lists the delivered Personal Data sections used for template creation:

<i>Section Number</i>	<i>Section Name</i>	<i>Countries with Country Specific Sections</i>
10	Name	BEL, BRA, CHE, CHN, DEU, ENG, ESP, FRA, HKG, ITA, JPN, MEX, and NLD
20	Birth Information	
40	Data Protection	
50	Gender	
60	Education	
70	Person Marital Status	
80	Language	
85	Person Student Status	
90	Alternate ID	
100 – 108	National ID	AUS, BEL, BRA, CAN, CHE, CHN, DEU, ESP, FRA, GBR, HKG, IND, IRL, ITA, JPN, MEX, MYS, NLD, SGP, THA, and USA
120 – 121	Address	AUS, BEL, BRA, CAN, CHE, CHN, DEU, ESP, FRA, GBR, HKG, IND, ITA, JPN, MEX, MYS, NLD, NZL, SGP, and USA GBL (global address)
130 – 133	Personal Phone	
135 – 136	E-mail Address	
140	Ethnic Group	AUS, CHN, MYS, NZL, SGP, and THA
145	Religion	AUS, CHN, MYS, NZL, SGP, and THA

Section Number	Section Name	Countries with Country Specific Sections
147	Person Hukou Data – China	CHN
148	Person Working Life – China	CHN
150	Person Smoker Status	CAN, JPN, and USA
210	General Registration – Brazil (Registro Geral)	BRA
211	CTPS – Carteira de Trabalho e Previdencia Social	BRA
212	Voter Registration – Brazil	BRA
213	Military Registration – Brazil	BRA
214	PIS/PASEP	BRA
220	Diversity	CAN
221	Health Care	CAN
230	Guardianship	CHE
231	Place of Origin	CHE
240	HR Responsibility	DEU
241	Military Status	DEU
242	Nationality	DEU
260	Personal Data – France	FRA
270	Diversity	GBR
280	Diversity	IND
290	Military Status	ITA
300	Honseki Prefecture	JPN
310	Personal Data – Mexico	MEX
320	Diversity	USA
330	Personal Data – United States	USA

The following table lists the delivered Job Data sections used for template creation:

Section Number	Section Name	Countries with Country Specific Sections
400	Work Location – Job Indicator	
410	Work Location – Position Data	
420	Work Location – Expected Job End Date	
430	Work Location – Job Fields	
431	Work Location – Spain	ESP
432	Work Location – Japan	JPN
435	Work Location – Military	
440	Job Information – Job Code	
450	Job Information – Reporting Information	
460	Job Information – Status	
470	Job Information – Employee Classification	
480	Job Information – Shifts	
490	Job Information – Standard Hours	
500	Job Information – Contract	
505	Job Information – Military	
510	Job Information	AUS, BEL, BRA, DEU, ESP, FRA, GBR, ITA, MEX, MYS, NLD, and USA
511	Job Information – Australian Higher Education	AUS
520	Job Labor – Bargaining Unit and Labor Agreement	
530	Job Labor – Employee Categories	
540	Job Labor – Union Code	

Section Number	Section Name	Countries with Country Specific Sections
550	Job Labor – Exemptions	
560	Job Labor	DEU, ESP, FRA, IND, and ITA
570	Payroll – Payroll System	
580	Job – Absence System (Payroll)	
590	Payroll – Payroll Information	
600	Job – Global Payroll/Absence Information	
610	Payroll – Balance Group Number	AUS, HKG, MYS, NZL, and SGP
620	Job – Salary Plan	
625	Military (Salary Plan)	
630	Job Compensation – Payroll Currency and Frequency	
640	Job Compensation – Auto Calc Premium	
650	Job Compensation – Pay Components	
655	Oracle Workforce Scheduling – Job Flag	
660	Employment Information – Original Start Date	
670	Employment Information – Organizational Assignment Data	
675	Employment Information – Military	
680	Employment Information – Additional Data	
690	Employment Information	BEL, BRA, CAN, JPN, NLD, and USA
690	Festive Advance	MYS and SGP
691	Employment Information – E & G	CAN and USA

Section Number	Section Name	Countries with Country Specific Sections
700	Benefit Program – Benefit Record Number	
710	Benefit Program – Benefit Status	
720	Benefit Program – Ben Admin Eligibility	
730	Benefit Program – Participation	
740	Time Reporter Status	
750	Time Reporter Type	
760	Time Reporter IDs	
770	Time Reporter Type – Rule Elements	

(USF) The following table lists the delivered Federal sections used for template creation:

Section Number	Section Name	Industry Specific Section Type
10	Data Control Dates & Action	Federal
20	Data Control Codes	Federal
30	Data Control PAR Request	Federal
40	Data Control PAR Remarks	Federal
41	Data Control PAR Remarks	Federal
42	Data Control PAR Remarks	Federal
43	Data Control PAR Remarks	Federal
44	Data Control PAR Remarks	Federal
50	Tracking Data	Federal
60	Name	Federal
70	Gender and Other Personal Data	Federal
80	Citizenship Status	Federal
90	National ID	Federal

Section Number	Section Name	Industry Specific Section Type
100	Additional Birth Information	Federal
110	Home Address	Federal
111	Mailing Address	Federal
121	Personal Phone Number 01	Federal
122	Personal Phone Number 02	Federal
123	Personal Phone Number 03	Federal
124	Personal Phone Number 04	Federal
130	Veterans Information	Federal
140	Marital Information	Federal
150	Education Details	Federal
160	Position Number	Federal
170	Job Data	Federal
180	Position Data	Federal
190	Compensation	Federal
200	Compensation - Quoted Pay	Federal
210	Other Pay Information	Federal
220	Accounting Information	Federal
230	Dates	Federal
240	Expiration Dates	Federal
250	Appointment Data	Federal
260	Service Computation Dates	Federal
270	Service Conversion Dates	Federal
280	Within-Grade Increase Data	Federal
290	Union Data	Federal
300	Permanent Data RIF	Federal

Section Number	Section Name	Industry Specific Section Type
310	Probation Dates	Federal
320	Retained Grade Expires	Federal
330	Non-Pay Data	Federal
340	Security Information	Federal
350	Benefits System	Federal
360	Benefits Control	Federal
370	Benefits Administration Eligibility	Federal
380	FEHB Eligibility	Federal
390	FEHB Date	Federal
400	NFC Benefits Coverage	Federal
410	FEGLI Data	Federal
420	Retirement Data	Federal
430	FICA Status	Federal
440	NFC Military Service Deposit	Federal
450	Time and Labor - Reporter Status	Federal
460	Time and Labor - Reporter Type	Federal
470	Time and Labor - Reporter Ids	Federal
480	Time and Labor - Rule Elements	Federal

As the template administrator, you can use the section label name listed, or create a text catalog entry for those fields in which you want to change the label.

Required and Recommended Sections within a Template

These sections are required when creating a template:

- NAME_01_xxx (Names) - where xxx is the country code.
- BIRTH_INFO (Birth Information)
- GENDER (Gender)
- JOB_PAYROLL_SYSTEM (Payroll System)

Note. The Name, Birth Information, and Gender sections are sequentially listed before the National ID section. Oracle highly recommends that you keep this order in the PeopleSoft SmartHire template for the National ID validations to work properly for certain countries.

Oracle recommends that these sections be included in the PeopleSoft SmartHire template:

- WORK_LOC_JOB_FLDS (Work Location - Job fields)
- JOB_ABSENCE_SYSTEM (Absence System)
- JOB_PAYROLL_INFO (Payroll Information)
- JOB_COMP_PAY_CMPNT (Job Compensation - Pay Components) or JOB_SALARY_PLAN (Job - Salary Plan)
- BEN_PROG_BEN_STAT (Benefit Status)

Multiple Instances of an Element in a Template

The Template Record Setup table contains one row for each table currently included in the core hire process with at least one enterable field. However, there are some tables with multiple instances, such as phone numbers, email, addresses, and so forth, where more than one row exists. The system supports the use of these multiple elements in hiring templates. This way you are able to maintain more than one address section in a hiring template for different countries or multiple pay elements.

Note. If you need to have multiple instances of information in a template, such as names, addresses, or compensation, you need to specify a unique record alias for each additional instance.

For example, to add multiple pay components, rather than adding multiple copies of the same compensation section in a template, you must first create a new record and record alias, such as COMPENSATION1, and then add the fields from the original compensation record to your newly created record.

In addition, each template section must use a unique record alias. For example, if you need two address sections in your hiring template, one for addresses in Australia and another section for addresses in Brazil, selecting ADDRESS_01_AUS and ADDRESS_01_BRA can cause errors since both template sections use the ADDRESSES_01 record alias. In this example you should use a different address alias selection, such as ADDRESS_01_AUS and ADDRESS_02_BRA.

Troubleshooting Templates

During a template-based hire, if a person is hired with a past effective date and the hire fails, check the Default Benefit Program and default Pay Group values for the organization and make sure they are the correct. When the benefit system is Base Benefits or Benefits Administration, the benefits code invoked during a hire requires a default benefit program to be set on the Pay Group Table.

1. Check the Default Benefit Program value on the Pay Group table and make sure it has the correct value.
2. Check the Pay Group value on the Company table and make sure it has the correct default Pay Group value.

Common Elements Used in this Section

Hiring template (or template)	A pre-configured template that enables end users to enter a subset of the data required for a hire. Other data is pre-entered by the template administrator during the template creation process.
End user	For the template-based hire process, the end user is typically a line manager or HR (Human Resources) representative in the field. This person is usually not familiar with the details of the hiring process. Whenever complex issues arise, the process is handed over to a centralized HR administrator.
HR administrator	The HR administrator is somebody who knows the hiring process very well and can easily deal with any level of complexity. This person reviews the data entered by end users and takes over the hiring process whenever errors occur or issues arise.
Template administrator	The person in your organization who knows the hiring process very well (may be an HR administrator). The person assigned this role sets up and maintains hiring templates to be made available to end users.
Implementer	For the template-based hire process, the implementer is typically an IT (Information Technology) specialist who works closely with the HR administrator and template administrator to review the delivered template records/fields and sections and modifies them, if necessary.
Template section (or section)	The fields available for the templates will be grouped into sections. For example, the Work Location section will include the following fields (all on the Job record): Regulatory Region, Company, Business Unit, Department, Department Entry Date, Location, and Establishment ID. Sections are the building blocks for creating templates, not the individual records/fields. PeopleSoft delivers these sections as system data, but the implementer can modify them, delete them, or add new sections.
Template page (or pages)	The dynamically generated data entry page visible to the end user, consisting of one or more template sections. The template administrator decides whether the sections are displayed in one long page or divided into smaller pages.
Template category	The template administrator assigns each template to a category. The category provides row-level security for a template and can be used to group templates. A category may represent a specific department, location, business unit, region, and so forth.
Auto-updates	Determines whether data entered by the end user can be directly submitted for processing (auto-updating is turned on) or will need to be reviewed by an HR administrator (auto-updating is turned off). This auto-update functionality is set by the template administrator (the end user is not able to change it).

Search match parameters

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

Pages Used to Set Up SmartHire Templates

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

Page Name	Definition Name	Navigation	Usage
Configuration	HR_TBH_TMPL_CFG	Set Up HRMS, Product Related, Workforce Administration, Template-Based Hire, Template Creation, Configuration	Set up general options and the search page configuration for a template.
Section Field Label Override	HR_TBH_TMPL_FLDL	- Click the Change Label link for a field on the Configuration page. - Click the Change Label link for a field on the Template Section Configuration page.	Change a field label by selecting another text ID for the field.
Section Field Default Value	HR_TBH_TMPL_FLDC	- Click the Change Value link for a field on the Configuration page. - Click the Change Value link for a field on the Template Section Configuration page.	Identify a default value for the field that will appear for the end user to assist with data entry for fields that would often use the same value.
Maintain Text Catalog	HR_SSTEXT_TEXT	- Click the Maintain Text Catalog link on the Configuration page. - Click the Maintain Text Catalog link on the Section Field Label Override page. - Click the Maintain Text Catalog link on the Pages page. - Click the Maintain Text Catalog link on the Page Title Details page. - Click the Maintain Text Catalog link on the Template Section Configuration page.	Define text catalog entries, and define the values for context-sensitive keys. See <i>PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook</i>, "Working with Common Components," Configuring the Text Catalog.
Pages	HR_TBH_TMPL_PAG	Set Up HRMS, Product Related, Workforce Administration, Template-Based Hire, Template Creation, Pages	Set up the page number order and tab names that should appear on the Template-Based Hire pages.
Page Title Details	HR_TBHTAB_DTL_SEC	Click the Change Title link on the Pages page.	Identify the page names on the Template-Based Hire pages.

Page Name	Definition Name	Navigation	Usage
Sections	HR_TBH_TMPL_SEC	Set Up HRMS, Product Related, Workforce Administration, Template-Based Hire, Template Creation, Sections	Add and configure template sections.
Template Section Configuration	HR_TBH_TMPL_FLDS	Click the Section Configuration link on the Sections page.	Configure the fields for a section within the template.
Person Rules	HR_TBH_TMPL_PER	Set Up HRMS, Product Related, Workforce Administration, Template-Based Hire, Template Creation, Person Rules	Enable or disable Search Match functionality for a template and define options for handling existing person data and employment instances in the database.
Copy Template	HR_TBH_COPY	Set Up HRMS, Product Related, Workforce Administration, Template-Based Hire, Copy Template, Copy Template	Copy a hire template and make modifications to the new template.

Defining Template Records and Fields

Access the Template Record/Field page (Set Up HRMS, Product Related, Workforce Administration, Template-Based Hire, Template Record/Field, Template Record/Field).

Template Record/Field

Record

Record Name: PERS_NID **Description:** PERS_NID Record

Instance
Find | View All | First 1 of 12 Last

Record Instance: 1 ***Status:** Active

***Record Alias:** PERS_NID_01 ☐ Internal Use Only

Field
Customize | Find | First 1-8 of 8 Last

*Field Name	Field Label	Key Field	Required	
COUNTRY	Country	☒	☒	—
EMPLID	EmplID	☒	☒	—
NATIONAL_ID_TYPE	National ID Type	☒	☒	—
LASTUPDDTTM	Last Update Date/Time	☐	☒	—
PRIMARY_NID	Primary ID	☐	☒	—
NATIONAL_ID	National ID	☐	☐	—
SSN_KEY_FRA	Social Security Nbr Key	☐	☐	—
TAX_REF_ID_SGP	Tax Ref	☐	☐	—

Template Record/Field page

- Record Name** Indicate the name of the table to be included. (Prompted from the same field in the PeopleTools Record Definition table.)
- Record Instance** Displays the instance number of the record. Defaults to 1. Use for records with more than one instance, such as phone numbers, email addresses, and so forth.
- Record Name Alias** Enter the alternative name of the table to be included. Defaults to the Record Name value. This field enables the implementer to differentiate between two different instances of the same record. For example, business address (ADDRESSES_1) from mailing address (ADDRESSES_2). This is the prompt shown for the record when adding a new record/field to a section.
- Internal Use Only** Select this check box to designate fields that are used in the SmartHire process but are not passed to the Services/CI.
- Key Field** This check box is selected (in PeopleCode) if the field is defined as a key field at the system level (in the PeopleTools Record Field table PSRECFIELD). This field cannot be changed by the Implementer (display-only).

Required

This check box is selected by default (in PeopleCode) and is based on the PeopleTools Record Field table PSRECFIELD. This field cannot be changed by the implementer (display-only).

Setting Up Template Sections

Access the Template Section page (Set Up HRMS, Product Related, Workforce Administration, Template-Based Hire, Template Section, Template Section).

Template Section

Section Identification

Section ID: NATIONAL_ID_FRA

*Description: Person National ID France

*Short Description: Natnl ID

Comments: Person National ID France

Section Configuration

Sequence Number: 100

*Section Type: Country

Section Type Value: FRA Description: France

Section Validation App Class

App Class ID: hrTbhValidateNID

App Class Path: HRTMPL:TBH

Method Name: execute

Section Fields

Seq Nbr	Record Alias	Record Instance	*Field	Field Label	Field Configuration
1	PERS_NID_01	1	COUNTRY	Country	Field Configuration
2	PERS_NID_01	1	NATIONAL_ID_TYPE	National ID Type	Field Configuration
3	PERS_NID_01	1	NATIONAL_ID	National ID	Field Configuration
4	PERS_NID_01	1	SSN_KEY_FRA	Social Security Nbr Key	Field Configuration
5	PERS_NID_01	1	PRIMARY_NID	Primary ID	Field Configuration

Add Field

Template Section page

Sequence Number

Enter the number to determine the order of sections on the end user data entry page.

Section Type	Specify a type that defines the section. Valid values are <i>General</i> , <i>Country</i> , <i>Name</i> , <i>Address</i> , and <i>Federal</i> .
	Note. (USF) U.S. Federal customers will only see National Finance Center (NFC) interface fields if the database is federalized and Payroll Interface is selected on the HR Installation table. See <i>PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook</i>, "Setting Up and Installing PeopleSoft HRMS."
Section Type Value	Enter the value for the section type you specified. For <i>Name</i> sections, this field stores the name format code. For the <i>Country</i> and <i>Address</i> sections, this field stores the appropriate country code. The field is empty for <i>Federal</i> and <i>General</i> sections.
Add Field	Click this button to add additional fields in the Section Fields grid area.

Section Validation App Class

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

Defining Template Section Field Configurations

Access the Template Section Field Configuration page (click the Field Configuration link on the Template Section page).

Template Section Field Configuration

Section Field			
Record Alias:	PERS_NID_01	Record Instance:	1
Record Name:	PERS_NID	Record Description:	PERS_NID Record
Field Name:	COUNTRY	Field Label:	Country

Section Field Configuration	
*Display Type:	Long Prompt
DropDown List Display:	Descr
Prompt Table:	NID_TYPE_VW
Prompt Field:	

Field Prompt App Class	
App Class ID:	
App Class Path:	
Method Name:	

Field Change App Class	
App Class ID:	
App Class Path:	
Method Name:	

[Template Section](#)

Template Section Field Configuration page

Section Field Configuration

Display Type,
DropDown List Display,
Prompt Table, and
Prompt Field

Select how a field type should appear on the template to an end user and from which table it should retrieve valid values.

The Display Type value options depend upon the field selected. For example, a field may or may not require a prompt table, it may use a date field, require a yes and no response, or needs to display a push button. The prompt table fields are disabled for all but the fields with a prompt table.

Field Change App Class

The Field Change App Class provides a user exit for field change code to be added. Some delivered section fields include field change code. For example, the Company field on the Work Location - Job Fields section has field change code that builds prompt lists for other fields in the section, such as Location and Establishment ID.

Note. Oracle recommends that any validation methods added to the PeopleSoft application at implementation be stored in a customer-created application class.

Defining Hire Template Categories

Access the Template Category Table page (Set Up HRMS, Product Related, Workforce Administration, Template-Based Hire, Template Category Table, Template Category Table).



The screenshot shows the 'Template Category Table' page. It features a form with the following fields:

- Category Code:** SEASONAL
- *Description:** Seasonal Employment Hiring Templates
- *Short Description:** Seasonal
- Comments:** Templates for holiday seasonal employment - temporary

Template Category Table page

When you create your templates, you will need to assign each template to a category. Template categories:

- Groups templates.

Categories are helpful when a template administrator is trying to narrow their search results when looking for a particular template. On the Template Creation page, you can perform an advance search for existing templates by category, as well as by other defined fields.

- Provide row-level security for a template.

End users will only see templates for which they have security access.

Note. To set up row-level security for end users, you will need to enable the security set (TBHTMPL) and security access types for template-based hires and set up security for the end user's permission list.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Administering HRMS Security"

Creating a Hire Template

Access the Template Creation page (Set Up HRMS, Product Related, Workforce Administration, Template-Based Hire, Template Creation, Template Creation).

Template Creation | Configuration | Pages | Sections | Person Rules

Template: RETAIL ASSOCIATE

Template Identification Find | View All | First | 1 of 1 | Last

*Status: Test + -

*Effective Date: 11/01/2010 31

*Description: Retail Associate - Seasonal

*Short Description: Retail-s

Comments: Template for seasonal hires Nov 1, 2010 to Feb 1, 2011 ?

Cancel

Template Creation page

Template	Enter a template name that defines this template.
Status	Select a status. The default option for this field is <i>Test</i> when creating a new template. You can change the value to <i>Active</i> when it's time to be published, or <i>Inactive</i> when the template is no longer necessary. Only active templates are available to the end user.
Effective Date	Determine the effective date of a template. The default value for this field is today's date.

Configuring a Hire Template

Access the Configuration page (Set Up HRMS, Product Related, Workforce Administration, Template-Based Hire, Template Creation, Configuration).

Template Creation
Configuration
Pages
Sections
Person Rules

Template

Template: RETAIL ASSOCIATE Effective Date: 11/01/2010

General Options

☒ Automatic Database Updates ☒ Allow Submission to HR
☒ Show Comments On All Pages ☐ Show Update Contracts Link
☐ U. S. Federal Template

Search Page Configuration

Field Label	Change Label	Default Value	Change Value	Override	Hide
Template	Change Label	RETAIL ASSOCIATE			☐
*Organizational Relationship	Change Label	EMP - Employee	Change Value		☒
*Country	Change Label	USA - United States	Change Value		☒
*Category Code	Change Label	POSITION - Position	Change Value		☐
Empl ID	Change Label	NEW	Change Value	☐	☒
Job Effective Date	Change Label		Change Value	☒	☐
Action	Change Label	ADD - Add Contingent Worker	Change Value	☐	☐
Reason Code	Change Label	SEA - Seasonal Activity	Change Value	☒	☐
Name Format	Change Label	001 - English	Change Value	☐	☒
Address Format	Change Label	USA - United States	Change Value	☐	☒

Go To: [Maintain Text Catalog](#)

Configuration page

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

Automatic Database Updates

Select this check box to have the data entered by the end user automatically update the database.

Deselect this check box to have the data entered by the end user sent to an HR administrator for final processing.

Allow Submission to HR Select this check box if the end user does not have all the required data, such as a National ID, and needs to submit the hire request to HR to complete the hire. This check box is only available when the Automatic Database Updates check box is selected.

If Automatic Database Updates is selected, the following applies:

- The Submit to HR button appears on the Template-Based Hire page. This enables the end user to submit incomplete data to HR without entering all the required fields (although first name and last name are required). When the end user clicks this button, the hire request is sent to HR in *HR Action Required* status for HR to complete final processing.
- The Save and Submit button appears on the Template-Based Hire page. When the end user clicks this button, data is automatically updated to the database (if no errors are encountered).

Show Comments On All Pages Select to have a Comments edit box appear at the bottom of each page of the Template-Based Hire component when an end user performs a hire.

Deselect to have the Comments edit box appear at the bottom of only the last page of the Template-Based Hire component when an end user performs a hire. If there is only a single page, the Comments box will appear on that page.

Show Update Contracts Link Select to have the Update Contracts link to the Contracts component appear on the Confirmation page after performing a template-based hire. This enables users to update contract information for a new hire. This link appears on the Confirmation page when Automatic Database Updates is selected on the template and the hire is saved successfully.

Note. Users of the template must have access to the Contract Data component.

U.S. Federal Template (USF) Select this check box to see the standard U.S Federal (USF) sections. This check box is only available when the Federal check box has been enabled on the Installation table.

Note. Do not select this check box when you are creating templates for U.S. Federal contingent workers.

Search Page Configuration

Determine how you want to display these fields to the end user on the Enter Hire Details page of the Template-Based Hire component. Select the field label and select whether the end user should be able to override a default value, or if the field should be hidden from the user.

Template Displays the template ID you entered for this template.

Organizational Relationship Select an organizational relationship of the worker. The default option for this field is *Employee*. The other available option is *Contingent Worker*.

Note. *Person of Interest* is not an option.

Country	Enter a default country code for the template. • The country you select impacts country defaults and what sections appear on the template. • (USF) This field defaults to <i>USA</i> for U.S. Federal installations.
Category Code	Select a category code for template grouping and as part of the row-level security for this template. A category may represent a specific department, location, business unit, region, and so forth.
Empl ID (employee ID)	Accept the default value of <i>NEW</i> to have the system automatically assign the next ID or leave the field blank to have the end user manually enter the ID.
Job Effective Date	Specify a default effective date of a hire, if applicable. Usually you will select the Override check box for this field and set the default value to blank so the end user provides the actual hire date. Some business processes require a fixed effective date, such as in the case of seasonal hiring.
Action	Enter the action of adding this employment instance. Values for an employee are <i>Hire</i> and <i>Rehire</i> . Values for a contingent worker are <i>Add</i> and <i>Renewal</i> .
Reason Code	Determine if you want to provide a default reason code, which is associated with the action.
Name Format	Specify a name format that may be used during the hire. The name format that you select impacts the actual hire page. You can hide this field from the end user if you do not want the end user to select a different name format. If you enable the end user to choose another name format, you must include at least two different name sections on the Sections page.
Address Format	Specify an country address format that may be used during the hire. The country address format that you select impacts the actual hire page. You may hide this field from the end user if you do not want the end user to select a different address format. If you enable the end user to choose another address format, you must include at least two different address sections on the Sections page.
Change Label	Click this link to open the Section Field Label Override page and use the Text Catalog to select another text ID to change the field label.
Default Value and Change Value	Click the Change Value link to open the Section Field Default Value page and define a default value for the field. The value you select displays in the Default Value field.
Override	Select this check box to enable the end user to change the default value when performing a template-based hire. Deselect this check box when the end user is not allowed to change the value. When you select this check box, the system deselects the Hide check box so the end user has access to the field to edit the value.

Hide

Select this check box to hide this field and the default value from the end user when performing a template-based hire. When you select this check box, the system deselects the Override check box. The end user will not be able to change the default value since the field is hidden.

Maintain Text Catalog

Click the Maintain Text Catalog link to open the Text Catalog - Maintain search page or Maintain Text Catalog page in a new browser window. Use the Maintain Text Catalog page to change the label sections.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Working with Common Components," Configuring the Text Catalog.

Setting Up Hire Template Pages

Access the Pages page (Set Up HRMS, Product Related, Workforce Administration, Template-Based Hire, Template Creation, Pages).

The screenshot shows the 'Pages' page in the PeopleSoft HRMS interface. The page has tabs for 'Template Creation', 'Configuration', 'Pages', 'Sections', and 'Person Rules'. The 'Pages' tab is selected. The page displays a template for 'RETAIL ASSOCIATE' with an effective date of 11/01/2010. Below this, there is a 'Page Information' table with two rows: 'Personal Data' (Page Number 1) and 'Job Data' (Page Number 2). Each row has a 'Change Title' link and '+'/'-' buttons. At the bottom, there is a 'Go To: Maintain Text Catalog' link and a 'Cancel' button.

*Page Number	Page Title	Change Title		
1	Personal Data	Change Title	+	-
2	Job Data	Change Title	+	-

Go To: [Maintain Text Catalog](#)
 Cancel

Pages page

Page Number

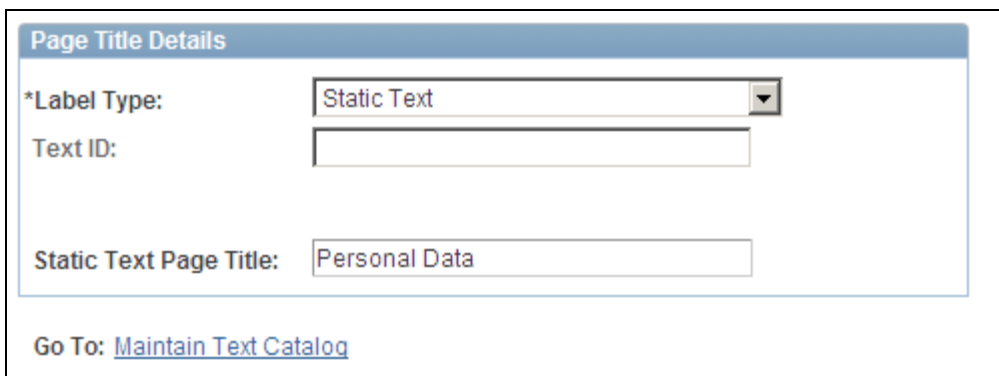
Enter a number that will define the page tab order on the Template-Based Hire - Enter Employee Information page. On the Sections page, you will assign sections to one of these page numbers. This will group sections together or separate them onto different tabbed pages. The system will display these tab names when the end user or HR administrator is performing a hire using the Template-Based Hire - Enter Employee Information page. For example, you may want to group all compensation and payroll information-related sections and fields within a page called Salary Data.

You can have all the sections appear on one page, by entering only one page number and label, or you can group the sections on different pages, by creating numerous page numbers and labels.

- Change Title** Click this link to access the Page Title Details page and define how the tab label should appear on the Enter Employee Information page during the template-based hire process.
- Maintain Text Catalog** Click the Maintain Text Catalog link to open the Text Catalog - Maintain search page or Maintain Text Catalog page in a new browser window. Use the Maintain Text Catalog page to change the label name.
- See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Working with Common Components," Configuring the Text Catalog.

Identifying the Template-Based Hire Page Names

Access the Page Title Details page (click the Change Title link on the Pages page).



Page Title Details page

- Label Type** Select the type of label that you will use. Values are *Static Text* and *Text Catalog*.
- Text ID** Select the text ID from the Text Catalog if you have selected *Text Catalog* in the Label Type field.
- Static Text Page Title** Enter the tab label name if you have selected *Static Text* in the Label Type field.
- Maintain Text Catalog** Click the Maintain Text Catalog link to open the Text Catalog - Maintain search page or Maintain Text Catalog page in a new browser window. Use the Maintain Text Catalog page to change the label names.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Working with Common Components," Configuring the Text Catalog

Setting Up Hire Template Sections

Access the Sections page (Set Up HRMS, Product Related, Workforce Administration, Template-Based Hire, Template Creation, Sections).

Template Creation Configuration Pages **Sections** Person Rules

Template: RETAIL ASSOCIATE Effective Date: 11/01/2010

Add Section Load/Reload Sections Preview Template Test Template

Select	Seq Nbr	Section ID	Section Name	Section Configuration	*Page Nbr	Page Title
☐	10	NAME_01_ENG	Primary Name - English	Section Configuration	1	Personal Data
☐	20	BIRTH_INFO	Birth Information	Section Configuration	1	Personal Data
☐	50	GENDER	Person Gender	Section Configuration	1	Personal Data
☐	100	NATIONAL_ID_USA	Person National ID United States	Section Configuration	1	Personal Data
☐	120	ADDRESS_01_USA	Person Address 01 - United States	Section Configuration	1	Personal Data
☐	121	ADDRESS_02_USA	Person Address 02 - United States	Section Configuration	1	Personal Data
☐	130	PHONE_NUMBER_01	Person Phone Number 01	Section Configuration	1	Personal Data
☐	440	JOB_INFO_JOB_CODE	Job Information - Job Code	Section Configuration	2	Job Data
☐	510	JOB_INFO_USA	Job Information - United States	Section Configuration	2	Job Data
☐	570	JOB_PAYROLL_SYSTEM	Job - Payroll System	Section Configuration	2	Job Data
☐	620	JOB_SALARY_PLAN	Job - Salary Plan	Section Configuration	2	Job Data
☐	760	TIME_REP_IDS	Time Reporter IDs	Section Configuration	2	Job Data

Add Section Load/Reload Sections Preview Template Test Template

Select All Deselect All

Delete Selected Sections

Cancel

Sections page

The template administrator uses the Sections page to determine which sections will appear in the template for the end user.

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

Note. If a position number is selected on the template definition it will not populate values from Position Management. The administrator must hide fields that are populated by position number because they are overridden at the time the position number is loaded in Job Data and defaults are automatically entered. See the Manage Positions PeopleBook for a list of fields that are provided by default into Job Data (from Position Data—this does not include what may also be defaulted in the job code).

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Positions*, "Setting Up Positions," Managing Position Data.

Add Section	Click this button to add a new row for another section.
Load/Reload Sections	Click this button to add all viable sections to the template. The system looks at the values that were entered for the country, name format, address format, and at the U.S. Federal flag to determine which sections to load. If a section is already present, it is not overwritten. If you change the country on a template, existing country-specific sections are deleted and new country sections are loaded. If you change the name format or address format on a template, existing name and address format-specific sections are deleted and new sections are loaded. If the U.S. Federal flag changes, all existing sections are deleted and new ones are loaded.
Select All and Deselect All	Click the Select All button to easily select all the sections on this page for easy deletion or deselect all section rows to avoid deletion.
Delete Selected Sections	Click this button to have the system delete all selected section rows from this template.
Preview Template	Click this button to open a new browser window to preview the template. Preview mode displays each template page and the sections on those pages.
Test Template	Click this button to validate if the template is set up correctly. Note. The template administrator is able to test the template only if Automatic Database Updates is selected on the Configuration page. Test mode is not available if Automatic Database Updates is deselected since the CI/Service is not called. The Template Administrator clicks this button and the Template-Based Hire - Enter Hire Details pages displays in a new browser. The administrator then enters a person's data as an end-user would and then clicks the Test Template button on the last Template-Based Hire page. If the template is set up correctly, the Test Confirmation page appears stating that your template configuration is successful. If the template is not set up correctly, the Test Confirmation page appears with a link to view the errors that the template encountered. Note. Testing a template does not update Personal Data and Job Data.

Template Sections

Seq Nbr (sequence number)	Enter a sequential number to reorder sections. The lower numbered section will appear first on a page for the end user. The sequence number is defined on the Template Section page but can be overridden here.

Section Configuration Click this link to open the Template Section Configuration page and use the Text Catalog to update fields values within a section.

Page Nbr (page number) and **Page Title** Assign sections to a page number you defined on the Pages page. The Page Title will automatically display from either the Text Catalog value or static text you entered Page Title Details page.

Configuring the Fields for a Section

Access the Template Section Configuration (click the Section Configuration link on the Sections page).

Template Section Configuration

Template: RETAIL ASSOCIATE Effective Date: 11/01/2010
 Section ID: ADDRESS_01_USA Section Name: Person Address 01 - United States
 Text ID: Section Name Override:
☐ Hide Entire Section Record Instance: 1

Section Fields								
Seq Nbr	*Position	Field Label	Change Label	Default Value	Change Value	Required	Override	Hide
1	Either	Country	Change Label	USA - United States	Change Value	☒	☐	☒
2	Either	Address Type	Change Label		Change Value	☒	☒	☐
3	Either	Address Line 1	Change Label		Change Value	☐	☒	☐
4	Either	Address Line 2	Change Label		Change Value	☐	☒	☐
5	Either	Address Line 3	Change Label		Change Value	☐	☒	☐
6	Either	City	Change Label		Change Value	☐	☒	☐
7	Either	State	Change Label		Change Value	☐	☒	☐
8	Either	Postal Code	Change Label		Change Value	☐	☒	☐
9	Either	County	Change Label		Change Value	☐	☒	☐

Go To: [Maintain Text Catalog](#)

Template Section Configuration page

The template administrator uses the Section Configuration page to determine which fields will appear in a section and determine if the field should be required, have a default value provided, and if the end user can change any values.

Text ID and Section Name Override	Enter a different text ID to if you want to change the group box header on the Template-Based Hire page. The new name displays in the Section Name Override field.
Hide Entire Section	Select this check box to hide this section from the end user during the hire.
Section Fields	
Seq Nbr (sequence number)	Enter a sequential number to reorder the fields in this section. The sequence number is defined on the Template Section page in the Section Fields group box, but can be overridden here.
Position	Enter the location that the field should appear within the section. Values are <i>Either</i> , <i>Left</i> , and <i>Right</i> . By selecting <i>Either</i> , the system will place the field in the next logical order location, either left or right.
Field Label and Change Label	Click the Change Label this link to open the Section Field Label Override page and use the Text Catalog to select another text ID to change the field label.
Default Value and Change Value	Click the Change Value link to open the Section Field Default Value page and define a default value for the field. The system displays this value in the Default Value field.
Required	Select this check box if the end user is required to enter a value in the field.
Override	Select this check box to enable the end user to change the default value when performing a template-based hire. Deselect this check box when the end user is not allowed to change the value. When you select this check box, the system deselects the Hide check box so the end user has access to the field to edit the value.
Hide	Select this check box to hide this field and default value from the end user when performing a template-based hire. When you select this check box, the system deselects the Override check box. The end use will not be able to change the default value since the field is hidden.
Maintain Text Catalog	Click the Maintain Text Catalog link to open the Text Catalog - Maintain search page or Maintain Text Catalog page in a new browser window. Use the Maintain Text Catalog page to change the label sections. See <i>PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook</i> , "Working with Common Components," Configuring the Text Catalog.

See Also

Chapter 2, "Setting Up the Administer Workforce Business Process," Understanding the SmartHire (Template-Based Hire) Process, page 17

Setting Up Hire Template Person Rules

Access the Person Rules page (Set Up HRMS, Product Related, Workforce Administration, Template-Based Hire, Template Creation, Person Rules).

Template Creation Configuration Pages Sections **Person Rules**

Template

Template: RETAIL ASSOCIATE Effective Date: 11/01/2010

Search for Existing Person

*Use Search Match To Find Existing Persons: Yes

Search Parameter: PSHR_HIRE

Search Result Code: PSHR_GENERAL

Person Exists in the System

*End-User Can Decide What Action to Take: Yes

*End-User Can Access the Person Organization Summary: No

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

☒ Select an Existing Contingent Worker Instance with an Action of Renewal

☒ Select an Existing Contingent Worker Instance with an Action of Add

☒ Create a New Contingent Worker Instance Using Add as the Action

☒ Send the Request to an HR Administrator to Process

Cancel

Person Rules page

Search for Existing Person

Use these fields to enable or disable Search Match.

Use Search Match To Find Existing Persons

Select whether the SmartHire process should use the Search Match functionality. If you select:

- *Yes* - Search/Match will be run before the hire can be saved or submitted, regardless if Automatic Database Updates is selected for this template on the Configuration page. Selecting the Save and Submit button during the hire will trigger the Search/Match process behind the scenes.
- *No* - the system will hide all other fields on this page and the Search/Match process will not be run. After the end user clicks Save and Submit, the system will display the confirmation page.

Search Parameter	This field appears when you select <i>Yes</i> in the Use Search Match To Find Existing Persons field. Enter a search parameter, which contains a set of one or more search rules. The search parameters are what the users select prior to performing a search to determine the search fields that they are permitted to search on.
Search Result Code	This field appears when you select <i>Yes</i> in the Use Search Match To Find Existing Persons field. Enter a search result code, which specifies the data that you want Search/Match to return in the grids on the Search Results page for the potential matching IDs that it finds.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Search/Match."

Person Exists in the System

End-User Can Decide What Action to Take	Determine whether the end user decides what action to take when Search/Match is activated. When you select <i>Yes</i>, the page displays the End-User Can Access the Person Organization Summary field and the Actions the End-User Can Take If No Active Organizational Instance Is Found group box. When you select <i>No</i>, the page displays the Action to Take if Only One Inactive Employment Instance Is Found and Action to Take if More than One Inactive Employment Instance (or None) is Found group boxes.
End-User Can Access the Person Organization Summary	Determine whether the end user can view more information about a person by selecting either <i>Yes</i> or <i>No</i>. When you select <i>Yes</i>, a Per Org Summary link is made available to the user to view organization details about a person. The End-User Can Access the Person Organization Summary field is available when you select <i>Yes</i> in the End-User Can Decide What Action to Take field.

Note. Depending on the Organizational Relationship value defined on the Configuration page of the Template, the field text will vary. An *Employee* relationship displays the text Employment Instance, where as a *Contingent Worker* relationship displays the wording Contingent Worker Instance. This applies to every instance of this wording on the Person Rules page.

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

When the template administrator selects *Yes* in the End-User Can Decide What Action to Take field, the page displays the Actions the End-User Can Take If No Active Organizational Instance Is Found group box.

Select one or more check boxes to enable functionality for the end user for the template. This group box appears when you select *Yes* in the End-User Can Decide What Action to Take field. Field selection options are:

- Select an Existing Employment Instance as a Rehire.

- Select an Existing Employment Instance as a Hire.
- Create a New Employment Instance Using Hire as the Action.
- Send the Request to an HR Administrator to Process.

Action to Take if Only One Inactive Employment Instance Is Found

When the template administrator selects *No* in the End-User Can Decide What Action to Take field, the page presents a set of different group boxes for inactive employment instance matches.

The screenshot shows a web form titled "Person Exists in the System". It contains a dropdown menu labeled "*End-User Can Decide What Action to Take:" with "No" selected. Below the dropdown are two sections, each with a blue header bar. The first section, "Action to Take if Only One Inactive Employment Instance Is Found", contains four radio button options: "Restart Employment Instance as a Rehire", "Restart Employment Instance as a Hire", "Create a New Employment Instance Using Hire as the Action", and "Send the Request to an HR Administrator to Process". The second section, "Action to Take if More than One Inactive Employment Instance (or None) is Found", contains two radio button options: "Create a New Employment Instance Using Hire as the Action" and "Send the Request to an HR Administrator to Process".

Person Rules page where the end user cannot decide what action to take when a person exists in the system

To define what action should occur if an inactive matching person is found during the hire, select one of the options in this group box. Values are:

- Restart Employment Instance as a Rehire.
- Restart Employment Instance as a Hire.
- Create a New Employment Instance Using Hire as the Action.
- Send the Request to an HR Administrator to Process.

This group box appears when you select *No* in the End-User Can Decide What Action to Take field.

Action to Take if More than One Inactive Employment Instance (or None) is Found

Select one option the end user can perform during a template hire when more than one inactive employment instance is found. This group box appears when you select *No* in the End-User Can Decide What Action to Take field. Values are:

- Create a New Employment Instance Using Hire as the Action.
- Send the Request to an HR Administrator to Process.

Copying a Hire Template

Access the Copy Template page (Set Up HRMS, Product Related, Workforce Administration, Template-Based Hire, Copy Template).

Copy Template	
Template Identification	
Template ID:	KJEMP_DEPT_HRADMIN Description: JPN HR user hires into dept 10000
*New Template ID:	KJEMP_DEPT_FIN
*Description:	JPN Finance hires into dept 11000
Short Description:	
*Effective Date:	01/01/2009 

Copy Template page

Enter the new template information and click Save. The system will open the Template Creation component where you can update the appropriate information.

Country Changes

If you copy a country template and save it for another country, only the related country sections appear on the page. The original country sections and their defaults do not display. For example, if a template for France (FRA) is copied and you change the country for the new template to Spain (ESP), the FRA sections are removed; the ESP sections appear, are blank, and ready for input.

Note. You will need to access the Sections page and select the Load/Reload Sections button to update the template with the related country sections and delete the original country sections and their defaults.

Defining Roles for Hire Notifications

To set up the hire notification roles table, use the Hire Notification (HR_HIRE_NOTIF) component.

This section provides an overview of hire notifications and discusses how to define which roles will receive hire notifications.

Understanding Hire Notifications

When a recruiter or user submits a hire request, the system uses the Hire Notification component to identify who should receive notification when someone is ready to be hired or there are errors in publishing the hire to HR.

Hire notification setup needs to be done for the administrator to receive email notifications that a person is ready to be hired or that errors occurred while processing the hire. The Hire Notifications page uses role queries to define who should receive notification of hire requests and errors. The delivered role query is `ROLE_HIRE_NOTIF`, however, you can define other role queries and add them on the Hire Notifications page.

The system enables hire notification emails:

1. Whenever a new hire request comes through the recruiting process.
2. Whenever there is an error in the push of profile data to HR once the applicant or person is hired.

The administrator can access the Manage Hires page to view pending hires and the status of each hire request to be processed.

Pages Used to Define Roles for Hire Related Notifications

Page Name	Definition Name	Navigation	Usage
Hire Notifications	HR_HIRE_NOTIF	Set Up HRMS, Product Related, Workforce Administration, Hire Notification, Hire Notifications	Define which roles in Human Resources will receive hire related notifications.

Defining Which Roles Will Receive Hire Notifications

Access the Hire Notifications page (Set Up HRMS, Product Related, Workforce Administration, Hire Notification, Hire Notifications).

Hire Notifications

Define which roles in Human Resources will receive hire related notifications.

Ready To Hire Notifications [Customize](#) | [Find](#) | [First](#) | [1 of 1](#) | [Last](#)

Role Query Name

ROLE_HIRE_NOTIF [+](#) [-](#)

Error Notifications [Customize](#) | [Find](#) | [First](#) | [1 of 1](#) | [Last](#)

Role Query Name

ROLE_HIRE_NOTIF [+](#) [-](#)

Hire Notifications page

Ready To Hire Notifications

Enter any role query names that should receive a notification that a person is ready to be hired. The system comes with the delivered role query `ROLE_HIRE_NOTIF`.

Error Notifications

Enter any role query names that should receive a notification when there is an error in the push of profile data to HR. The system comes with the delivered role query `ROLE_HIRE_NOTIF`.

You can define a query by navigating to Reporting Tools, Query, Query Manager.

Defining Employee Identification

To set up the employee identification tables, use the Supporting Documents (`SUPPORT_DOC_TABLE`), Visa/Permits (`VISA_PERMIT_TABLE`), and Driver's License Type (`DRIVE_LIC_TBL`) components.

This section discusses how to:

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

Pages Used to Define Employee Identification

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

Defining Visas and Work Permits

Access the Visa/Permits page (Set Up HRMS, Product Related, Workforce Administration, Visas/Permits, Visas/Permits).

Visas/Permits

Country: USA United States

Visa/Permit Type: BU1 Business Traveller

Visa/Permit Data Find | View All First 1 of 1 Last

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

*Description: Business Traveller

Short Description: Business

*Visa/Permit Classification: Visa

Comment: This visa is required for employees frequently working between Canada and United States but not living outside of domicile country.

Supporting Documents Needed Customize | Find | View All First 1-3 of 3 Last

1	BIRTH	Birth Certificate	+	-
2	LTREMP	Letter of Employment	+	-
3	PSSPRT	Passport and Photos	+	-

Visa/Permits page

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

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

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

Setting Up Military Rank Structure

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

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

- Enter military service types.

- Create military component type categories.
- Establish military service details.
- Define service ranks.
- Associate grades with ranks.

Understanding Military Ranking Structure

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

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

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

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

Recording Rank Changes in Profile Management

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

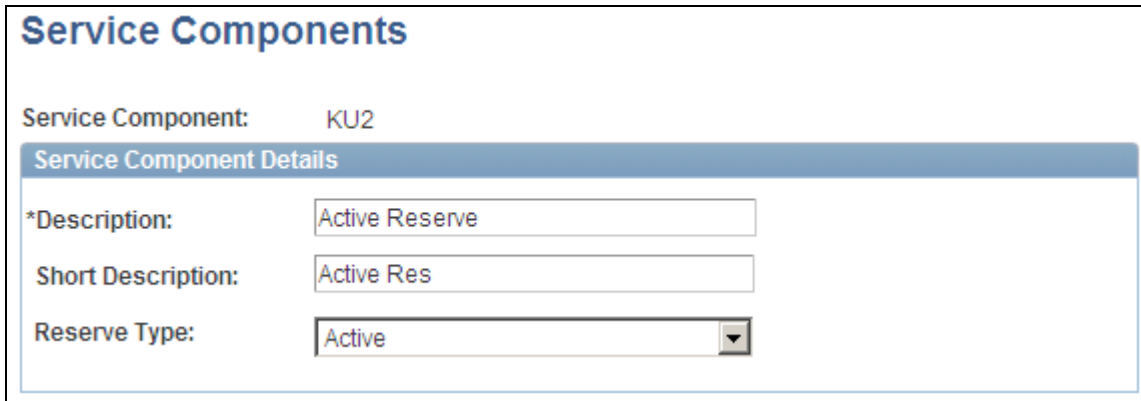
See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles*, "Setting Up Profile Management."

Pages Used to Set Up Military Rank Structure

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

Entering Military Service Types

Access the Service Components page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data MIL, Service Components, Service Components).



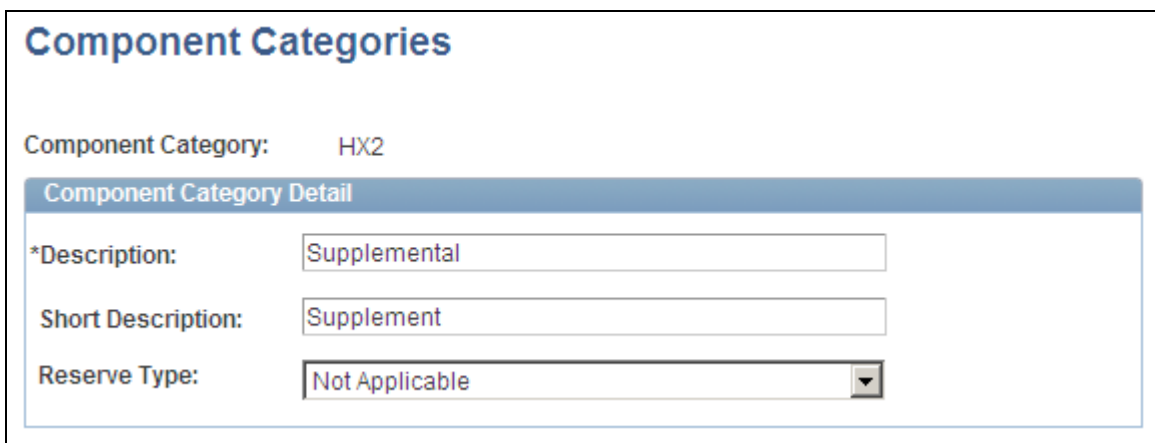
The screenshot shows the 'Service Components' page. At the top, the title 'Service Components' is in blue. Below it, 'Service Component: KU2' is displayed. A section titled 'Service Component Details' contains three fields: '*Description:' with the value 'Active Reserve', 'Short Description:' with the value 'Active Res', and 'Reserve Type:' with a dropdown menu showing 'Active'.

Service Components page

Reserve Type Identify if this service component is part of a military reserve force. Valid values are *Active*, *Inactive*, or *Not Applicable*.

Creating Military Component Type Categories

Access the Component Categories page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data MIL, Component Categories, Component Categories).



The screenshot shows the 'Component Categories' page. At the top, the title 'Component Categories' is in blue. Below it, 'Component Category: HX2' is displayed. A section titled 'Component Category Detail' contains three fields: '*Description:' with the value 'Supplemental', 'Short Description:' with the value 'Supplement', and 'Reserve Type:' with a dropdown menu showing 'Not Applicable'.

Component Categories page

Reserve Type Identify if this service component category is part of a military reserve force. Valid values are *Active*, *Inactive*, or *Not Applicable*.

Defining Military Service Details

Access the Service Definition page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data MIL, Military Service, Service Definition).

Service Definition | **Service Ranks**

Military Service: KUUAR

Service Details

*Description: United States Army

Short Description: US Army

Country: USA United States

Military Service Details Find | View All First 1 of 4 Last

*Service Component: KU1 Regular Service + -

Associated Service Categories Customize | Find | View All First 1-2 of 2 Last

	*Component Category	Description		
1	KU1	Regular	+	-
2	KU7	Awaiting Init Active Duty Trai	+	-

Service Definition page

- Country** Enter the country to which this military service applies.
- Service Component** Select one or multiple service components related to this military service. When a user associates a military service with a position or military service member, only those service components associated with that military service are available to the user.
- Component Category** Associate service categories to service components. When a user associates a service component with a military service member, only those component categories associated with that service component are available to the user.

Defining Service Ranks

Access the Service Ranks page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data MIL, Military Service, Service Ranks).

Service Definition

Service Ranks

Military Service: KUUAR United States Army

Service Ranks

Customize | Find | View All | First 1-5 of 32 Last

Seq Nbr	*Rank	*Description	Short Description	NATO Rank Code	*Rank Category	Content Type	Content Item ID	Salary Grade		
5	GENA	General of the Army	Gen Army	OF-10	Officer	RANK	KUMAROF10	Salary Grade	+	-
10	GEN	General	General	OF-09	Officer	RANK	KUMAROF09	Salary Grade	+	-
20	LGEN	Lieutenant General	Lt Gen	OF-08	Officer	RANK	KUMAROF08	Salary Grade	+	-
30	MGEN	Major General	Maj Gen	OF-07	Officer	RANK	KUMAROF07	Salary Grade	+	-
40	BGEN	Brigadier General	Brig Gen	OF-06	Officer	RANK	KUMAROF06	Salary Grade	+	-

Service Ranks page

Seq Nbr (sequence number)

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

Rank

Define rank code designations specific to this military service.

NATO Rank Code

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

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

Rank Category

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

Content Type

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

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

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles*, "Setting Up the Content Catalog."

Content Item ID

Select a content item that further defines the RANK content type. The system uses this information to manage a person's job profile.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles*, "Setting Up the Content Catalog."

Salary Grade

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

Associating Grades with Ranks

Access the Salary Grades - Military Ranks page (select the Salary Grade link on the Service Ranks page).

Salary Grades - Military Ranks

Associated Salary Grades

Military Service: KUUAR United States Army
Military Rank: GENA General of the Army

Salary Grades						Customize	Find	View All	First	1 of 1	Last
	*Salary Set ID	*Sal Plan	*Grade	Description							
1	SHARE	KUML	O10	Officer-10							

Salary Grades - Military Ranks page

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

Setting Up Military Rank Change Notification and Documentation

To set up military rank change notification and documentation tables, use the Military Processing Definition (MIL_RANK_CHNG_PROC), Rank Change Status MIL (MIL_RANK_CHNG_STAT), Military Rank Change Template (MIL_RANK_CHNG_TMPL), and Clone Military Rank Template (MIL_RNK_CLONE_TMPL) components.

This section provides an overview of the military change rank and notification process and discusses how to:

- Define military rank change processing rules.
- Specifying allowable actions for rank change processing.
- Create a military rank change template definition.
- Enter military rank change control criteria.
- Specify stakeholder notification details.
- Clone a military rank change template.

Understanding the Military Change Rank and Notification Process

The Military Rank Change process enables you to track the various states of military service member rank changes, notify stakeholders that are involved in the process using Approval Framework, and generate official documentation. If your organization has elected to require approval processing using the Rank Change process, then upon completion of the last approval, and when the date of the rank change arrives, the system will insert a new row into the service member's Job Data to reflect the rank change using the component interface `CI_JOB_DATA`.

Since rank change requests often happen months in advance of the actual approval process, the system enables you to record military rank change requests, amendments, and cancellations without having enter this information in Job Data. When approval processing is enabled, the system will send out rank change transaction notifications on a predefined date to stakeholders; stakeholders can be identified as either reviewers or approvers. Approvers will then access the self service pages to approve or deny the request.

The PeopleSoft HR application delivers several setup tables to support the rank change approval and notification process. These tables are available through these components:

- **Military Processing Definition**

Use this component to identify the method used to access the employee-manager reporting structure for determining the unit commander with final approval. Also, this is the location you can enable the approval and prenotification process. When the approval process is not enabled in this component, the rank changes will automatically be applied to Job Data without requiring approvals when the Rank Change Application Date arrives.

- **Rank Change Status MIL**

Use this component to specify a subset of valid actions and related statuses that can be used in a rank change request, since the final rank change promotion or demotion will be written to Job Data and requires an Action value. You can also opt to include this action and status for prenotification or whether to apply it to Job Data. Here, the system can also calculate the Early Promotion Date that's written to the Job Data row. Only the actions specified in this component will appear as a rank change option.

- **Military Rank Change Template and Clone Military Rank Template**

Use these components to create templates that enable users to default as much data as possible into the Rank Change MIL component for a service member rank change request. This ensures that entering data is a quick and easy process. Use the cloning component to copy an existing template to streamline the template creation process.

See Also

[Chapter 15, "Updating Person and Job Information," Managing Military Rank Change Requests, page 741](#)

Pages Used to Set Up the Military Rank Change and Notification Process

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Military Processing Definition	MIL_RANK_CHNG_PROC	Set Up HRMS, Product Related, Workforce Administration, Workforce Data MIL, Military Processing Definition, Military Processing Definition	Define military rank change processing rules. Determine the service member unit commander, who will be used as the final approver in the rank change approval process. Use this page to turn on the approval process and enable prenotification of a rank change.
Rank Change Status MIL	MIL_RANK_CHNG_STAT	Set Up HRMS, Product Related, Workforce Administration, Workforce Data MIL, Rank Change Status MIL, Rank Change Status MIL	Specify the allowable Action table values for change rank processing. Only those action and disposition status combinations defined here are available for military rank change templates and requests.
Template Definition	MIL_TMPL_DEFN	Set Up HRMS, Product Related, Workforce Administration, Workforce Data MIL, Military Rank Change Template, Template Definition	Create a military rank change template definition. Define the template name, description, and any comments that will help to describe when this template should be used.

Page Name	Definition Name	Navigation	Usage
Template Change Control	MIL_TMPL_CHNG_CNTL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data MIL, Military Rank Change Template, Template Change Control	Enter military rank change control criteria. This page enables you to define default specific personnel action and reason values as well as the rank change status values (New, Amendment, Cancel by Command, Cancel by Admin) to be associated with the template. Enter default values for the authorizing organization's business unit and department as well as the position or user role that should be used when determining the responsible career manager. The system will use these values to populate the Military Rank Change page fields in the Rank Change MIL component.
Template Notifications	MIL_TMPL_NOTIFY	Set Up HRMS, Product Related, Workforce Administration, Workforce Data MIL, Military Rank Change Template, Template Notifications	Specify the stakeholder notification details such as default roles that should be associated with a template and indicate when to start the approval and notification process.
Clone Military Rank Template	MIL_RNK_CLONE_TMPL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data MIL, Clone Military Rank Template, Clone Military Rank Template	Clone a military rank change template by identifying an existing a rank change template to copy and entering the new template ID you wish to create.

Defining Military Rank Change Processing Rules

Access the Military Processing Definition page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data MIL, Military Processing Definition, Military Processing Definition).

Military Processing Definition

Rank Change Processing

Access Type: By Part Posn Mgmt Supervisor ▼

☒ Approval Process?

☒ Allow Prenotification

Military Processing Definition page

Use this page to identify how the system will determine the unit commander role for the approval and workflow notification process. When using the approval process, the unit commander is the final approver. You will also use this page to identify if you want the system to require approvals for rank change or use the prenotification process.

Access Type

Select the access type that best fits how the unit commander structure for your organization is determined. This is the final approver for a service member's rank change.

Valid values are *By Department Manager ID*, *By Dept Security Tree* (by department security tree), *By Group ID*, *By Part Posn Mgmt Dept Mgr ID* (by partial position management department manager ID), *By Part Posn Mgmt Supervisor* (by partial position management supervisor), *By Reports To Position*, and *By Supervisor ID*.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Self-Service Transactions," Setting Up Access to Direct Reports Data and *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Working with Common Components," Configuring Direct Reports Functionality.

Approval Process?

Select this check box if the unit commander approval is needed to process a new or amended rank change and have the system apply these changes to Job Data. If approval is not required to process the rank change and update Job Data on the specified date, deselect this check box.

Allow Prenotification

Select this check box to enable the Prenotification process and have the system notify stakeholders in advance of a rank change being made to Job Data. This function provides stakeholders with another opportunity to review the service member's rank change before Job Data is updated. Coordination with the career manager and manual intervention would be required at this point to stop the system from processing the rank change.

The actual prenotification date is defined on the Stakeholder page of the Rank Change MIL component for the person receiving the rank change.

Note. If the Application Date field on the Military Rank Change page of the Rank Change MIL component is not populated, the prenotification date on the Stakeholder page will not be populated and therefore not picked up by the prenotification process.

Prenotification messages operate independently of Approval Framework, and it does not register an Approval Framework event. You can access the Prenotification for Mil Rank (MIL_NOTIFY_AE) Application Engine process by navigating to PeopleTools, Process Scheduler, System Process Requests.

See [Chapter 15, "Updating Person and Job Information," Entering Military Rank Change Notification Information, page 749.](#)

Specifying Allowable Actions for Rank Change Processing

Access the Rank Change Status MIL page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data MIL, Rank Change Status MIL, Rank Change Status MIL).

Rank Change Status MIL

Action: PRO Promotion

Action Details Find | View All First 1 of 1 Last

*Effective Date: 01/01/1980

Status Details Find | View All First 1 of 4 Last

*Disposition Status: AMD Amendment

Change Action History

*Description: Amendment Status: Active

Short Description: Amended

Set Processing Field Selection

☒ Include in Prenotification

☒ Apply Row to Job Data

Set Earliest Review Date

☒ No Affect

☐ JOB.EFFDT + Number of Weeks

☐ Special Calculation Routine

Comments:

Rank Change Status MIL page

Action Select a value from the Action table that can be used for military rank change requests.

Disposition Status Enter the disposition statuses eligible for this action type. Only those action and rank change disposition status combinations defined here are available for selection in the Action and Disposition Status fields on the Template Change Control page for military rank change templates or Rank Change MIL page to record a service member's rank change request.

Valid values are *AMD* (Amendment), *CNA* (Cancel by Administrator), *CNC* (Cancel by Command), and *NEW* (new).

Change Action History

Identify the rank change status descriptions that the system will display to a user during the Rank Change process. You can also activate or inactivate a specific disposition status for the action.

Set Processing Field Selection

Use this section when configuring prenotification and the push of rank change requests to Job Data for an action and disposition status combination.

Include In Prenotification

Select this check box to generate a prenotification for stakeholders when a person has this action and disposition status combination. If this check box is not selected, prenotification will not be generated for stakeholders.

Note. Prenotification must be enabled on the Military Processing Definition page in order for prenotification to occur.

Apply Row to Job Data

Select this check box to have the system push the rank change request to Job Data. If this check box is not selected, the system will not apply the rank change to Job Data. For example, a cancellation of a rank change request would not need to be recorded in Job Data, and therefore would have this check box deselected.

Set Earliest Review Date

Use this section to determine how the system should calculate the Early Promotion Date field value on the Job Data - Employment Information page use after the rank change row has been inserted into Job Data.

No Affect

Select this if there is no impact to the earliest review date when the Job Data row is inserted. This is the default value selection.

JOB.EFFDT + Number of Weeks (job effective date plus number of weeks)

Select this option to calculate a review date using the effective-date of the rank change row in Job Data plus the number of weeks specified here. If this option is selected, you must also enter the number of weeks (up to a 3-digit number) in the edit box after this field. The system uses this date to populate the Early Promotion Date on the Job Data - Employment Information page. In the case of a demotion or reversal, you may need to enter a negative number.

Note. To use this option, you must enter an Application Date value on the Military Rank Change page.

Special Calculation Routine

Select this option if your organization has created their own customized calculations. The PeopleSoft application does not deliver calculations for this field.

Creating a Military Rank Change Template Definition

Access the Military Rank Change Template - Template Definition page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data MIL, Military Rank Change Template, Template Definition).

Template Definition	Template Change Control	Template Notifications
Template ID: KPROELIG		
Status: Active		
*Description: Selected for Promotion-Competi		
Short Descr: Selected		
Comments: This template assumes: * Eligible Service member has been selected for promotion (competitive); * Responsible Career Manager is in Position K0ML0004; * Authorizing Org is KUMILUS04 (Human Resources) * Employee role is a reviewer; * Career Manager role is an Approver; this is in addition to the Servicemember's Unit's (Department's) Manager 		

Military Rank Change Template - Template Definition page

Template ID Enter an ID (up to 15-characters) to uniquely identify this template.

Entering Military Rank Change Control Criteria

Access the Template Change Control page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data MIL, Military Rank Change Template, Template Change Control).

Template Change Control page

Use this page to define default values the system will use to populate fields in the Rank Change MIL component when creating a rank change request. The only required fields for defaulting are Action, Disposition Status, and the Responsible Career Manager selection.

Action	Select a default action value. Valid actions for rank changes are defined on the Rank Change Status MIL page.
Reason	Select a default reason that will be associated with the action, if applicable. Valid reasons for actions are defined in the Action Reasons table.
Disposition Status	Select the disposition status that will be provided by default when using this template. Valid values are defined on the Rank Change Status MIL page for an action.
Business Unit and Department	Enter the authorizing organization's business unit and department for this template.

Responsible Career Manager

Use this selection to specify how the default career manager is derived. The system uses this information for notification purposes.

Position Number and Position Number	Select this option if the career manager is decided by position. When you select this option, the Position Number field becomes available and you can enter the position number associated with the career manager for defaulting purposes or leave it blank.
Role and Role Name	Select this option if the career manager is decided by a role. When you select this option, the Role Name field becomes available and you can enter the name of the role associated with the career manager user ID for defaulting purposes or leave it blank.

Specifying Stakeholder Notification Details

Access the Military Rank Change Template - Notifications page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data MIL, Military Rank Change Template, Notifications).

Template ID: KPROELIG Selected for Promotion-Competi

Set Promulgation Date Methods

Approvals Start On

☒ Immediately (Current Date)

☐ Future Date Status Date + Days:

Prenotification Date = Effective Date - Days:

Specify Stakeholder User List Customize | Find | View All | First 1-2 of 2 Last

	Role Name	Participant Involvement		
1	Employee	Reviewer	+	-
2	HR Military Career Manager	Approver	+	-

Military Rank Change Template - Template Notifications page

Use this page of the template to configure for an immediate start of the approval process (when the rank change request is saved) or configure the approval process to start on a future date, to be calculated by the system. This page also enables the user to associate a prenotification date, which is essentially a final notification to stakeholder that the rank change is being applied to Job Data.

Immediately (Current Date)

Select this method to have the system populate the Start Approvals On field in the Rank Change MIL component with the system date. This will start the approval process upon saving the request in the Rank Change MIL component.

Future Date and Status Date + Days	Select this method to have the system populate the Start Approvals On field in the Rank Change MIL component with a future date based on the Status Date field value in the Rank Change MIL component. When you select this option, the Status Date + Days field becomes available. Enter the number of days (up to two digits) the system should wait before sending out the approval notices. For example, you create a template indicating that approvals should be sent out on a future date. You enter 14 in the Status Date + Days field. Later, the HR manager enters a request for an employee rank using this template with a Status Date value of September 1. The system automatically populates the Start Approvals On field with the date of <i>September 15</i> on the Stakeholder page of the Rank Change MIL component, 14 days after the status date of this request. The HR manager can accept this default value or override this value with another date.
Prenotification Date = Effective Date - Days	Enter the number of days prior to the rank change being applied to the person's Job Data record that the stakeholders should be notified of the change being made in the system. The system calculates the prenotification date using the Application Date value on the Military Rank Change page in the Rank Change MIL component minus the number of days entered in this field. The system then enters this date in the Prenotification Date field on the Stakeholder page of the Rank Change MIL component. The HR manager can accept this default value or override this value with another date when creating the rank change request. Note. Prenotification must be enabled on the Military Processing Definition page in order for prenotification to be performed.
Role Name	Identify the roles, or stakeholders, that should be notified in the rank change notification process.
Participant Involvement	Identify the level of involvement of the stakeholder. Values are <i>Approver</i> or <i>Reviewer</i> .

Cloning a Military Rank Change Template

Access the Clone Military Rank Template page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data MIL, Clone Military Rank Template Definition, Clone Military Rank Template)

Clone Military Rank Template

Template ID:	KPROELIG	Selected for Promotion-Competi
Action:	PRO	Promotion
Disposition Status:	NEW	

New Template ID:	KRNK	
Action:	RNK	Rank Change
Disposition Status:	NEW	

Clone Military Rank Template page

Use this page to copy an existing military rank template by selecting the existing template and then enter the new template ID, action, and disposition status. After saving, the system will open the Military Rank Change Template component, where you can then update fields related to this template.

Defining Additional Employment Setup Data

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

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

Understanding Supervisor Levels

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

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

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

Table 1: Supervisor Levels

This table lists the supervisor levels and their descriptions.

<i>Supervisor Level</i>	<i>Description</i>
01	Director
02	Senior Manager

Table 2: Departments

This table lists the department IDs and their descriptions.

<i>Department ID</i>	<i>Description</i>
100	Development
102	Development Section One
200	Sales
210	Sales - West Division

Table 3: Position, Supervisor Level, and Departments

This table lists the positions or posts and their corresponding supervisor levels and department IDs.

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

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

Pages Used to Define Additional Employment Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Ethnic Groups	ETHNIC_GROUP_TBL	Set Up HRMS, Product Related, Workforce Administration, Ethnic Groups, Ethnic Groups	Define ethnic groups. Regulations in some countries require ethnic group tracking by employers. The system tables contain predetermined values for defining ethnic groups and religions. You can add or edit values and descriptions.
Non-Employee Provider	NEE_PROVIDER_TBL	Set Up HRMS, Product Related, Workforce Administration, Non-Employee Provider, Non-Employee Provider	Define the provider, agency, or employer of a contingent worker. Link this information to a worker on the Employment Information page or Contract Data page.
Religions	RELIGION_TBL	Set Up HRMS, Product Related, Workforce Administration, Religions, Religions	Define religions.
Supervisor Levels	SUPVSR_LVL_TBL	Set Up HRMS, Product Related, Workforce Administration, Supervisor Levels, Supervisor Levels	Add and modify supervisor level data.
Temporary Duties	TEMP_DUTIES_TBL	Set Up HRMS, Product Related, Workforce Administration, Temporary Duties, Temporary Duties	Define or modify duty types for temporary assignments. This field only appears on the Job Code page of Job Data when the action is Temporary Assignment (TAS) and the Installation table has Auto Job Suspend selected. The value can indicate what type of duties are included in the assignment. <i>See PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Meet Regulatory Requirements, "(GBR) Meeting Regulatory Requirements for the United Kingdom," Running the Northern Ireland Report.</i>

Page Name	Definition Name	Navigation	Usage
Volunteer Organizations	VOLUNTEER_ORG_TABL	Set Up HRMS, Product Related, Workforce Administration, Volunteer Organizations, Volunteer Organizations	Add volunteer organization data that your company recognizes or sponsors.
Employee Class	EMPL_CLASS_TABLE	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Employee Class, Employee Class	Set up employee classes to further categorize your workforce. Employee classes are assigned on the Job Data - Job Information page (JOB_DATA_JOBCODE). Note. (GBR) The Northern Ireland Fair Employment Monitoring report (UKNI001) uses the employee class to determine the classification for workers. If your organization submits this report, you must use the required employee classes for the report to work correctly.

Defining Ethnic Groups

Access the Ethnic Groups page (Set Up HRMS, Product Related, Workforce Administration, Ethnic Groups, Ethnic Groups).

Ethnic Groups

Set ID: AUS01 Ethnic Group: ASIAN

Ethnic Group

Find | View All First 1 of 1 Last

*Effective Date: 01/01/1980

*Status: Active

Regulatory Region: USA

*Description: Asian

Short Description: Asian

USA

EEO Ethnic Category:

Ethnic Groups page

Regulatory Region	Enter the country or region used to monitor diversity reporting for this ethnic group.
EEO Ethnic Category	(USA) Select the category for this ethnic group. You may select one or more categories for each ethnic group. Values include: • <i>American Indian/Alaska Native</i> • <i>Asian</i> • <i>Black/African American</i> • <i>Hispanic/Latino</i> • <i>Native Hawaiian/Oth Pac Island</i> (other Pacific Island) • <i>Not Specified</i> • <i>White</i>

Setting Up Security Clearance Types

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

This section discusses how to define security clearance types.

Page Used to Set Up Security Clearance Types

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Security Clearance Type	SEC_CLR_TYP_TBL	Set Up HRMS, Product Related, Workforce Administration, Security Clearance Type, Security Clearance Type	Define security clearance types.

Defining Security Clearance Types

Access the Security Clearance Type page (Set Up HRMS, Product Related, Workforce Administration, Security Clearance Type, Security Clearance Type).

Security Clearance Type

Security Clearance Type: 1

Security Clearance Detail			
Effective Date:	01/01/1900	Status:	Active
Description:	Classified		
Short Description:	Classified		

Security Clearance Type page

Effective Date	The date the security clearance type becomes effective.
Status	Provide the status of the security clearance. Valid values are <i>Active</i> or <i>Inactive</i> .
Description	Provide the long description of the security clearance type.
Short Description	Provide the short description of the security clearance type.

Creating Checklists

To set up the checklists tables, use the Checklist Items (CHKLST_ITEM_TBL), Checklist (CHECKLIST_TABLE), and Dynamic Link (DL_LINK_TBL) components.

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

Understanding Checklists

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

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

To make a checklist:

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

3. Create a checklist by adding items to a checklist using the Checklist page.

Pages Used to Create Checklists

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

Setting Up Standard Checklists

Access the Checklist page (Set Up HRMS, Common Definitions, Checklist, Checklist).

Checklist

Checklist Code: DEUHIR

Checklist Item

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

*Description: Hire Short Description: Hire

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

Checklist page

Checklist Type

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

Sequence and Item Code

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

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

Setting Up Workforce Contracts

To set up contracts for your workforce, use the Define Contract Types (CONTRACT_TYPE_TBL), Contract Type Groups (CNTRCT_TYPE_GRP), Contract Clause Table (CNT_CLAUSE_TABLE), and Define Contract Templates (CNT_TEMPLATE_TABLE) components.

This section discusses how to:

- Define contract types.
- Set up standard contracts.

See Also

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "(E&G) Administering Contract Pay"

Pages Used to Set Up Workforce Contracts

Page Name	Definition Name	Navigation	Usage
Define Contract Types	CONTRACT_TYPE_TBL	Workforce Administration, Job Information, Contract Administration, Define Contract Types, Define Contract Types	Define contract types.
Contract Type Groups	CNTRCT_TYPE_GRP	Set Up HRMS, Product Related, Workforce Administration, Contract Administration, Contract Type Groups, Contract Type Groups	Group contract types together.
Contract Clause Table	CNT_CLAUSE_TABLE	• Set Up HRMS, Product Related, Workforce Administration, Contract Administration, Contract Clause Table, Contract Clause Table • Workforce Administration, Job Information, Contract Administration, Define Contract Clauses, Contract Clause Table	Define special languages and riders that can be added to the main body of a workforce contract.

Page Name	Definition Name	Navigation	Usage
Define Contract Templates	CNT_TEMPLATE_TABLE	- Set Up HRMS, Product Related, Workforce Administration, Contract Administration, Define Contract Templates, Define Contract Templates - Workforce Administration, Job Information, Contract Administration, Define Contract Templates, Define Contract Templates	Set up all of your organization's standard workforce contracts. Use the information that you define here when you assign contracts to employees and contingent workers in your organization.

Defining Contract Types

Access the Define Contract Types page (Workforce Administration, Job Information, Contract Administration, Define Contract Types, Define Contract Types).

Define Contract Types

Set ID: USA Contract Type: CON

Contract Type Find | View All First 1 of 1 Last

Effective Date: 01/01/1990 *Status: Active

Description: Contractor/Consultant

Short Description: Contractor

Spain

Contract Rule: ☐ Allowed Extensions

Min Duration: Unit:

Max Duration: Unit:

Reduction ID: Social Security Number Type:

Long Description:

Italy

*Applicability: All

Define Contract Types page

(ESP) Spain

Contract Rule	Enter the number of the law that governs this kind of contract. A typical law number includes the type of law, law number, and year—for example, RD 3290/1997 or Ley 22/1995. The system doesn't edit your entry.
Allowed Extensions	Select to permit extensions to be added to this type of contract.
Min. Duration (minimum duration), Max Duration (maximum duration), and Unit	Specify the minimum and maximum length that is allowed for this type of contract. Enter a quantity in the Min. Duration and Max Duration fields and use the Unit field to select a unit of time. For example, if the minimum contract duration is six months, enter 6 in the Min. Duration field, then select <i>Months</i> from the available options in the Unit field.
Reduction ID	This field is active only if PeopleSoft Enterprise Global Payroll for Spain is installed. Select the reduction ID that corresponds to the contract type. The reduction ID identifies the specific reduction definition or rule that applies to an employer. In certain limited cases—such as when a company hires employees with disabilities, or hires workers older than 45 years of age—the employer may qualify for a reduction in the amount of social security contributions.
Soc. Sec. Nbr. For Employer Type (social security number for employer type)	Select a social security number type from the available options: none, <i>Part Time</i> , <i>Regular</i> , and <i>Training</i> .

(ITA) Italy

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

Setting Up Standard Contracts

Access the Define Contract Templates page (Set Up HRMS, Product Related, Workforce Administration, Contract Administration, Define Contract Templates, Define Contract Templates).

Define Contract Templates

Contract Template ID: K00002 Set ID: USA

Contract Template Find | View All First 1 of 1 Last

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

*Description: Contractor Placement

Short Description: Contractor

Contract Type: 001 Limited Employment Contract

*Contract Family: Temporary

Contract Content: In this Agreement, the party who is filling this temporary position is termed "Contractor".

Contract Clauses Customize | Find | View All First 1-2 of 3 Last

*Sequence	*Contract Clause	Description	Clause Status
1	K05	Unauthorized info disclosure	Required
2	K07	Services to the Third Parties	Required

Contract Task Orders Find | View All First 1 of 1 Last

Task Order Number:

Begin Date:

End Date:

Description:

Comments:

Define Contract Templates page

Contract Type

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

Contract Family

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

Contract Clauses

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

Sequence	Enter the order in which to add the contract clauses to the contract.
Contract Clause	Select a contract clause from among those you've defined on the Contract Clause Table page. For example, a contract for a limousine driver requires that the employee have a driver's license.
Clause Status	Indicate if the clause is <i>Optional</i> or <i>Required</i> .

Setting Up the Company Directory

To set up the Company Directory tables, use the Company Directory Setup (HRCD_SETUP), Job Tree Builder (HR_TREEBLD_RNCTL), and Structure and Content (PORTAL_FLDR_ADM) components.

This section provides an overview of Company Directory functionality, the Company Directory setup, and discusses how to:

- Define general settings for the Company Directory pages.
- Identify fields on the Company Directory - Profile page.
- Identify fields on the Company Directory - Org Chart page.
- Run the Job Tree Builder process.
- Update the portal folder definition for the Company Directory.
- Identify Company Directory tree node queries.

Understanding the Company Directory Functionality

With functionality provided in PeopleTools 8.51.02 or higher, the Company Directory, an organizational visualization and navigation directory, offers functionality beyond a typical organization chart by supporting worker collaboration and enabling users to initiate employee self service transactions from the organizational view. In addition to the configuration options available to the organization, an individual can also personalize the contact content they want to display for themselves in the Company Directory, thereby ensuring data privacy defined at the user level. End users use the Company Directory component.

The screenshot displays the Oracle Company Directory interface. At the top, there's a navigation bar with 'ORACLE' and links for 'Home', 'Worklist', and 'MultiChannel Console'. Below this is a breadcrumb trail: 'Favorites | Main Menu > Company Directory > Douglas Lewis > Jean Parsons > Betty Locherty'. The main heading is 'Company Directory' with a 'Preferences' link. A search bar allows searching by 'Name, Job Title, Department, or Email', with links for 'Advanced Search' and 'My Org Chart'. Below the search bar are tabs for 'Profile' and 'Org Chart'. The 'Org Chart' tab is active, showing a hierarchical tree. At the top is Jean Parsons (Senior Vice President Finance). Below her is Betty Locherty (Director-Finance). Betty has five direct reports: Diane Palmer (Assistant-Administrative), Jill Chancellor (Manager-Payroll), Mei Lee (Analyst-Financial), Netty Owyang (Manager-Accounting), and Rosanna Channing (Senior Manager-Accounting). Each node includes a profile picture, name, title, department, email, and direct report counts.

The Company Directory pages

The Company Directory component has two primary pages:

- Org Chart page

This page enables you to visually view a person within the context of your organization and reporting structure. It displays a three-tiered graphical representation using trees from Tree Manager. These trees build the hierarchies rendered by the organization chart. The chart focuses on a person and where he or she fits within the reporting structure.

- Profile page

This page displays up to five sections: two company related sections on the left side and three personalized sections on the right. The Profile page provides additional information about the person, such as his or her job details; links to other people with whom he or she is associated, such as direct reports, peers, and the manager; as well as personalized sections, which enable the employee to enter additional contact details, personal links, and a place to enter free from text.

Users can navigate to people using the search fields, selecting another person's node in the organizational tree structure, or through the use of the breadcrumbs and SmartNavigation, which display above the page in the navigational header. Breadcrumbs and SmartNavigation enhance drop-down menus by incorporating your company hierarchy into the menu structure.

Note. In order to utilize the Company Directory functionality, you must be on PeopleTools 8.51.02 or greater.

See [Chapter 16, "Viewing Summary Workforce Information," Pages Used to View the Company Directory, page 779.](#)

The Organizational Reporting Structure for the Company Directory

The reporting structure for the organizational chart and SmartNavigation menu uses a Tree Manager tree to provide the visual representation of the person-based organization chart. You can manually create a tree for the Company Directory structure, or use the delivered PeopleSoft batch process that leverages the Direct Reports API to create a tree of persons based upon their job data.

This will enable you to:

- Effective date each version of the hierarchy you want to expose via the Company Directory.
- Enforce a very strict hierarchy that is predetermined through your tree setup.
- Have improved performance at run-time and eliminate the necessity of fetching data from transactional tables (primarily PS_JOB) to derive the reporting relationships. With a Tree, the hierarchy will already exist in the database and not need to be derived at run-time from transactional data.

Note. The Company Directory uses trees with the tree structure ID of *COMPANY_DIRECTORY* only.

The Direct Reports API is a common HCM data service used for obtaining a list of employee's (including contingent workers and persons of interest) who report to a specific employee job or position number. This data service is primarily leveraged for determining a manager's security to specific employee jobs and as the data source for rendering org charts based on a selected employee (Job).

See Also

PeopleTools PeopleBook: PeopleSoft Tree Manager

PeopleTools PeopleBook: Using PeopleSoft Applications, "Working With Browser-Based Applications," Using Drop-Down Menus

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Working with Common Components," Configuring Direct Reports Functionality

Understanding the Company Directory Setup

Before you begin to using the Company Directory functionality, you should perform these tasks:

1. Set up the Company Directory.
2. Build a tree.
3. Update the Company Directory Portal folder (if the tree name is not equal to *COMPANY_DIRECTORY*).

The system administrator will need to set up the rule definitions for the organizational chart and profile summary, both of which are presented in the Company Directory. The combined setup pages enable you to configure not only the hierarchy that you want to display, including by supervisor, department, or position, but also the type of data you want to display on the page.

The system administrator will also need to build the tree, either manually or through the Job Build Tree process, using the *COMPANY_DIRECTORY* tree structure. This will support the organizational chart that shows the hierarchies of people according to their job information.

Note. If you build a tree manually, you still need to run the Job Tree Builder with a Build Action of *Update Process Tables Only*.

Understanding the Steps to Building a Job Tree

This section lists the steps to build a Job tree.

1. Analyze Your Organization.

a. Determine the population.

The first step to building a job tree is to determine the population of employees who should be included in the tree. For example, do you want to include the entire company, or only a particular division? This is key to determining which person (job) should be the root, or top node, of your job tree.

b. Determine reporting relationships.

Next, you will need to understand the reporting structure, or hierarchy, of your organization. In other words, how do the jobs in the organization relate to each other? How are the reporting relationships defined? For example, your organization may use the reports to position in Position Management as your reporting structure, or maybe you enter the supervisor's ID directly into the person's Job Data record.

c. Determine the appropriate effective date.

Finally, determine the point in time you want to capture these job relationships. Should the hierarchy always be based on current information? Do you need to capture future relationships? Should the tree represent past job relationships?

2. Build the Tree.

Once you have a good understanding of the organization you want to represent in your job tree, it is time to build the tree. The approach you take for building the tree depends upon how closely the reporting structure of your organization matches one of these Build Method types:

- *By Department Manager ID*
- *By Department Security Tree*
- *By Partial Position Management and Department Manager ID*
- *By Partial Position Management and Supervisor ID*
- *By Report To Position (Number)*
- *By Supervisor ID*

If your organization's reporting structure exactly matches one of the types listed above, then you can use the Job Tree Builder to build your tree automatically.

If your organization's reporting structure mostly matches one of the types previously listed, then you can use the Job Tree Builder to build your initial version of the tree, then manually update the tree (by adding, moving, or deleting nodes) using Tree Manager. The Job Tree Builder also supports partial updates to existing trees using the build action *Update Existing Tree-From Node*. This allows a selected section of the tree to be created using a different Build Method value.

If your organization's reporting structure does not closely match one of the build methods, then you will build a job tree using the following two steps.

a. Populate the Source Tree Data

First you will need to populate a table with all current and future active Jobs as of the system date. As part of this step, the Job data is assigned a new key value that is compatible with Tree Manager. This step is performed by the Job Tree Builder using any of the Build Action values. If you only want to perform this step, select the Build Action option *Update Process Tables Only*.

b. Build the Tree and Tree Nodes

This step uses the data created in the previous step to build the tree. Depending on how closely your organization's reporting structure matches one of the delivered build methods determines if the Job Tree Builder is used for this step, or if this is a manual task in Tree Manager.

See [Chapter 2, "Setting Up the Administer Workforce Business Process," Running the Tree Builder Process, page 98.](#)

3. Review the Tree in Tree Manager.

After you have created any tree, you should review it using Tree Manager to ensure that the tree appropriately represents the organization's reporting structure. You can make changes directly to the tree in Tree Manager, if desired, or use the Job Tree Builder to refresh the tree or portions of the tree. Remember that trees in Tree Manager are effective dated and can also be saved as draft trees or made inactive.

See *PeopleTools PeopleBook: PeopleSoft Tree Manager*

4. Determine Update Frequency.

Trees in PeopleSoft are effective-dated and static. Your job tree will represent a reporting hierarchy as of a given point in time. Changes to employee job data will not automatically be reflected in a job tree. This means that your organization will need to determine how often and by which means the tree will be updated. For example, will your organization update the tree nightly by a scheduled run of the Job Tree Builder? Are manual updates required? Since the Job Tree Builder is a standard run control page, it can be used to schedule your tree refreshes or partial updates according to a defined frequency. If your tree contains a large number of manual updates, you will need to consider your plan for tree refreshes carefully.

Regardless of how often or by which means your job tree is updated, PeopleSoft recommends that your organization use a regularly scheduled process that performs the build action process of *Update Process Tables Only*. This will ensure that all newly active jobs (new hires, for example) are available in the tree's source data table.

Company Directory Portal Pagelet

The PeopleSoft system also delivers a Company Directory pagelet to be used on the portal home page.

The portal folder HC_COMPANY_DIRECTORY is delivered to use a tree named *COMPANY_DIRECTORY*. If your organization uses another name, you will need to update the portal folder definition.

See *PeopleSoft Enterprise HRMS Portal Pack 9.1 PeopleBook*, "Using HRMS Portal Pack Pagelets."

See Also

Chapter 2, "Setting Up the Administer Workforce Business Process," Running the Tree Builder Process, page 98

PeopleTools PeopleBook: PeopleTools Portal Technologies, "Working With Navigation Pages"

Pages Used to Set Up the Company Directory

Page Name	Definition Name	Navigation	Usage
General Settings	HRCD_SETUP_GENERAL	Set Up HRMS, Product Related, Company Directory, Company Directory Setup, General Settings	Define default startup page content and layout settings.
Profile Content	HRCD_SETUP_PROFILE	Set Up HRMS, Product Related, Company Directory, Company Directory Setup, Profile Content	Select the contact information, company details, and employee personalization field options that should appear on the Profile page of the Company Directory.

Page Name	Definition Name	Navigation	Usage
Org Chart Content	HRCD_SETUP_OC_NODE	Set Up HRMS, Product Related, Company Directory, Company Directory Setup, Org Chart Content	Select the organization chart field options that should appear on the Org Chart Content page of the Company Directory.
Tree Builder Run Control	HR_TREEBLD_RNCTL	- Set Up HRMS, Product Related, Company Directory, Job Tree Builder, Tree Builder Run Control - Set Up HRMS, System Administration, Utilities, Job Tree Builder, Tree Builder Run Control	Create or rebuild an entire tree, update a portion of a tree starting from a specific node, or update the tree's source data table without making any alterations to an existing tree.
Folder Administration	PORTAL_FLDR_ADM	PeopleTools, Portal, Structure and Content Click the Edit link for the Company Directory folder.	Update the portal folder definition for the Company Directory.

Defining General Settings for the Company Directory Pages

Access the General Settings page (Set Up HRMS, Product Related, Company Directory, Company Directory Setup, General Settings).

General Settings | Profile Content | Org Chart Content

☒ Display Multiple Jobs

☒ Show Domain Name In Emails

Start Page Content

☒ Search Box Only

☐ Show User's Information

☐ Show Other Person's Info

Layout

☒ Profile First

☐ Org Chart First

General Settings page

Display Multiple Jobs

Select to have the Company Directory search feature return all multiple job or additional job rows for a person. Deselect this option to have the system display the primary job only for the person.

When you select this check box, the Job Title fields on the Profile Content and Org Chart Content pages will be automatically selected. Also, the Company Directory - Profile page will display the Additional Jobs field in the Company Details section.

Note. Selecting the Display Multiple Jobs check box will allow additional jobs in the search only when these jobs are present in the tree. You may need to refresh the tree using the Job Tree Builder component or update the tree manually in Tree Manager.

See [Chapter 2, "Setting Up the Administer Workforce Business Process," Running the Tree Builder Process, page 98.](#)

Show Domain Name in Emails

Select this check box to have the domain name appear in the person's email. The domain name is the text that appears after the "@" sign in an email address.

Deselect this check box to not have the system display the domain name. This will save space on the page and avoid redundancy, such as when all employees have the same domain name in their business email address. With this option deselected, the full email address still appears when the user places the mouse over an email address field.

Note. The selection you make here does not affect the email addresses entered by end-users in the Additional Contact Information section of the Company Directory - Profile page.

Start Page Content

This section enables you to specify the default settings for the Company Directory start page. Users can override these default settings by defining their own preferences.

Choose from one of the following options to establish how the system should display the Company Directory start page:

Search Box Only

Select this option to display the search field only, where you can search by name, job title, department, or email for any active person in the system. You will also have the option to use an advanced search, where you can enter additional search criteria.

Show User's Information

Select this option to have the system display the information of the user accessing the page on the startup page. The user will appear as the focus of the Org Chart node or on the Profile page, depending on the layout setting selected.

The search field is also available at the top of the page when you select this option.

Show Other Person's Info

Select this option and enter a person's employee ID in the accompanying field to have the system display the information of this employee on the startup page. The identified person will appear as the focus of the Org Chart node or on the Profile page, depending on the layout setting selected.

Note. In order to populate this field, a tree must already be created and the tree name must match the Tree Name provided on the portal folder definition HC_COMPANY_DIRECTORY.

For more information, see *PeopleTools PeopleBook: PeopleTools Portal Technologies*, "Administering Portals," Managing Portal Objects.

Layout

This section enables you to define which page of the Company Directory component the system should display first. The value you select here will determine the page order of the Company Directory component. The user can override these default settings by defining personal preferences. This table lists the options:

Profile First

Select this option to have the system display the Profile page for the focus person. The Profile page displays detailed information about the person, such as contact information, company details, and personalized links and information. This option will also display the Profile page as the first page in the component.

Org Chart First
organizational chart first

Select this option to have the system display the Org Chart page. The Org Chart page displays a three-leveled graphical representation of the focus person's reporting structure, as well as high-level details about this person. This option will also display the Org Chart page as the first page in the component.

Identifying Fields for the Company Directory - Profile Page

Access the Profile Content page (Set Up HRMS, Product Related, Company Directory, Company Directory Setup, Profile Content).

General Settings
Profile Content
Org Chart Content

Contact and Organizational Content

Person Name will always display on the Profile.

If Multiple Jobs Display is defined as a general setting, then Job Title(s) will display.

☒ Photo

☒ Default Photo from HR System

☐ Allow User to Add Own Image

Line Number	Contact Info Section Field
1	Name
2	Job Title
3	Address - Business
4	Telephone - Business
5	Telephone - Mobile
6	Location
7	Building
8	Email - Business
9	Action Drop-Down

Line Number	Company Details Section Field
1	Reports To
2	Peers
3	Direct Reports
4	Manager Level
5	Additional Jobs

Employee Personalizations

Select the section(s) Employees will be allowed to personalize and edit.

☒ Display Additional Contacts

Select	Label	Value Format	
☒	Other Email	Email	
☒	Personal Email	Email	
☒	Home Phone	Text	
☒	Home Office Phone	Text	
☒	Mobile Phone	Text	
☒	Other Phone	Text	
☒	Other	Text or Email	

Add Row

☒ Display My Profile Links

☒ Show My Links Shortcut Icon

☒ Display Personal Statement

Profile Content page

The Profile page in the Company Directory component will display detailed information about a person using the fields you select on this page.

Contact and Organizational Content

The fields selected in this section will appear on the left side of the Profile page.

Photo

Select to have the photo of the person appear on the Profile page, if available. When you select this option, you must select the Default Photo from HR System check box, Allow User to Add Own Image check box, or both.

If you deselect this check box, the Default Photo from HR System and Allow User to Add Own Image check boxes will not be available.

Default Photo from HR System

Select this option to have the system use a person's picture stored on the Identification Data - Employee Photo page. This option can be used in conjunction with the Allow User to Add Own Image check box.

Allow User to Add Own Image

Select this option to enable the use to upload his or her own picture. This option can be used in conjunction with the Default Photo from HR System check box.

Note. As delivered, users can upload images of type JPEG with a maximum file size of 256KB.

For more information on field images, see *PeopleTools PeopleBook: PeopleSoft Application Designer Developer's Guide*, "Creating Field Definitions," Specifying Image Field Attributes.

Contact Information

Select up to nine contact fields that will appear in the Contact Information section of the Profile page. The Profile page will display the fields in the order you select them on this page. Valid values are:

- *Name*

This field display is always selected and listed as line number 1.

- *Job Title*

Job Title is the only field display option available for line number 2. You can choose to have the system display the person's job title on the Company Directory - Profile page by selecting this value. If you do not select this value, line number 2 will be left blank.

This field is automatically selected when Display Multiple Jobs is selected on the General Settings page.

- *Action Drop-Down*

Action Drop-Down is the only field display option available for line number 9.

Select this field display option if you want to enable the user to perform self service transactions from his or her profile, such as an address or name change.

The Action Drop-Down values are configured through PeopleSoft Related Content Services. This framework enables developers and subject matter experts to link application pages with contextually relevant collaborative content.

For more information, see *PeopleTools PeopleBook: PeopleTools Portal Technologies*, "Developing and Configuring Related Content".

These options are available for line numbers 3-8.

Select the fields and the order in which you want the system to display them on the Company Directory - Profile page.

- *Address - Business*
- *Building*
- *Email - Business*
- *Floor Nbr*
- *Location*
- *Telephone - Business*
- *Telephone - Mobile*

Company Details

Select up to five company details fields that will appear in the Company Details section of the Profile page. The Profile page will display the fields in the order you select them on this page. Valid values are:

- *Additional Jobs*
- *Business Unit*
- *Company*
- *Cost Center*
- *Department*
- *Direct Reports*
- *Dotted-Line To*
- *Job Family*
- *Job Function*
- *Manager Level*
- *Organizational Relationship*
- *Peers*
- *Person ID*
- *Regular/Temporary*
- *Reports To*
- *Standard Hours*
- *Standard Work Period*
- *Union*
- *Years of Service*

See [Chapter 16, "Viewing Summary Workforce Information," Updating a Personal Photo, page 790.](#)

Employee Personalizations

The fields selected in this section will appear on the right side of the Profile page.

Display Additional Contacts

Select this option to have the Additional Contact Information section available on the Profile page. When this option is selected, the system will enable the user to select from the different contact types you specify in the Employee Options group box.

If you deselect an option that is already in use, the system will display a warning message.

Employee Options	Select the contact types that should be available to the user on the Edit Additional Contacts page when the user updates his or her additional contact information on the Company Directory - Profile page. If you deselect an option, this contact type will not be available to the user.
Label	Enter the contact type, or field description, that should be available to the user on the Edit Additional Contacts page when selecting a value from the Contact Type field. This label will appear on the Profile page of the Company Directory when a user selects and enters a value for this contact type. These labels are display only for the user with the exception of the <i>Other</i> field. The contact type <i>Other</i> enables users of the Company Directory to enter their own label or field description for a contact type. See Chapter 16, "Viewing Summary Workforce Information," <u>Managing Additional Contact Information</u>, page 792.
Value Format	Select the format the system should use for this field. Options are <i>Email</i> , <i>Text</i> , and <i>Text or Email</i> .
Add Row	Click this button to add additional contact types in the Employee Options group box. This will open up free-form text fields in which the administrator will enter the field labels and determine the value format that will be available to the user.
Display My Profile Links	Select this option to have the My Profile Links section available on the Profile page. Profile links enable the user to define shortcut links to other web sites. When you select this option, the Show My Links Shortcut Icon check box on this page will be available for selection.
Show My Links Shortcut Icon	Select this check box to have the shortcut icons associated with target web addresses appear next to the label entered by the user. Some sites may or may not have a default shortcut icon. For example, when this check box is selected, and the user enters the web address for Oracle (http://oracle.com), an icon will appear next to the label name. This option is available when the Display My Profile Links check box is selected.
Display Personal Statement	Select this option to have the Personal Statement section available on the Profile page. This functionality enables the user to enter personalized text. Users will update their personal statement using the Rich Text Editor. See <i>PeopleTools PeopleBook: Using PeopleSoft Applications</i>, "Using PeopleSoft Application Pages," Working With the Rich Text Editor

Identifying Fields for the Company Directory - Org Chart Page

Access the Org Chart Content page (Set Up HRMS, Product Related, Company Directory, Company Directory Setup, Org Chart Content).

General Settings
Profile Content
Org Chart Content

Person Name will always display and on the top of the Node. If Multiple Jobs Display is defined as a general setting, then Job Title(s) will display.

Select up to 4 additional attributes from among the sections below. The field order shown is the field order displayed on the Node.

☐ Show Siblings of Focus Node

☒ Photo

Image Height (pixels):

Org Chart Node Attributes	
Attribute Number	Node Attribute Data
1	Name
2	Job Title
3	Refocus Org Chart Icon/Link
4	Department
5	Email - Business
6	Reports Count - Directs/Total
7	Action Menu

Org Chart Content page

Show Siblings of Focus Node

Select this check box to have the system display peers within the same reporting structure level of the focus person. Deselect this check box to show only the focus person at the middle level or the organizational chart. The report to and subordinate nodes will still display for this person, if applicable.

Photo

Select to have a photo of the person appear within the node box of the person on the Org Chart page. When you select this option, the Image Height (pixels) field becomes available.

The photo that appears in a node depends upon the Profile Content page settings in the Company Directory Setup component and the user's photo preferences.

Image Height (pixels)

Enter size in which the height of the picture should appear within the node. This option is available when you select the Photo check box.

Org Chart Node Attributes

Select up to seven field attributes that will display in the individual nodes of the chart on the Org Chart page. The fields within the node will appear in the order of the attribute line number. Valid values for line numbers are:

- *Name*

This field is always selected and listed as line number 1.

- *Job Title*

This field is the only field display option available for line number 2. You can choose to have the system display the person's job title on the Company Directory - Org Chart node by selecting this value. If you do not select this value, line number 2 will be left blank.

The *Job Title* field option will automatically be selected if the Display Multiple Jobs check box is selected on the General Settings page.

If the Display Multiple Jobs check box is selected and a person has more than one job in the tree, then the Job Title field will appear as a drop-down list on that person's node. This drop-down list enables users to quickly view and refocus the chart on a person's additional jobs.

- *Refocus Org Chart Icon/Link*

The *Refocus Org Chart Icon/Link* field value is always selected and listed as line number 3. This link appears in each node of the organization chart and, by clicking the link, enables you to change the focus node to another individual.

- *Action Drop-Down*

Action Drop-Down is the only field display option available for line number 7.

Select this field display option if you want to enable the user to perform self service transactions from his or her profile, such as an address or name change.

The Action Drop-Down field values for are configured through PeopleSoft Related Content Services. This framework enables developers and subject matter experts to link application pages with contextually relevant collaborative content.

For more information, see *PeopleTools PeopleBook: PeopleTools Portal Technologies*, "Developing and Configuring Related Content"

These values are available for line numbers 4-6.

- *Building*
- *Business Unit*
- *Company*
- *Cost Center*

- *Department*
- *Dotted-Line To*
- *Email – Business*
- *Floor Nbr*
- *Job Family*
- *Job Function*
- *Location*
- *Manager Level*
- *Regular/Temporary*
- *Reports Count - Directs*

The *Reports Count – Directs* option will show the number of employees that directly report to this individual.

- *Reports Count - Directs/Total*

The *Reports Count – Directs/Total* options will show the number of employees that directly report to this individual as well as the total number of subordinate workers that report indirectly to this person.

- *Reports Count - Total*

The *Reports Count - Total* option will show the total number of subordinate workers that report up through this person.

- *Standard Hours*
- *Standard Work Period*
- *Telephone - Business*
- *Telephone - Mobile*
- *Union*
- *Years of Service*

Running the Tree Builder Process

Access the Tree Builder Run Control page (Set Up HRMS, Product Related, Company Directory, Job Tree Builder, Tree Builder Run Control or Set Up HRMS, System Administration, Utilities, Job Tree Builder, Tree Builder Run Control).

Tree Builder Run Control	
Run Control ID: 1	Report Manager Process Monitor Run
Tree Build Parameters	
*Build Action: Create/Replace Tree	
*Tree Structure ID: COMPANY_DIRECTORY	
Tree Definition	Hierarchy Source Information
SetID:	Build Method: By Department Manager ID
Set Control Value:	Dept Set ID:
Tree Name: COMPANY_DIRECTORY	Department ID:
Tree EffDt: 10/21/2010	☒ Include Multiple Jobs
Tree Description: Company Directory	
Category: HR	Root Node Definition
☐ Save As Draft	Employee ID:
	Empl Record: 0
Process Tables	Start From Node
Target Record: HRCD_JOB_TREE	Start Node:
Exception Table: HRCD_JOBTR_EXCP	

Tree Builder Run Control page

The Job Tree Builder run control page executes the HR_TREEBLD Application Engine process. This process creates trees of jobs using a selected reporting hierarchy.

See [Chapter 2, "Setting Up the Administer Workforce Business Process," Understanding the Steps to Building a Job Tree, page 85.](#)

Build Action

Indicate whether you want to create or rebuild an entire tree, update a portion of a tree starting from a specific node or location on a tree, or update the trees source data table without making any alterations to an existing tree. Valid values are:

- *Create/Replace Tree*

Creates a new tree or, if a tree exists for the Tree Definition parameters entered on this page, deletes and recreates the tree.

- *Update Existing Tree-From Node*

Updates an existing tree from a tree node identified in the Start Node field. The start node cannot be a root node from an existing tree. All nodes under the selected tree node will be refreshed according to the hierarchy Build Method selected.

- *Update Process Tables Only*

No tree processing occurs. The target table is updated, enabling you to manually add new Jobs added by the process to the tree using Tree Manager.

The following table represents the fields within each group box that are available, depending on the Build Action value that is selected:

Group Box	Create/Replace Tree	Update Existing Tree-Form Node	Update Process Tables Only
Tree Definition	- SetID - Set Control Value - Tree Name - Tree EffDt - Tree Description - Category - Save As Draft	- SetID - Set Control Value - Tree Name - Tree EffDt - Save As Draft	N/A
Hierarchy Source Information	Build Method	Build Method	N/A
Root Node Definition	- Employee ID - Empl Record	N/A	N/A
Start From Node	N/A	Start Node	N/A

Note. N/A indicates that a field availability is not applicable for this method and group box.

Tree Structure ID

Select a tree structure ID. The value selected in Tree Structure ID field determines the fields that are required to uniquely identify a tree and it tells the process which type of tree it should build when the process is run.

For example, the Company Directory feature uses the *COMPANY_DIRECTORY* tree structure to create trees for determining the structure of the organizational chart and SmartNavigation.

Note. If you are building a job tree for the Company Directory, you must enter *COMPANY_DIRECTORY* as the tree structure ID.

The system uses the HR_JOBTREE_META table to retrieve meta-data from the tree structure ID to auto-populate the following fields on this page: Set ID, Tree Name, Tree EffDt, Tree Description, Category, Target Record, and Exception Table. The tree structure ID also determines the fields that are required in the Tree Definition group box.

Tree Definition

Many of the fields in this section are available when the Build Action values *Create/Replace Tree* and *Update Existing Tree-From Node* are selected.

Set ID and Set Control Value	Enter the set ID and set control value of the tree, if applicable. Availability of this field depends on the configuration of the tree structure ID. For example, these fields are not available when using the <i>COMPANY_DIRECTORY</i> tree structure required by the Company Directory feature.
Tree Name	Enter the name of the tree. The default value is <i>COMPANY_DIRECTORY</i> when you have entered <i>COMPANY_DIRECTORY</i> as the Tree Structure ID value. Note. For the Company Directory to work properly, you need to update the portal definition to use the same tree name you have identified here. This field is available when the Build Action values <i>Create/Replace Tree</i> and <i>Update Existing Tree-From Node</i> are selected. See Chapter 2, "Setting Up the Administer Workforce Business Process," <u>Updating the Portal Folder Definition for the Company Directory, page 105.</u>
Tree EffDt (tree effective date)	Enter an effective date for the tree. If a date is not provided, the process will use the system date when creating the tree. This enables you to leave this field blank and set up the run control as a recurring process. This field is required for the <i>Update Existing Tree-From Node</i> build action. When updating an existing tree, you must point the process to a unique tree, so an effective date is required. When you select the <i>Update Existing Tree-From Node</i> build action option, this field provides by default the current tree for the SetID, Set Control Value, and Tree Name field values you entered on this page. SetID and Set Control Value field values may not be required for all tree structure IDs. This field is available when the Build Action values <i>Create/Replace Tree</i> and <i>Update Existing Tree-From Node</i> are selected.
Tree Description	Enter the description of this tree. This field is available when the Build Action value <i>Create/Replace Tree</i> is selected.
Category	Enter the tree category for a tree. This field is available when the Build Action value <i>Create/Replace Tree</i> is selected.
Save As Draft	Select this check box when you want to save the tree in draft mode. To change the status of the tree, run the process again with the Save As Draft check box deselected or save the draft as a valid tree through Tree Manager. This field is available when the Build Action values <i>Create/Replace Tree</i> and <i>Update Existing Tree-From Node</i> are selected.

Hierarchy Source Information

Use this section to specify how the system should define the hierarchical structure of the tree. The fields in this section are available when the Build Action values *Create/Replace Tree* and *Update Existing Tree-From Node* are selected.

Build Method

Select the method the process will use for deriving reporting relationships based on Job Data.

This field is available when the Build Action values *Create/Replace Tree* and *Update Existing Tree-From Node* are selected.

Valid Build Method options are:

- *By Department Manager ID*
- *By Part Posn Mgmt Dept Mgr ID*
- *By Part Posn Mgmt Supervisor*
- *By Report To Position (Number)*
- *By Supervisor ID*

For the first five build methods listed here, the Job Tree Builder process uses the existing Direct Reports API data service to determine the reporting structure for building the job tree. This data service is capable of navigating an organization structure and returning a list of workers that report to a particular manager.

Also, for these build methods, the process uses Employee ID/Empl Record entered on the Tree Builder Run Control page to set the root node of the job tree. The process then determines the jobs reporting to the root node by making a request to the Direct Reports API data service using the Build Method, Employee ID/Empl Record, and Tree EffDt entered on the run control page. Nodes are created for all jobs returned by the data service. This process is repeated down the reporting chain for every job in the hierarchy.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Working with Common Components," Understanding Direct Reports Functionality.

- *By Dept Security Tree*

The method is available only with the build action *Create/Replace Tree*.

This build method does not use the Direct Reports API to determine a reporting structure. Instead, this build method uses the department security tree and the manager information for the departments to determine the reporting structure.

To build the job tree, the process traverses the specified department security tree starting from the department node specified. For each department node in the department security tree, the process determines the node's manager, and then creates a tree node for each of the department managers. For each manager node, the process creates nodes for the department members reporting to the appropriate department manager. If an employee reports to a department that is not assigned to an active manager, then the process assigns that employee to the next manager up the tree.

Departments can have the following manager types: Manager ID, Manager Position, or not be assigned to a manager.

If Position Management is being used, a department may be assigned to a Manager Position that could be associated to multiple active incumbents.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up Organization Foundation Tables," Maintaining Departments.

Note. When creating trees using *By Dept Security Tree*, it is recommended that you audit the source Dept Security tree and run the Repair Tree utility on the source Dept Security Tree to correct any invalid level numbers. For this build method, the Job Tree Builder assumes the level numbers for the nodes to be correct.

See *PeopleTools PeopleBook: PeopleSoft Tree Manager*, "Auditing and Repairing Trees" for more information on the Repair Tree utility.

Dept Set ID (department set ID) and **Department ID**

Enter the department set ID and department code when you select the Build Method option *By Dept Security Tree*. The batch process will start from this department in the Dept Security tree and work downwards from that node.

When you enter or change the Dept Set ID value, the Department ID field provides the root node of the Dept Security tree as a default value and the Root Node Definition fields default the employee ID associated with the department of the root node. If the department is assigned to a manager position, the Employee ID field will provide by defaulted the lowest employee ID of the active incumbents of that position.

Include Multiple Jobs

Indicates if the tree is to include nodes for both primary and non-primary jobs. If this field is not selected, only nodes for active primary jobs will be included in the tree.

For the tree structure ID *COMPANY_DIRECTORY*, this value comes from the Company Directory Setup - General Settings page and the check box is not available on this page.

Note. For the tree structure ID *COMPANY_DIRECTORY*, if you have selected the Display Multiple Jobs check box on the Company Directory Setup - General Settings page, the system will allow additional jobs in the search only when these jobs are present in the tree. Therefore, if you change the Display Multiple Jobs setting on the Company Directory Setup - General Settings page, you should run the Job Tree Builder process to ensure that all jobs are captured on the tree.

Root Node Definition

The fields in this section are available when the Build Action value *Create/Replace Tree* is selected.

Employee ID and **Empl Record** (employment record number)

Enter the employee ID and his or her employment record number that should serve as the topmost node, or root node, of the tree.

Start From Node

The field in this section is available when the Build Action value *Update Existing Tree-From Node* is selected.

Start Node

Select a node from the tree specified in the Tree Definition section of the page.

The Job Tree Builder process will delete any nodes reporting directly or indirectly to the start node specified. Then it will create nodes based on the Build Method value selected.

Note. Depending on how the existing tree was created, an employee may have multiple nodes in the existing tree. For example, this can occur when:

- The employee has or had multiple jobs.
 - The employee reports to a position that has or had multiple incumbents.
 - The employee is or was assigned to a department with multiple managers (Manage Positions with multiple incumbents). If the prompt list shows multiple nodes for the same person, then review the tree in Tree Manager to ensure that you are selecting the appropriate start node.
-

Process Tables

The Target Record and Exceptions Table fields are always display only. These fields are populated based on the Tree Structure ID value. The target record refers to the table containing the source data for all trees created using the selected Tree Structure ID.

Updating the Portal Folder Definition for the Company Directory

The portal folder HC_COMPANY_DIRECTORY is delivered to use the tree name *COMPANY_DIRECTORY*. If your organization uses another name, you will need to update the portal folder definition in order for the Company Directory to work properly to match the tree name you entered when creating your tree.

Access the Folder Administration page (PeopleTools, Portal, Structure and Content, then click the Edit link for the Company Directory folder).

Folder Administration		Folder Security	
Root > Company Directory			
Folder Administration			
Name:	HC_COMPANY_DIRECTORY	Parent Folder:	Root
*Label:	Company Directory	Copy object	Select New Parent Folder
Long Description: (254 Characters)	Search for employees across the organization. View employee profile details, such as contact and company-related information, and graphical representations of employee reporting relationships.		
Product:	HC	*Valid from date:	01/01/1900
Sequence number:	90	Valid to date:	
Object Owner ID	HHR	Human Resources	Author: PS
☐ Hide from portal navigation			
Folder Navigation			
☐ Is Folder Navigation Disabled		☐ Default Chart Navigation Page	
Folder Navigation Object Name:	HC_HRCD_CO_DIRECTORY_GBL		
Application Navigation			
Data Source:	Tree	☒ Display as Content Reference	
*Node Name:	HRMS	Portal Node - HRMS	
Tree Properties			
*Tree Name:	COMPANY_DIRECTORY		
Set ID:			
Set Control Value:			
Effective Date:			
Tree Branch:			

Folder Administration page for the Company Directory

Element Definition

Enter the tree name you used when building the tree for the Company Directory. This tells the Company Directory where to find the structure for the portal breadcrumbs and org chart.

For trees based on the tree structure ID of *COMPANY_DIRECTORY*, the system uses the required Tree Name field to uniquely identify a tree. The delivered field value is *COMPANY_DIRECTORY*, but the Company Directory will work with any tree name as long as you created the tree based on the *COMPANY_DIRECTORY* tree structure ID.

Effective Date

(Optional) Enter the effective date for the tree.

If this field is populated, the Company Directory uses the effective date of the Tree Name value identified on the Folder Administration page.

If this field is blank, the Company Directory uses the current effective dated tree identified in Tree Name field.

Leaving this field blank enables you to run a nightly process that creates a new effective-dated version of the tree. If the Effective Date field is left blank, you do not need to make any changes to the Folder Administration page because the Company Directory will always use the current tree.

For more information and details on setting up and working with the portal folders, see *PeopleTools PeopleBook: PeopleTools Portal Technologies*, "Administering Portals," Understanding Folder Administration, SmartNavigation.

Identifying Company Directory Tree Node Queries

PeopleSoft delivers the following Company Directory queries that you can use to analyze the nodes and data for your tree:

Query Name	Purpose
Active Employees not in Tree (HRCD_ACTIVE_EMPS_NOT_IN_TREE)	Lists active employees (by business unit) who are not in the tree name for which the query is being run. Note. Results depend on the user's row level security settings to employee data.
Co. Directory Batch Exceptions (HRCD_BATCH_EXCEPTIONS)	Reports the rows in the exceptions table populated by the Job Tree Builder utility for trees based on the <i>COMPANY_DIRECTORY</i> tree structure ID. The batch process populates the exceptions table with active jobs that were not added to the tree (by the batch process). The batch process requires a build hierarchy method and starting employee ID to determine the basis for the node structure in the tree. It is possible that not all employees fit within the structure set for the batch process. For example, if the build hierarchy method determines reporting relationships by (Job) supervisor ID, any active jobs without a supervisor ID will not be added to the tree during the batch process. This query will help identify employees that may need to be added to the tree manually or by an additional run of the batch process. Note. Results displayed depend on the user's row level security settings to employee data.
Nodes reporting to secondary (HRCD_JOB_RPT_TO_NON_PRIM_JOBS)	Returns a list of nodes representing jobs that report to non-primary (additional) job nodes in the Tree.

<i>Query Name</i>	<i>Purpose</i>
Nodes for Inactive Jobs (HRCD_NODES_WITH_INACTIVE_JOBS)	Returns nodes that represent currently inactive jobs for a given tree name and as of date. These nodes will remain in the tree until the tree is updated manually using Tree Manager or the tree is refreshed using the Job Tree Builder. Note. The nodes reported by this query may have other (child) nodes reporting to them. Note. Results displayed depend on the user's row level security settings to employee data.
All non-primary job nodes (HRCD_NON_PRIMARY_JOBS_IN_TREE)	Returns a list of all nodes representing non-primary (additional) jobs in the tree.

Chapter 3

Setting Up Country-Specific Tables

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

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

Understanding Country-Specific Table Setup

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

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

See Also

[Chapter 2, "Setting Up the Administer Workforce Business Process," page 5](#)

(FRA) Setting Up French Workforce Tables

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

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

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

Understanding French Social Security Tracking Code Maintenance

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

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

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

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

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Monitor Health and Safety, "Creating and Tracking Incidents"

Pages Used to Set Up French Workforce Tables

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

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

Maintaining INSEE Codes

Access the INSEE Table page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, INSEE Table).

INSEE Table

INSEE Code: 231a

INSEE Codes		Find	View All	First	1 of 1	Last
*Description:	CEO of large company (500 , em)	Short Description:		CEO of lar		+ -
*Effective Date:	01/01/2004	*Status:		Active		
☐ Special ability						
Population Category:	220	Managers				
CEO of large company (500 , employees and more)						
Comments:						

INSEE Table page

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

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

Special ability Select if this INSEE code represents a job that requires a special ability. An worker who is assigned (through the job code) an INSEE code with this check box selected can't be listed as disabled on the French Disability report.

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

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up Jobs," Classifying Jobs

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Meet Regulatory Requirements, "(FRA) Meeting Regulatory Requirements for France," Setting Up French Regulatory Requirements

Entering Salary and Social Security Ceiling Information

Access the External Variables page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, External Variables).

External Variables

External Variables: 01

Leg&Reg Report Parameters

Find | View All First 1 of 1 Last

Effective Date:

01/01/2000

Minimum Salary:

6175.87

Retail Price Index:

Minimum Salary Guaranteed:

6175.87

Disability Report Rate:

0.06

Social Security Ceiling

Social Security Ceiling A:

14700.00

Social Security Ceiling B:

58800.00

Social Security Ceiling C:

117600.00

External Variables page

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

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

Minimum Salary, Retail Price Index, and Minimum Salary Guaranteed Enter a minimum salary, retail price index, and guaranteed minimum salary for this external variable. The French government sets the amounts.

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

Social Security Ceiling

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

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

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

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

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

Defining Hours Type Codes

Access the Hours Type page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, Hours Type, Hours Type).

Hours Type

Hour Types				
	*Hours Type	*Description	Short Description	
1	2*8	2*8 Hours	2*8 Hours	+ -
2	3*8	3*8 Hours	3*8 Hours	+ -
3	IND	Individual Hours	IND	+ -
4	STA	Standard Hours	Standard	+ -

Hours Type page

Hours Type

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

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

Entering French Occupational Illness Codes

Access the Occupational Illness Tbl - FRA page (Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Occupational Illness Tbl - FRA, Occupational Illness Tbl - FRA).

Occupational Illness Tbl - FRA

Find | View All | First | 1-3 of 7 | Last

Professional Disability	*Description	Short Description
30	Asbestos affections	Asbestos
Comment:		
42	Deafness lesions	Deafness
Comment:		
54	Poliomyelitis	Poliomyeli
Comment:		

Occupational Illness Tbl - FRA page

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

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

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

(DEU) Setting Up German Workforce Tables

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

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

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

Understanding Accident Insurance

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

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

Pages Used to Set Up German Workforce Tables

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Accident Insurance Table	ACCDT_INS_TABLE	Set Up HRMS, Product Related, Workforce Administration, Workforce Data DEU, Accident Insurance, Accident Insurance Table	Define accident insurance codes for German employees.
Accident Insurance Address	ACCDT_INS2_TABLE	Set Up HRMS, Product Related, Workforce Administration, Workforce Data DEU, Accident Insurance, Accident Insurance Address	Enter address information for this accident insurance provider.
Accident Insurance Upload	HRDE_AI_UPLOAD	Set Up HRMS, Product Related, Workforce Administration, Workforce Data DEU, Accident Insurance, Accident Insurance Upload	Upload UVGT and UVSD files to use.

Page Name	Definition Name	Navigation	Usage
BA Codes (Bundesanstalt fur Arbeit Codes)	BA_CD_TABLE	Set Up HRMS, Product Related, Workforce Administration, Workforce Data DEU, BA Codes, BA Codes	Add or update <i>Bundesanstalt fur Arbeit</i> job codes. PeopleSoft maintains the BA Code table so that you can add or update it. All job codes are published by the German Federal Labor Office (<i>Bundesanstalt fur Arbeit</i>) in <i>Verzeichnis der Berufsbezeichnungen</i> and are required on reports to the German Federal Labor Office.
Function Code	FUNCTION_CD_TABLE	Set Up HRMS, Product Related, Workforce Administration, Workforce Data DEU, Function Code, Function Code	Add or maintain job codes for conducting statistical analyses of your workforce in Germany. For example, you can use the codes that you establish here to examine how many consultants, administrators, support staff, or sales representatives make up your workforce.
Nation Duvo	NATION_DUVO_TABLE	Set Up HRMS, Product Related, Workforce Administration, Workforce Data DEU, Nation Duvo, Nation Duvo	Add or update nation DEUEV information.
Industrial Inspection	INDUST_INSP_GER	Set Up HRMS, Product Related, Workforce Administration, Workforce Data DEU, Industrial Inspection, Industrial Inspection	Set up German industrial inspection codes that you associate with locations in your organization. Note. Industrial inspection codes are not effective-dated and have no status.
Social Insurance Unit	SI_UNIT_GER	Set Up HRMS, Product Related, Workforce Administration, Workforce Data DEU, Social Insurance Unit, Social Insurance Unit	Set up German social insurance unit codes that you associate with locations in your organization.

Defining Accident Insurance Codes

Access the Accident Insurance - Accident Insurance Table page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data DEU, Accident Insurance, Accident Insurance Table).

Accident Insurance Table

Accident Insurance Address

Accident Insurance Upload

Accident Insurance:

CH

Data

Find | View All | First 1 of 1 Last

*Effective Date:

01/01/1900

*Status:

Active

*Description:

Professional Association for the Chemical Industry

Short Description:

Prof Chem

Accid Ins Lim:

Currency:

Data

Customize | Find | First 1 of 1 Last

	*Hazard	*Description	Hazard class	
☐	1 040	production/processing/reprocessing of radioactive materials	1.50	+ -

Accident Insurance - Accident Insurance Table page

Hazard

Enter the code for the hazard type.

Note.

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

Hazard Class

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

Entering German Nation DEUEV Codes

Access the Nation Duvo page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data DEU, Nation Duvo, Nation Duvo).

Nation Duvo

Nationality Key:

000

*Description:

Germany

Short Description:

Germany

Nationality:

German

Nationality Code:

D

Country:

DEU

☐ OECD Country

☐ EU-Land

Nation Duvo page

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

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

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

Nationality	Enter the nationality associated with this country. For example, the nationality associated with The Netherlands is <i>Dutch</i> .
Nationality Code	The DEUEV Directive specifies a unique two-character nationality code for each nationality key. These nationality codes are different from the three-character ISO country codes stored on the Country table.
Country	Indicate an ISO country code to be associated with the DEUEV Directive nationality key.
OECD Country (Organization of Economic Cooperation and Development country)	Select to indicate the nationality key is for an OECD country. Germany carefully regulates the types of industries in which citizens of non-OECD countries, like Iraq, can work. For example, non-OECD nationals are restricted from working in defense-related industries or for companies that produce products involving protected trade technologies.
Note. There isn't always a one-to-one correspondence between ISO countries on the Country table and the nationality keys on the Nation DEUEV table. The German DEUEV Directive makes nationality distinctions that have no direct relationship to ISO country standards.	

EU-Land(European Union country)

Select to indicate this is European Union country. Workers from European Union nations are tracked for purposes of reporting to the German Social Insurance administration.

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

(ITA) Setting Up Italian Workforce Tables

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

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

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

Pages Used to Set Up Italian Workforce Tables

Page Name	Definition Name	Navigation	Usage
C.I.A. <i>Contratto Integrativo Aziendale</i>)	CIA_TBL_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, C.I.A., C.I.A.	Enter company integrative contract information.
Cities	CITY_TABLE_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Cities, Cities	Use the Italian City Table page to maintain the city data. Update the table by downloading the file supplied annually from the <i>Ministero delle Finanze</i> website and the running the Italian City Update process. You can enter the postal codes for cities to expedite data entry during the hiring process.

Page Name	Definition Name	Navigation	Usage
INAIL Codes	INAIL_TBL_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, INAIL Codes, INAIL Codes	Define the INAIL (<i>Istituto Nazionale per l'Assicurazione degli Incidenti sul Lavoro</i>) position code and rate for INAIL contribution.
INPDAI Codes	INPDAI_TBL_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, INPDAI Codes, INPDAI Codes	Define the INPDAI (<i>Istituto Nazionale di Previdenza per I Dirigenti di Aziende Industriali</i>) position codes for pension funds. Note. The INPDAI codes are used for historical data only. The INPDAI is no longer a legal body in Italy and these codes are no longer required.
INPS Sites	INPS_SITE_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, INPS Sites, INPS Sites	Set up INPS (<i>Istituto Nazionale per la Previdenza Sociale</i>) site codes. Link INPS sites to INPS codes on the INPS Codes page.
INPS Codes	INPS_TBL_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, INPS Codes, INPS Codes	Define INPS data for social security contributions and information needed for social security reporting (DM10).
PREV Codes	PREV_TBL_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, PREV Codes, PREV Codes	Define PREVINDAI codes, descriptions, and PREVINDAI position codes.
Company Codes - INPS Codes	COMP_INPS_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Company Codes, INPS Codes	Link the company with INPS codes.
Company Codes - INAIL Codes	COMP_INAIL_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Company Codes, INAIL Codes	Link the company with INAIL codes.

Page Name	Definition Name	Navigation	Usage
Company Codes - INPDAI Codes	COMP_INPDAI_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Company Codes, INPDAI Codes	Link the company with INPDAI codes.
Company Codes - PREV Codes	COMP_PREV_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Company Codes, PREV Codes	Link the company with PREV codes.
Company Codes - C.I.A. Codes	COMP_CIA_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Company Codes, C.I.A. Codes	Link the company with C.I.A. codes.
Company/Estab Codes - INPS Codes	EST_INPS_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Company/Estab Codes, INPS Codes	Link the company and establishment with INPS codes.
Company/Estab Codes - INAIL Codes	EST_INAIL_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Company/Estab Codes, INAIL Codes	Link the company and establishment with INAIL codes.
Company/Estab Codes - INPDAI Codes	EST_INPDAI_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Company/Estab Codes, INPDAI Codes	Link the company and establishment with INPDAI codes.
Company/Estab Codes - PREV Codes	EST_PREV_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Company/Estab Codes, PREV Codes	Link the company and establishment with PREV codes.
Company/Estab Codes - CIA Codes	EST_CIA_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Company/Estab Codes, CIA Codes	Link the company and establishment with C.I.A. (<i>Contratto Intergrativo Aziendale</i>) codes.
Country Fiscal Codes	COUNTRY_DEFN_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Country Fiscal Codes, Country Fiscal Codes	Define the city fiscal code.

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

Defining INPS Codes

Access the INPS Codes page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, INPS Codes, INPS Codes).

INPS Codes

INPS Code: KIINPS020

INPS

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

*Effective Date:

01/01/1980

*Status:

Active

*Description:

BUSINESS INSTITUTE 2

Short Description:

Inps Cd 20

INPS Activity Desc:

CREDITO

INPS Position Code:

KI03

INPS Site:

7001

ROMA EUR

Stat Cntb Code:

020

INPS Fiscal Code:

INPS020KI2

Authorization Number:

13579

Istat Code:

300

Address

Country:

ITA

Italy

Address:

Via A. Gramsci, 21
11320 Roma (RM)

Edit Address

INPS Codes page

- INPS Activity Desc**
(INPS activity description)

Enter the company activity description to be reported on the INPS declarations.
- INPS Position Code**

Enter the company INPS position codes.
- INPS Site**

Select the INPS site to which the company must send declarations. Set up INPS site codes on the INPS Site page.
- Stat Contr Code**
(statistical contribution code)

Enter the statistical contribution code to be reported on the INPS declarations.
- INPS Fiscal Code**

Enter the company fiscal code.
- Authorization Number**

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

Istat Code

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

Defining Seniority Notification Periods

Access the Seniority Notification Periods page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Seniority Notification Periods, Seniority Notification Periods).

Seniority Notification Periods

Set ID: ITA

Labor Agreement: KI01

Labor Agreement

Find | View All | First 1 of 1 Last

Effective Date: 01/01/1980

Status: Active

Description: Credito e finanza

Customize | Find | View All | [Grid Icon] | First 1 of 1 Last

	*Category	Subcategory	Subcategory 2	From Seniority	To Seniority	Notif Days	Type of Day		
1				0	0	0		+	-

Seniority Notification Periods page

- Category

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

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

Select the job subcategory 2 to which this labor agreement notification applies.
- From Seniority

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

Enter the end of the seniority period to which this labor agreement notification applies. The seniority must be entered in month units.
- Notif Days (notification days)

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

Indicate whether the notification uses working days or calendar days.

(JPN) Setting Up Intercompany Transfer Company Data

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

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

Understanding Setup of Company Data for Intercompany Transfers

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

To set up company data for intercompany transfers for Japan:

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

See Also

[Chapter 2, "Setting Up the Administer Workforce Business Process," Understanding Supervisor Levels, page 70](#)

PeopleSoft Enterprise Global Payroll 9.1 PeopleBook, "Working with Payee Data"

[Chapter 13, "\(JPN\) Tracking Intercompany Transfers \(Shukkou\)," Indicating the Home or Host Compensation Owner, page 654](#)

Pages Used to Set Up Intercompany Transfer Company Data

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

Page Name	Definition Name	Navigation	Usage
IC Trans External Superv Lvl (intercompany transfer external supervisor level)	INTCPX_SPV_JPN	Set Up HRMS, Product Related, Workforce Administration, Workforce Data JPN, IC Trans External Superv Lvl	Set up supervisor level codes for companies outside the database to use for intercompany transfers.

Setting Up Company Data for Intercompany Transfers

Access the IC Trans External Company/Dept page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data JPN, IC Trans External Company/Dept, IC Trans External Company/Dept).

IC Trans External Company/Dept

External Company: JS1

Company History Find | View All First 1 of 1 Last

*Effective Date: 01/01/1990

*Status: Active

*Description: RadishSoft, KK

Short Description: RSFT

Department Information Customize | Find | View All First 1-3 of 6 Last

	*Dept ID	*Description	Short Desc		
1	JS001	President	President	+	-
2	JS100	Administration Department	Admin Dept	+	-
3	JS110	Accounting Section	Acctg Sect	+	-

IC Trans External Company/Dept page

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

Enter required rows in the Department Information group box.

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

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

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

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

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

(NZL) Setting Up New Zealand Disability Codes

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

Page Used to Set Up New Zealand Disability Codes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Disability NZL	DISABILITY_TBL_NZL	Set Up HRMS, Product Related, Workforce Administration, Disabilities NZL, Disability NZL	Create new disability type codes or modify existing codes.

(ESP) Setting Up Spanish Workforce Tables

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

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

This section discusses how to:

- Enter Country codes for social security reporting.
- Enter Industry Activity codes.
- Enter insurance company descriptions and address information.

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

Pages Used for Spanish Workforce Tables

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Country Codes Table	SOCS_CNTRY_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Country Codes Table, Country Codes Table	Enter country codes valid for social security reporting purposes.
Industry Activity Table	INDUSTRY_ACT_CD_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Industry Activity Table, Industry Activity Table	Enter industry activity codes and descriptions. The industry activity code helps determine the employer social security number.
Insurance Company Table	INSUR_COMP_CD_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Insurance Company Table, Insurance Company Table	Enter insurance company descriptions and address information.
Social Security Risk Code	SOCS_RISKCD_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Social Security Risk Code, Social Security Risk Code	View the risk codes that can apply to employees in your organization.
Scheme	SOCS_SCHEME_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Social Security Scheme Table, Scheme	Review or define maximum and minimum social security ceilings, as well as review or define the minimum hourly rate for each social security scheme.

Page Name	Definition Name	Navigation	Usage
Work Group	SOCS_WRKGRP_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Social Security Scheme Table, Work Group	Define maximum and minimum social security bases by work group, as well as the minimum hourly rate used to calculate the base for part-time employees.
Contribution	SOCS_CONTRIB_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Social Security Scheme Table, Contribution	Define the contribution rates and percentages for both employees and employers used in the social security calculation.
Social Security Occupation Cd (social security occupation code)	SOCS_OCCUPATN_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Social Security Occupation Cd, Social Security Occupation Cd	Define social security occupation codes.
Company Setup	SOCS_SETUP_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Social Security Company Setup, Company Setup	Enter specific company information, including data needed for social security purposes.
Banking Setup	SOCS_SETUP_2_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Social Security Company Setup, Banking Setup	Enter pay type and specific bank information.
Social Security Data	SOCS_DATA_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Social Security Data, Social Security Data	Define a time limit for transferring FDI medical report data to the social security agency.
Hiring Center Table	HIRING_CENTER_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Hiring Center Table, Hiring Center Table	Define the hiring centers you will attach to employee personnel records on the Contract Data page. You connect every Spanish employee with a hiring center.

Entering Country Codes for Social Security Reporting

Access the Country Codes Table page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Country Codes Table, Country Codes Table).

Country Codes Table					
Social Security Country Codes					
Customize Find View All First 1-5 of 12 Last					
	Country	Description	Social Security Country Code		
1	BEL	Belgium	056	+	-
2	DEU	Germany	276	+	-
3	DNK	Denmark	208	+	-
4	ESP	Spain	724	+	-
5	FRA	France	250	+	-

Country Codes Table page

Country Enter the standard ISO country code.

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

Entering Industry Activity Codes

Access the Industry Activity Table page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Industry Activity Table, Industry Activity Table).

Industry Activity Table

Industry Activity Code: 501

Industry Activity Code Find | View All | First 1 of 1 Last

Effective Date: 01/01/1980 31 Status: Active + -

Description: Construction

Short Description: Constructn

Social Security Rates

IMS Risk Rate:

IT Risk Rate:

Total Rate:

Industry Activity Table page

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

Social Security Rates

Enter percentages for *Invalidez, Muerte y Supervivencia* (IMS) and *Incapacidad Temporal* (IT) risks. For payees with no assigned occupational code, PeopleSoft Global Payroll for Spain uses these percentages to calculate IMS and IT contributions.

See Also

PeopleSoft Enterprise Global Payroll for Spain 9.1 PeopleBook, "Setting Up Social Security Contributions," Retrieving Calculation Percentages and Rates

Entering Insurance Company Descriptions and Address Information

Access the Insurance Company Table page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Insurance Company Table, Insurance Company Table).

Insurance Company Table

Insurance Company Code:061

*Description:

FREMAP

Short Description:

FREMAP

Insurance ID:

Address

Country:

ESP

Spain

Address:

Avenue General Peron, 45. 17-28019- Madrid. Madrid

Edit Address

Insurance Company Table page

Edit Address Click to enter or modify address information.

Viewing Risk Codes

Access the Social Security Risk Code page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Social Security Risk Code, Social Security Risk Code).

Social Security Risk Code

Social Security Risk Code:004

Social Security Risk Code

Find | View All | First1 of 1Last

*Effective Date:

01/01/2007

Status:

Inactive

+ -

*Description:

Vineyard farming (Rioja)

IMS Risk Rate:

0.98

IT Risk Rate:

1.95

Total Rate:

2.93

Social Security Risk Code page

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

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

Social Security Risk Code	The code that you entered to access this page. This is the code defined on this page.
IMS Risk Rate (<i>Riesgo de Invalidez/Muerte/Supervivencia</i>)	Displays the IMS risk rate that applies to this social security risk code. The Spanish government assigns IMS risk rate codes that assess the risk of work-related disability, death, or survival.
IT Risk Rate (<i>Riesgo de Incapacidad Temporal</i>)	Displays the IT risk rate that applies to this social security risk code. The Spanish government assigns IT risk rate codes to assess the risk of work-related temporary disability, such as respiratory problems for miners or injuries for construction workers.
Total Rate	The system automatically calculates the total rate, the sum of the IMS risk rate, and the IT risk rate.

Defining Maximum and Minimum Social Security Ceilings

Access the Scheme page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Social Security Scheme Table, Scheme).

The screenshot displays the 'Scheme' page in the PeopleSoft system. At the top, there are tabs for 'Scheme', 'Work Group', and 'Contribution'. Below the tabs, the 'Scheme ID' is 0111 and the 'Currency' is ESP. The 'Scheme' section includes a search bar with 'Find | View All' and a status dropdown set to 'Active'. The main form contains the following fields:

- *Effective Date:** 01/01/2001
- *Description:** General Scheme
- Short Description:** Gral Sche.
- Lower Ceiling:** 84150.00
- Upper Ceiling:** 415950.00
- Minimum Hourly Rate:** 419.00

Scheme page

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

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

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

Defining Maximum and Minimum Social Security Bases by Work Group

Access the Work Group page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Social Security Scheme Table, Work Group).

Scheme Work Group Contribution

Scheme ID: 0111 Currency: ESP

Scheme Find | View All First 1 of 1 Last

Effective Date: 01/01/2001 Status: Active

Lower Ceiling: 84150.00 Upper Ceiling: 415950.00 Minimum Hourly Rate: 419.00

Social Security Work Group Customize | Find | View All First 1-5 of 11 Last

	*Social Security Work Group	*Description	Frequency	Minimum Amount	Maximum Amount	Minimum Hourly (Part Time)		
1	01	Engineers & BA & BSc	Monthly	125430	415950	627.00	+	-
2	02	Technical, Experts & Workshop engine	Monthly	104040	415950	520.00	+	-
3	03	Administrative & Workshop managers	Monthly	90450.0	414950	453.00	+	-
4	04	Assistants without a degree	Monthly	84150.0	415950	419.00	+	-
5	05	White Collar officials	Monthly	84150.0	396060	419.00	+	-

Work Group page

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

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

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

Minimum Amount	Enter the minimum amount used to calculate the common contingencies funding base.
Maximum Amount	Enter the maximum amount used to calculate the common contingencies funding base.
Minimum Hourly (Part Time)	Enter the minimum hourly rate used to calculate the common contingencies funding base for part-time employees. Important! To trigger the correct part-time calculation of the base, you must specify whether the employee is working on a full or part-time basis in the Full/Part field on the Job Information page.

See Also

[Chapter 6, "Increasing the Workforce," Entering Job Information, page 236](#)

Defining Contribution Rates and Percentages

Access the Contribution page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Social Security Scheme Table, Contribution).

SchemeWork GroupContribution

Scheme ID:0111Currency:ESP

Scheme

Find | View All | First1 of 1Last

Effective Date:01/01/2001Status:Active

Lower Ceiling:84150.00Upper Ceiling:415950.00Minimum Hourly Rate:419.00

Contribution

Find | View All | First1 of 6Last

*Contribution ID:001

*Description:General Regular Employee

Short Description:G.E.R.

Contribution Type:PercentageSocial Security Number Type:Regular

Contribution Concept

Customize | Find | View All | First1-6 of 6Last

	*Concept	Employer Percentage	Employee Percentage		
1	Common Contingency	23.600000	4.700000	+	-
2	Professional Training	0.600000	0.100000	+	-
3	FOGASA	0.400000		+	-
4	Unemployment	6.000000	1.550000	+	-
5	Structural Overtime	12.000000	2.000000	+	-
6	Non Structural Overtime	23.600000	4.700000	+	-

Contribution page

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

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Contribution ID

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

Possible values for the contribution ID are:

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

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

Social Security Number Type

Select one of the following values:

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

Contribution Type

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

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

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

Concept	Indicates the type of contributions for which the system displays corresponding employee or employer contribution rates or percentages in the Contribution-Concepts grid. Possible values are: • <i>Common Contingency</i> • <i>FOGASA</i> • <i>Non Structural Overtime</i> • <i>Permanent Disability D & S</i> • <i>Professional Training</i> • <i>Structural Overtime</i> • <i>Temporary Disability</i> • <i>Unemployment</i>
Employer Rate	Displays the employer contribution rate associated with the concept listed in the left-hand column of the grid. If you are defining a new rate, enter the rate in this field. Note. Only contributions of apprentices and trainees are based on fixed rates.
Employer Percentage	Displays the employer contribution percentage associated with the concept listed in the left-hand column of the grid. Social security contributions of regular employees are calculated as percentages of a funding base. If you are defining a new percentage, enter the percentage in this field.
Employee Rate	Displays the employee contribution rate associated with the concept listed in the left-hand column of the grid. If you are defining a new rate, enter the rate in this field.
Employee Percentage	Displays the employee contribution percentage associated with the concept listed in the left-hand column of the grid. Social security contributions of regular employees are calculated as percentages of a funding base. If you are defining a new percentage, enter the percentage in this field.

Defining Social Security Occupation Codes

Access the Social Security Occupation Cd (social security occupation code) page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Social Security Occupation Cd, Social Security Occupation Cd).

Social Security Occupation Cd	
Occupation Code:	C
Occupation Code Find View All First 1 of 1 Last	
*Effective Date:	01/01/2009 Status: Active
*Description:	Sickness and special labor relationships
Definition:	Sickness and special labor relationships
IMS Risk Rate:	0.85
IT Risk Rate:	0.35
Total Rate:	1.20

Social Security Occupation Cd (social security occupation code) page

Enter the effective date, status, description, and short description of the occupation code.

Enter percentages for *Invalidez, Muerte y Supervivencia* (IMS) and *Incapacidad Temporal* (IT) risks. PeopleSoft Global Payroll for Spain uses these percentages to calculate IMS and IT contributions.

See Also

PeopleSoft Enterprise Global Payroll for Spain 9.1 PeopleBook, "Setting Up Social Security Contributions," Retrieving Calculation Percentages and Rates

Entering Social Security Company Information

Access the Company Setup page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Social Security Company Setup, Company Setup).

Company Setup		Banking Setup	
Company:	KE1	Business Institute - Spain	Fiscal Code: B81473118
Company Data Find View All First 1 of 1 Last			
Effective Date:	01/01/2000		
Social Security Country Code:	724	Spain	
Main SSN:	28214365546	GBI - Madrid	
Process Label Data			
Silcon Key:	23568451	Deliver Process Code:	Winsuite
Authorization Key:	25689451		
Contact Data			
Empl ID/Name:	KE0001	Antonio Rodriguez Salgado	
Contact Phone:		Contact Fax:	
Delta Data			
Preventive:	External		

Company Setup page

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

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

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

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

Delta Data**Preventive**

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

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

See [Chapter 11, "\(ESP\) Managing Spanish Reporting," Managing Delta Communications, page 583.](#)

Entering Social Security Bank Information

Access the Banking Setup page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Social Security Company Setup, Banking Setup).

Company Setup Banking Setup

Company: KE1 Business Institute - Spain Fiscal Code: B81473118

Company Data Find | View All First 1 of 1 Last

Effective Date: 01/01/2000

Bank Account Data

Pay Type: Direct Deb

Source Bank: KE01 BSCH

Holder Name: Bussines Institute SL

Source Bank (Pay Back): KE02 BBVA

Holder Name: Bussines Center SL

SSN Employer Overrides Customize | Find | View All First 1 of 1 Last

Bank Data Bank Data Contact Data

Social Security Number	Description	Source Bank ID	Description	Holder Name	Pay Type
01123456727	GBI - Álava				Elect. Pay

Banking Setup page

Bank Account Data

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

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

Defining a Social Security Time Limit for FDI Data

Access the Social Security Data page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Social Security Data, Social Security Data).

Social Security Data

Social Security Data Find | View All | First | 1 of 1 | Last

Effective Date: 01/01/2000 Status: Active

WinSuite

*WS File Version: 5.4.1

FDI Security Days

*Sick Note: 5 *Medical Discharge: 5 *Confirmation Note: 5

Social Security Data page

WS File Version

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

Sick Note

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

Medical Discharge

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

Confirmation Note

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

See Also

PeopleSoft Enterprise Global Payroll for Spain 9.1 PeopleBook, "Working with Absence Rules," Generating the FDI Medical Report Text File

Defining Spanish Hiring Centers

Access the Hiring Center Table page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Hiring Center Table, Hiring Center Table).

Hiring Center Table

Hiring Center Code: KE1

Hiring Center Find | View All | First | 1 of 1 | Last

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

*Description: General Hiring Center

Short Description: General

Responsible ID: KE0001 Antonio Rodriguez Salgado

Responsible Role: Representative

Unemployment Office: INEM

Signature City: Madrid

Hiring Center Table page

Hiring Center Code	The hiring center code that you entered to access this page.
Responsible ID	Select the employee ID of the person in your organization who is responsible for signing employment contracts at this hiring center.
Responsible Role	Enter a description of the job responsibilities of the person who you designated in the Responsible ID field.
Unemployment Office	Enter a description of the unemployment office for this hiring center.
Signature City	Spanish contracts must be stamped with the date and the name of the city where the contract was signed. Enter the city's name here.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Working with System Data Regulation in HRMS"

(BRA) Setting Up Brazilian Establishments

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

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

Note. All Brazilian establishments must belong to a company.

This section discusses how to:

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

Pages Used to Set Up Establishments

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

Entering Types of Establishment ID Codes

Access the Establishment ID Type BRA page (Set Up HRMS, Product Related, Workforce Administration, Establishment ID Type BRA, Establishment ID Type BRA).

Establishment ID Type BRA

Country: BRA Brazil

National ID Types					Customize Find View All First 1-6 of 6 Last	
Type	Default	*Description	Short Desc	ID Format		
CAGED	☒	CAGED Authorization	CAGED	99.99-999	+	-
CAIXA	☐	CAIXA	CAIXA	999999999999999	+	-
CEI	☐	CEI	CEI	999999999999999	+	-
CNAE	☐	CNAE Fiscal	CNAE	99999999	+	-
CNPJ	☐	CNPJ	CNPJ	999999999999999	+	-
MCPIS	☐	Matr Conv /PIS	MCPIS	XXXXXXXXXX	+	-

Establishment ID Type BRA page

- Type** Enter the type of establishment ID code. You can enter ID types that are not legal IDs (national IDs) but are required for certain reports.
- Default** Select to establish this type of ID code as the default for the selected country.
- ID Format** Specify the format of the ID code. Enter a 9 for each digit of the ID number.
The system has edit masks that apply special formatting to some of the ID types you enter on this page. The system applies the following formatting to these ID types:
- CNPJ: 99.999.999/9999-99
 - CNAE: 99.99-9

Setting Up Establishments

Access the Additional Info - Brazil page (Set Up HRMS, Product Related, Workforce Administration, Establishment BRA, Additional Info - Brazil).

Establishment AddressPhone NumbersAdditional Info - Brazil

Establishment ID:KRC1-1

Additional InformationFind | View All First1 of 1Last

Effective Date:01/01/1980

Description:Matriz São Paulo

Data

*County Code:3550308SAO PAULO

*Last Reg Number:1

*Estab Type Cd:Other

*Inscr Type:CNPJAssociated to CNPJ:

Company Name for Legal Reports

Company

Establishment

PIS Data

☒ Estab Responsible by AgreementDate:01/01/2002

CAIXA Agency:2277

Additional Info - Brazil page (1 of 3)

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RAIS Data

*RAIS Estab Pref:

00

Nbr of Owners:

2

Own Serv %:

5

Kit Admin %:

4

Meals Agr %:

3

Trans Meals %:

2

Food Basket %:

1

Feeding Agr %:

☐ Closing Activities RAIS

☒ PAT Participation Option

Union Codes Contributions

Associative:

KR1

Sind. Proc. Dados - São Paulo

Associative Amount:

100000.00

Union:

KR2

Sind. Proc. Dados - Rio

Union Amount:

200000.00

Welfare:

KR1

Sind. Proc. Dados - São Paulo

Welfare Amount:

300000.00

Confederative:

KR2

Sind. Proc. Dados - Rio

Confederative Amount:

400000.00

GPS/SEFIP Data

GPS Pay Code:

2100

SAT Code:

3322

FPAS Code:

551

Third Party Code:

1524

SS 3th Party %:

3.00

SAT % 15 Years:

10.00

Work Risk %:

5.00

SAT % 20 Years:

15.00

Company %:

20.00

SAT % 25 Years:

20.00

Independent %:

Philant Exemp %:

Additional Info - Brazil page (2 of 3)

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DIRF Responsible

*DIRF Rep Type:

Employee

DIRF Resp ID:

KR0001

Marcia Oliveira

SEFIP Responsible

*SEFIP Rep Type:

Employee

SEFIP Resp ID:

KR0001

Marcia Oliveira

RAIS Responsible

*RAIS Rep Type:

Employee

RAIS Resp ID:

KR0001

Marcia Oliveira

GRRF Responsible

*Representative Type:

Representative ID:

Contact ID:

Establishment Bank

Source Bank ID:

Bank ID:

Bank Branch ID:

Establishment ID

Customize | Find | First 1-4 of 4 Last

*Type	Description	ID		
CAIXA	CAIXA	12345678901234	+	-
CNAE	CNAE Fiscal	1234567	+	-
CNPJ	CNPJ	66470907000122	+	-
MCPIS	Matr Conv /PIS	22771234567	+	-

Additional Info - Brazil page (3 of 3)

County Code Enter the county code.

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

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

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

PIS Data

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

Estab Responsible by Agreement When you select this check box, the CAIXA Agency field appears.

(establishment responsible by agreement)

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

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

RAIS Data

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

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

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

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

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

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

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

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

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

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

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

GPS/SEFIP Data

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

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

SAT Code Enter the work accident insurance code.

FPAS Code Enter the FPAS (*Fundo de Previdência e Assistência Social*) social assistance and pension fund code. The activity type of the company determines this code.
The system identifies all third parties and their respective percentages assigned to this code and generates a total percentage of collection for the establishment.

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

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

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

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

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

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

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

DIRF Responsible

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

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

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

SEFIP Responsible

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

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

RAIS Responsible

Complete this group box only for RAIS centralizing establishments.

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

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

Establishment Bank

Type Enter an establishment ID type.

Source Bank ID Enter the establishment's ID.

Establishment ID

Type Enter an establishment ID type.

ID Enter the establishment's ID.

Grouping Establishments for Centralized Data

Access the Centralization Data BRA page (Set Up HRMS, Product Related, Workforce Administration, Centralization Data BRA, Centralization Data BRA).

Centralization Data BRA

Effective Date:01/01/2002

Process Type:CAGED

Centralizer Data

Find | View All | First1 of 5 | Last

Centralizer:

KRC1-1

Matriz São Paulo

Centralized Data

Customize | Find | View All | First1-2 of 2 | Last

	Establishment ID	Description		
1	KRC1-1	Matriz São Paulo	+	-
2	KRC1-2	Filial Porto Alegre	+	-

Centralization Data BRA page

- Process Type

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

Enter the name of the establishment that creates centralized data for reporting purposes.
- Establishment ID

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

(CHN) Setting Up Hukou Data

To set up Hukou data, use the Hukou Setup CHN (HUKOU_SETUP_CHN) component.

This section discusses how to:

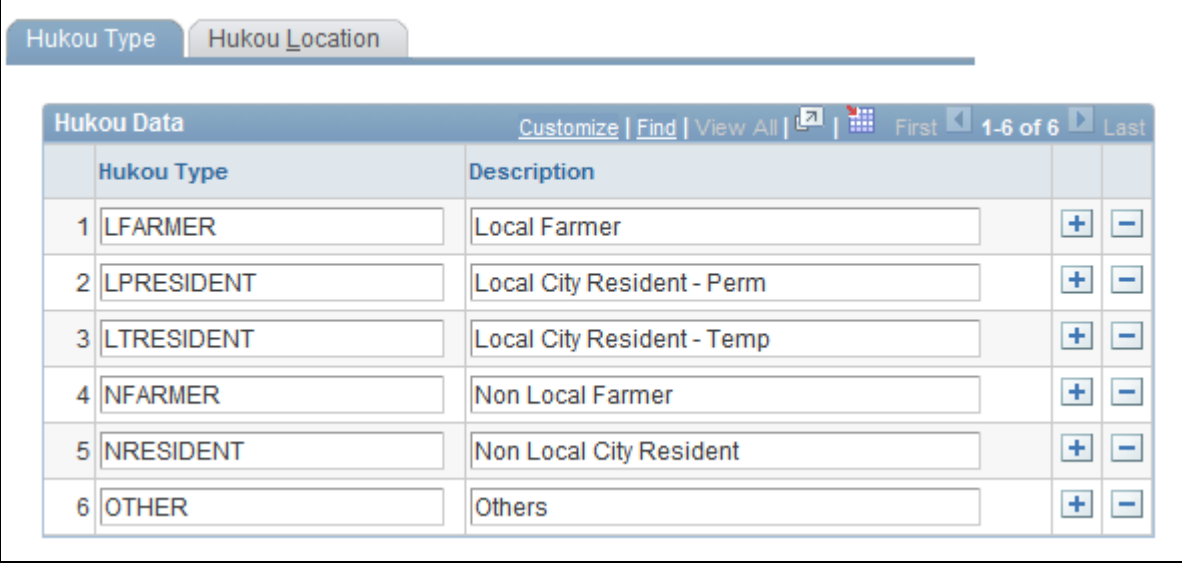
- Set up Hukou types.
- Set up Hukou locations.

Pages Used to Set Up Hukou Data

Page Name	Definition Name	Navigation	Usage
Hukou Type	HUKOU_DTL_TYPE_CHN	Set Up HRMS, Product Related, Workforce Administration, Hukou Setup CHN, Hukou Type	Set up Hukou types.
Hukou Location	HUKOU_DTL_LOC_CHN	Set Up HRMS, Product Related, Workforce Administration, Hukou Setup CHN, Hukou Location	Set up Hukou locations.

Setting Up Hukou Types

Access the Hukou Type page (Set Up HRMS, Product Related, Workforce Administration, Hukou Setup CHN, Hukou Type).



The screenshot shows the 'Hukou Type' page with a tabbed interface. The 'Hukou Type' tab is selected. Below the tabs is a table titled 'Hukou Data' with columns 'Hukou Type' and 'Description'. The table contains six rows of data, each with a numeric ID, a text input field for the type, a text input field for the description, and two buttons (+ and -) for editing.

Hukou Data			
	Hukou Type	Description	
1	LFARMER	Local Farmer	+ -
2	LPRESIDENT	Local City Resident - Perm	+ -
3	LTRESIDENT	Local City Resident - Temp	+ -
4	NFARMER	Non Local Farmer	+ -
5	NRESIDENT	Non Local City Resident	+ -
6	OTHER	Others	+ -

Hukou Type page

Use this page to review and update Hukou types and their descriptions.

Setting Up Hukou Locations

Access the Hukou Location page (Set Up HRMS, Product Related, Workforce Administration, Hukou Setup CHN, Hukou Location).

Hukou TypeHukou Location

Hukou Data					Customize		Find	View All			First	1-4 of 4	Last
	Hukou Location	Description											
1	BEIJING	Beijing			+	-							
2	SHANGHAI	Shanghai			+	-							
3	SHENZHEN	Shenzhen			+	-							
4	TIANJIN	Tianjin			+	-							

Hukou Location page

Use this page to review and update Hukou locations and their descriptions.

Chapter 4

Understanding Organizational Relationships, Employment Record Numbers, and Multiple Jobs

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

Organizational Relationships

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

Organizational relationships fall into one of the following categories:

- Employee.

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

- Contingent worker.

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

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

- Person of interest (POI).

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

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

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

This chapter refers only to those people with organizational relationships.

Personal Information Data for People with Organizational Relationships

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

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

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

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

See [Chapter 5, "Adding a Person in PeopleSoft Human Resources," Understanding Identification Assignment, page 179.](#)

Organizational Instances

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

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

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

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

- Add Person of Interest Job Relationship (JOB_DATA_POI).

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

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

See *PeopleSoft Enterprise Talent Acquisition Manager 9.1 PeopleBook*, "Hiring Applicants."

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

Organizational Instances for People of Interest

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

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

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

Example: A Person with Three Organizational Instances

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

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

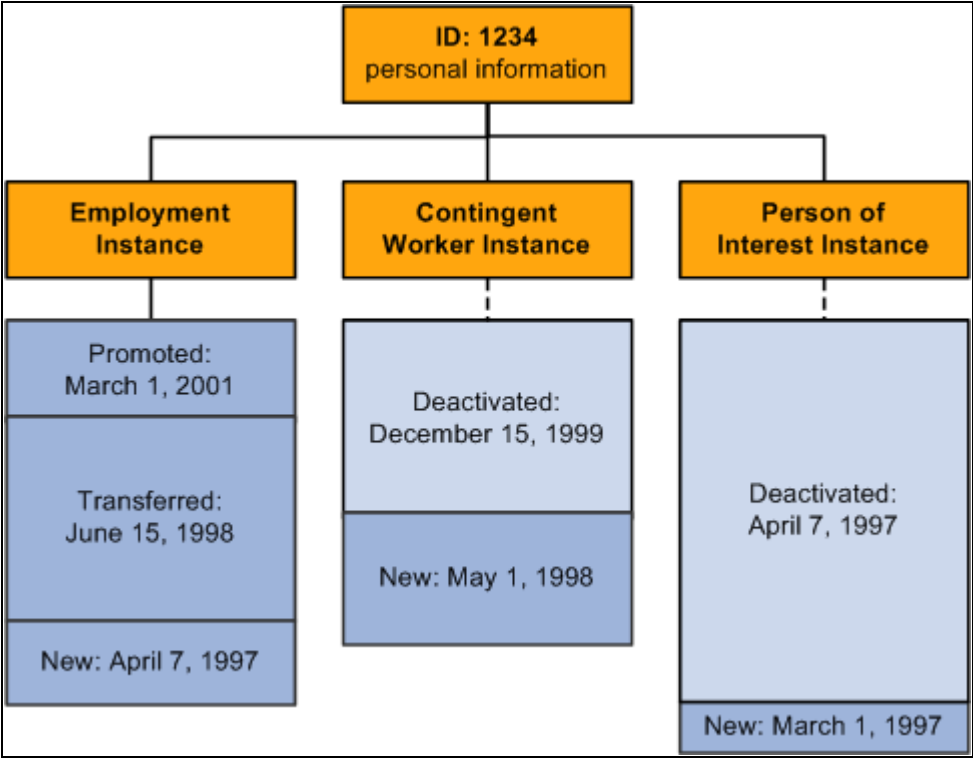
A little more than a year after joining the company, Mario is given the opportunity to participate in a short-term project. The human resources administrator creates a contingent worker instance for him on the Add Contingent Worker Instance component.

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

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

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

This diagram illustrates how the system stores Mario's data: under the person record, there are separate employee, contingent worker, and POI organizational instances, each with its own event history:



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

Employment Record Numbers

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

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

Action	Comments
Create concurrent jobs, including: • Additional assignments. • Additional organizational instances. • (JPN) Additional appointment (<i>kenmu</i>). • (CHE) Multicontract.	• Use the Add Additional Assignment component (ADD_PER_ORG_ASGN) to add an additional job (using the action of Add Additional Job) to the one an employee or contingent worker already holds. This job is added to an existing organizational instance, retains the employment dates of the original job, and is terminated if you terminate the original job. Note. Access the Concurrent Job Data component (JOB_DATA_CONCUR) from the Add Additional Assignment component. • Use the Add Employment Instance component or Add Contingent Worker Instance component to create an additional organizational instance for a worker using the action Hire. This job record is not tied to any other jobs that the worker holds, has its own job data, and has its own hire dates. HIR is used in the Add Employment Instance only. The Add Contingent Worker Instance component uses the ADD action. Note. Additional organizational instances are identified as hires on human resources reports and additional assignments are not. Use this distinction to guide how you enter additional jobs in the system. If you do not need to distinguish between concurrent jobs, choose one method of entering concurrent jobs and use it consistently. See Chapter 6, "Increasing the Workforce," Adding Organizational Instances for Employees, Contingent Workers, and POIs, page 220. See Chapter 6, "Increasing the Workforce," Adding Additional Assignments, page 287. See Chapter 12, "(JPN) Tracking Additional Appointments (Kenmu)," page 633.
Create a global assignment (employees only).	Use the Home/Host Information component (HOME_HOST_DATA) to create a global assignment job record. The system gives the global assignment (host) job record a new employment record number to distinguish it from the employee's original (home) job record. See <i>PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Track Global Assignments</i>, "Tracking Assignments."

Action	Comments
Create a temporary assignment, including Japanese intercompany transfer (<i>shukkou</i>).	When you assign a worker to a temporary assignment on the Job Data component, the system suspends the substantive job and identifies the temporary job record with a new employment record number. See Chapter 8, "Entering Additional Data in Human Resources Records," Entering Temporary Assignments, page 400. See Chapter 13, "(JPN) Tracking Intercompany Transfers (Shukkou)," page 649.

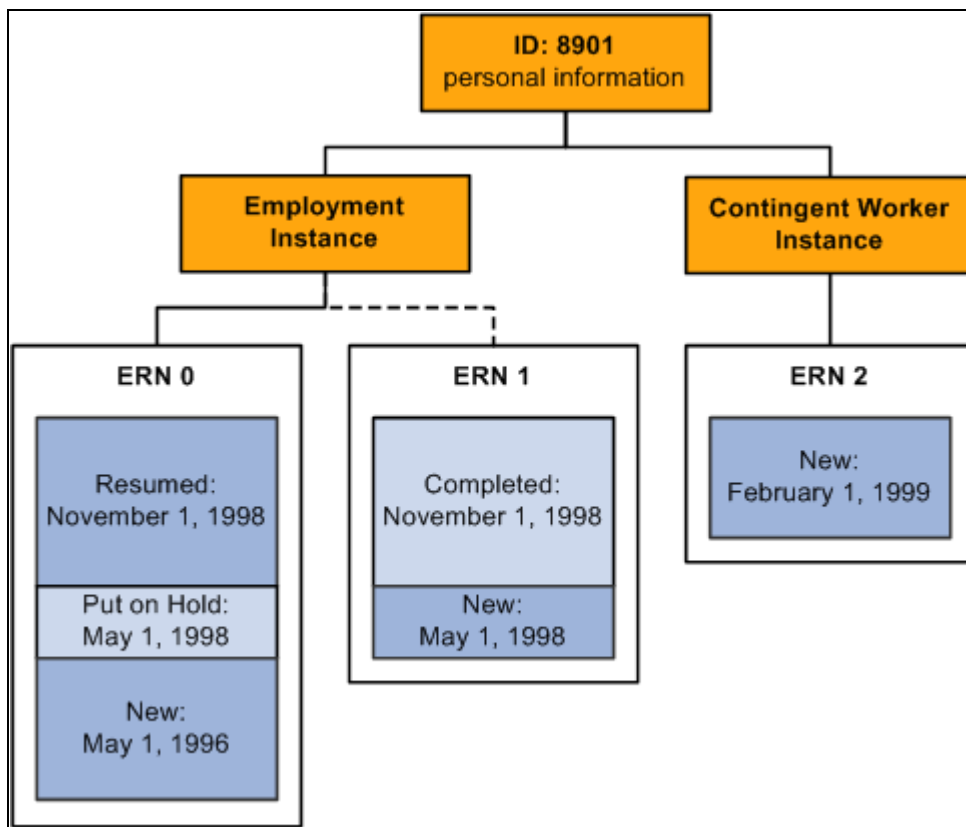
Example: A Person with Multiple ERNs

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

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

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

This diagram illustrates Jan Smith's job records under the organizational relationships. Under the person record, there are separate employee and contingent worker organizational instances. There are two ERNs under the employment instance and one ERN under the contingent worker instance. Each ERN has its own event history:



Jan Smith's employee and contingent worker instances and the ERNs that are associated with those instances

Multiple Jobs

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

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

This section discusses:

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

Multiple Employment Records Compared to Multiple Jobs

A person can have multiple ERNs without holding multiple jobs.

A person does not have multiple jobs when they have:

- A contingent worker and an employment instance.

The two organizational instances have their own job records, each identified by a unique ERN.

- A substantive job and a temporary job where the substantive job is suspended.

People have multiple jobs when they have:

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

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

Examples of multiple job include these methods:

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

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

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

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

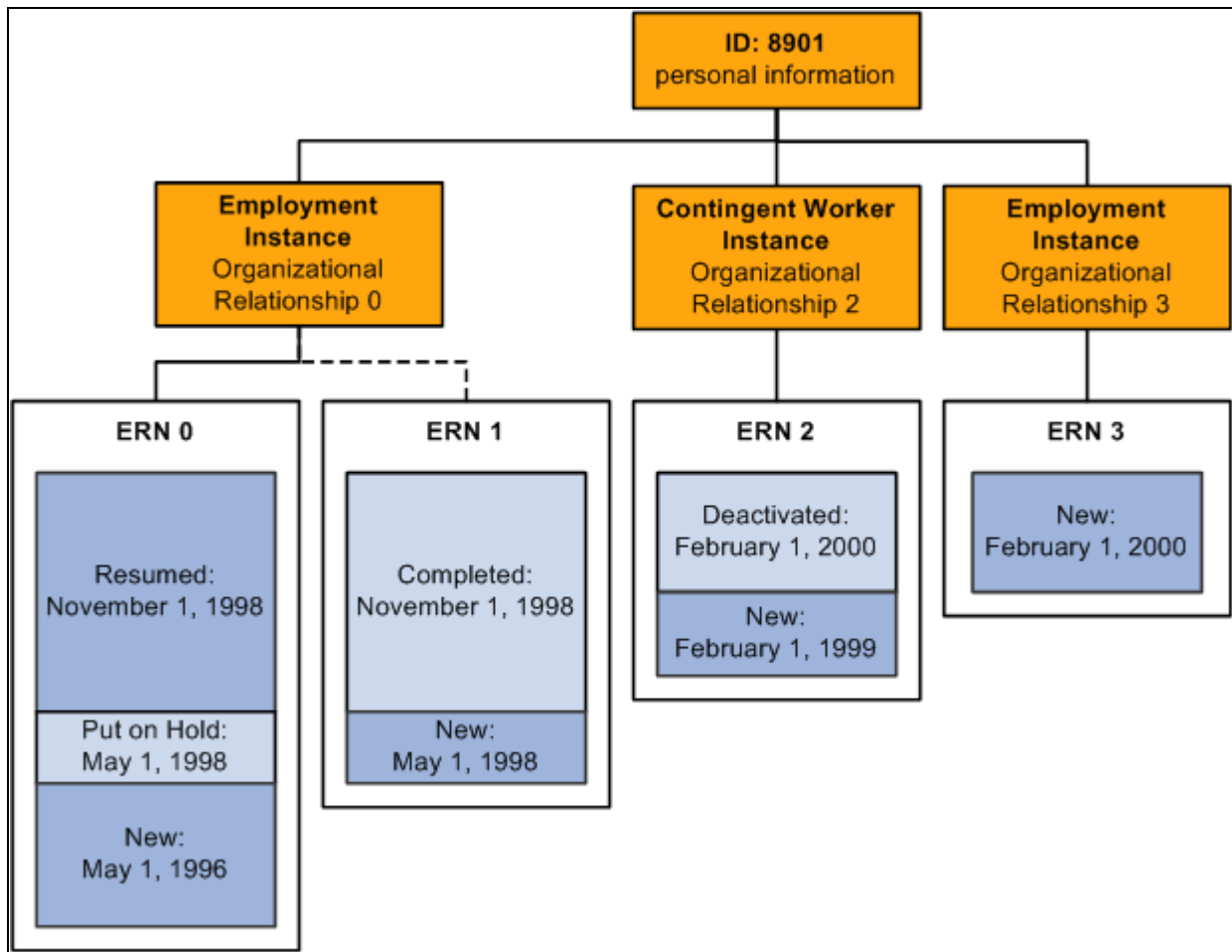
See [Chapter 4, "Understanding Organizational Relationships, Employment Record Numbers, and Multiple Jobs," Multiple Jobs, page 164.](#)

Example: A Person with Multiple Jobs

As of February 1, 1999, when Jan Smith begins her contingent worker relationship with the organization, Jan Smith does not have multiple jobs. She has an active employment job record and an active contingent worker job record, distinguished in the system by their ERNs.

On February 1, 2000, when Jan has held the consulting job at the subsidiary company as a contingent worker for a year, management decides to make the job permanent. This requires creating a new employment job record in addition to the original job record. Jan Smith now has multiple jobs.

This diagram illustrates Jan Smith's organizational relationships and job records after the changes of February 1, 2000. A second employment instance has been added alongside the existing employment instance and contingent worker instances. The new employment instance has its own ERN and event history:



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

Multiple Jobs and PeopleSoft Human Resources

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

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

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

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

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

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

Maintain Multiple Concurrent Military Ranks

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

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

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

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

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

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

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

Multiple Jobs and Base Benefits

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

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

Designate the Primary Job for Benefits

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

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

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

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

The primary job flag is used throughout the system to:

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

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

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

Group Jobs to Determine Benefit Eligibility

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

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

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

Maximum Number of Concurrent Jobs

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

Calculate Benefit Deductions

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

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

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

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

Apply Regulatory Contribution Limits

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

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

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

Percent of Gross Deduction Limits

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

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

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Benefits, "Managing Multiple Jobs"

Multiple Jobs and PeopleSoft Benefits Administration

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

- Which jobs do you look at for benefits eligibility, and how should they be evaluated?

- If a change affects one job, how do you determine the effect that it has on the other jobs?

Determine Eligibility with Multiple Jobs

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

- Eligibility Criteria.
- Grouping Method.
- Evaluation Method.

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

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

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

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

Primary Job in Benefit Record Looks at only the primary job within the benefit record number of the event.

When determining which jobs should be grouped, the Consider Active Jobs Only check box from the eligibility rule is also used. If this check box is selected, then only those jobs with an active Empl_Status (employee status) of A, L, P, W, or S are included when the grouping method is *All Flagged Jobs* or *Flagged Jobs in Benefit Record*.

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

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

All in Group All jobs in the group must satisfy the rule.

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

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

- Minimum FTE must equal 1.
- Grouping Method is *All Flagged Jobs*.

- Consider Active Jobs Only check box is selected.

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

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

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

Benefits Credits and the Primary Job

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

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

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

Trigger Events with Multiple Jobs

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

There are three main categories of events:

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

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

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

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

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

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

Passive Events and Multiple Jobs

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

Mark Events for Reprocessing

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

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Benefits, "Managing Multiple Jobs"

PeopleSoft Enterprise Benefits Administration 9.1 PeopleBook, "Defining Eligibility Rules," Setting Up Eligibility Rules

Multiple Jobs and PeopleSoft Payroll for North America

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

- **Primary Pay Group**

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

- **Single Check**

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

- **Deduction Limits**

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

- **Union Dues**

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

- **FLSA Overtime Rules**

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

See Also

PeopleSoft Enterprise Payroll for North America PeopleBook

Multiple Jobs and PeopleSoft Pension Administration

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

Multiple Jobs and the Eligibility Process

The eligibility process always produces two primary results:

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

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

Multiple Jobs and the Primary Job Record

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

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

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

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

See Also

PeopleSoft Enterprise Pension Administration PeopleBook

Chapter 5

Adding a Person in PeopleSoft Human Resources

This chapter discusses how to:

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

Adding a Person

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

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

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

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

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Administering HRMS Security"

Understanding Identification Assignment

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

- Automatically

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

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

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Installing PeopleSoft HRMS," Specifying the Starting Number for System-Assigned Numbers.

- Manually

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

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

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

Common Elements Used in This Component

Smoker and As of	Indicate if the person is a smoker and enter the date on which the person started smoking. A person's smoker status affects benefits eligibility and rate determination in PeopleSoft Enterprise Human Resources Manage Base Benefits and is required for regulatory reporting.
Ethnic Group	Select an ethnic group. You set up ethnic groups on the Ethnic Groups page. (AUS) Affirmative action reports and the ATSI (Aboriginal and Torres Strait Islander) code come from this page. (USA) Values are based on U.S. Federal Equal Employment Opportunities ethnic categories. Use ethnic group information to compile the establishment's affirmative action plan and to generate several equal employment opportunity (EEO) reports. (GBR) Values are based on U.K. equal opportunity ethnic categories.
Military Status	Enter the person's military status.
Preferred	Select the person's preferred email address or phone number.

Pages Used to Add a Person

Page Name	Definition Name	Navigation	Usage
Biographical Details	PERSONAL_DATA1	Workforce Administration, Personal Information, Biographical, Add a Person, Biographical Details	Enter name and other biographical information.

Page Name	Definition Name	Navigation	Usage
Edit Name	NAME_DFT_SEC	Workforce Administration, Personal Information, Biographical, Add a Person, Biographical Details Click the Add Name link on the Biographical Details page.	Edit and refresh name information.
Contact Information	PERSONAL_DATA2	Workforce Administration, Personal Information, Biographical, Add a Person, Contact Information	Enter or edit a person's contact information.
Address History	ADDR_HISTORY_SEC	Workforce Administration, Personal Information, Biographical, Add a Person, Contact Information Click the Add Address Detail link on the Contact Information page.	Enter the effective date, country, and status for the address and refresh the address data when you make changes.
Edit Address	EO_ADDR_SEC	Workforce Administration, Personal Information, Biographical, Add a Person, Contact Information Click the Add Address Detail link on the Contact Information page and then click Update/View Addresses on the Address History page.	Edit address information.
Regional	PERSONAL_DATA3	Workforce Administration, Personal Information, Biographical, Add a Person, Regional	Enter country-specific personal information.
Self Identification Data Canada	CAN_SELF_ID_DATA	Click the Self Identification Data link on the Regional page. This link is visible only to users with access to the Self Identification Data Canada page, which can be granted using the delivered role <i>HR Admin CAN Confdl Data</i> .	Enter Canadian ethnicity data for a person, including whether the person is a visible minority and whether the person is an aboriginal person. Note. Be sure this page is appropriately secured to protect the confidentiality of this data.

Page Name	Definition Name	Navigation	Usage
Organizational Relationships	PERSONAL_DATA4	Workforce Administration, Personal Information, Biographical, Add a Person, Organizational Relationships	Select an organizational relationship and checklist to create for this person.
Update Personal Data-Future	PRCSRUNCNTL	Set Up HRMS, System Administration, Database Processes, Update Personal Data-Future	Run this process shortly after midnight to update the Personal Data component. The process will update data with new, effective information that is not currently in the component. The Update Personal Data-Future process runs the HR_PERSDATA application engine program.

Entering Name and Biographical Data

Access the Biographical Details page (Workforce Administration, Personal Information, Biographical, Add a Person, Biographical Details).

Biographical Details

Contact Information

Regional

Organizational Relationships

Person ID:

NEW

Name

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

*Effective Date:

06/30/2009

31

+ -

*Format Type:

English

Display Name:

Add Name

Biographic Information

Date of Birth:

31

0

Years

0

Months

Birth Country:

USA

United States

Birth State:

Birth Location:

☐ Waive Data Protection

Biographical History

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

*Effective Date:

06/30/2009

31

+ -

*Gender:

Unknown

*Highest Education Level:

A-Not Indicated

*Marital Status:

Unknown

As of:

31

Language Code:

Alternate ID:

☐ Full-Time Student

▼ National ID

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

*Country	*National ID Type	National ID	Primary ID		
USA	Social Security Number		☒	+ -	

Biographical Details page

Person ID

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

Name

Display Name

Click to add or edit a name.

Biographic Information

Date of Birth	Enter the person's date of birth. If you leave this field blank, a warning message appears when you save the record. You can continue entering information after you acknowledge the message. Though the birth date isn't required for the Administer Workforce business process, the system uses it to calculate a person's age in some benefit and payroll tasks. It also calculates dates, such as the U.K. expected retirement date, based on the person's age.
Birth Country	Select a country. Based on the selected country, the system might display additional fields.
Birth Location	Usually a city, town, or village.
Date of Death	This field does not appear during the hiring process. Use this field when updating a person's records.
Waive Data Protection	European community employment and personal privacy legislation specifies that personnel information can't be passed across countries in the European Union without authorization from the employee. Select this check box if you obtain the employee's consent to share personal data with users in other European Union member nations.

Biographical History

Highest Education Level	Select a value. Note. (JPN) For Japanese education-level age-related pay calculations, a form of seniority pay, these values are linked to an education-level age basis as of hire.
Marital Status and As of	Select the person's marital status. Values are: <i>Common Law</i> , <i>Divorced</i> , <i>Head of Household</i> , <i>Married</i> , <i>PACS</i> [(FRA) this field is used in France. <i>Pacte civil de solidarite</i>], <i>Separated</i> , <i>Single</i> , <i>Unknown</i> , and <i>Widowed</i> . When a marital status is changed, the default as of date is the same as the biographical history effective date. PeopleSoft Enterprise Payroll doesn't use the marital status that is entered on this page for tax calculations. For U.S. employees, you enter that information in Maintain Payroll Data on the Federal, State, and Local Tax pages. Taxes for Canadian employees are based on net claim amount, which varies depending on the employee status. Note. Laws in the Netherlands require tracking effective-dated marital status information for employees.

Language Code	Select the person's native or preferred language. Although tracking official or preferred languages is required in some countries in PeopleSoft Enterprise Human Resources, the system also uses the preferred language when you communicate with people with a relationship to the organization. For example, PeopleSoft Enterprise Global Payroll for Germany and Switzerland use the language code to print paychecks in the payee's preferred language. Other types of communication also use this as the default language for written communication. Note. Don't use this field to record the organization's official language or to rate a worker's proficiency in speaking, reading, or writing various languages. Use the Location Table to track the organization's official language. Use the Languages table to record a worker's language proficiency. The Language Code field prompts from the LANG_CD table, which concerns the person's native or preferred language, and not from the LANGUAGE_CD table, which contains the languages into which the application can be translated.
Alternate ID	To use a second type of ID for a person, enter the ID.
Full-Time Student	Select if the person is a full-time student.
National ID	
Country	Select the country that issued the worker's national ID.
National ID Type	The system enters the value that you establish for this country on the National ID Type Table page. You can override this default. Note. (BRA) Add rows to enter one or more of the following IDs for the person: <i>RG number</i>, <i>voter registration card</i>, <i>PIS/PASEP number</i>, and <i>reserve certificate</i>. Note. (BRA) Changes made to a Brazilian person's <i>Work Card</i> and <i>PIS</i> national ID types will be recorded on the National ID History page.
National ID	Enter the worker's national ID number. The system checks the format of the entry against the default format that you enter on the National ID Type Table page. (GBR) For the U.K. the normal format of two letters followed by six digits and then one letter for National Insurance identification appears by default. Other options that are dependent on employee status are available. (GBR) When you enter a national insurance number, the system uses the NID Prefix GBR page to check that you have entered a valid national insurance prefix. You can't save this page if you have entered an invalid national insurance prefix.
Primary ID	Select if the national ID is the person's primary ID. If this is the only data row for this person, the system selects the check box by default. You can deselect it.
Tax Ref	(SGP) Select if the worker's national registration ID is used as the person's employer tax reference number. This field is for information only.

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

(CAN) Verifying Social Insurance Numbers for Canadian Employees

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

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

(NLD) Verifying Social Security IDs for Dutch Employees

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

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

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

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Monitor Health and Safety, "Processing Rehabilitation, Claims, and Examination Data," Tracking Employee Medical Exam Results

[Chapter 8, "Entering Additional Data in Human Resources Records," page 383](#)

Entering Contact Information

Access the Contact Information page (Workforce Administration, Personal Information, Biographical, Add a Person, Contact Information).

Biographical Details						Contact Information		Regional		Organizational Relationships	
						Person ID:		NEW			
Current Addresses						Customize Find View All First 1-2 of 2 Last					
Address Type	As Of Date	Status	Address								
Home	06/30/2009	A	1244 Sansome Ave. Jules, CA 94444 Stanislaus	Edit/View Address Detail		+		-			
Mailing	06/30/2009	A	76 Franklin St. Suite 102 San Francisco, CA 94601	Edit/View Address Detail		+		-			
Phone Information						Customize Find View All First 1 of 1 Last					
*Phone Type	Telephone		Extension	Preferred							
Main	415/555-1234			☐		+		-			
Email Addresses						Customize Find View All First 1 of 1 Last					
*Email Type	*Email Address			Preferred							
Business	jbaar@vpl.com			☐		+		-			

Contact Information page

Current Address

Address Type

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

Note. Payroll for North America requires the person to have one address with type *Home* to successfully calculate taxes. You must set up each Puerto Rico employee's home address with country code *USA* and state code *PR* for proper tax reporting.

Add Address

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

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

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

Phone Information

Phone TypeandTelephone

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

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

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

Email Addresses

Email TypeandEmailAddress

Select an email type and enter the employee's email address.

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

Entering Country-Specific Person Data

Access the Regional page (Workforce Administration, Personal Information, Biographical, Add a Person, Regional).

Biographical DetailsContact InformationRegionalOrganizational Relationships

Person ID: NEW

Australia

Ethnic GroupFind | View All First1 of 1LastRegulatory Region: USAUnited StatesEthnic Group: + -

ReligionFind | View All First1 of 1Last*Regulatory Region: USAUnited StatesReligion: + -

Regional page (1 of 12)

Brazil

RG

Issued By:

Issued Date:

31

State:

CTPS

Series:

Issued Date:

31

State:

Voter Data

Zone:

Section:

City:

State:

Military Data

Series:

Region:

State:

Cert Type:

Category:

PIS / PASEP

Issued Date:

31

History

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

Effective Date:

31

Regulatory Region:

Ethnic Group:

*Blood Type:

Unknown

Nationality:

Education Level:

Regional page (2 of 12)

Canada

Self Identification Data

History

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

Effective Date:

31

Bilingualism Code:

Health Care Number:

Health Care Province:

Smoker History

Customize | Find | 1 | First | 1 of 1 | Last

*Smoker

*As of

1

31

Regional page (3 of 12)

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 Switzerland

Guardian

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

Effective Date	Guardian
1 	

Place of Origin

Customize | Find |  First 1 of 1 Last

Place of Origin	Main Origin
	☐

Regional page (4 of 12)

 China

Ethnic Group

Find | View All | First 1 of 1 Last

Regulatory Region:  China Ethnic Group: 

Religion

Find | View All | First 1 of 1 Last

*Regulatory Region:  China Religion: 

Hukou Data

Find | View All | First 1 of 1 Last

Effective Date: 

Hukou Type:  Hukou Location: 

Work Life Data

Working Life Start Date: 

Working & Living Permit

Find | View All | First 1 of 1 Last

Effective Date: 

Working & Living Status: 

Issue Date: 

Renew Date: 

Expiration Date: 

Regional page (5 of 12)

Germany

History

Find | View All | First 1 of 1 Last

Effective Date:

31

Military Status:

Expected Military Date:

31

HR Responsible ID:

Nationality

Customize | Find | 1 | First 1 of 1 Last

Nationality Date	Nationality Key	Nationality		
			+	-

Spain

History

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

	Effective Date	Military Status	Social Security Affiliation Dt		
1				+	-

Regional page (6 of 12)

France

Previous Employment Situation:

History

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

	Effective Date	Date of First Entry in France	Military Status	CPAM ID	Description		
1						+	-

United Kingdom

Expected Retirement Date:

31

Ethnic Group:

Community Background (NI)

Community Background:

☐ Arrived by Direct Question

Determination Date:

31

Regional page (7 of 12)

 **India**

Religion

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

*Regulatory Region:

USA

United States

Religion:

Blood Type:

Caste

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

Effective Date:

Caste:

 **Italy**

History

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

Effective Date:

Military Status Italy:

Type of Service:

Function or Rank:

Military End Date:

Regional page (8 of 12)

 **Japan**

Honseki History

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

Effective Date:

Honseki Prefecture:

Smoker History

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

	*Smoker	*As of		
1				

 **Mexico**

History

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

Effective Date:

AFORE:

Med Region Code:

Regional page (9 of 12)

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 Malaysia

Ethnic Group

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

Regulatory Region:  United States Ethnic Group: 

+ -

Religion

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

*Regulatory Region:  United States Religion: 

+ -

 New Zealand

Ethnic Group

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

Regulatory Region:  United States Ethnic Group: 

+ -

Religion

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

*Regulatory Region:  United States Religion: 

+ -

Regional page (10 of 12)

 Singapore

Ethnic Group

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

Regulatory Region:  United States Ethnic Group: 

+ -

Religion

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

*Regulatory Region:  United States Religion: 

+ -

 Thailand

Ethnic Group

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

Regulatory Region:  United States Ethnic Group: 

+ -

Religion

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

*Regulatory Region:  United States Religion: 

+ -

Regional page (11 of 12)

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Ethnic Group Find | View All First 1 of 1 Last

Regulatory Region: USA United States

Ethnic Group: ☐ Primary

History Find | View All First 1 of 1 Last

Effective Date: Military Status:

Date Entitled to Medicare: Military Discharge Date: [Edit Discharge Date](#)

Citizenship (Proof 1): Citizenship (Proof 2):

☒ Eligible to Work in U.S.

Smoker History Customize | Find | View All First 1 of 1 Last

	*Smoker	*As of
1		

Regional page (12 of 12)

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

(BRA) Brazil

Issued By	Enter the <i>Registro Geral</i> (RG) issuing entity. This information is required if you enter the individual's RG number in the National ID group box.
Issued Date and State	Enter this information, which is required if you enter the individual's RG number.
Series	Enter the work card number.
Exp Date (expiration date)	Enter the work card's expiration date. This information is required if a <i>Carteira de Trabalho e Previdência Social</i> (CTPS) number is provided.
State	Enter the political subdivision of the CTPS issuing agency. This information is required if a CTPS number is provided.
Zone, Section, City, and State	Enter this information, which is required if a voter registration card is provided.
Series, Region, and Category	Enter this information, which is required if a reserve certificate is provided.
State	Enter the political subdivision of the issued reserve certificate. This information is required if a reserve certificate is provided.
Cert Type (certificate type)	Enter the type of military service. Values are: <i>Aeronautic</i> , <i>Army</i> , <i>Marine</i> , or <i>Other</i> . This information is required if a reserve certificate is provided.

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

(CAN) Canada

Self Identification Data Click this link to access the Self Identification Data Canada page, where you enter ethnic background information for the person. The Self Identification Data Canada page has two fields:

- Use the Visible Minority field to indicate if the person's ethnic background is apparent based on physical appearance.
- Use the Aboriginal Person check box to indicate if the person is a Canadian aboriginal person.

The Self Identification Data link is visible only to users with access to the Self Identification Data Canada page. To secure this page and protect the confidentiality of the ethnicity data, you can use the delivered permission list *HCCPHR40CA* and the delivered role *HR Admin CAN Confdl Data*.

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

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

(CHE) Switzerland

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

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

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

(CHN) China

Regulatory Region Enter a regulatory region for the person.

Ethnic Group Enter the person's ethnic group.

Religion Enter the person's religion.

Hukou Type	Enter the person's Hukou type.
Hukou Location	Enter the person's Hukou location.
Working Life Start Date	Enter the date on which the person first began to work.
Working & Living Status	Enter the status of the worker's working and living permit. Values are: <i>Expired</i> , <i>Granted</i> , and <i>Renewed</i> .
Issue Date	Enter the date on which the working and living permit was issued.
Renew Date	Enter the date on which the working and living permit was renewed.
Expiration Date	Enter the date on which the working and living permit expires.

(DEU) Germany

Expected Military Date	If the person hasn't already completed military service, enter the date when service is expected to begin.
HR Responsible ID	Select the ID of the human resources representative responsible for this person.
Nationality Date	Enter the effective date of the person's nationality status. If the employee is a native citizen of the country, enter the person's birth date. If the person is a naturalized citizen, enter the date on which the person became a citizen.

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

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

(ESP) Spain

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

(FRA) France

Date of First Entry in France	Leave blank if the person is a native-born French citizen. If the person is foreign-born, enter the date on which the person first arrived in France. This data is used to maintain work visa information for foreign workers who are employed in France.
CPAM ID (<i>Caisse Primaire d'Assurance Maladie</i> ID)	Enter the code of the CPAM ID that is assigned to the person. CPAM depends on the person's home address. The CPAM is the social security body that compensates persons for illness and work accidents.

(GBR) United Kingdom

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

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

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

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

(GBR) Community Background

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

Community Background	Select the person's community background: <i>Protestant, Catholic, or Undetermined/Other.</i>
Arrived by Direct Question	Select if you determine the person's community background by asking the employee directly.

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

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

(IND) India

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

Caste Select the person's caste.

(ITA) Italy

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

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

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

(JPN) Japan

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

(MEX) Mexico

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

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

(MYS) Malaysia, (THA) Thailand, and (SGP) Singapore

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

(USA) United States

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

Military Discharge Date Displays the military discharge date from the Maintain Military Dischrg Date page. This date is used by the VETS-100 report to determine which veterans qualify for the Newly Separated Veteran designation.

To enter or modify the date, click the Edit Discharge Date link to access the Maintain Military Dischrg Date page.

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

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

(FPS) French Public Sector

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

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

See Also

Chapter 3, "Setting Up Country-Specific Tables," Understanding French Social Security Tracking Code Maintenance, page 110

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Meet Regulatory Requirements, "(CAN) Meeting Regulatory Requirements for Canada"

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "Maintaining Payroll Data"

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Benefits, "Setting Up Base Benefits Core Tables"

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up Local Country Functionality," (JPN) Setting Up Japanese Control Tables

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Understanding HRMS," Effective Dates

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Languages"

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Working with System Data Regulation in HRMS," Understanding PeopleSoft HRMS System Data Regulation

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "PeopleSoft Enterprise HRMS Application Fundamentals Preface," Common Elements Used in PeopleSoft HRMS

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Meet Regulatory Requirements, "(AUS) Meeting Regulatory Requirements for Australia"

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Meet Regulatory Requirements, "(FRA) Meeting Regulatory Requirements for France"

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage French Public Sector, "Updating Employee Records," Tracking Supporting Documents

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Meet Regulatory Requirements, "(GBR) Meeting Regulatory Requirements for the United Kingdom"

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Meet Regulatory Requirements, "(USA) Meeting Regulatory Requirements for the United States"

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

Enterprise PeopleTools PeopleBook: Global Technology

Creating Organizational Relationships and Maintaining Checklists

Access the Organizational Relationships page (Workforce Administration, Personal Information, Biographical, Add a Person, Organizational Relationships).

Organizational Relationships page

Choose Org Relationship to Add

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

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

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

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

When you select Employee, Contingent Worker, or a POI type with a job, the Empl Rcd Nbr field appears. The system determines the next employee record number available for this person, or you can enter your own number and the system will verify that the number you entered does not already exist for this person.

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

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

Add the Relationship

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

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

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

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

(FPS) French Public Sector

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

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

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

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

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage French Public Sector*, "Hiring French Public Sector Employees."

See Also

[Chapter 5, "Adding a Person in PeopleSoft Human Resources," Controlling Data Access for POIs Without Jobs, page 203](#)

[Chapter 6, "Increasing the Workforce," Adding Organizational Instances for Employees, Contingent Workers, and POIs, page 220](#)

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "(E&G) Administering Contract Pay"

Controlling Data Access for POIs Without Jobs

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

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Administering HRMS Security"

Understanding Security for POIs Without Jobs

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

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

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

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

Security Type	Security Key
Location	CCBC1
Business Unit	CFBBU
Institution	PSSTA

The following users have access to this person:

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

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

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

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

Adding and Maintaining POI Types

Access the Add a POI Relationship page (Workforce Administration, Personal Information, Organizational Relationships, Add a POI Relationship, Add a POI Relationship) or the Maintain a Person's POI Reltn page (Workforce Administration, Personal Information, Organizational Relationships, Maintain a Person's POI Reltn, Maintain a Person's POI Reltn).

Add a POI Relationship

Paul Acosta Person ID: AA0002

Person of Interest Type: Other

Security Data Find | View All First 1 of 1 Last

*Effective Date: 06/30/2009 Get Enabled Security Types

Data	Customize	Find	First	1 of 1	Last
*Security Access Type	Enabled	Value 1	Value 2		
	☐				

Person of Interest History Customize | Find | First 1 of 1 Last

	*Effective Date	*Status	Planned Exit	More Information
1	06/30/2009	A		

Add a POI Relationship page

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

Security Data

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

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

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

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

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

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

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Administering HRMS Security."

Person of Interest History

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

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

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Training*, "Defining Training Courses and Programs," Setting Up Instructors.

See *PeopleSoft Enterprise Learning Management PeopleBook*.

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

Chapter 6

Increasing the Workforce

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

- Add organizational instances for employees, contingent workers, and persons of interest (POIs).
- Add additional assignments.
- Hire job applicants.
- Increase the workforce through SmartHire templates.
- Review organizational relationships.
- (BRA) Run Brazil employment reports.
- (CAN) Run the Canadian Hire List report.
- (NLD) Run the First Day Notification.

Understanding Job Data

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

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

See [Chapter 5, "Adding a Person in PeopleSoft Human Resources," page 179](#).

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

Component	Menu	Use To
Template-Based Hire (HR_TBH_JOB)	- Workforce Administration, Template-Based Hire - Manager Self-Service, Job and Personal Information, Add Template-Based Hire	Add a new hire by picking a pre-configured template and completing a simple data entry page. Once the data is entered it can be saved directly to the database, submitted for processing or saved for later.
- Hire (HR_MANAGE_HIRES) (FPS) Hire (USF) Hire USF (ER_GVT_HIRE_LAUNCH)	Workforce Administration, Personal Information, Organizational Relationships, Manage Hires	Add a job applicant with information in the system, added through the Recruit Workforce business process. When you use these components to hire an applicant, the information that you've already entered in the system becomes part of the worker's record, including the referral source information. All other fields on these pages are documented in this chapter. Note. (USF) Federal users can find information on hiring job applicants in the Recruit Workforce business process. (FPS) French Public Sector users can find information on hiring job applicants in the Recruit Workforce business process.
Add Contingent Worker Instance (JOB_DATA_CWR)	- Workforce Administration, Job Information - Workforce Administration, Personal Information, Organizational Relationships	Add a contingent worker organizational instance.
Add POI Instance (JOB_DATA_POI)	- Workforce Administration, Job Information - Workforce Administration, Personal Information, Organizational Relationships	Add a POI organizational instance for a person who does not comprise the workforce but for whom you require a job record.
- Add Additional Assignment (ADD_PER_ORG_ASGN) (FPS) Add Concurrent Empl Record FPS (HIRE_DATA_BIS) (USF) Concurrent Hire USF (EE_CONC_HIRE)	Workforce Administration, Job Information Note. Access the Concurrent Job component from the Add Additional Assignment component (ADD_PER_ORG_ASGN).	Add an additional employment instance for an employee or contingent worker.

Component	Menu	Use To
Job Data (JOB_DATA).	Workforce Administration, Job Information	Update (including adding temporary assignments) the job record of an employee, contingent worker, or POI.

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

Note. Template-based hires does not use the actual job data pages in the template, however, it does use all the fields broken up into logical sections.

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

See *PeopleSoft Enterprise Talent Acquisition Manager 9.1 PeopleBook*, "Hiring Applicants."

See [Chapter 7, "\(USF\) Adding an Employment Instance," page 333.](#)

See [Chapter 10, "Managing Country-Specific Workforce Data," page 511.](#)

See [Chapter 15, "Updating Person and Job Information," page 695.](#)

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage French Public Sector*, "Hiring French Public Sector Employees."

Adding New Job Records through the PeopleSoft Services Procurement Integration

A new job record may also be created in the system if your organization uses the PeopleSoft Enterprise Services Procurement product within the PeopleSoft Enterprise Supply Chain Management (SCM) database. The PeopleSoft applications deliver integration points that enable you to use PeopleSoft Human Resources as your system of record for contingent workers who are brought in to fill PeopleSoft Services Procurement requisitions.

When a work order is submitted in Services Procurement, the Services Procurement application does the following:

1. If the Services Procurement service provider is a new candidate, Services Procurement sends a message to Human Resources requesting Human Resources to add this person with an organizational relationship of contingent worker, add a job assignment, and create a user profile.
2. If the Services Procurement candidate already exists in the Human Resources system, Services Procurement sends a message with this person's ID requesting Human Resources to create a new job assignment for this person.
3. When a Services Procurement work order is closed or cancelled, Services Procurement sends a termination message to Human Resources. Human Resources then terminates the associated job assignment.

Human Resources uses the Component Interface (CI) and internal services to add the person, job, and user profile. This integration is automated and requires manual intervention only if there is a problem. For example, let's say Human Resources has successfully added a person profile from a Services Procurement request but encountered errors when creating the job assignment, such as an incorrect job code or location code. Human Resources sends a message back to Services Procurement stating that the person was created but the job assignment and user profile were not created and lists the error details. A Services Procurement administrator will then access the error correction page, correct the data, and resubmit the request. Human Resources will process the updated information, create the job assignment and user profile, and send an acknowledgement back to Services Procurement.

Note. The *PeopleSoft Enterprise Services Procurement PeopleBook* provides the technical details of the integration between PeopleSoft Human Resources and PeopleSoft Services Procurement.

Additional integration enables you to use Services Procurement to search for contingent workers as an alternate source of filling job postings in PeopleSoft Enterprise Talent Acquisition Manager. When you use this integration, and a new Services Procurement candidate is sent to Talent Acquisition Manager for hiring, Talent Acquisition Manager initiates the hire process and sends all necessary Human Resources data to Services Procurement to add the contingent worker information. When the hire is successful, Talent Acquisition Manager sends a message to Services Procurement stating that the candidate was added. At this point, Services Procurement will send a message to Human Resources to add a user profile for this candidate in the Human Resources system. Human Resources will add the user profile and send an acknowledge message. Services Procurement continues to send messages directly to the Human Resources system when it is time to terminate the Services Procurement service provider.

See *PeopleSoft Enterprise Services Procurement PeopleBook*

See *PeopleSoft Enterprise Talent Acquisition Manager 9.1 PeopleBook*, "Managing Job Postings," Posting Jobs to PeopleSoft Services Procurement.

Understanding the Job Data Pages

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

- General employment information.
Includes business title and work phone. This information is optional, but useful for reporting purposes.
- Specific job data.
Includes the person's department, job code, company, supervisor, and compensation information.
- Earnings data.
This information is included if the person's compensation comes from more than one department or category. You specify how to distribute the person's earnings among the sponsoring groups.
- Benefits program.

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

Understanding Employment Information Data

Unlike the data on the Job Data pages, the information on the Employment Information page isn't effective-dated, so the data that you enter and review on this page tells you about the worker's current information for this employment record number.

This means that if you rehire a worker and enter a future effective date, the system deselects the Termination Date and Assignment End Date fields. To review information that is in other data rows, use the Job Data component.

This page tracks data at two different levels: organizational and assignment. The organizational instance is the occurrence of an employment, contingent worker, or POI relationship with an organization, initiated when you create the person's first job data record. The system uses an organizational instance record number to distinguish between organizational instances. The organizational instance number is the same as the Employment Record (ERN) of the original (controlling) job data record under that instance.

The assignment level is the actual job data record, or records, associated with the instance. Since people can have more than one job data record under an instance (for example, an additional job or a temporary assignment), tracking the dates of the assignments separately from the dates of the instance enables you to distinguish between when a person was hired (tracked at the instance level) and terminated and when they started and completed an assignment or job.

The system uses the dates of the original job data record under an instance (when there are more than one job data records under an instance, this job data record is the *controlling instance*) to determine the dates of the instance. All other assignments under the instance inherit the instance dates from the original assignment.

The system also uses the actions you use on a job data record to determine which dates to update. For example, when you use the action of *HIR* (hire), the system assumes that the new job data record represents a new instance for a new hire, with its own hire dates. However, if you use the action of *ADL* (additional job), the system assumes that the new job data record is in addition to an existing instance and will use the hire dates from the controlling instance.

This example illustrates how the system establishes and tracks the organizational record numbers, ERNs, instance dates, and assignment dates for someone with multiple organizational relationships and job data records:

Note. This example is intended to illustrate the record number fields and the system date fields, not every field on this page.

Bobby Singh joined company XYZ on February 2, 2002. At the end of 2006, company ABC bought company XYZ; it completed the takeover on January 1, 2007. When the HR administrator at company ABC first enters Bobby in the system, he creates a job data record with the action of *HIR* and an effective date of January 1, 2007, reflecting Bobby's hire date with the new company.

The fields on the Employment Data page have the following values:

Bobby Singh	EmplID: XYZ001	ERN: 0
Level	Field	Date
Organizational Instance	Organizational Instance Record	0

Bobby Singh	EmplID: XYZ001	ERN: 0
Level	Field	Date
	Original Start Date	February 2, 2002 The system entered the effective date of the job data record as a default value, but the HR administrator overrides it to enter Bobby's start date at company XYZ.
	Last Start Date	January 01, 2007
	First Start Date Note. This is the hire date used in all reports tracking hires.	January 01, 2007
	Termination Date	blank
	Org Instance Service Date	January 02, 2007 The system entered the effective date of the job data record as a default value, but the HR administrator overrides it to the date from which the company calculates service for acquired employees.
Organizational Assignment	Last Assignment Start Date	January 01, 2007
	First Assignment Start	January 01, 2007
	Assignment End Date	blank

From June 3, 2007 to September 10, 2007, Bobby has an additional assignment with the company. The HR administrator uses the action of *ADL* when creating the additional assignment so the system does not treat the new job data record as a separate instance with it's own hire date. The fields on the Employment Data page for the new assignment's job data record have the following values:

Bobby Singh	EmplID: XYZ001	ERN: 1
Level	Field	Date
Organizational Instance	Organizational Instance Record	0
	Original Start Date	February 2, 2002
	Last Start Date	January 01, 2007
	First Start Date	January 01, 2007
	Termination Date	blank

Bobby Singh	EmplID: XYZ001	ERN: 1
Level	Field	Date
	Org Instance Service Date	January 02, 2007
Organizational Assignment	Last Assignment Start Date	June 3, 2007
	First Assignment Start	June 3, 2007
	Assignment End Date	September 10, 2007

The organizational instance dates come from the original, controlling instance and cannot be changed on the Employment Data page for the non-controlling instance.

On September 15, 2007, Bobby takes on a new job with company ABC. The HR administrator creates a new employment instance and uses the action of *HIR* when creating the instance. The fields on the Employment Data page for the new job have the following values:

Bobby Singh	EmplID: XYZ001	ERN: 2
Level	Field	Date
Organizational Instance	Organizational Instance Record	2 Note. Notice that the organizational instance record number does not follow in sequence with Bobby's other instance, but that it matches the ERN of the job data record created under the new instance.
	Original Start Date	September 15, 2007
	Last Start Date	September 15, 2007
	First Start Date	September 15, 2007
	Termination Date	blank
	Org Instance Service Date	September 15, 2007
Organizational Assignment	Last Assignment Start Date	September 15, 2007
	First Assignment Start	September 15, 2007
	Assignment End Date	blank

This organizational instance is completely separate from the first organizational instance and Bobby is treated as a new hire, as reflected in his original start date and service date. A company with different business rules may choose to acknowledge his past service for this instance, but company ABC does not and, because the two instances are separate, it doesn't have to.

Bobby is offered an additional assignment with the second job starting on January 14, 2008 and so he tenders his resignation for his original job, effective January 15, 2008. The fields on the Employment Data page for the first organizational instance have the following values:

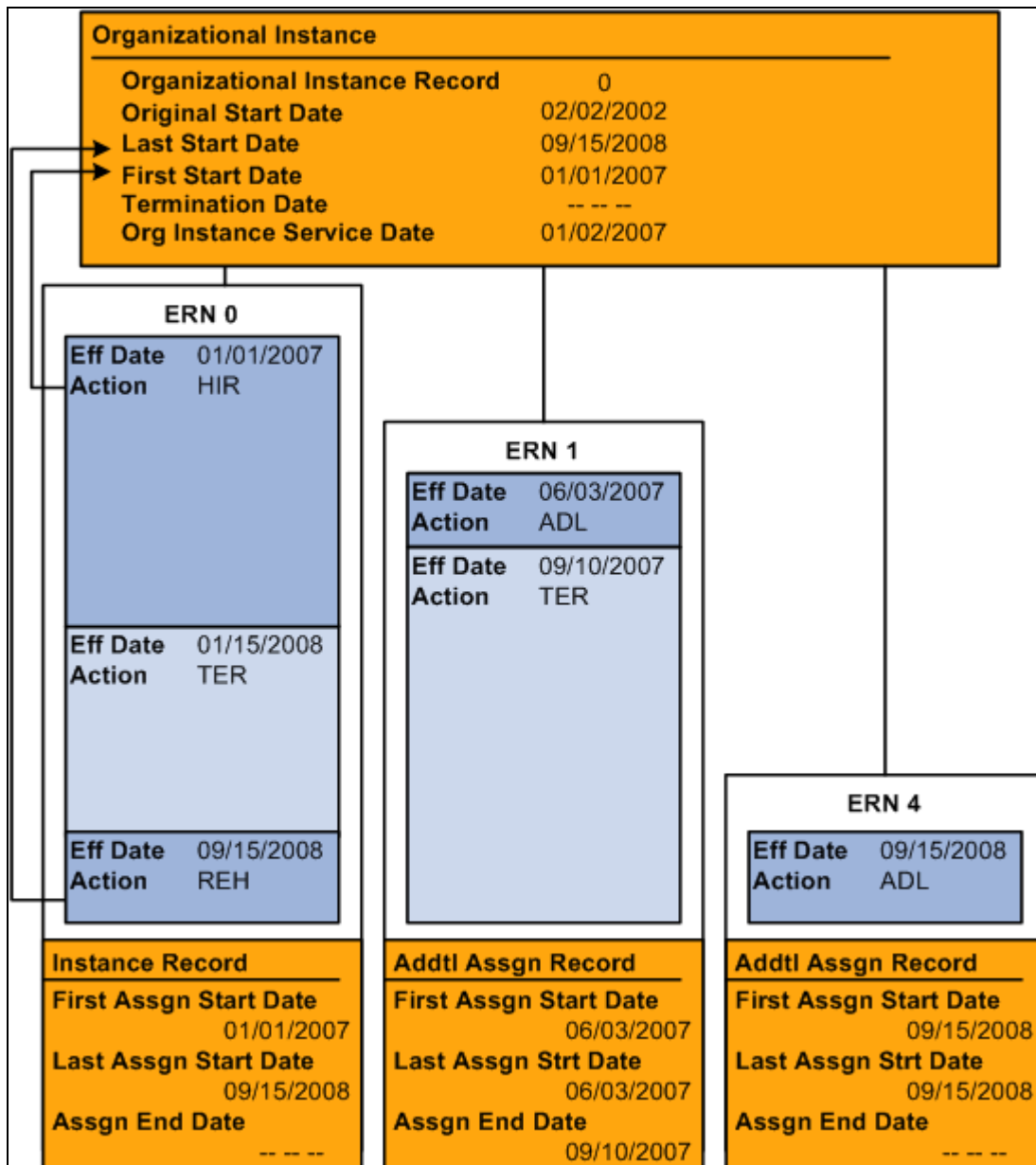
Bobby Singh	EmplID: XYZ001	ERN: 0
Level	Field	Date
Organizational Instance	Organizational Instance Record	0
	Original Start Date	February 2, 2002
	Last Start Date	January 1, 2007
	First Start Date	January 1, 2007
	Termination Date	January 15, 2008
	Org Instance Service Date	January 2, 2007
Organizational Assignment	Last Assignment Start Date	January 1, 2007
	First Assignment Start	January 1, 2007
	Assignment End Date	January 15, 2008

The fields on the Employment Data page for the new assignment under the second organizational instance have the following values:

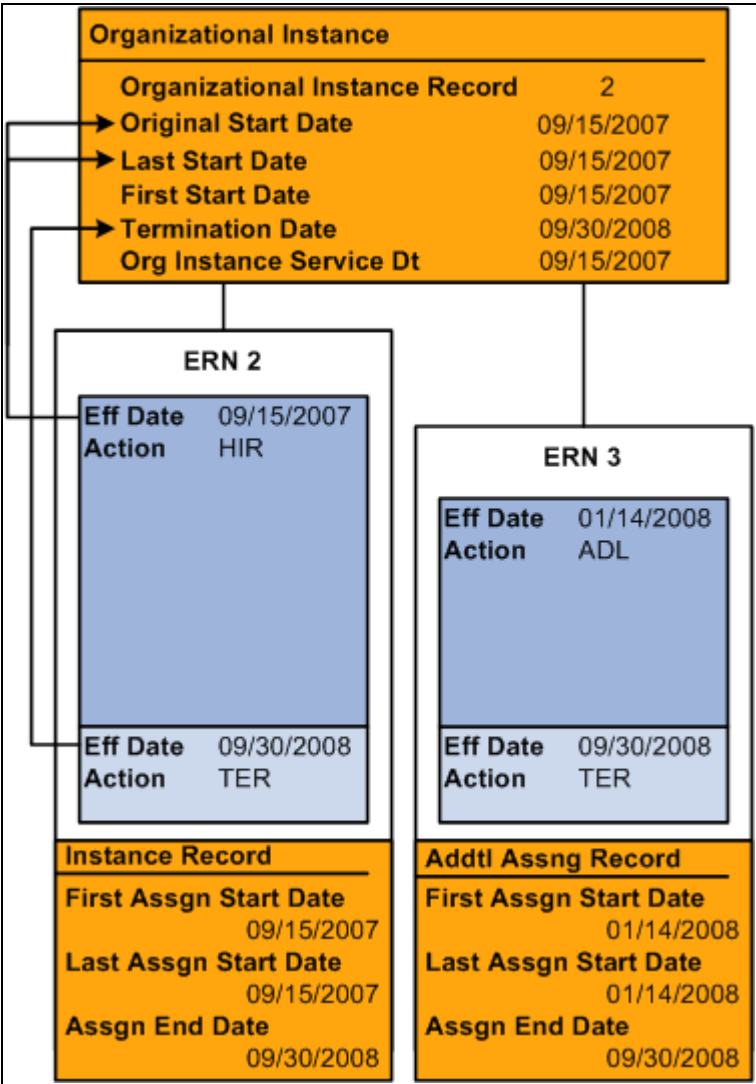
Bobby Singh	EmplID: XYZ001	ERN: 3
Level	Field	Date
Organizational Instance	Organizational Instance Record	2
	Original Start Date	September 15, 2007
	Last Start Date	September 15, 2007
	First Start Date	September 15, 2007
	Termination Date	blank
	Org Instance Service Date	September 15, 2007
Organizational Assignment	Last Assignment Start Date	January 14, 2008
	First Assignment Start	January 14, 2008
	Assignment End Date	blank

Finally, the division in which Bobby has worked the two jobs in his second organizational instance closes, terminating both the controlling instance and, by association, the assignment effective September 30, 2008 and Bobby is rehired into his original job with a new, additional job on the side, effective September 15, 2008.

The following graphics illustrates Bobby's organizational instances and assignments:



Bobby's organizational relationships and assignments for organizational record 0 (1 of 2)



Bobby's organizational relationships and assignments for organizational record 2 (2 of 2)

Notice that all of the instance dates come from the controlling assignment and that the termination date is refreshed when Bobby is rehired.

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

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

Page	Add Employment Instance Fields	Add Contingent Worker Instance Fields	Add POI Instance Fields
Work Location	The default value for the Action field is <i>Hire</i>	The default value for the Action field is Add Contingent Worker	The default value for the Action field is <i>Add Person of Interest</i>
Work Location	Payroll Status	Job Status	Job Status

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

Security Considerations for Users Managing Employees and Contingent Workers

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

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

Managing Job Data When You Use the Manage Positions Business Process

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

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

Adding Versus Updating Job Records

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

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

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

See [Chapter 15, "Updating Person and Job Information," page 695](#).

See [Chapter 17, "\(USF\) Administering Personnel Action Requests," page 811](#).

(JPN) Assigning Internal Identification Numbers

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

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

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

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

Example 1

In the Internal EmplID column of the following table, the first two numbers indicate the year (2004) that the person is hired as a full-time employee and the 2 in 20091 indicates part-time employment:

Effective Date	Action	Reason	ID	Internal EmplID	Notes
April 1, 2008	Pay rate change	Merit	45883	94010333	
April 1, 2004	Rehire	New position	45883	94010333	Rehired as full-time employee.
March 31, 2004	Termination		45883	20091	
April 1, 2000	Hire	Temporary assignment	45883	20091	Hired as contingent worker.

Example 2

In the Internal EmplID column of the following table, the first two numbers indicate the year (2000 and 2005) that the person is hired as an employee with the company and the next three numbers indicate the company (014 and 034) that the person is working for:

Effective Date	Action	Reason	ID	Internal EmplID	Notes
May 31, 2006	Transfer	Completion of intercompany transfer	64096	90014278	Transferred back to home company.
May 8, 2005	Transfer	Intercompany transfer	64096	95034278	Transferred to host company.

<i>Effective Date</i>	<i>Action</i>	<i>Reason</i>	<i>ID</i>	<i>Internal EmplID</i>	<i>Notes</i>
April 1, 2000	Hire	New graduates	64096	90014278	Hired as a full time employee.

Prerequisites

Before you add a new organizational instance:

- Set up the Administer Workforce control tables.

See [Chapter 2, "Setting Up the Administer Workforce Business Process," page 5.](#)

- Set up the Administer Workforce country-specific control tables.

See [Chapter 3, "Setting Up Country-Specific Tables," page 109.](#)

- Create personal data records for employees, contingent workers, and POIs.

See [Chapter 5, "Adding a Person in PeopleSoft Human Resources," page 179.](#)

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Working with Regulatory Regions"

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Administering HRMS Security"

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Installing PeopleSoft HRMS"

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Languages"

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up Organization Foundation Tables"

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up Personal Information Foundation Tables"

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up Jobs"

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "(USF) Setting Up Human Resources Management Tables"

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up Banks and Bank Branches"

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up Local Country Functionality"

Adding Organizational Instances for Employees, Contingent Workers, and POIs

This section lists common elements and discusses how to:

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

See [Chapter 6, "Increasing the Workforce," Adding Additional Assignments, page 287.](#)

Common Elements Used in this Section

Go To Row	Click icon to enter a date or row number in which you would like to view.
Benefits Program Participation	Click to Access the Benefit Program Participation page.
Cross Border Worker	Select if the person lives in one country and works in another. These people have special tax and social security needs.
Employment Data	Click to access the Employee Information page.
Earnings Distribution	Click to access the Job Earnings Distribution page.
FA Holiday Type (festive advance holiday type)	Select the festive advance holiday type.
Festive Advance Eligible From	Select the date on which the person becomes eligible for the selected festive advance pay program.

Festive Advance Pay Program	Select the festive advance pay program for the person.
Job Data	Click to access the Work Location, Job Information, Job Labor, Payroll, Salary Plan, and Job Data - Compensation pages.
Military Status	Select the person's current military status.
Owns 5% (Or More) of Company	Select if the person owns five percent or more of the company. The system uses this field to identify highly compensated employees for the Non-Discrimination Testing – 401(k)/401(m) report (NDT004) in the Manage Base Benefits business process of PeopleSoft Enterprise Human Resources.
Regulatory Region	Select the regulatory region.
Religion	Select the religion. You set up religion on the Religions page.
	Note. (AUS and NZL) Set this field to <i>Not Applicable</i> .
Security Clearance	If the person receives a security clearance, enter the level of clearance: <i>Classified, Secret, or Top Secret</i> .

See Also

[Chapter 7, "\(USF\) Adding an Employment Instance," page 333](#)

[Chapter 8, "Entering Additional Data in Human Resources Records," page 383](#)

[Chapter 15, "Updating Person and Job Information," page 695](#)

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

Note. One of the pages used to add employees, contingent workers and POIs is the Template-Based Hire page. It is discussed in detail in another section in this chapter.

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Job Information	JOB_DATA_JOBCODE	• Workforce Administration, Job Information, Add Employment Instance, Job Information • Workforce Administration, Personal Information, Organizational Relationships, New Employment Instance, Job Information • Workforce Administration, Job Information, Add Contingent Worker Instance, Job Information • Workforce Administration, Personal Information, Organizational Relationships, New Contingent Worker Instance, Job Information	Enter information about a person's job, including status, employee class, shift, or standard hours.

Page Name	Definition Name	Navigation	Usage
Job Labor	JOB_LABOR	• Workforce Administration, Job Information, Add Employment Instance, Job Labor • Workforce Administration, Personal Information, Organizational Relationships, New Employment Instance, Job Labor • Workforce Administration, Job Information, Add Contingent Worker Instance, Job Labor • Workforce Administration, Personal Information, Organizational Relationships, New Contingent Worker Instance, Job Labor	Enter National Labor agreement data if the employee or contingent worker belongs to a National Labor agreement.
Payroll	JOB_DATA2	• Workforce Administration, Job Information, Add Employment Instance, Payroll • Workforce Administration, Personal Information, Organizational Relationships, New Employment Instance, Payroll • Workforce Administration, Job Information, Add Contingent Worker Instance, Payroll • Workforce Administration, Personal Information, Organizational Relationships, New Contingent Worker Instance, Payroll	Enter payroll processing data. The payroll system and pay group information that you enter here affects component compensation processing on the Job Data - Compensation page.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Salary Plan	JOB_DATA_SALPLAN	• Workforce Administration, Job Information, Add Employment Instance, Salary Plan • Workforce Administration, Personal Information, Organizational Relationships, New Employment Instance, Salary Plan • Workforce Administration, Job Information, Add Contingent Worker Instance, Salary Plan • Workforce Administration, Personal Information, Organizational Relationships, New Contingent Worker Instance, Salary Plan	Enter information about a person's salary plan.
Compensation	JOB_DATA3	• Workforce Administration, Job Information, Add Employment Instance, Compensation • Workforce Administration, Personal Information, Organizational Relationships, New Employment Instance, Compensation • Workforce Administration, Job Information, Add Contingent Worker Instance, Compensation • Workforce Administration, Personal Information, Organizational Relationships, New Contingent Worker Instance, Compensation	Enter compensation information.

Page Name	Definition Name	Navigation	Usage
Contract Change Prorate Options	JOB_CNT_CHG_SEC	Click the Contract Change Prorate Option link on the Compensation page.	Choose how to handle contract pay when there is a change to the contract amount.
Employment Information	EMPLOYMENT_DTA1	- Click the Employment Data link at the bottom of the Add Employment Instance component. - Click the Employment Data link at the bottom of the New Employment Instance component. - Click the Employment Data link at the bottom of the Add Contingent Worker Instance component.	Enter optional data, such as a worker's business title.
Job Earnings Distribution	JOB_DATA_ERNDIST	- Click the Earnings Distribution link at the bottom of the Add Employment Instance component. - Click the Earnings Distribution link at the bottom of the New Employment Instance component. - Click the Earnings Distribution link at the bottom of the Add Contingent Worker Instance component. - Click the Earnings Distribution link at the bottom of the New Contingent Worker Instance component.	Distribute a person's compensation for one job among different departments, job codes, accounts, shifts, position numbers, or general ledger pay types. If the person's pay is regularly charged to more than one cost center, designate how much to allocate to each cost center.

Page Name	Definition Name	Navigation	Usage
Benefit Program Participation	JOB_DATA_BENPRG	- Click the Benefits Program Participation link at the bottom of the Add Employment Instance component. - Click the Benefits Program Participation link at the bottom of the New Employment Instance component. - Click the Benefits Program Participation link at the bottom of the Add Contingent Worker Instance component. - Click the Benefits Program Participation link at the bottom of the New Contingent Worker Instance component.	Specify the benefit program in which a person is enrolled for benefits in PeopleSoft Enterprise Human Resources or PeopleSoft Enterprise Benefits Administration.
Person Checklist	PERSON_CHECKLIST	Workforce Administration, Personal Information, Organizational Relationships, Person Checklist, Person Checklist	To ensure that the human resources administrators perform all the required administrative tasks for a person, create a checklist listing all the items that need to be completed and the person responsible for completing them.
Person Applicant Information	PERS_APPL_INFO	Workforce Administration, Personal Information, Organizational Relationships, Person Applicant Information, Person Applicant Information	Define applicant referral information.
Person Assignment Checklist	EMPLOYEE_CHECKLIST	Workforce Administration, Personal Information, Organizational Relationships, Person Assignment Checklist, Person Assignment Checklist	To ensure that the human resources administrators perform all the required administrative tasks for an employee, create a checklist listing all the items that need to be completed and the person responsible for completing them.

Entering Employee Job Location and Position Information

Access the Work Location page (Workforce Administration, Job Information, Add Employment Instance, Work Location).

Work LocationJob InformationJob LaborPayrollSalary PlanCompensation

John BaarEmployee

Empl ID: KCI002Empl Record: 1

Military Service:

Work Location

FindFirst1 of 1Last

*Effective Date:07/02/2009

Effective Sequence:0

HR Status:Active

Payroll Status:Active

*Action:Hire

Reason:

*Job Indicator:Secondary Job

Go To Row

Calculate Status and Dates

Current

Position Number:

Override Position Data

Position Entry Date:

☐ Position Management Record

*Regulatory Region:USAUnited States

*Company:

*Business Unit:GBIBUGlobal Business Institute BU

*Department:

Department Entry Date:

*Location:

Establishment ID:

Date Created:07/02/2009

Last Start Date:07/02/2009

Expected Job End Date:

Work Location page (1 of 2)

▼ Military Service Component:  Component Category: 			
▼  Spain SSN Employer: 			
▼  Japan			
Internal Employee ID			
Internal EmplID:			
Intercompany Transfer			
Transfer Flag: ▼			
Internal Company		External Company	
Company:		Company:	
Business Unit:		Department:	
Department:		Supervisor Level:	
Supervisor Level:			
Transfer Start Date:			
Transfer End Date:			
Job Data	Employment Data	Earnings Distribution	Benefits Program Participation

Work Location page (2 of 2)

Military Service	Select the military service in which the person is serving. Displays when the Military check box is selected on the Installation Table. This field is available if you are adding a new Job Data record, when you are not adding a new Job Data record this field is display only.
Effective Date	Enter the effective date. When you add a new instance with the action of <i>Hire</i>, the effective date that you enter here becomes the hire and original hire date.
Effective Sequence	Enter a number to track multiple administrative actions that occur on the same day. The default value is 0, the correct number for new instances.
ActionandReason	Select the action requiring you to create or modify this record. The system displays a default value when you create a new employment, contingent worker, or POI instance. Reason codes are associated with the action you select. Note. During data conversion into the PeopleSoft system for new customers, it may be appropriate to correct the default action value, such as <i>Hire</i>, to a value that reflects the person's current information, but changing the Action code for the first row of job data is not otherwise appropriate.
HR Status	Displays the status of the current job record. A person can have an active HR status but an inactive job or payroll status.

Payroll Status or Job Status	The page displays the Payroll Status text for employee employment instances. Displays the payroll status of the current job record. Some changes that you make to this field trigger Retro Pay or Final Check processing. A Retro Pay Request is triggered by any payroll status change with an effective date that's earlier than or equal to the latest pay end date of a check already paid to the employee. A Final Check Request is triggered by any payroll status change that's based on one of the action or reason codes that are defined in the Final Check Action/Reason table. The page displays the Job Status text for contingent worker or POI instances.
Job Indicator	Indicate whether this is the person's primary or secondary job for this organizational relationship. Select <i>Not Applicable</i> if those selections don't apply to this job. This field is used to process people with more than one organizational instance in a single organizational relationship.
Calculate Status and Dates	Click this button to calculate the person's HR, job, or payroll status and the employment dates so that you can review the changes before you save the component. The system displays this button when you make a change to the effective date or one of the status fields. You do not need to click this button to refresh the status and date fields. The system will refresh these fields when you save the component.
Maintain/View Notes	Click this icon to access the Job Data Notepad page.
Position Number	If you drive part or all of the system by position, select a position number. Define positions in the Add/Update Position Info component. When you leave the Position Number field, the system completes position-related fields in the Job Data component with default data from the Add/Update Position Info component, including job code, department, location, supervisor level, reports to, and full- or part-time status. The corresponding fields become unavailable for entry. PeopleSoft Enterprise Human Resources issues a warning message if you assign a person to a position that is already filled and if the new appointment exceeds the maximum headcount for that position. The system calculates the headcount and displays the appropriate indicator in the Open/Filled field in the Add/Update Position Info component when you change assignments.
Position Entry Date	When you enter a position number for this person, the system populates this field with the effective date and this field becomes unavailable for entry. You can override the default by clicking the Override Position Data button.

Override Position Data and Use Position Data

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

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

Position Management Record

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

Regulatory Region

If you have specified a regulatory region for the position you associated with this person, the system enters a default regulatory region and this field becomes unavailable for entry, unless you click the Override Position Data button.

If you have not assigned the person to a position, then the system populates the field by default with the regulatory region for the person, based on your user preferences entered in the Org Defaults by Permission Lst component. You can override the default.

Company

If you have specified a company for the position you associated with this person, the system enters a default company and this field becomes unavailable for entry, unless you click the Override Position Data button.

If you have not assigned the person to a position and you assigned a company to a department in the Department table, a default company code appears, and this field becomes unavailable for entry. If you did not designate a company on the Department table, select a company here.

PeopleSoft Payroll for North America requires employees and supported types of persons of interest to be associated with companies that have the correct tax report type, as configured on the Company Table - Tax Details page:

- Employees must be associated with companies with tax report type W-2 or W-2PR (W-2 Puerto Rico).
- *Other Payee* and *Pension Payee* persons of interest must be associated with companies with tax report type 1099R.
- *Student Refund* persons of interest must be associated with companies with tax report type Non-Employees or None.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up Organization Foundation Tables," (USA) Entering FICA and Tax Information.

Business Unit

If you have specified a business unit for the position you associated with this person, the system enters a default business unit and this field becomes unavailable for entry, unless you click the Override Position Data button.

If you have not assigned the person to a position, then the system populates the field by default with the business unit for the person, based on your user preferences. You can override the default.

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

Department

If you have specified a department for the position you associated with this person, the system enters a default department and this field becomes unavailable for entry, unless you click the Override Position Data button.

If you have not assigned the person to a position, select the department code for this person. When you leave the field, the system inserts a default supervisor or reports to ID on the Job Information page if you entered a default supervisor or reports to ID for this department in the Department table.

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

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up Organization Foundation Tables," Setting Up Holiday Schedules.

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

Department Entry Date

If you have specified a department for the position you associated with this person, the system enters a default department entry date and this field becomes unavailable for entry, unless you click the Override Position Data button.

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

Location

If you have specified a location for the position you associated with this person, the system enters a default location and this field becomes unavailable for entry, unless you click the Override Position Data button.

If you have not assigned the person to a position and you assigned a location to a department in the Department table, the system displays the department location, if the default location setID that you define in the Department table matches the control location setID that is defined for that business unit in the TableSet Control - Record Group table. You can change the location code.

If you did not designate a location on the Department table, select a location here.

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

Establishment ID

Select the person's establishment.

Establishments are used for several countries for local regulatory reporting. These reports require that each person be assigned to a single establishment.

Establishments in regulatory regions other than USA have a one to one relationship with locations.

Note. (USA) In the USA regulatory region, there is a many to many relationship between locations and establishments. USA regulatory reports require that you associate an establishment ID with a person at the job level.

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

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

Date Created

Displays the date on which you enter this record.

Last Start Date

Enter the most recent start date for this organizational instance.

Expected Job End Date and Expected Return Date

Enter the end date or return date for this job, if known. If you don't know the date initially, you can enter it later.

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

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

End Job Automatically	Select to end the job on the specified date. This stops all related processing for payroll and benefits for this job. You must run the Reactivate/Termination Update process if the organization uses this feature. You can use this feature only if the Automatic Job Termination check box is selected on the Installation Table - Product Specific page.
Termination Date, Last Date Worked, and Override Last Date Worked	The system displays the day before the termination effective date as the termination date and the date last worked. These fields display when you have indicated an action that will inactivate or suspend a job. If you rehire the person, the system deselects these fields. When a person returns from leave, the system deselects only the Last Date Worked field. If the date is not accurate, select Override Last Date Worked to enter the date.

Military

The Military section is available when military is enabled on the Installation Table. Valid values for the service component and component category of the person depend upon the military service you enter at the top of the Work Location page.

Service Component	Indicate the employee's service type for their military service, such as regular, activity reserve, and so forth.
Component Category	Enter a service component category to further define for the service component for this person.

(ESP) Spain

SSN Employer (social security number for employer)	Enter the company SSN, as assigned by the Spanish government, that applies to this person.

(JPN) Japan

Internal EmplID (internal employee ID)	Enter the person's internal ID. You can store an internal emplID if the company uses meaningful employee IDs, and those IDs themselves need to change with certain employee data changes such as employment type changes. Internal EmplIDs also appear on the JPN Job Summary page, and you can search the system by internal EmplID. See Chapter 5, "Adding a Person in PeopleSoft Human Resources," <u>Understanding Identification Assignment</u>, page 179.

(JPN) Intercompany Transfer

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

Intercompany Transfer Flag	Specify whether the data that you enter on the page is home or host company information. The system uses this value in conjunction with intercompany transfer-related action or action reason codes to check the validity of the entries. Values are: • <i>Home Company Information:</i> Select if another company's worker joins the company in an intercompany transfer. • <i>Host Company Information:</i> Select if one of the workers is on intercompany transfer to another company. Select the blank value at the top of the list to remove all entries.
Company	Select the home or host company. The home or host company ID is a prompt value from the Company component (for internal company transfers) and the IC Trans External Company/Dept page (for external company transfers).
Business Unit	Select the home or host business unit for internal company transfers only. Your entry in this field controls the Department and Supervisor Level field values in the Internal Company group box due to setID functionality for business units.
Department	Select the home or host department. The home or host department ID is a prompt value from the Departments component (for internal company transfers) and the IC Trans External Company/Dept page (for external company transfers).
Supervisor Level (external supervisor level)	Select the home or host supervisor level. This value is a prompt value from the Supervisor Lvl Table component (for internal company transfers) and the IC Trans External Superv Lvl page (for external company transfers).
Transfer Start Date	If you enter host data, enter the start date of this intercompany transfer. Don't enter a date if the action is <i>RET</i> (retirement) and the reason is <i>PIT</i> (permanent intercompany transfer).
Transfer End Date	If you enter host data, enter the expected end date of this intercompany transfer. Don't enter a date if the action is <i>RET</i> and the reason is <i>PIT</i>. The end date must be equal to or later than the effective date of the worker's current job record.

See Also

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "Setting Up the Payroll Process," Defining the Final Check Process

Chapter 12, "(JPN) Tracking Additional Appointments (Kenmu)," page 633

Chapter 13, "(JPN) Tracking Intercompany Transfers (Shukkou)," page 649

Chapter 15, "Updating Person and Job Information," Running Job Data Reports, page 762

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Working with System Data Regulation in HRMS"

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Working with Regulatory Regions"

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up Organization Foundation Tables," Entering Company Information

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "Processing Retro Pay"

Entering Job Information

Access the Job Information page (Workforce Administration, Job Information, Add Employment Instance, Job Information).

Work Location

Job Information

Job Labor

Payroll

Salary Plan

Compensation

John Baar

Employee

Empl ID: KCI002

Empl Record: 1

Military Service:

Job Information

Find First 1 of 1 Last

Go To Row

Effective Date:

07/02/2009

Effective Sequence:

0

Action:

Hire

HR Status:

Active

Reason:

Payroll Status:

Active

Job Indicator:

Secondary Job

Current

*Job Code:

Entry Date:

Supervisor Level:

Supervisor ID:

Reports To:

*Regular/Temporary:

Regular

*Full/Part:

Full-Time

Empl Class:

*Officer Code:

None

*Regular Shift:

N/A

Shift Rate:

Shift Factor:

Standard Hours

Standard Hours:

40.00

Work Period:

W Weekly

FTE:

0.000000

As of Date:

07/02/2009

Combined Standard Hours:

40.00

FTE:

1.000000

Contract Number

Contract Number:

Next Contract Number

Contract Type:

Job Information page (1 of 4)

▼ Military

Job Family:

Function:

Subfunction:

▼  Australia

Salary Packaging

☒ Salary Packaged

Payroll Tax State:

Higher Education

Work Sector:

Job Function:

Annual Contact Hours:

Type of Work Performed:

Type of Appointment:

Appointment Duration:

Teaching Weeks:

Job Classification:

▼  Belgium

☐ Cross Border Worker

▼  Brazil

*Contract Salary Type:

Monthly

*SEFIP Category:

Employee

Occupation Code:

Membership Union:

▼  Germany

Function Code:

☐ Cross Border Worker

Job Information page (2 of 4)

Spain

Industry Activity (CNAE): -

Occupation Code:

Matricula Number: [Next Matricula Number](#)

France

Hours Type:

Paid Hours:

Paid Work Period:

Paid FTE:

☐ Cross Border Worker

Italy

Hiring Category:

Type of Part-Time:

Percentage: End Date:

Equal Opportunities

Turnover Action: Turnover Reason:

Productive Unit:

Job Information page (3 of 4)

Malaysia

Work Day Hours:

Mexico

Worker Type: IMSS Location Code:

Week/Reduced Schedule: IMSS Termination Date:

Salary Type:

Netherlands

Workdays / week:

USA

*FLSA Status: Work Day Hours:

*EEO Class:

[Job Data](#)
[Employment Data](#)
[Earnings Distribution](#)
[Benefits Program Participation](#)

Job Information page (4 of 4)

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

Job Code

If you have specified a job code for the position you associated with this person, the system enters a default job code and this field becomes unavailable for entry, unless you click the Override Position Data button on the Work Location page.

If you haven't assigned the person to a position, select the job code for this person.

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

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

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Labor Administration*, "Setting Up Labor Administration Data," Assigning Job Codes to Labor Agreements.

Entry Date

When you leave the Job Code field, the system displays the date on which the person is first assigned to this job code. If you are using position management, this field is unavailable for entry, unless you click the Override Position Data button on the Work Location page.

Supervisor Level

Supervisor levels are a class of position that represent levels of some managerial or supervisory significance and can be used as another type of employee identifier.

If you have specified a supervisor level for the position you associated with this person, the system enters a default supervisor level and this field becomes unavailable for entry, unless you click the Override Position Data button.

If you did not assigned the person to a position, select the supervisor level code for this person, if applicable.

See Chapter 2, "Setting Up the Administer Workforce Business Process," Defining Additional Employment Setup Data, page 70.

Supervisor ID

If you use position management, don't use this field. Use the Reports To field to identify the position number to which this person reports. This field is unavailable for entry, unless you click the Override Position Data button.

If you have not assigned the person to a position and you assigned a manager ID to a department in the Department table, a default supervisor ID appears.

If you did not designate a manager ID on the Department table, enter a supervisor ID here, if applicable.

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

Reports To

Displays the position number, title, and name of the manager associated with this position.

If you have specified a reports to number for the position you associated with this person, the system enters the default value and this field is unavailable for entry, unless you click the Override Position Data button.

If you have not assigned the person to a position and you assigned a reports to ID to a department in the Department table, a default reports to ID appears.

If you did not designate a reports to ID on the Department table, enter a reports to ID here, if applicable.

Regular/Temporary

Defaults from the position number you associated with this person, and this field is unavailable for entry, unless you click the Override Position Data button.

If you have not assigned the person to a position, the system displays the default value from the Job Code Table. You can override this value.

Full/Part

Defaults from the position number you associated with this person, and this field is unavailable for entry, unless you click the Override Position Data button.

If you have not assigned the person to a position, indicate whether the worker is full-time or part-time.

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

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

Empl Class (employee class)

Select an employee class, which provides another method of grouping workers. Examples may include *Assignee*, *Expatriate*, or *Intern*. Employee classes are included in the Employee Class table. To override, access this page in correction mode.

The list of values depends on the regulatory region that is specified on the Work Location page and the setID values entered in the Employee Class component.

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

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

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Meet Regulatory Requirements*, "(GBR) Meeting Regulatory Requirements for the United Kingdom."

Officer Code	Identify highly compensated workers for the Non-Discrimination Testing - 401(k)/401(m) report (NDT004). The default value is <i>None</i> .
Regular Shift	Defaults from the position number you associated with this person, and this field is unavailable for entry, unless you click the Override Position Data button. If the worker is working shifts, select the appropriate shift. If the worker doesn't work shifts, leave the Shift Rate and Factor fields blank. The default value is <i>N/A</i> (not applicable).
Shift Rate and Shift Factor	If you selected the Specified at Employee level option on the Shift table, enter the shift differential for this worker and job. Enter the shift differential as a rate (flat amount), a factor (percentage), or both. Use the first field to enter a flat amount and the second field to enter a percentage. Note. To apply the same shift differential to a group of workers who work the same shift, enter shift information in the Shift table in Payroll for North America. If you specify the differential on the Shift table, the system does not use shift rate information from Job data. See <i>PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook</i>, "Setting Up the Payroll Process."
Classified Ind (classified indicator)	Associate the position with an FTE Classification (full time equivalents classification) that you established on the Department Budget FTE page. This field is visible only for departments that have been set up to use commitment accounting. Departments are configured to use commitment accounting on the Comm. Acctg and EG page in the Department component.
Duties Type	For jobs where the action or reason is temporary assignment, select the type of duties for the temporary assignment from the Temporary Duties Type table. You can use this feature only if the Automatic Job Suspension check box is selected on the Installation Table - Product Specific page.
Encumbrance Override	Select to override encumbrance processing at the job level when you create a new organizational instance or add a concurrent job for a worker date if the department uses Commitment Accounting.

Standard Hours

The standard hours fields defaults from the position number you associated with this person, and these fields are unavailable for entry, unless you click the Override Position Data button. If you have not assigned the person to a position or click the Override Position Data and change the job code, then the system populates the fields by default from the job code. You can override the defaults.

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

Work Period

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

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

FTE (full-time equivalency)

Displays the percentage of full-time work that the worker should normally work in this job. The system calculates this value based on the standard hours entry for this job and the standard work period. However, you can override the system-calculated FTE and enter any value. The system issues a warning if you enter a value that is greater than 1.0.

Combined Std Hours/FTE (combined standard hours/full-time equivalent)

Displays the total standard hours that are assigned to the worker for all active jobs combined and the worker's total FTE status for all active jobs combined.

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

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

Contract Number**Contract Number or Next Contract Number**

Select the worker's contract number or click the Next Contract Number to associate a contract with a person, if applicable.

Note. Existing contracts that have a value in the End Date field (the system displays this field on the prompt page) are not valid selections. The system populates the contract end date when the contract is terminated. If you know when the contract will end, enter the date in the Contract Expected End Date on the Contract Status/Content page.

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

Contract Type

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

See [Chapter 8, "Entering Additional Data in Human Resources Records," Tracking Workforce Contracts, page 387.](#)

Military

The Military check box must be selected on the Installation Table to view this section.

Information in this military section enables you to define an occupational group at the service member level to quickly identify which service members actually have specialty areas, such as a physician that is an orthopedic surgeon. Additionally, Australia Defense also uses job families, functions and subfunctions to derive pay for the service member. In Canada, a member with a particular specialty, for example, a light-wing pilot, may be paid an additional allowance. These values do not come from the job code.

Job Family	Select a job family to categorize the job for this service member.
Function	Select the code that best categorizes the job for this person by function, such as administrative, legal, or management. If you change the job family after entering the function, this field will be deselected.
Subfunction	Enter a subfunction to further categorize the job function. If you change the job family for function after entering the subfunction, this field will be deselected.

(AUS) Australia - Salary Packaging

Salary Packaged	Select to transfer the worker's salary packaging information into the job data component.
Payroll Tax State	Enter the code for the state in which the worker is paid and for which the organization pays the payroll tax.

(AUS) Australia - Higher Education

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

Annual Contact Hours	Enter the calculated annual contact hours for this worker.
Type of Appointment and Appointment Duration	Select the type of appointment. If you select <i>Limited</i> , enter an appointment duration.
Teaching Weeks	Enter the number of teaching weeks for this worker.
Job Classification	Select the DETYA job classification.

(BEL) Belgium

Cross Border Worker	Select if the person lives in one country and works in another. These people have special tax and social security needs.

(BRA) Brazil

Contract Salary Type	Enter the contractual salary code for RAIS.
SEFIP Category	Select the worker category for SEFIP.
Occupation Code	Enter an occupation code based on the Brazilian Code of Occupation (CBO). Leave this field blank if the CBO that is associated with the position code is valid.
Note. Go to www.mte.gov.br to view a list of CBOs.	
Membership Union	Enter the union code that details how to calculate and pay the worker's monthly union dues.

(DEU) Germany

Function Code	Select the appropriate code for the worker.
Cross Border Worker	Select if the person lives in one country and works in another. These people have special tax and social security needs.

(ESP) Spain

Industrial Activity	Displays the social security number (SSN) employer assigned to the employee. This industrial activity code defines the percent to calculate contributions for work-related accidents and occupational disease
Occupation Code	Assign a specific occupational code from the list provided by Social Security if the industry activity done by the employee doesn't match the general activity defined for the social security number he is assigned to. This occupational code determines the percent to calculate contributions for work-related accidents and occupational disease.
Note. This information replaces the social security risk code.	
Matricula Number and Next Matricula Number	Enter or click the button to enter a matricula number. The Spanish government requires every worker to have a matricula number. Employers use this number to compile a matricula book that reports workplace statistics to the government. You maintain matricula numbers in the Location table.

(FRA) France**Hours Type**

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

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

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

Paid Hours

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

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

- A: Annual
- B: Biweekly
- C: Contract
- D: Daily
- F: Every four weeks
- M: Monthly
- Q: Quarterly
- S: Semimonthly
- W: Weekly

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

(ITA) Italy

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

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

Percentage Define the percentage of part-time.

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

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

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

(MYS) Malaysia

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

(MEX) Mexico

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

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

Worker Type	Define the person's worker type. Values are: <i>Construction Eventual</i> , <i>Eventual Worker</i> , and <i>Permanent Worker</i> . This field is used for reporting the type of worker to the SUA.
IMSS Location Code	Specify the location code. This field is used to indicate the location of the worker to the SUA.
Week/Reduction Schedule (reduced weekly schedule)	Specify the reduced work schedule for the worker. Values are: <i>1 Day per Week</i> , <i>2 Days per Week</i> , <i>3 Days per Week</i> , <i>4 Days per Week</i> , <i>5 Days per Week</i> , <i>Complete Week</i> , and <i>Workday Less than 8 Hours</i> .
IMSS Termination Date	Enter the IMSS termination date.
Salary Type	Select the salary type that the worker receives. Values are: <i>All Salaries</i> , <i>Fixed Salary</i> , <i>Mixed Salary</i> , and <i>Variable Salary</i> . This field is used for reporting to the IMSS.

(NLD) Netherlands

Workdays / week	Enter the average number of working days per week. The default value is 5, reflecting a full-time job. Enter 0 for standby workers who are only working on demand. You receive a warning if the number of working days is inconsistent with the full- or part-time parameter.
Note. From January 1, 2006, PeopleSoft Enterprise Global Payroll for the Netherlands no longer uses this field to calculate social security premiums for part-time workers. For further information refer to the <i>PeopleSoft Enterprise Global Payroll for the Netherlands PeopleBook</i> .	

See *PeopleSoft Enterprise Global Payroll for the Netherlands 9.1 PeopleBook*, "Tracking and Reporting Employee Social Security Contributions," Understanding Social Security Contributions.

(GBR) UK

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

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

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

(USA) United States of America

FLSA Status (Fair Labor Standards Act status) FLSA status indicates whether this job is exempt or nonexempt according to the Fair Labor Standards Act. FLSA status also helps determine benefits eligibility in PeopleSoft Enterprise Benefits Administration.

The FLSA status defaults from the position number you associated with this person, and this field is unavailable for entry, unless you click the Override Position Data button.

If you have not assigned the person to a position or you click the Override Position Data button and change the job code, then the system populates the fields by default from the job code. You can override the defaults

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

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

See Also

PeopleSoft Enterprise Global Payroll PeopleBook

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Frequencies"

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up Jobs," Defining Job Subfunction and Job Function Codes

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Benefits, "Setting Up Base Benefits Core Tables"

Entering National Labor Agreement Data

Access the Job Labor page (Workforce Administration, Job Information, Add Employment Instance, Job Labor).

Work LocationJob InformationJob LaborPayrollSalary PlanCompensation

John BaarEmployee

Empl ID: KCI002Empl Record: 1

Military Service:

Labor Information

FindFirst1 of 1Last

Go To Row

Effective Date: 07/02/2009

Effective Sequence: 0

HR Status: Active

Payroll Status: Active

Action: Hire

Reason:

Job Indicator: Secondary Job

Current

Bargaining Unit:

Labor Agreement:

Labor Agreement Entry Dt:

Employee Category:

Employee Subcategory:

Employee Subcategory 2:

☐ Position Management Record

Union Code:

Union Seniority Date:

Works Council ID:

Labor Facility ID:

Entry Date:

☐ Stop Wage Progression

☐ Pay Union Fee

☐ Exempt from Layoff

Reason:

Assigned Seniority Dates

CustomizeFindView AllFirst1 of 1Last

Seniority Date	Control Value	*Labor Seniority Date	Override	Override Reason
			☐	

Recalculate Seniority Dates

Job Labor page (1 of 3)

Germany	
Tariff:	
Tariff Area:	
Performance Group:	
Labor Type:	
Spain	
Union Membership/Representativ	
Union Date:	
Works Council Function:	
Intercenter Works Council Function:	
☐ Pay Union Fee	Union Fee Amount: USD
Fee Start Date:	Fee End Date:
☐ Exempted	Hours/Month:
France	
Labor Agreement:	
Employee Category:	Rate:

Job Labor page (2 of 3)

Italy	
Union Date:	
Union Position:	
Participation:	
India	
Union Membership Details	
*Membership Status:	
Member Category:	Position Held:
Comment:	
Job Data Employment Data Earnings Distribution Benefits Program Participation	

Job Labor page (3 of 3)

- Bargaining Unit** Select a code representing the bargaining unit to which the employee belongs.
- Labor Agreement** Specify which labor agreement applies to this worker.
- Labor Agreement Entry Dt** (labor agreement entry date) If this worker is part of a national labor agreement, enter the date on which the worker enters the category or subcategory. Also, use this date to track the worker's seniority within the category.
- Employee Category** Specify the worker category to which the worker belongs under the labor agreement.

Employee Subcategory	Select the subcategory that applies to the worker. If the employee category that you select for this person contains subcategories, this field appears. Note. (FRA) This field is unavailable when France is selected as the regulatory region on the Work Location page. Subcategories for France are defined on the Labor Agreement Categories page.
Employee Subcategory 2	Select the secondary subcategory that applies to this worker. If the subcategory that you select for this person contains secondary subcategories, this field appears. Note. (FRA) This field is unavailable when France is selected as the regulatory region on the Work Location page. Subcategories for France are defined on the Labor Agreement Categories page.
Position Management Record	The system selects this check box whenever the system inserts this data by updating the incumbent to reflect user-made changes to the Position Management component.
Union Code	This field defaults from the position number you associated with a person, and is unavailable for entry, unless you click the Override Position Data button. If the worker belongs to a union, enter the code.
Union Seniority Date	Enter the date on which the worker enters the union.
Works Council ID	Select the ID of the Works Council representing this employee.
Labor Facility ID	Select the facility this worker belongs to.
Entry Date	Enter the date the worker began in the labor facility.
Stop Wage Progression	If the selected job code is associated with a wage progression salary plan, select to stop wage progression for this worker. The system will not accumulate hours towards a wage progression step for this worker. To resume wage progression, insert a new Job Data row and deselect this check box.
Pay Union Fee	Select if a union fee should be paid. The organization can define whether the worker or the employer should pay the fee. This field doesn't affect system processing.
Exempt From Layoff and Reason	Select if the worker is exempt from layoff and select a reason for the layoff exemption.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Labor Administration*, "Setting Up Labor Administration Data."

Assigned Seniority Dates

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

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

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

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

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Labor Administration*, "Setting Up Labor Administration Data," Defining Seniority Dates.

(DEU) Germany

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

Tariff	Displays the tariff, which is a labor contract between the union and the employers' association. The default comes from the worker's location listed in the Location table. You can override this default.
Tariff Area	Displays the tariff area, which is usually associated with geographical regions in Germany. The tariff area comes from the worker's location that is listed in the Location table. You can override this default.
Performance Group	Select a performance group, such as blue collar or white collar.
Labor Type	Specify if a worker is management or nonmanagement. Depending on where this worker belongs, different sets of human resources laws and rules apply. One rule concerns which internal labor committee monitors personnel actions.
Spokesmen Committee ID	If you identify a worker as management in the Labor Type field, then the Spokesmen Committee is responsible for the worker, and this field appears. The Spokesmen Committee ID for this worker comes from the worker's location in the Location table.

(ESP) Spain

Union Date	Enter the date on which the worker joins the union.
Works Council Function	If the worker is a member of the works council for the organization, select which role. Values are: <i>Member</i> , <i>President</i> , and <i>Secretary</i> .
Intercenter Works Council Function	Select the role that the worker has in the union group (<i>comite intercentros</i>). Values are: <i>Member 1</i> , <i>Member 2</i> , and <i>Member 3</i> .
Pay Union Fee and Union Fee Amount	Select if the worker pays a fee to the union and enter the amount of the fee.
Fee Start Date and Fee End Date (fee end date)	Enter the first and last dates on which the union fee should be paid.

Exempted	Select if this worker is exempt from a certain amount of work duty to handle works council duties.
Hours/Month	Enter the number of hours each month that the worker is exempted from regular work to handle works council business.

(FRA) France

Rate	Enter the minimum salary calculation rate for this category. The rate is a three-digit number that is used in certain collective agreements to calculate the minimum salary for the subcategories, as defined on the Labor Agreement Categories page for the category. A subcategory can be associated with several possible rates, but only one rate is associated with the worker.

(ITA) Italy

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

Union Date	Enter the date on which the worker joins the union.
Union Position	Select the position that the worker holds in the union, if applicable.
Participation	Indicate the worker's level of participation in the union.

(IND) India

Membership Status	Select whether the worker's union membership status is active or inactive.
Member Category	Enter the member category. For example, <i>Staff</i> , <i>Officer</i> , or <i>Workman Category</i> .
Position Held	Enter the position that the worker holds. Some of the members of the union may hold office in the union as president, vice president, treasurer, or secretary; you enter this information here.

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

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

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Positions, "Managing Position Data"

Entering Payroll Processing Data

Access the Payroll page (Workforce Administration, Job Information, Add Employment Instance, Payroll).

The screenshot shows the 'Payroll' tab selected in the top navigation bar. The employee 'John Baar' is selected, with 'Empl ID: KCI002' and 'Empl Record: 1'. The 'Military Service' field is a dropdown menu. The 'Payroll Information' section contains the following data: Effective Date: 07/02/2009, Effective Sequence: 0, HR Status: Active, Payroll Status: Active, Action: Hire, Reason: (blank), Job Indicator: Secondary Job. A 'Go To Row' button is present. Below this, the '*Payroll System' is set to 'Payroll for North America' and the 'Absence System' is set to 'Other'. The 'Payroll for North America' section includes fields for Pay Group, Employee Type, Tax Location Code, GL Pay Type, Combination Code, Holiday Schedule, *Tipped, and FICA Status. At the bottom, there are links for 'Job Data', 'Employment Data', 'Earnings Distribution', and 'Benefits Program Participation'.

Payroll page

Payroll System

Select the payroll system that is used to process this person's paycheck. The Payroll System field is available for entry only if the Action that was entered on the Work Location page is *Change of Pay System* or a hire-related action such as *Hire*, *Rehire*, or *Additional Job*.

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

Absence System

Select the absence system that is used to process this person's absences.

Payroll for North America

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

Pay Group	Select a pay group. Available values are the valid pay groups for the country selected on the Company table (not the regulatory region selected in the worker's job data).
Employee Type	Displays the employee type; the value depends on the pay group. The system completes the field with the default value from the Pay Group table. If an employee type doesn't exist for this pay group, establish one in the Pay Group table.
Holiday Schedule	If you defined a default holiday schedule for the employee's location, the system displays it here. If you left the holiday schedule blank on the Location Profile page and entered a default on the Pay Group table, the system displays it here.
Tax Location Code	Select a tax location code. Available values are the valid tax locations for the country selected on the Company table (not the regulatory region selected in the worker's job data). Warning! Do not change a person's tax location code more than once for the same effective date (using effective sequence). The system creates tax records according to the first tax location change only. Tax records for the second tax location change on the same date are not created; instead, the system issues an error message.
Tipped	Indicate whether this worker receives tips. This field is available only if you define tips processing in the Company table. Values are: <i>Directly:</i> Select for workers who normally receive tips directly from customers (for example, food servers). <i>Indirectly:</i> Select for workers who do not normally receive tips directly from customers, but who might receive tips occasionally (for example, cooks and kitchen helpers). <i>Not Tipped:</i> Select for workers who are not tipped.
GL Pay Type (general ledger pay type)	Organizations can use this field for customized general ledger interfaces. Payroll for North America does not use this field.
FICA Status	Indicate whether the person status is <i>exempt</i> , <i>subject</i> , or <i>Medicare only</i> .
Combination Code	(Optional) Select the appropriate labor distribution to which to post the hours and earnings for this person. Enter the general ledger combination code in the employee's job data only on an exception basis. If you do not want the employee's earnings charged to the default combination code that is mapped to the earnings code and department, you can enter a different combination code here. For example, you might want to temporarily charge the employee's earnings to a different department. Use Correct History mode to enter or remove the temporary combination code.
Combination Code	Displays the combination code that defines a combination of ChartFields.
Edit ChartFields	Click this link to access the ChartField Details page for selecting ChartField values.

Global Payroll

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

Pay Group

Select a pay group.

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

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

Use Pay Group Eligibility, Use Pay Group Rate Type, and Use Pay Group As Of Date

When you select a pay group, these check boxes are automatically selected.

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

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

Holiday Schedule

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

Eligibility Group

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

Exchange Rate Type

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

Use Rate As Of

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

(AUS) Australia**Balance Group Nbr**
(balance group number)

Enter a balance group number. Balance group numbers identify which Global Payroll accumulator the system should store tax balances in. Tax accumulators are keyed by ID, empl rcd#, pay entity, and balance group number. You use balance group numbers to combine or separate tax balances for multiple jobs (where different tax rates apply) or to separate balances in the case of termination and rehire. A balance group ID for each payment summary is required at the end of the year. There must be a person tax data record for each balance group ID that the person has.

(HKG) Hong Kong**Balance Group Nbr**
(balance group number)

Enter a balance group number. When workers are terminated and subsequently rehired in the same or similar position in the same tax year (using the Job Data component in Workforce Administration), there is a legislative reporting requirement in Hong Kong to keep the periods of employment and earnings balances separately. PeopleSoft Enterprise Global Payroll uses the balance group number to ensure that the relevant periods of employment and balances of a worker in a tax year are stored separately in terms of payroll data. This enables a worker to have multiple tax balances if the worker is terminated and rehired in the same financial year.

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

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

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

(NZL) New Zealand**Balance Group Nbr**
(balance group number)

Enter a balance group number. Balance group numbers identify which Global Payroll accumulator the system should store tax balances in. Tax accumulators are keyed by ID, empl rcd#, pay entity, and balance group number. You use balance group numbers to combine or separate tax balances for multiple jobs (where different tax rates apply) or to separate balances in the case of termination and rehire. A balance group ID for each payment summary is required at the end of the year. There must be a person tax data record for each balance group ID that the person has.

(SGP) Singapore

Balance Group Nbr
(balance group number) Enter a balance group number. Balance group numbers identify which Global Payroll accumulator the system should store tax balances in. Tax accumulators are keyed by ID, empl rcd#, pay entity, and balance group number. You use balance group numbers to combine or separate tax balances for multiple jobs (where different tax rates apply) or to separate balances in the case of termination and rehire. A balance group ID for each payment summary is required at the end of the year. There must be a person tax data record for each balance group ID that the person has.

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

See Also

Chapter 10, "Managing Country-Specific Workforce Data," (USA) Determining U.S. Residency Status for Foreign Nationals, page 549

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Compensation, "Getting Started with Administer Compensation," Administer Compensation Overview

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up Organization Foundation Tables," Setting Up Holiday Schedules

PeopleSoft Enterprise Payroll for North America PeopleBook

Entering Salary Plan Information

Access the Salary Plan page (Workforce Administration, Job Information, Add Employment Instance, Salary Plan).

Work LocationJob InformationJob LaborPayrollSalary PlanCompensation

John BaarEmployee

Empl ID: KCI002Empl Record: 1

Military Service:

Salary Plan

Find | View All | First1 of 1Last

Effective Date:07/02/2009

Effective Sequence:0

HR Status:Active

Payroll Status:Active

Action:Hire

Reason:

Job Indicator:Secondary Job

Go To Row

Current

Military

Rank:

Worn Rank:

Worn Rank Type:

Skill Grade:

Rank Entry Date:

Salary Admin Plan:

Grade:

Step:

Grade Entry Date:

Step Entry Date:

☐ Includes Wage Progression Rule

Job Data

Employment Data

Earnings Distribution

Benefits Program Participation

Salary Plan page

Military

The section appears when military functionality is enabled on the Installation Table. Select a military service for a person on the Work Location page prior to entering a rank or worn rank.

Rank

Enter the service member's earned rank. Valid ranks are defined on the Military Service - Service Ranks page.

Rank Entry Date

Enter the date the member received this rank.

Worn Rank

Enter the service member's rank insignia while serving in a particular post.

The default value for this field comes from the Rank field but it can be overwritten. Changes to the Rank field value will also change the value in this field.

Note. To have the system display the worn rank in front of the employee's name at the top of the Personal Data, Job Data, and military pages, you must have Military, Event Manager, and Publish/Subscribe enabled in the system and the Domain status should be active. When a rank is changed on the current row, the event `AssignmentMilitaryRankChanged` is raised and the Event Manager triggers the handler to update the Names in Personal Data Component.

See PeopleSoft Enterprise Human Resources PeopleBook: Events and Notifications

Worn Rank Type

Indicate why the individual is on worn rank.

Skill Grade

Select the overall grade level for which the individual has been evaluated

Note. When military rank information is defined for a service member, the system restricts the salary plan to those plans associated with military ranks on the Military Service table. In addition to this, only the salary grades associated with the specified ranks are available. Therefore, the salary defaulting logic does not apply to military users.

Salary Plan

Salary Administration Plan

Displays the salary administration plan code. This field will default from the position number you associated with a person, and is available for entry regardless if you click the Override Position Data button.

If you are not using position management and you associate salary administration plans with locations or job codes, the value that is in this field comes from either the Location or Job Code table, based on setID matching. You can override the default.

Note. If you have salary administration plans associated with more than one of these tables, the system uses the default from the last table value entered. For example, first you enter a location that is associated with salary plan KU02 where this salary plan defaults to this page. Then, you enter a job code that is associated with salary plan KU03, and the system will update the salary plan to KU03.

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

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

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

Grade

If you associate a grade with the person's position or job code, the system displays the default value from the appropriate table.

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

Grade Entry Date

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

Step

If you associate a step with the person's position or job code, the system displays the default value from the appropriate table.

Step Entry Date

Displays the date on which the person first joined this step. You can override this value.

Note. The system verifies the combinations of salary administration plans and grades that you select.

Includes Wage Progression Rule

The system selects this check box if the salary plan includes wage progression.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Working with System Data Regulation in HRMS"

Entering Compensation Information

Access the Compensation page (Workforce Administration, Job Information, Add Employment Instance, Compensation).

Work Location Job Information Job Labor Payroll Salary Plan **Compensation**

John Baar
Employee

Empl ID: KCI002
Empl Record: 1

Military Service:

Compensation Find First 1 of 1 Last

Effective Date: 07/02/2009 [Go To Row](#)

Effective Sequence: 0 Action: Hire

HR Status: Active Reason:

Payroll Status: Active Job Indicator: Secondary Job

Current

Compensation Rate: 0.00 USD *Frequency: M Monthly

▼ Comparative Information

Change Amount: 0.000000 USD Monthly

Change Percent: 0.000 Compa-Ratio:

▼ Pay Rates

USD USD

USD USD

Default Pay Components [Contract Change Prorate Option](#)

Pay Components Customize Find First 1 of 1 Last

Amounts Controls Changes Conversion

	*Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group		
1		0								

[Calculate Compensation](#)

Job Data [Employment Data](#) [Earnings Distribution](#) [Benefits Program Participation](#)

Compensation page

Compensation Rate

Displays the compensation rate for the person, which is the sum of all base pay salary components.

Frequency

Select a compensation frequency.

Select *Contract* for contract persons. The system uses the information that you set up on the Contract Pay page to manage the person's compensation.

Note. The Retro Pay functionality in PeopleSoft Enterprise Payroll for North America and PeopleSoft Enterprise Global Payroll is triggered by any frequency or compensation rate change with an effective date that's earlier than or equal to the latest pay end date of a check that is already paid to the person.

Auto Calculated Premium

Target Comprate (target compensation rate) Enter the compensation rate for the person if the person is being compensated at a rate that exceeds the default salary. Auto calculating premium may be:

Absorbing. Premium decreases when the compensation rate increases over time in order to maintain the target compensation rate.

Non-Absorbing. Premium does not change even when the compensation rate increases over time.

The system calculates the difference between this amount and the original job compensation rate and enters the difference in the premium components (the absorbing or nonabsorbing or both premium rate codes of the salary plan) of the person's compensation package. The system then recalculates the compensation rate with the premium component compensation rate.

If both an absorbing rate code and a nonabsorbing rate code are associated with the salary plan, the absorbing rate code initially receives the full, calculated amount of the difference between the target compensation rate and the originally calculated job compensation rate.

You can then enter some portion of the total calculated premium in the nonabsorbing rate code (in which case the absorbing rate code amount automatically decreases by the same amount so that the target compensation rate remains the same) or delete the nonabsorbing rate code. The system recalculates the job compensation rate, including the premium component compensation rate.

You cannot enter a target compensation rate that is less than the original job compensation rate without the premium components.

This field is available only if the person's salary plan (on the Salary Plan page) has auto-calculated premium enabled.

Don't Absorb Changes Select to instruct the system to leave absorbable rate codes unchanged if there is a change in the default salary amount.

This option only applies to persons who have a target compensation rate and are assigned to a salary plan with the auto calculated premium function enabled and an absorbing premium defined.

Comparative Information

Change Amount Displays the change in the amount of compensation for the rate code.

Change Percent Displays the percent of change in the compensation for the rate code.

Compa-Ratio (comparison ratio) Displays the percent-through-range calculation, based on the salary plan and grade and the currency that the organization uses.

Job Ratio Displays the percent-through-range calculation, based on the midpoint salary of the person's job code.

The job ratio is available only if the person's job code has job ratio information (midpoint salary, currency, and frequency) defined.

Pay Rates

This group box contains pay rates that are calculated by using the default frequencies from the country. You can specify the default frequencies by country on the Default Frequencies page.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Frequencies," Setting Country-Specific Frequency Defaults.

Default Pay Components

Click to:

- Carry out rate code defaults (excluding seniority pay) based on the current values of the designated job fields.
- Replace manual updates and old default values with the current default values.
- Recalculate the compensation package of affected persons, including the compensation rate, currency, frequency, apply FTE, percent (including current rate code groups), salary points, automatically calculated premium, and so on.
- Recalculate compensation-related fields, such as annual amounts or compa-ratio, on the Job Data record.

If you don't click this button after updating relevant job data fields, the system issues a warning when you attempt to save the new record. If you click OK, the system displays this page, where you can click this button and make any required changes. If you do not click this button, the component package doesn't appear by default until the next time that the default component logic is triggered (either when you click the button or through a batch update process).

(E&G) Contract Change Prorate Option

Click to access the Contract Pay Prorate Options page, where you choose how to handle contract pay when there is a change to the contract amount. Use this link only when the payment frequency is C (contract).

The link is active only when the row is available for data entry. The system displays the selected proration option to the left of the link so that you can review the settings even when the link is inactive.

See *PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook*, "(E&G) Administering Contract Pay," Defining Proration Options for Contract Changes.

Calculate Compensation

Click to have the system recalculate the person's compensation without carrying out any rate code defaults or replacing any default values. You cannot modify the person's pay components without recalculating the compensation.

Pay Components: Amounts Tab

Select the Amounts tab.

Rate Code	Select a rate code. Rate codes are IDs for pay components. The system inserts any compensation information that is associated with this rate code in the pay components grid.
	Note. If a seniority rate code, or group-based rate code, is inserted as a default, the values for these rate codes are display-only; you can't delete them.
Comp Rate (compensation rate)	Displays the compensation rate for the pay component.
Frequency	Displays the compensation frequency for the pay component.
Points	Displays the salary points that are associated with this rate code, if any. Set the points monetary value on the Company Table page. Associate point value (an integer) with rate codes on the Default Compensation and Non-Base Compensation pages, Salary Step Components page, and Compensation page. To use points, select the Salary Points check box on the Installation Table page.
Percent	If the rate type for this rate code is percent, the system displays the percent that is to be applied to the job compensation rate or to a rate code group (if you are using rate code groups).
Rate Code Group	Select a rate code group. A rate code group enables you to be more specific when calculating percentage-based components as part of a person compensation package.

Pay Components: Controls Tab

Select the Controls tab.

Source	Indicates how the pay component gets into the pay components grid. <i>Manual</i> indicates that the pay component is added manually. <i>Salary Step</i> indicates that the pay component is retrieved by default from the salary step. <i>Job Code</i> indicates that the pay component is retrieved by default from the job code, and so on.
Manually Updated	This flag indicates whether the pay component is manually updated or the pay component contains only values that appear by default.
Default Without Override	Indicates whether you can change the default values of the pay component or the values for this rate code are default values and display-only.

Pay Components: Changes Tab

Select the Changes tab.

Change Amount	Displays the overall change amount in this pay component rate.

Change Points	Displays the overall change amount (in points) for this pay component. This field is visible only if Salary Points is selected on the Installation Table page.
Change Percent	Displays the overall change amount for this pay component. This field isn't available for rate codes that have a rate code type of percent or points.

Pay Components: Conversion Tab

Select the Conversion tab.

Converted Comp Rate (converted compensation rate)	Displays the converted compensation rate for this pay component. The system converts all base pay components to the currency and compensation frequency that you specify.
Apply FTE (apply full-time equivalent)	Select if you want the value that is associated with the rate code to be multiplied by the FTE factor for annualization and deannualization. FTE is the percentage of full-time that the worker should normally work in the corresponding job. This field isn't available for rate codes of type percent.

See Also

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "(E&G) Administering Contract Pay"

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Compensation, "Getting Started with Administer Compensation"

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Frequencies," Job Data Pay Rate Frequencies

Entering Optional Employment-Related Data

Access the Employment Information page (click the Employment Data link at the bottom of any page in the Job Data component).

Employment Information

John Baar

Employee

Empl ID:

Empl Record:

KCI002

1

Military Service:

Organizational Instance

Organizational Instance Rcd:

1

Original Start Date:

☐ Override

Last Start Date:

First Start Date:

Termination Date:

Years

Months

Days

Org Instance Service Date:

☐ Override

Organizational Assignment Data

Instance Record

Last Assignment Start Date:

07/02/2009

First Assignment Start:

07/02/2009

Assignment End Date:

Home/Host Classification:

Home

Years

Months

Days

Company Seniority Date:

☐ Override

Benefits Service Date:

☐ Override

Seniority Pay Calc Date:

☐ Override

Probation Date:

Professional Experience Date:

Last Verification Date:

Business Title:

Position Phone:

Time Reporter Data

▼ Military

Early Promotion Date:

Employment Information page (1 of 4)

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 Belgium	
Official Language:	Preferred Language:
Personnel Registry Nbr:	*Registration Date: 07/02/2009 
 Brazil	
INSS Days:	
INSS Months:	
INSS Years:	
 Canada	
☐ Owns 5% (or More) of Company	
Appointment End Date: 	Contract Length: Not Applicable
☐ Accrue Tenure Services	FTE for Tenure Accrual:
Service Calculation Group: 	FTE for Flex Service Accrual:
 Japan	
Years Months Education-Level-Adjusted Birth Date: 	
Highest Education Level: A A-Not Indicated	

Employment Information page (2 of 4)

 Malaysia	
Ethnic Group:	Religion:
Festive Advance Pay Program: 	
*FA Holiday Type: Value Not Applicable	
Festive Advance Eligible From: 	
 Netherlands	
Relation to Owner:	☐ Owns 5% (or More) of Company
 Singapore	
Ethnic Group:	Religion:
Festive Advance Pay Program: 	
*FA Holiday Type: Value Not Applicable	
Festive Advance Eligible From: 	

Employment Information page (3 of 4)

 **USA**

Appointment End Date:



Service Calculation Group:



☐ Owns 5% (or More) of Company

☐ Accrue Tenure Services

Contract Length:

Not Applicable

FTE for Tenure Accrual:

FTE for Flex Service Accrual:

[Job Data](#)

Employment Data

[Earnings Distribution](#)

[Benefits Program Participation](#)

Employment Information page (4 of 4)

Note. The dates on this page are used in reports and to enable you to track a person's work history.

Organizational Instance

Organizational Instance Rcd (organizational instance record)

The number of the instance associated with this job data record. The organizational instance record number is the same as the ERN of the controlling instance.

You can only modify the organizational instance dates when you review this page for the controlling instance.

Note. When you review this page for a non-controlling instance, the system makes the rest of the fields in this group box display only because non-controlling instances inherit the instance dates from the controlling instance.

Original Start Date

Displays the earliest date that this job data record (emplID/ERN instance) was associated with the organization. The date is provided by default from the effective date of the job record with an action of *Hire*, *Add Contingent Worker*, or *Add POI Instance*. This is not the date the job was created in the system, like the Date Created field on the Work Location page. You can override this date to enter an earlier start date, for example if the person has previously worked for the company or an affiliate or, depending upon company policies, for special cases like jobs with probationary periods, mergers and acquisitions, and so on.

See [Chapter 6, "Increasing the Workforce," Understanding Employment Information Data, page 211.](#)

Last Start Date

Displays the most recent start date for this organization instance. The system populates this field originally with the effective date of the controlling instance's job data row with the action of *HIR* and then refreshes it with the effective date of job data rows with the actions *REH* (for employees) or *RNW* (for contingent workers).

This date is different from the first start date if this organization instance has been inactive and then reactivated.

First Start Date	Displays the first start date for this organization instance. The system populates this field with the effective date of the first job data row with the action of <i>HIR</i> (for employees) or <i>ADD</i> (for contingent workers) from the controlling instance. The system uses this date as the hire date in reports. Note. The system does not refresh this date again unless you enter a new row in the controlling instance with one of these actions. You would normally not do this unless you needed to reset the hire date.
Termination Date	Displays the effective date of the controlling instance's job data row with the action of <i>TER</i> or <i>COM</i>, if applicable. If you rehire or renew a person's controlling instance, the system deselects this field.
Org Instance Service Date (organizational instance service date) and Override	Displays the effective date on which the service of a person commenced with the organization. The date is provided by default from the effective date of the job record with an action of <i>Hire</i>, <i>Add Contingent Worker</i>, or <i>Add POI Instance</i>. Select the Override check box to override this date to enter an earlier service date, for example if the person has previously worked for the company or an affiliate. See Chapter 6, "Increasing the Workforce," Understanding Employment Information Data, page 211.
Provider ID	For contingent workers, displays the ID of the service provider.

Organizational Assignment Data

Assignments are the job data records tracked under an organizational instance, each identified by a unique emplID/ERN combination. Track the start and completion dates of individual assignments at the assignment level.

Last Assignment Start Date	Displays the most recent start date for this assignment. The system populates this field with the effective date of the job data row with an action that reactivates the assignment. This date is different from the first assignment start date if this assignment has been inactive and then reactivated.
First Assignment Start	Displays the first start date for this assignment. The system populates this field with the effective date of the first job data row with an action that activates the assignment (such as <i>HIR</i> or <i>ADD</i>).
Assignment End Date	Displays the effective date of the job data row with the action of <i>TER</i> or <i>COM</i> , if applicable.
Home/Host Classification	For workers who are on assignments, this field specifies whether the current job is at the worker's home location or the assignment location. For a new hire, select <i>Home</i> .

Time Reporter Data	Click to review the PeopleSoft Time and Labor data for this worker. If you don't use PeopleSoft Enterprise Time and Labor, this link is unavailable.
Company Seniority Date or Engagement Date	This field normally displays as the Company Seniority Date field. However, when military functionality is enabled on the Installation Table and this person is a person associated with a rank, this field displays as the Engagement Date field. Based on the date that you enter here, the system calculates the number of years, months, and days of seniority or engagement for a person.
Benefits Service Date	Based on the date that you enter here, the system calculates the total years, months, and days of service for a worker, including any credit for military leave or the total amount of time that the worker works for multiple companies in the organization. This date is used to calculate benefits eligibility. The system uses the original start date as the default value.
Seniority Pay Calc Date (seniority pay calculation date)	Enter the date that the system should use to calculate seniority-based pay. The system uses the original start date as the default value.
Probation Date	Enter the date on which the worker is placed on probation.
Professional Experience Date	Displays the earliest date on which the worker started working in a job that required skills that are directly related to the worker's current position.
Last Verification Date	Displays the latest date on which the worker verified his or her personal data in the system.
Business Title	Enter the worker's official title, which might be different from the job title. If you drive part or all of the system by position, the system enters the default title for the position number that you assign to the worker on the Work Location page.
Position Phone	Track the worker's primary work phone number. You can also update this field by using the Add/Update Position Info pages. If you drive part or all of the system by position, the system enters the default phone number for the position number that you assign to the worker on the Work Location page.

Note. When you enter a new row with an action of *HIR* or *ADD* and save the component, the system sets the Company Seniority Date, Benefits Service Date, and Seniority Pay Calc Date (Seniority Pay Calculation Date) fields on this page to the effective date that you enter on the Work Location page. You can override these fields after saving the component. The system calculates and displays the worker's service months and days based on the information that you enter in the Company Seniority date, Service Date, and Seniority Pay Calc Date fields.

Military

The system displays the military section when military functionality is enabled on the Installation Table.

Early Promotion Date Enter the earliest date this service member may be considered for the next promotion.

(BEL) Belgium

The system displays the official language, based on the company official language, unless the company is located in Brussels-Capital Region, in which case the preferred language is the default.

Personnel Registry Nbr Enter the number under which the worker is registered in the personnel register.
(personnel registry number)

(BRA) Brazil

INSS Days, INSS Months, and INSS Years Enter the number of days, months, and years that the worker makes social security contributions before being hired by the company.
(*Instituto Nacional de Seguridade Social* days, months, and years)

(CAN) Statistics Canada Academic Teaching Employment Table

The fields in this table are used in the Canada Academic Teaching Surveys business process, a regulatory requirement for Canadian higher-education, degree-granting institutions. Complete this table for all faculty staff if you are required to submit Academic Teaching Surveys to Statistics Canada. Review the information in this table to ensure that it is up-to-date every time that you change a worker's record.

Teaching Change Date The system adds a new teaching change date row only if you choose to add one.
Insert a new row for each teaching appointment if the institution uses the same employee record number to record successive appointments. For the Part-Time Academic Teaching Survey, the system reports the Academic Teaching Employment record that is effective on the end date of the appointment or at the end of the period that is being reported.

Survey Report Flag Displays the report flag value, as specified on the Job Code Table - Job Code Profile page. If the value is *N/A*, this record isn't reported in academic teaching surveys. You can override this default value.

Duties Displays the duties value, as specified on the Job Code Table - Job Code Profile page. You can override this default.

Principal Subject Select the principal subject that is taught by the worker.

Teaching Load Enter the worker's teaching load during the academic teaching employment. For example, if the worker is teaching three full courses, enter *3.0*. If the worker is teaching one full course and one-third of another, enter *1.33*.

FTTE (full-time teaching equivalency)	Enter the ratio of the teaching load to the full-time teaching equivalency. For example, if teaching four courses constitutes full-time and the worker is teaching three courses, enter .75.
Collapse as FT (collapse as full-time)	Select if the employment can be collapsed into the reportable full-time job for the purpose of consolidating salary amounts from jobs that make up a full-time job. Use this field only if the worker: • Has two or more part-time jobs in different departments that function as a single full-time job. • Receives an administrative stipend under another employee record number that doesn't accrue benefits but counts toward the worker's full-time salary. Don't collapse reportable part-time jobs into a reportable full-time job. (The system doesn't report on the part-time job.) Instead, if you use this field, set up a separate employee record for part-time jobs.

(CAN) Canada

Accrue Tenure Services	Select to activate the tenure accrual.
FTE for Tenure Accrual	Enter the FTE to be used in tenure accruals. FTE cannot be greater than 1.0. On multiple jobs, the sum of the FTEs of all the jobs selected to accrue tenure cannot be greater than 1.0.
Service Calculation Group	Select the service calculation group that represents a group employees who have the same calculation rules applied to their service accrual process.
FTE for Flex Service Accrual	Enter the FTE value to be used in prorating the worker's accrued service.

(JPN) Japan

Educ Lvl-Adjsted Birth Date (education-level-adjusted birth date)	Select the worker's education-level-adjusted birth date. The day and the month are the organization's standard calculation birth date (SCB—usually April 1); the year comes from the worker's education-level-adjusted birth date (ELABi). Although the system calculates this date, you can overwrite it (for example, to give a worker credit for special work experience).
Years Months	Displays the worker's highest education level as specified in the Personal Data component. This education level is the starting point for education-level age-related calculations.

(MYS and SGP) Malaysia and Singapore

After you set up festive advance calculation rules and the pay programs, and associated job codes with pay programs, the eligible workers that are in the workforce are granted festive advances. Assigning the festive advance type to the worker occurs during the hire process after you assign the ethnic group, religion, and job code. However, before you accept those defaults, you might still have some issues to resolve. If you decide that any of the worker's festive advance details should be different, change them on this page.

Ethnic Group and Religion	Displays the values that you enter on the Personal Data - Regional page.
Festive Advance Pay Program	Displays the value from the Job Code Table - Job Code Profile page. You can change this default.
FA Holiday Type (festive advance holiday type)	Select a festive advance type. Values are: <i>Chinese New Year</i>, <i>Christmas</i>, <i>Deepavali</i>, <i>Hari Raya</i>, and <i>N/A</i>. The default value is the festive holiday that is appropriate to the ethnicity or religion that you enter for this person on the Personal Data - Regional page. You can change this selection. If a person chooses not to receive a festive advance, select <i>N/A</i>.
Festive Advance Eligible From	Displays the festive advance eligible from date. If the firm has a probation period that must be served before a worker is entitled to a festive advance, the probation period must be monitored. When you set the probation period in the Festive Advance Pay Program, you set the number of days or months. The system adds this information to the worker's hire date to determine the festive advance eligible from date; this date appears as the default on the FA Employee Details page. When you process the festive advances, the system checks the festive advance eligible from date against the date on which to pay the advance. If the festive advance eligible from date is not yet passed, the worker is not paid a festive advance. Note. This date is used by the festive advance calculation process and the festive advance calculation rule to determine if the worker has served enough time to be eligible for a festive advance. The date is derived from the job commencement date and the probation period in the Festive Advance Pay Program.

(NLD) Netherlands

Relation to Owner	Select the worker's relationship to the owner, as appropriate.

(USA) United States of America

Accrue Tenure Services	Select to activate the tenure accrual.

FTE for Tenure Accrual Enter the FTE to be used in tenure accruals. FTE cannot be greater than 1.0. On multiple jobs, the sum of the FTEs of all the jobs selected to accrue tenure cannot be greater than 1.0.

Service Calculation Group Select the service calculation group that represents a group employees who have the same calculation rules applied to their service accrual process.

FTE for Flex Service Accrual Enter the FTE value to be used in prorating the worker's accrued service.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Track Global Assignments, "Tracking Assignments," Entering Basic Assignment Data

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up Local Country Functionality," Setting Up the Education Level Age Table

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Festive Advance, "Managing Festive Advances"

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Benefits, "Setting Up Base Benefits Core Tables"

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Positions, "Setting Up Positions"

PeopleSoft Enterprise Time and Labor 9.1 PeopleBook, "Setting Up Basic Tables"

Distributing Job Earnings

Access the Job Earnings Distribution page (click the Earnings Distribution link at the bottom of any page in the Job Data component).

Job Earnings Distribution			
John Baar Employee		Empl ID:	KCI002
		Empl Record:	1
Earnings Distribution Type		Find First 1 of 1 Last	
Effective Date:	07/02/2009	Go To Row	
Effective Sequence:	0	Action:	Hire
HR Status:	Active	Reason:	
Payroll Status:	Active	Job Indicator:	Secondary Job
		Current	
Compensation Rate:	USD	Work Period:	Monthly
Standard Hours:	40.00	Compensation Frequency:	Weekly
*Earnings Distribution Type:	None		
Job Earnings Distribution		Find First 1 of 1 Last	
Position Number:		Business Unit:	
Department:		Job Code:	
Regular Shift:	N/A		
*Earnings Code:		General Ledger Pay Type:	
Compensation Rate:		Standard Hours:	
Percent of Distribution:			
Earnings Chartfields			
Combination Code:			

Job Earnings Distribution page

Review these guidelines prior to entering data on the Job Earnings Distribution page:

- Skip this page if you don't need to distribute standard earnings for the person.
Payroll for North America uses the department, job code, account, shift, position number, and general ledger type that you enter on the Work Information and Payroll pages to calculate pay earnings records.
- The system hides this page when all job rows in the component use PeopleSoft Enterprise Global Payroll.
However, if any job row has another payroll system (for example, PeopleSoft Enterprise Payroll for North America or Payroll Interface), then the system displays the page.
- Don't use this page to distribute special earnings, such as holiday pay or bonuses; instead, use the processes in PeopleSoft Enterprise Payroll for North America for handling special earnings.
- If you enter a parameter such as department on this page, the parameter overrides the same field on the job record.

If you leave a parameter blank, the system uses the field from the job record.

Standard Hours and Work Period

If you are using position management and click the Override Position Data button, these fields become available. If you change these values on this page, it will also update the same fields on the Job Information page.

Earnings Distribution Type

Select an earnings distribution type. Values are:

- *None*: Select to indicate that you don't allocate earnings for this person. The system calculates and charges person compensation according to the information that is listed in the Job Data component. If you select this option, leave the other fields on this page blank.

Note. You must select *None* if you want the system to use the proration rule that you select on the Pay Group Table - Paysheets page when prorating partial pay.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up Jobs," Understanding Pay Groups.

- *By Amount*: Available only for salaried workers. This enables you to apportion the worker's total earnings for a period on the basis of an amount.

Select to instruct the system to total the amounts that are in the distribution lines and check the total against the total in the Compensation Rate field on the Job Data - Compensation page. The total earnings distribution amount must equal the compensation rate amount. If the amounts are not the same, the system generates an error when you try to save the record. You will need to resolve the discrepancy to save the Job Data record.

For example, to charge 3,000 of a worker's regular earnings to the worker's regular department (on the job record), 544 to department 105, and 1,000 to department 10503, you set up three distribution lines:

- On the first line, leave Department blank (so that the system uses the worker's regular department from the job record) and enter *3000* in the Amount field.
- On the second line, enter *105* in the Department field and *544* in the Amount field.
- On the third line, enter *10503* in the Department field and *1000* in the Amount field.

The amounts that are in the distribution lines total 4,544, so the system checks that amount in the Compensation Rate field on the worker's job record equals this total.

- *By Hours:* Available only for hourly or exception hourly workers. Select to instruct the system to total the hours that are in the distribution lines and update the total in the Standard Hours field on the Job Data - Job Information page. The Standard Hours field that appears at the top of this page also changes.

Enables you to apportion the worker's total earnings for a week on an hourly basis. The system totals the hours in all distribution lines and inserts the total in the Standard Hours field on the worker's job record.

For example, if a worker works a 40-hour week, and you want to charge 30 hours of regular pay to the worker's regular department (on the job record) and 10 hours to department 103, you set up two distribution lines:

- On the first line, leave Department blank (so that the system uses the worker's regular department (from the job record) and enter 30 in the Standard Hours field.
- On the second line, enter 103 in the Department field and 10 in the Standard Hours field. The hours that are in the distribution lines total 40, so the system inserts 40 in the Standard Hours field on the worker's job record.
- *By Percent:* Available to all workers. The sum of the percentages that are in the distribution lines must equal 100.

Enables you to apportion the worker's total earnings for a period on a percentage basis.

For example, to charge 80 percent of regular earnings to the worker's regular department (on the worker's job record) and 20 percent to department 100, set up two distribution lines:

- On the first line, leave Department blank (so that the system uses the worker's department from the job record) and enter 80 in the Percent field.
- On the second line, enter 100 in the Department field and 20 in the Percent field.

Paying Workers on Disability

Some workers on disability need to be paid at a given percentage of their regular pay. Handle this situation without changing the worker's salary by setting up a disability plan earnings code in the Earnings table, based on a percentage.

Note. This feature works only for hourly workers, not for salaried workers.

When you enter an action of short-term disability with pay or long-term disability with pay, the system changes the worker's status to leave with pay.

To send 100 percent of the worker's pay to the disability plan earnings code, access the Job Data - Job Earnings Distribution page, select the By Percent option, enter the appropriate disability earnings code, and enter a percent of *100*.

Note. When you put a worker on disability, don't forget to check additional pay records and make any necessary changes.

See Also

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "Defining Earnings Codes and Earnings Programs"

Specifying Benefit Program Enrollment

Access the Benefit Program Participation page (click the Benefits Program Participation link at the bottom of any page in the Job Data component).

Benefit Program Participation			
John Baar Employee		Empl ID:	KCI002
		Empl Record:	1
Benefit Status Find First 1 of 1 Last Benefit Record Number: 1 Effective Date: 07/02/2009 Effective Sequence: 0 HR Status: Active Payroll Status: Active Action: Hire Reason: Job Indicator: Secondary Job *Benefits System: Not Managed in PeopleSoft Annual Benefits Base Rate: USD Benefits Employee Status: Active Current			
Benefits Administration Eligibility BAS Group ID: Elig Fld 1: Elig Fld 2: Elig Fld 3: Elig Fld 4: Elig Fld 5: Elig Fld 6: Elig Fld 7: Elig Fld 8: Elig Fld 9:			
Benefit Program Participation Find View All First 1 of 1 Last *Effective Date: 09/16/1990 Currency Code: CAD *Benefit Program: KC1 GBI Master CAN Benefit Program Job Data Employment Data Earnings Distribution Benefits Program Participation			

Benefit Program Participation page

Benefit Record Number Displays the benefit record number, which is an identifier that links two or more jobs for benefits purposes. The system sets the value to 0. You can override this value to attach this job to a different benefit record number. The system deselects the benefits program data and repopulates it with values that are attached to the benefit record number that you enter.

Benefits System Select the appropriate benefits system. Select *Not Managed in PeopleSoft* (benefits managed by a system other than PeopleSoft) to filter out persons who have insufficient employment and job information to support benefit enrollment.

Benefits Administration Eligibility

Elig Fld 1–9 (eligibility configuration fields 1–9) Enter values to further filter persons' eligibility for a specific benefit. These are client-definable fields.

Benefit Program Participation

Currency Code Displays the code of the currency that is specified for the benefit program in the Benefit Program table.

Benefit Program Displays the code that corresponds with the benefits program for the person's pay group, which you specify in the Pay Group table. You can override this value.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Benefits, "Setting Up Base Benefits Core Tables"

Creating a Person Checklist

Access the Person Checklist page (Workforce Administration, Personal Information, Organizational Relationships, Person Checklist, Person Checklist).

Person Checklist

John Baar Person ID: KCI002

Checklist History Find | View All First 1 of 1 Last

*Checklist Date: 07/02/2009

*Checklist: DEUXFR Transfer

Comment:

*Sequence	*Item Code	Description	*Status	Link ID
100	XFR01	Verify Employee Review	Initiated	Verify Employee Review
200	XFR02	Process Job Change	Initiated	Job Change Request
300	XFR03	Verify Transfer Info	Initiated	Verify transfer info
400	XFR04	Update Tax Data	Initiated	Update Tax Data
500	XFR05	Update Social Insurance Data	Initiated	Update Social Insurance Data
600	XFR06	Update Bank information	Initiated	Update Bank information
700	XFR07	Update Company Car	Initiated	Update Company Car

Person Checklist page

You can have more than one checklist active for a person at any one time.

Checklist Select the appropriate checklist. The system populates the list with the associated items.

Person Checklist Items

The system populates this table when you select a checklist. You can add additional items.

Item Code	Displays the checklist item if you selected a checklist. To add items without a checklist, select the item.
Status	The system displays a status of <i>Initiated</i> for all new checklist items. Update the status from the following options as necessary: • <i>Completed</i> • <i>Initiated</i> • <i>Notified</i> • <i>Received</i>
Link ID	Displays a link to the component used to complete the listed item. For example, the link ID for the item Emergency Contact is Emergency Contact, which links to the Emergency Contact component (EMERGENCY_CONTACT).

Defining Applicant Referral Information

Access the Person Applicant Information page (Workforce Administration, Personal Information, Organizational Relationships, Person Applicant Information, Person Applicant Information).

Person Applicant Information

John Baar Person ID: KCI002

Referral Source		Find View All First 1 of 1 Last
*Effective Date:	09/16/1990	

Data		Find View All First 1 of 1 Last
*Source ID:	7	Other
Sub Source ID:		
Employee Referral ID:		
Specific Referral Source:		
☐ Applicant is a Family Member ☐ Previously Employed by Company		

Person Applicant Information page

- Source ID** Select a referral source for this person. Referral sources are defined using the Source Setup page.
See *PeopleSoft Enterprise Talent Acquisition Manager 9.1 PeopleBook*, "Setting Up Recruitment Sources and Third Party Integrations," Setting Up Recruitment Sources.
- SubSource ID** Select a subsource for this person. Subsources are defined on the Marketing page.
See *PeopleSoft Enterprise Talent Acquisition Manager 9.1 PeopleBook*, "Setting Up Recruitment Sources and Third Party Integrations," Setting Up Recruitment Sources.
- Employee Referral ID** Select the employee who referred this person. This field is available if the Source ID field equals *Employee*.
- Specific Referral Source** Enter any text that further defines the referral information.
- Applicant is a Family Member** Select this check box if this person is a family member of the referral source.
- Previous Employed by Company** Select this check box if this person was previously employed by the company.

Creating a Person Checklist

Access the Person Assignment Checklist page (Workforce Administration, Personal Information, Organizational Relationships, Person Assignment Checklist, Person Assignment Checklist).

Person Assignment Checklist

John Baar EMP ID: KCI002 Empl Record: 0

Employee Checklist Find | View All First 1 of 1 Last

*Checklist Date: 07/02/2009 Checklist: DEUHIR Hire

Responsible ID:

Comment:

Employee Checklist Items							Customize	Find	First	1-15 of 15	Last
*Sequence	*Checklist Item Code	Description	*Briefing Status	*Status Date	Link ID						
1	50	HIR10	Personal Data	Initiated	07/02/2009	Personal Data					
2	100	HIR20	Send Contract	Initiated	07/02/2009	Send Contract					
3	200	HIR30	Signed contract received	Initiated	07/02/2009	Signed contract received					
4	300	HIR40	Hire Applicant	Initiated	07/02/2009	Hire Applicant					
5	400	HIR50	ID Badge	Initiated	07/02/2009	ID Badge					
6	420	HIR60	Request Security Access	Initiated	07/02/2009						
7	450	HIR70	Tax Card Received	Initiated	07/02/2009						
8	500	HIR80	Update Tax Data	Initiated	07/02/2009	Update Tax Data					
9	550	HIR100	Insurance Passport Available	Initiated	07/02/2009						
10	600	HIR110	Update Social Insurance	Initiated	07/02/2009	Update Social Insurance Data					
11	650	HIR120	Child Benefit Information	Initiated	07/02/2009						
12	700	HIR130	Bank information	Initiated	07/02/2009	Bank information					
13	800	HIR140	Company Car	Initiated	07/02/2009	Company Car					
14	900	HIR150	Probation Period	Initiated	07/02/2009	Probation period					
15	1000	HIR160	Eintrittsstichtag	Initiated	07/02/2009						

Person Assignment Checklist page

You can have more than one checklist active for an employee at any one time.

Checklist Select the appropriate checklist. The system populates the list with the associated items.

Responsible ID Select the person who is responsible for making sure the tasks on the checklist are completed.

Employee Checklist Items

The system populates this table when you select a checklist. You can add additional items.

Checklist Item Code	Displays the checklist item if you selected a checklist. To add items without a checklist, select the item.
Briefing Status	The system displays a status of <i>Initiated</i> for all new checklist items. Update the status from the following options as necessary: • <i>Completed</i> • <i>Initiated</i> • <i>Notified</i> • <i>Received</i>
Link ID	Displays a link to the component used to complete the listed item. For example, the link ID for the item Emergency Contact is Emergency Contact, which links to the Emergency Contact component (EMERGENCY_CONTACT).

Adding Additional Assignments

This section provides an overview of the process of adding additional assignments, lists prerequisites, and discusses how to:

- Work with multiple benefit record numbers.
- Enter additional assignments.

Understanding the Process of Adding Additional Jobs

PeopleSoft Enterprise Human Resources enables you to keep complete job information about workers who hold more than one job at a time in an organization.

If you set up PeopleSoft Enterprise HRMS security to allow workers to have multiple jobs, you can add an additional assignment to a worker's employment record. Use the Add Additional Assignment component (ADD_PER_ORG_ASGN) in Administer Workforce to add new jobs for workers who already have one or more jobs. From the Add Additional Assignment page (PER_ORG_INST_ASGN), access the Concurrent Job Data component (JOB_DATA_CONCUR) to enter data for the new job. The component consists of the same pages as the Job Data component. If all jobs are within the same company and meet certain criteria, you can combine earnings from multiple jobs on one paycheck if you are using PeopleSoft Enterprise Payroll for North America.

Note. (USF) Use the Concurrent Hire USF component (EE_CONC_HIRE) instead of the Add Additional Assignment component.

Do not use the Add Additional Assignment component for adding temporary assignments where the substantive job must be suspended for the duration of the temporary assignment. Use the Job Data component instead.

Update job data for concurrent jobs on the Job Data component.

See [Chapter 6, "Increasing the Workforce," Adding Organizational Instances for Employees, Contingent Workers, and POIs, page 220.](#)

See Also

[Chapter 4, "Understanding Organizational Relationships, Employment Record Numbers, and Multiple Jobs," page 157](#)

[Chapter 8, "Entering Additional Data in Human Resources Records," Entering Temporary Assignments, page 400](#)

Understanding Multiple Benefit Record Numbers

In addition to an employment record number, you assign each concurrent job a benefit record number that tracks the worker's participation in benefit programs. Jobs that share the same benefit record number also share the same benefit programs.

The following tables show different ways to assign benefit record numbers in a situation where a worker has three concurrent jobs:

Apply Job 1's Benefits to All Jobs

Job	Employment Record Number	Benefit Record Number
Job 1	0	0
Job 2	1	0
Job 3	2	0

Apply Job 3's Benefits to All Jobs

Job	Employment Record Number	Benefit Record Number
Job 1	0	0
Job 2	1	0
Job 3	2	0

Apply Separate Benefits to Each Job

<i>Job</i>	<i>Employment Record Number</i>	<i>Benefit Record Number</i>
Job 1	0	0
Job 2	1	1
Job 3	2	2

Apply Job 1's Benefits to Jobs 1 and 2 and Separate Benefits to Job 3

<i>Job</i>	<i>Employment Record Number</i>	<i>Benefit Record Number</i>
Job 1	0	0
Job 2	1	0
Job 3	2	2

When you add a concurrent job, the system sets the default benefit record number on the Benefit Program Participation page to 0. If you change the benefit record number, the system deselects and repopulates the Benefit Program field with the data attached to the benefit record number that you enter. If the benefit record number that you enter doesn't match any existing benefit record number for the worker, the system populates the Effective Date field with the worker's hire date and the Benefits Program field with the default benefit program for the worker's pay group.

Note. Use the Benefit Program Participation page to maintain benefits program information.

Prerequisites

Before you can add multiple jobs for the workforce, you must update the user security so that users have access to the menu options that they need.

When a worker has more than one job, you might want to designate one job as primary and the others as secondary. The primary job designation is used for government reporting.

Pages Used to Add Concurrent Jobs

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Add Additional Assignment	PER_ORG_INST_ASGN	Workforce Administration, Job Information, Add Additional Assignment, Add Additional Assignment	Enter additional worker assignments and access the Concurrent Job Data component to create new assignments.

Page Name	Definition Name	Navigation	Usage
Work Location	JOB_DATA1	Click the Create Assignment button on the Add Additional Assignment page.	Enter position and location information for a person's concurrent job, including the regulatory region, company, department, and location.
Job Information	JOB_DATA_JOBCODE	Click the Create Assignment button on the Add Additional Assignment page and access the Job Information page.	Enter information about a person's concurrent job, including status, employee class, shift, or standard hours.
Job Labor	JOB_LABOR	Click the Create Assignment button on the Add Additional Assignment page and access the Job Labor page.	Enter National Labor agreement data if the employee or contingent worker belongs to a National Labor agreement.
Payroll	JOB_DATA2	Click the Create Assignment button on the Add Additional Assignment page and access the Payroll page.	Enter payroll processing data. The payroll system and pay group information that you enter here affects component compensation processing on the Compensation page.
Salary Plan	JOB_DATA_SALPLAN	Click the Create Assignment button on the Add Additional Assignment page and access the Salary Plan page.	Enter information about a person's salary plan.
Compensation	JOB_DATA3	Click the Create Assignment button on the Add Additional Assignment page and access the Compensation page.	Enter compensation information.
Employment Information	EMPLOYMENT_DTA1	Click the Create Assignment button on the Add Additional Assignment page and click the Employment Data link.	Enter optional data, such as an employee's business title.

Page Name	Definition Name	Navigation	Usage
Job Earnings Distribution	JOB_DATA_ERNDIST	Click the Create Assignment button on the Add Additional Assignment page and click the Earnings Distribution link.	Distribute a person's compensation for one job among different departments, job codes, accounts, shifts, position numbers, or general ledger pay types. If the person's pay is regularly charged to more than one cost center, designate how much to allocate to each cost center.
Benefit Program Participation	JOB_DATA_BENPRG	Click the Create Assignment button on the Add Additional Assignment page and click the Benefits Program Participation link.	Specify the benefit program in which a person is enrolled for benefits in PeopleSoft Enterprise Human Resources or PeopleSoft Enterprise Benefits Administration.

Entering Additional Assignments

Access the Add Additional Assignment page (Workforce Administration, Job Information, Add Additional Assignment, Add Additional Assignment).

Add Additional Assignment

John Baar Person ID: KCI002

Organizational Instance Find | View All First 1 of 1 Last

Org Relation: Employee

Organizational Instance: 0

HR Status: Active

Pay Status: Active

Effective Date: 09/16/1990

Business Unit: GBIBU Global Business Institute BU

Department: 15000 Business Services

Company: GBI Global Business Institute 9999

Last Start: 09/16/1990

Next Empl Rcd: 1

Create Assignment

Assignments Customize | Find | First 1 of 1 Last

Empl Record	HR Status	Effective Date	Business Unit	Department	Home/Host
0	Active	09/16/1990	GBIBU	15000	Home

Add Additional Assignment page

Create Assignment	Click to access the Job Data record to enter specific information about the new assignment.
Org Relation (organizational relationship)	Displays the person's organizational relationship.
Organizational Instance	Displays the instance number for this relationship.
Next Empl Rcd (next employee record)	Enter the employment record number for the next assignment. This number should be unique from all other employment record numbers currently held by this person.
Assignments	Lists the assignments under this organizational instance by employment record number.

Hiring Job Applicants

To hire applicants, use the Manage Hires (HR_MANAGE_HIRES) component.

This section discusses how to:

- Manage hires.
- Review hire details and initiate the hiring process for job applicants.

The Add Employment Instance and Add Contingent Worker components are commonly used to increase your workforce, but they are not the only components. You can also use the Manage Hires component for hiring applicants.

The Manage Hire page displays a list of applicants that have gone through the recruiting process and are ready to be hired. Selecting an applicant name on the Manage Hires page opens the Manage Hire Details page where you can review job information and transfer applicant information to the personal data and job data records to complete the hire.

Note. The Manage Hires component is also used with the SmartHire (template-based hires) process.

See Also

[Chapter 6, "Increasing the Workforce," Increasing the Workforce Through SmartHire Templates, page 298](#)

Pages Used to Hire Job Applicants

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Manage Hires	HR_MANAGE_HIRES	Workforce Administration, Personal Information, Manage Hires, Manage Hires	Manage hires. Displays a list of people who are ready to be hired. The list includes applicants who have been readied for hire in PeopleSoft Recruiting Solutions. The list also includes persons who have gone through the template-based hire process.
Manage Hires Detail	HR_MNGHIRE_DET	Click the name link for a person whose Source is <i>Recruiting</i> on the Manage Hires page.	Review hire details and initiate the hiring process. View detailed data for job applicants.

Managing Hires

Access the Manage Hires page (Workforce Administration, Personal Information, Manage Hires, Manage Hires).

Manage Hires

The following Hire Transactions are ready to be processed. Select a Transaction by Name to start the process.

Manage Hires

*Select Transactions Where:

*Equals:

Select	Start Date	Status	Name	Person ID	Type of Hire	Source	Submitted By
☐	07/15/2003	Requested	Jack Sophans		Add Contingent Worker	Recruiting	Betty Locherty
☐	08/25/2003	Requested	Tracy Maquire		Add Contingent Worker	Recruiting	Betty Locherty
☐	07/01/2001	Requested	Chad Brown		Add Contingent Worker	Recruiting	Betty Locherty
☐	10/27/2002	Requested	Mueller Karl		Add Contingent Worker	Recruiting	Betty Locherty
☐	11/03/1998	Requested	Robin de la Camara		Hire	Recruiting	Betty Locherty
☐	08/21/2003	Requested	Frank Pierce		Add Contingent Worker	Recruiting	Betty Locherty
☐	08/21/2003	Requested	Claire Lewandowski		Add Contingent Worker	Recruiting	Betty Locherty
☐	08/21/2003	Requested	Kristen Richards		Add Contingent Worker	Recruiting	Betty Locherty
☐	08/21/2003	Requested	Aidan Quinn		Add Contingent Worker	Recruiting	Betty Locherty
☐	04/22/2002	Requested	Frank Rose		Add Contingent Worker	Recruiting	Betty Locherty

[Select All](#) [Deselect All](#)

Manage Hires page

Select Transactions Where:

Select the value that represents how you want the search to produce results.
Valid values are: *Source*, *Start Date*, *Status*, and *Type of Hire*.

Equals:

This field is visible if the when you select *Source*, *Status*, or *Type of Hire* in the Select Transaction Where: field.

When Select Transaction Where: is *Source*, the valid values for Equals are *Template-Based Hire* and *Recruiting Solutions*.

When Select Transaction Where: is *Status*, the valid values for Equals are *Action Required*, *All*, *Draft*, *Error*, and *Requested*.

When Select Transaction Where: is *Type of Hire*, the valid values for Equals are *Add Concurrent Job*, *Add Contingent Worker*, *Hire*, *Rehire*, and *Transfer*.

From: and To:	These fields are visible when you select <i>Start Date</i> in the Select Transaction Where field. Enter the range of desired dates to retrieve a list of applicants to hire or a list of people in the template-based hire process.
Refresh	Click to update the list of applicants or hires in the Hire Transactions region when you change the value of the Select Transaction Where field and/or the Equals field.
Select	Use this check box to select transactions that you want to cancel. The check box is active only for rows where the Source is <i>Template</i> (template-based hire). You cannot use this page to cancel transactions where the source is <i>Recruiting</i> (recruiting solutions); instead, you must cancel the transaction using the Withdraw from Hire action on the Job Opening page in PeopleSoft Enterprise Recruiting Solutions.
Status	Status values include <i>Action Required</i>, <i>Draft</i>, <i>Error</i>, <i>Requested</i>, and <i>All</i>. The initial status for job applicants who were processed through PeopleSoft Recruiting Solutions is <i>Requested</i>. If the hiring request is cancelled from the Recruiting Solutions application when the hiring process is partially complete (you have created a personal data record, but not a job record), then the status changes to <i>Action Required</i>, indicating that an HR administrator needs to reverse the incomplete hiring process.
Name	Click a person's name to access the person's data in the Manage Hires Detail page, where you can review job details and initiate the hiring process.
Person ID	This field is blank when you have not yet begun the hire process for a person. Otherwise, it displays the person ID that was assigned when you created a personal data record for the person.
Cancel Selected Transactions	Click to cancel the selected transactions. You cannot select transactions where the source is <i>Recruiting</i> (recruiting solutions). Although you cannot cancel recruiting transactions from this page, recruiting users can withdraw a hire request. If the transaction request is <i>Requested</i> at the time the withdraw hire message is received, the system cancels the transaction and the transaction no longer appears on this page.

See Also

PeopleSoft Enterprise Talent Acquisition Manager 9.1 PeopleBook, "Hiring Applicants"

Reviewing Hire Details and Initiating the Hiring Process for Job Applicants

Access the Manage Hires Detail page (click the Name link for a person whose Source is *Recruiting* on the Manage Hires page).

Manage Hires

Manage Hires Detail

John Jones

The Start Date entered on this page will be used as the Effective Date for Job.

Job

Recruiter Name:

Betty Locherty

Job Opening ID:

10077

Job Opening:

Benefits Specialist

Position:

Benefits Specialist

Job Code:

Specialist-Benefits

Business Unit:

Global Business Institute BU

Department:

Benefits

Applicant Type:

External - Previous Employee

*Type of Hire:

Rehire

*Desired Start Date:

09/14/2004

Empl ID:

HXRS01

[View Person Org Summary](#)

Employee ID Not Verified

Manage Hires Detail page (1 of 2)

Org Instance

☐ Create new Org Instance

☒ Use existing Org Instance

0

Employment Record

☒ Create New Assignment

☐ Use Existing Assignment

0

Hire Information

[View Job Offer Letter](#)

Hire Comments:

Add Person

Select this button in order to pull the person's personal data information from Recruiting Solutions.

Add Person

Manage Hires Detail page (2 of 2)

Job

The Job group box displays information about the job for which the person is to be hired.

Type of Hire	Select <i>Hire</i> or <i>Add Contingent Worker</i> . The default value comes from the recruiting application.
Desired Start Date	Displays a default start date that comes from the recruiting application. You can override this value. This date becomes the default effective date of the job record that you create when you hire this applicant.
Empl ID (employee ID)	If you have initiated the hire process and saved a personal data record for the person, the person's employee ID is displayed, but is not editable. If the field is blank, then the system generates a unique employee ID when you save the person's personal data record. If an editable value appears, the system uses this value as the employee ID when you create the person's personal data record. If the employee ID already exists, a warning appears when you click the Add Person button to begin the hire process. PeopleSoft Recruiting Solutions provides a default employee ID if the applicant was associated with an existing employee ID (for example, the person is an internal transfer or a rehire). A text message on the page indicates whether the value provided by the recruiting application has been verified.
View Person Org Summary	If an employee ID exists, click this link to open the Person Organizational Summary page for the person in a new window.

Hire Information

View Job Offer Letter	Click this link to open the applicant's offer letter in a new window. PeopleSoft Recruiting Solutions users can choose whether to make offer letters available for viewing. If no offer letter has been made available, then the link does not appear on this page.
Hire Comments	Displays any hire-related comments that were sent from PeopleSoft Recruiting Solutions. These comments can come from two sources: • A recruiter manually enters comments when submitting the person for hire. • The system generates a message when a recruiter submits a request to withdraw the hire request but the hiring process has already begun. This message advises the HR administrator to use the Delete ID process to roll back the incomplete hire.

Add Person

Add Person and View/Edit Person

If you have not yet begun the hiring process, click the Add Person button to access the Personal Data component where you can add the person to the system. The system transfers applicant data to the Personal Data component to simplify data entry.

After you save the personal data record, the Add Person group box and button become the View/Edit Person group box and link. Click the link to open the personal data component and review or update the data.

Add Job

This group box appears only after you have created a personal data record for the applicant.

Add Job

If you have created the applicant's personal data, but you have not yet entered job data, click the Add Job button to access the Job Data component where you can complete the hire process. The system transfers applicant data to the Job Data component to simplify data entry.

After you save the job data record, the applicant no longer appears in the Manage Hires page.

Increasing the Workforce Through SmartHire Templates

This section provides an overview of SmartHires (template-based hires), lists prerequisites, and discusses how to:

- Select a template or person to perform a template-based hire.
- Enter hire details.
- Enter employee information.
- Complete the hire when a person match is found.
- Select an action when a person match is found.
- View the status of a template based hire.
- Manage hires.
- Review hire detail.

Understanding SmartHires (Template-Based Hires)

The SmartHire process, or template-based hires, enables you to expedite the hiring of individuals. Using a template-driven approach, it offers a way to streamline repetitive data entry by reducing the current data entry process through the Personal Data and Job Data pages.

There are three types of users that will facilitate template-based hires:

- The template administrator creates various templates for use by the end users.
- The end user enters data for persons being added to the database. The amount of data an end user enters is dependant on the types of templates created. Security determines which templates the end user can access.
- The human resources administrator (HR administrator) determines at the template level whether the end user's data will automatically update the HR system, or if it requires an HR administrator to review it first. Also, the HR administrator is sent any errors that occur when the end user saves a person's data to the database for completion.

This table summarizes the pages used by each type of user:

Template Administrator	End user	HR Administrator
• Template Record/Field • Template Category Table • Template Section • Template Creation: • Configuration • Sections • Person Rules • Test Transaction Log • Copy Template	• Hires to Process - Template-Based Hire • Enter Hire Details • Enter Employee Information • Person Match Found • Select an Action • Confirmation • Template Hire Status	• Manage Hires: • Manage Hire Details • Error Transaction • Add Person • Job Data

Note. This section focuses on the records the end user and HR administrator use in the template-based hire process. Template setup by the template administrator is discussed in another chapter.

See [Chapter 2, "Setting Up the Administer Workforce Business Process," Setting Up SmartHire \(Template-Based Hires\), page 16.](#)

To start the template-based hire process, select a pre-configured template. This template will display a simple entry page or multiple data entry pages, depending upon how it was set up. The fields on this page may also be hidden or values will be provided by defaulted, based on how the template was set up by the template administrator. After the hire data is entered it can be either saved directly to the HR system, reviewed by an human resources administrator, or saved for later.

When templates are created by the template administrator, the template status is set to *Test* (T). After the template is tested and ready for use, the status will need to be changed to *Active* (A). When you are searching for templates to use in the template-based hire process, the only templates that are available are those with a status of *Active* (A). End users will only be able to see templates they for which they have row-level security access.

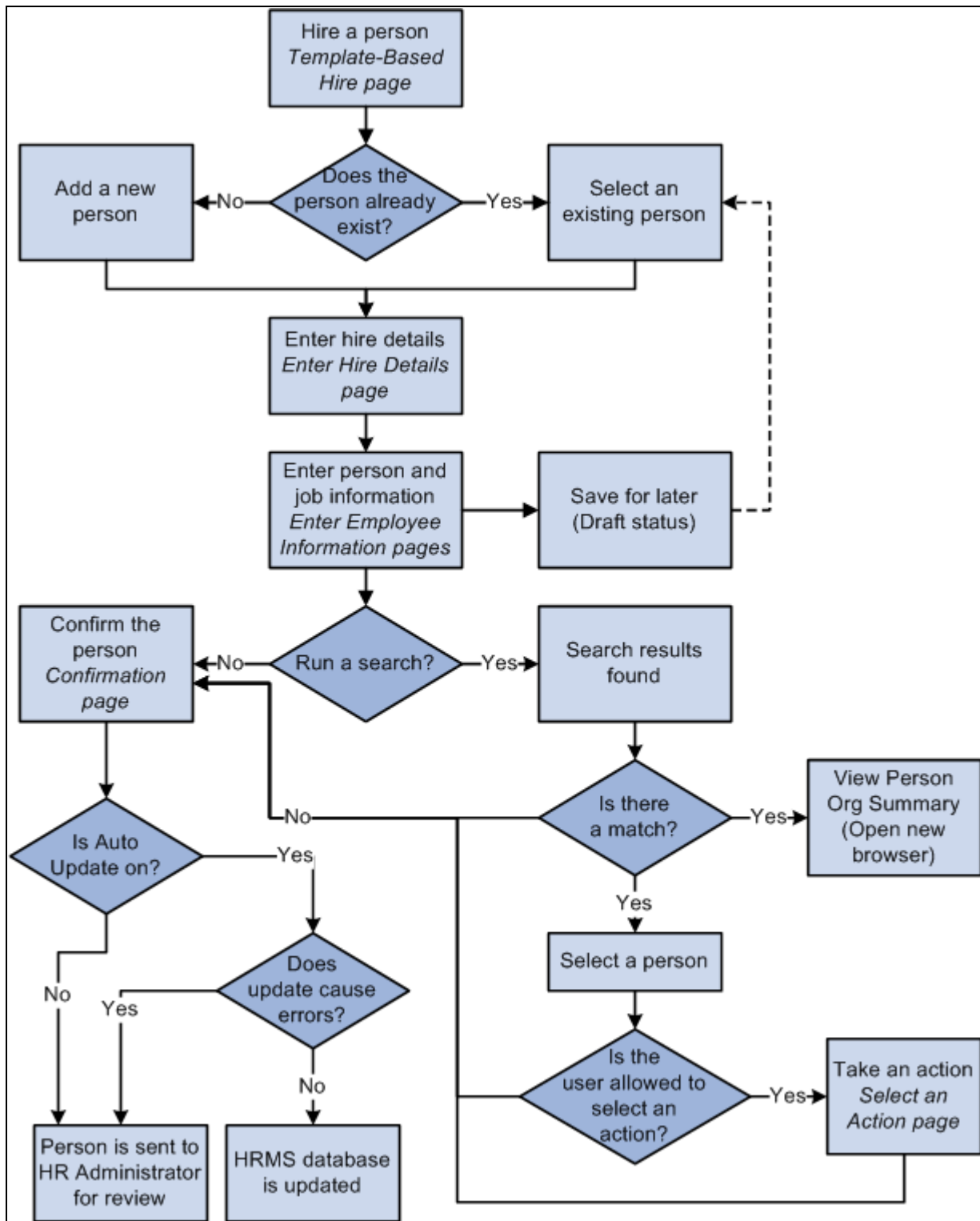
When the data is submitted for processing, the appropriate service-oriented architecture (SOA) or component interface (CI) will be called to process the actual hire. If an error occurs during processing, a line item will be added to the Manage Hires component and a human resources administrator is able to review the data, make corrections, resubmit for processing, or cancel the hire. The human resources administrator will be taken into the Personal Data and the Job Data hire components to complete the hiring process and can modify the data entered by the end user as needed. The components will be pre-populated with the data entered through the template.

Template-Based Hire Process Flow

When hiring a person using the template-based hire feature you will use the following pages:

- Hires to Process - Template-Based Hire.
- Enter Hire Details.
- Enter Employee Information.
- Person Match Found.
- Select an Action.
- Confirmation.
- Template-Based Hire Status.

This diagram illustrates the template-based hire process, during which the user selects an existing person or creates a new person, enters hiring details and person and job information, optionally searches for a match to a person already in the system, and confirms the person data. Depending on the template definition, the confirmed information will either update the database directly, or it will be routed to an HR administrator for review.



Template-based hire process flow includes person and job data entry, optional search for an existing person, and submission of confirmed data

Template-Based Hire

The Hires to Process grid on the Hires to Process - Template-Based Hire page displays the people who are in draft status within the hire process. The list of people is filtered based on the operator ID of the person accessing the page. The page will only show the entries that the end user has previously entered using their operator ID. On this page you can delete a person which will delete the person's information.

Enter Hire Details

On the Enter Hire Details page, enter basic information for the template. On this page you may enter the:

- Person ID.
- Job effective date.
- Hire action.
- Action reason.
- Name and address formats.

Note. Depending on how the template administrator has set up the template configuration this information will be display only, visible and editable, or hidden.

Also, for informational purposes, this page will display such information as the:

- Template name.
- Country.
- Organizational relationship, which is the type of person being hired, such as employee or contingent worker.
- Template category.

Enter Employee Information

The Enter Employee Information page is where you will enter name details, home and mailing address details, National ID, and job details. The number of sections and fields on this page are dependent on how the template chosen has been configured by the template administrator.

Person Match Found

The Person Match Found page displays the possible person matches. The match parameters are set up by the template administrator. If a match is found, select the person from the list and the EmplID is carried forward in the hire process. If no match is found, you can continue with the hire process by clicking the *Not a Match - Continue with Hire* button.

Select an Action

The Select an Action page displays only if a match is found during the search and you are allowed to take some action (defined at the template level). If the user is not allowed to take any action, the page will not display and a Hire Request for the person is sent to the HR administrator.

Confirmation

The Confirmation page displays if the user has successfully saved the data to the system. There are four different messages displayed on the confirmation page based on the template level set up and the security access of the user's Operator ID. The confirmation page will display one of the following four messages:

- **Save Confirmation.** The system displays this message if the user has access to save the person being hired to the database and a Person ID is generated.
- **Save for Later Confirmation.** The system displays this message if the person entered is saved in draft status and a Person ID is not generated.
- **Submit Confirmation.** The system displays this message if the user has access to enter the data but not save it to the database. The person being hired is submitted to Human Resources for final processing.
- **Further Processing Required.** The system displays this message if errors were encountered while trying to save to the database. The person's hire information is then sent to human resources to complete the hire process.

When the data has been confirmed it is stored in the staging tables HR_TBH_HDR and HR_TBH_DATA until the hire process is complete. The HR_TBH_HDR table stores the high-level information, which includes a unique sequence number representing the transaction ID, the template ID, the Operator ID of the user who entered the data, the status representing various stages of the hire process, and the transaction date. The HR_TBH_DATA table stores the record name, field name, and value of the Record/Field with the unique transaction ID. This table is a child of the HR_TBH_HDR table.

The status field on the HR_TBH_HDR may have one of the values displayed in the table below:

Status	Definition	Scenario
DFRT	Draft	The user has begun to enter data but saved to continue later.
SBMT	Submitted	The user entered all required data based on the template configuration.
ACTR	Action Required	The user decided to send the hire request to the HR administrator to review or complete the rest of the information.
EROR	Error	The user encountered some error while saving the data in to the system.
HIRE	Hired/Added	Once the HR administrator completes the hire process by adding person and job information into the system, the status of the row will change to <i>Hire/Added</i> .
COMP	Completed	Once the row is deleted by the user, the status of the row will change to <i>Completed</i> .

Error Transaction

The Error Transaction page is displayed when the template administrator is testing the template and the test is unsuccessful. This page is also available to the HR Administrator on the Manage Hire Details page. This page will display the template used, the person causing the error, the transaction ID, and the start date. It will also give a description of the error found.

Template Hire Status

The Template Hire Status page displays the persons being processed by the template-based hire process and their status. The list is filtered based on the operator ID of the user. Also, the user has the option of deleting a row.

Note. This page does not show people in draft status. You can only view those individuals currently being processed by the HR department, view those who have been cancelled by the HR department, and those who have been successfully hired. You can remove people from the Cancelled Hires and Processed Hires grids.

Prerequisite

Template-based hires provide a configurable, template-driven approach, where you can define default data for various sections in the hiring process. You will be able to create templates to meet different user needs by determining to hide or display specific fields. This allows your Human Resources department to decentralize the hiring process out to line managers or human resource representatives in the field.

Prior to hiring persons with templates, a template administrator must set up the templates. The administrator must be a person who is very familiar with the hiring process. When creating a template, the administrator is responsible for determining:

- Logical groups of fields, which will be the sections to include on the template.
- The sequence of sections and fields within sections.
- Default values for fields.
- Which fields will be hidden, display-only, or enterable.
- Whether data entered by the end user can be directly submitted for processing or will need to be reviewed by a human resource administrator.

Sections and fields used within templates are delivered as system data. These delivered sections can be modified within your templates to suit your organization's needs for hiring. These sections are located in the Template Section component (Set Up HRMS, Product Related, Workforce Administration, Template-Based Hires, Template Section). A list of delivered template-based hire sections are located in the Setting Up the Administer Workforce Business Process chapter in this PeopleBook.

The labels of the fields on the template sections typically reflect the actual field labels. However, the template administrator can create a text catalog entry for those fields in which they want to change the label.

When the templates are created, the template administrator will assign a category to each template. The category is used for row-level security of the template. This security will restrict end user access to the template. Also, PeopleTools Permission Lists and Roles are used for security purposes.

When templates are similar, the template administrator can clone an existing template to eliminate duplicate entry.

See [Chapter 2, "Setting Up the Administer Workforce Business Process," Setting Up SmartHire \(Template-Based Hires\)](#), page 16.

Pages Used to Increase the Workforce Through Templates

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Hires to Process - Template-Based Hire	HR_TBH_EULIST	- Workforce Administration, Template-Based Hire, Template-Based Hire, Template-Based Hire - Manager Self Service, Job and Personal Information, Add Template-Based Hire, Template-Based Hire	Select a template or person to process a template-based hire.
Enter Hire Details	HR_TBH_ADD	- Select a template from the Select Template field on the Template-Based Hire page and click Continue. - Select a name link from the Name field on the Hires to Process - Template-Based Hire page.	Enter hire details to start the template hire process for a person, such as the person's job effective date.
Enter Employee Information	HR_TBH_DATA	Click Continue on the Enter Hire Details page	Enter employee information details for the person being hired. The page will display the tabs and fields defined by the template you selected for this person.
Person Match Found	HR_TBH_SRMATCH	Click Save and Submit on the Enter Employee Information page.	Complete a hire when a person match is found. When saving and submitting the person to the database, if a match is found on the person's name or national ID, this page displays and allows you to select an existing person in the database or continue with the hire.

Page Name	Definition Name	Navigation	Usage
Select an Action	HR_TBH_ACTION	Click the Select button on the Person Match Found page.	Select an action if a matching person is found in the database.
Confirmation Further Processing Required	HR_TBH_CONFIRM	Click Save and Submit on the Template-Based Hire pages.	Displays the type of confirmation after saving a template-based hire, based on the template level set up and the security access of the user's operator ID. When the hire is saved successfully, automatic database updates is turned on, and the Show Update Contracts Link is selected for the template, the system will display the Update Contracts link, which enables users with security permission to the contract pages to enter contract information for a new hire.
Template Hire Status	HR_TBH_STATUS	- Workforce Administration, Template-Based Hire, Template-Based Hire Status, Template Hire Status - Click the Template-Based Hire Status link on the Template-Based Hire page.	View the status of template-based hires for people with a pending, cancelled, or processed status.
Manage Hires	HR_MANAGE_HIRES	Workforce Administration, Personal Information, Manage Hires, Manage Hires	Displays a list of applicants or hire that have gone through either the recruiting process or persons who are going through the template-based hire process.
Manage Hire Details	HR_TBH_HIREDDET	Click the name link for a person whose Source value is <i>Template</i> on the Manage Hires page.	View job details entered during a template-based hire and complete the hire process.

Page Name	Definition Name	Navigation	Usage
Manage Hire Details - Manage Hires	HR_TBH_HIRESM	Click the Search for Matching Persons link on the Manage Hire Details page.	Determine if a person in the Search/Match process matches the person you are hiring. You can also access the Person Organizational Summary component for the selected person from this page by selecting the Per Org Summary link. If a person does not match the person you are hiring, click the Not a Match - Continue with Hire link and the system returns you to the Manage Hire Details page.
Transaction Errors	HR_TBH_ERRORS	Click View Errors from the Manage Hire Details page.	View the errors that occur during the save of the hire.

Selecting a Template or Person to Process a Template-Based Hire

Access the Hires to Process - Template-Based Hire page (Workforce Administration, Template-Based Hire, Template-Based Hire, Hires to Process - Template-Based Hire).

Hires to Process

Template-Based Hire

Choose a template and select Continue enter a new person. The Hires to Process section lists people you have previously started to hire. Select a name and press Continue to work with a Hire in Process. You have the option to delete people you do not intend to hire.

Add a New Person

Select Template: HX Template for Priority 1 Sections Continue

Hires in Process

Customize | Find | | First 1 of 1 Last

Select	Name	Type of Hire	Start Date	Action	Country
☐	Carter Tippets	Employee	11/04/2010	Hire	United States

Select All Deselect All

Delete Selected Names

Go To: [Template-Based Hire Status](#)

Hires to Process - Template-Based Hire page

Start or complete a template-based hire. Click the Template-Based Hire Status link to view hires pending HR processing, hires cancelled by HR, or people who have been hired in the system.

Add a New Person

Select a template and click the Continue icon to add a person using the SmartHire (template-based hire) process. The templates available for selection are those set up by the template administrator.

Hires to Process

Displays the hires that are in *Draft* status. You can only view those people you have added through the Template-Based Hire pages but selected to save for later. The person will remain in *Draft* status until you submit the person, send them to HR for completion, or delete them by selecting the Delete Selected Names button after selecting them.

See Also

[Chapter 2, "Setting Up the Administer Workforce Business Process," Setting Up SmartHire \(Template-Based Hires\), page 16](#)

Entering Hire Details

Access the Enter Hire Details page (click a name link or select a template from the Select Template field on the Hires to Process - Template-Based Hire page and click the Continue button).

Template-Based Hire

Enter Hire Details

The following information is required before hiring, rehiring, adding, or renewing a Person.

Hire Details	
Template:	HX Template for Priority 1 Sections
*Job Effective Date:	11/04/2010
Action:	Hire
Reason Code:	First Job

Continue

Cancel

Enter Hire Details page

Note. The fields you view or update vary depending on the template set up.

Enter basic hire details to start the hire process. Once the values on this page are entered, click Continue to access the Enter Employee Information page.

Possible fields that may be visible or editable are Template ID, Organizational Relationship, Country, Category, EmplID, Job Effective Date, Action, Reason, Name Format, and Address Format.

Empl ID

Displays the value *NEW* if you are adding a new person and are using system-assigned IDs. Otherwise, the system displays the value that you enter to access the page.

Entering Employee Information

Access the Enter Employee Information page (click Continue on the Enter Hire Details page).

Template-Based Hire

Enter Employee Information

Enter the following employee or contingent worker information. If you cannot enter all of the person's information select Save for Later.

Personal Information

Work Information

Salary Information

Hire Template Information

Template:

HX Template for Priority 1 Sections

Effective Date:

11/04/2010

Employee Information

Primary Name - English

Name Prefix:

*First Name:

Middle Name:

*Last Name:

Name Suffix:

Birth Information

Date of Birth:

Birth Country:

Birth State:

Birth Location:

Example of the Enter Employee Information page (1 of 3)

Person Gender

*Gender:

Person National ID United States

*National ID Type:

PR

*National ID:

Person Address 01 - United States

Address Type:

Home

*Address Line 1:

Address Line 2:

Address Line 3:

*City:

*State:

*Postal Code:

County:

Person Address 02 - United States

Address Type:

Mailing

Address Line 1:

Address Line 2:

Address Line 3:

City:

State:

Postal Code:

County:

Example of the Enter Employee Information page (2 of 3)

Person Phone Number 01

*Phone Type:

Home

Telephone:

Phone Extension:

Person Email Address 01

*Email Type:

*Email Address:

☐ Preferred

Comments

Comments:

[Edit Hire Details](#)

Save and Submit

Save for Later

Cancel

Example of the Enter Employee Information page (3 of 3)

Note. The page tabs and fields you vary depending on the template set up.

Enter employee information for the fields that are defined for the template chosen. This data will be used to hire the person. If there is more than one page to the template, use the tabs to navigate between the pages.

See [Chapter 6, "Increasing the Workforce," Understanding Job Data, page 207.](#)

Completing a Template-Based Hire

Once all data is entered, you may be presented with these options:

- **Save and Submit** – Click this button to save and submit the information for the person to the database.
 - If Search Match is enabled for this template, the system will run the Search/Match process and display the Person Match Found page if a match is found.
 - When the Automatic Database Updates check box is selected for the template and the hire is saved successfully, the person is hired in the database and all information entered is updated in the appropriate tables.
 - When the Automatic Database Updates and the Show Update Contracts Link check boxes are selected on the template and the hire is saved successfully, the system will display the Update Contracts link, which enables users with security permission to the contract pages to enter contract information for a new hire.
 - If Automatic Database Updates is not selected on the template definition, and no matching person was found, the Submit Confirmation page will appear.
- **Save for Later** – Click this button to place the hire in draft status. Depending on the security access granted the end user, he or she can access the person later to complete the hire, or the hire can be completed by the HR representative.
- **Submit to HR** – Click this button to submit the person's information to HR for review, completion, or submission by the HR administrator.
- **Cancel** – Click this button to return to the initial Template-Based Hire page and no data is saved.

Note. The save options will vary depending on the template setup and the end user's security access. For example, if the end user is not allowed to save and submit data to the database, the template administrator will set up the template so all hires will have to be saved for later or submitted to HR for completion.

(USF) U.S. Federal Specific Considerations

In cases of U.S. Federal implementations, when the end user selects Save and Submit for an employee template, the following will occur:

- When Automatic Database Updates is selected.

The employee goes to the first step in the PAR approval process. The data is not sent directly to Personal Data and Job Data.

- When Automatic Database Updates is deselected.

The hire request will go to the Manage Hire page to await HR action. When the HR administrator saves the person (in the HR Processing USF component), the data will go to the first step in the PAR approval process, not directly to Personal Data and Job Data.

There are two exceptions to this rule:

1. When Federal customers hire contingent workers they do not go through the PAR approval process, instead they go directly to Personal Data and Job Data.
2. If the template administrator defaults the PAR Status field to *Processed by Human Resources* when setting up the template, then the employee data will be sent on to Personal Data and Job Data as part of the processing Federal Hire component interface.

See Also

[Chapter 2, "Setting Up the Administer Workforce Business Process," Troubleshooting Templates, page 26](#)

Completing the Hire when a Person Match is Found

Access the Person Match Found page (click Save and Submit on the Enter Employee Information page).

Template-Based Hire

Person Match Found

The personal information you entered matches, or is similar to, person(s) in the Human Resources system. Please review the person information below. Choose Select if the person is a match. Select No Match - Continue with Hire if no one is a match. The Person Org Summary hyperlink will open a new browser window and provide additional details about the person's work history.

Hire Template Information

Template: USA HR user hires EMP into IT dept Effective Date: 03/03/2009

Name: Jeff Carson Person ID: NEW

Possible Person Matches

	Employee ID	Name Type	Name Effective Date	First Name	Last Name	National ID	Date of Birth	Per Org Summary
Select	HXRR006		1/1/2001	Jeff	Carson	572453156	2/12/1962	Per Org Summary
Select	HXRR030		9/4/2002	Jeff	Carson	551565117	1/14/1951	Per Org Summary

Previous Not a Match - Continue with Hire Save for Later Cancel

Person Match Found page

This page appears only if Search Match is enabled for the template and a match is found on the person being hired.

Select

If a match is found, the end user can select one of the existing people to continue with the hire. If the matching person selected is currently active in the system, the hire request will automatically be sent to an HR administrator to complete. If the matching person selected is currently inactive in the system, you will be presented different options on how to proceed depending upon how the template rules are set up.

Per Org Summary

Click this link to have the system open the Person Organizational Summary page in a new window to view more details about this person. This can be useful in deciding whether the person should be treated as a new hire, if this should be treated as a concurrent job for an existing person, or if this is a rehire of someone already in the database.

Not a Match - Continue with Hire Click this button if none of the search results are a match.

Save for Later Click this button to save this person in draft status and come back at a later time to decide whether the person is a match or not.

Cancel Click this button to cancel this hire process. You will lose all data previously entered and the system will return you to the initial Template-Based Hire page.

Send to HR for Completion Click this button to submit this hire to HR for completion.

See [Chapter 6, "Increasing the Workforce," Reviewing Organizational Relationships, page 321.](#)

Selecting an Action when a Person Match is Found

Access the Select an Action page (click the Select button for a person on the Person Match Found page).

Template-Based Hire

Select an Action

Hire Template Information

Template:	HX Template for Priority 1 Sections	Effective Date:	04/03/2009

Name: Norman Jones

 This person already exists in the Human Resources system. You must decide what action should be used to hire this person into the system.

Search for Matching Persons found this person has one or more inactive Employee Instances in the system.

Select an Action

☐ Select existing employee instance as a Rehire.
☐ Select existing employee instance as a Hire.
☒ Create a new employee instance using Hire as the action.

Instance #: 1

☐ Send the request to an HR Administrator to process.

Previous

Save and Submit

Save for Later

Cancel

Select an Action page

Note. The options on this page vary depending upon how the rules are set up for the template.

When no active organizational instance is found and the template administrator has set up the template to enable the end user to decide what action to take, options may include:

- Select existing employee instance as a Rehire or Select existing employee instance as a Hire.

The system will default to the lowest employment instance. The end user has the option to select a different employee instance, if applicable. When an employee instance is selected, the system always defaults to the controlling instance employee record number behind the scenes.

- Create a new employee instance using Hire as the action.

The action will always default to *HIR* (Hire) for employee templates and *ADD* (Add Contingent Worker) for contingent worker templates. The employee instance and employee record number is automatically calculated behind the scenes.

- Send the request to an HR Administrator to process.

When the end user does not get to decide what action to take, the template administrator must decide at the template level the options to take.

If only one inactive employment instance is found for the selected person when the Search Match process is run, the template administrator must decide between the following actions:

- Restart Employment Instance as a Rehire.
- Restart Employment Instance as a Hire.
- Create a New Employment Instance using Hire as the Action.
- Send the Request to an HR Administrator to Process.

When more than one inactive employment instance is found for the selected person when the Search Match process is run, the template administrator can choose from with of these option to have the system perform:

- Create a New Employment Instance using Hire as the Action.
- Send the request to an HR Administrator to process.

Note. When an active person is selected from the search results, the hire request will always be sent to HR to complete the process.

See [Chapter 2, "Setting Up the Administer Workforce Business Process," Setting Up Hire Template Person Rules, page 46.](#)

Viewing the Status of a Template Based Hire

Access the Template Hire Status page (Workforce Administration, Template-Based Hire, Template-Based Hire Status, Template Hire Status).

Template Hire Status

The following people are currently being processed for hire by the Human Resources department.

Pending Hires							Customize Find  First  1 of 1  Last
Name	Type of Hire	Start Date	Action	Country	Status	Person ID	
Farnsworth Chester	Employee	04/03/2009	Hire	United States	Requested	NEW	

The following people have been cancelled by Human Resources. In order to hire this person you must restart the hire process. You have the option to Remove them from your list.

Cancelled Hires

You do not have any cancelled hires.

The following people have been hired into the system. You have the option to Remove them from your list.

Processed Hires							Customize Find  First  1 of 1  Last
Select	Name	Type of Hire	Start Date	Action	Country	Person ID	
☐	Jeff Carson	Employee	03/03/2009	Hire	United States	0053	

Select All

Deselect All

Remove Selected from List

Go To: [Template-Based Hire](#)

Template Hire Status page

View the status of the persons that you entered using the template based hire process. The end user will only be able to view the persons they have entered in the system. The HR administrator will have access to view all persons entered through template-based hires.

Managing Hires

Access the Manage Hires page (Workforce Administration, Personal Information, Manage Hires, Manage Hires).

Manage Hires

The following Hire Transactions are ready to be processed. Select a Transaction by Name to start the process.

Manage Hires

*Select Transactions Where: Start Date ▼

From: 03/24/2009 31 To: 04/13/2009 31 Refresh

Select	Start Date	Status	Name	Person ID	Type of Hire	Source	Submitted By
☐	04/03/2009	Draft	Thomas Jackson	NEW	Hire	Template	Betty Locherty

[Select All](#) [Deselect All](#)

Cancel Selected Transactions

Manage Hires page

The HR administrator uses the Manage Hires page to view hires that may be in draft status that the end user started, to view hires that require HR review prior to committing to the database, or to review hires that encountered errors upon saving and require an HR administrator's review to complete the hire process.

When the template administrator sets up the templates, he or she can select or deselect the Automatic Database Update check box. If selected, the end user is able to save the hire to the database or save the hire in draft status. If deselected, then the end user only has the option to save the hire as a draft or to submit the hire to HR. In these instances, the HR administrator uses the Manage Hires page to view people and continue with the hire process.

The Manage Hires page is also used by Recruiting Solutions to notify HR when a hire request has been submitted and needs to be processed.

Select Transactions Where

Select a value that will assist viewing and managing hires. Values are *Status*, and *Type of Hire*.

- *Source* – When selecting this option, the system displays the Equals field. Values in this field are *Recruiting Solutions* and *Template-Based Hire*.
- *Start Date* – When selecting this option, the system displays the From and To date fields. Enter a date range for hire requests submitted within a specified time period.
- *Status* – When selecting this option the system displays the Equals field. Values in this field are *Action Required*, *All*, *Draft*, *Error*, and *Requested*.
- *Type of Hire* – When selecting this option the system displays the Equals field. Values in this field are *Add Concurrent Job*, *Add Contingent Worker*, *Hire*, *Reassignment*, and *Rehire*.

Source

View hire requests submitted by Recruiting Solutions (*Recruiting*) or by the Template-Based Hire (*Template*) process.

Select and Cancel Selected Transactions

Select the check box for a person and click the Cancel Selected Transactions button to cancel the hire request.

See Also

PeopleSoft Enterprise Talent Acquisition Manager 9.1 PeopleBook, "Hiring Applicants"

Managing Hire Details

Access the Manage Hire Details page (click the name link for a person whose Source value is *Template* on the Manage Hires page).

Manage Hires

Manage Hire Details

Name:

Carol Timpet

The Start Date entered on this page will be used as the Effective Date for Personal Data and Job.

Template Data

Template:

HX_CONTRACT_DATA - HX- Template with Contract data

Hire Status:

Error

Organizational Relationship:

Employee

Start Date:

08/04/2009

31

Action:

Hire

Action Reason:

New Position

Manage Hire Details page (1 of 3)

▼ Hire Details		
Position Number:	QA Analyst	Job Title:
Regulatory Region:		Supervisor:
Company:		Reported To:
Business Unit:		
Department:		Regular/Temporary:
Location Code:		Full/Part Time:
Tax Location Code:		Standard Hours:
Pay Group:		Regular Shift:
Employee Type:		Labor Agreement:
Currency Code:		
Frequency:		Contract Number:
Compensation Rate:		Benefit Program:
Comments		

Manage Hire Details page (2 of 3)

Person Model Information	
Employee ID:	0051 Search for Matching Persons
Organizational Instance:	☒ Create new Org Instance Instance Nbr: 0
View Errors	
Select this button to view errors encountered when the hire/add attempted to update the system. View Errors	
View/Update Person Data	
Select this link to view Personal Data that was successfully uploaded to the system. View/Edit Person	
Add Job Data	
Select this button to upload Job Data. You may view/update the data before saving it to the system. Add Job	
Return to Manage Hires	

Manage Hire Details page (3 of 3)

Use this page to change the hire date, perform a search for matching persons, or select the appropriate buttons or links to complete the hire.

Note. This page appears different for the *Template* source as it does for the *Recruiting* source page display. The Manage Hire Details page for a *Template* hire displays the buttons and links in the various sections that are dependent upon the template status.

Status	Available Button or Link	Description
Requested	Add Person (button)	Automatic updates is off. The person has not been added to the system.
Requested	View Person (link) Add Job (button)	Automatic updates is off. Person has been to Personal Data. The person still needs to be added to Job Data.
Draft	N/A	The HR administrator does not have the ability to add someone to the system who is in Draft status.
Action Required	Add Person (button)	Automatic updates is on. This person was submitted to HR for completion.
Action Required	View Person (link) Add Job (button)	Automatic updates is on. Personal Data is not updated through Template-Based Hire when an active person is found. The job information has not been added.
Error	View Errors (button) Add Person (button)	Automatic updates is on. An error occurred when attempting to save the record to Personal Data.
Error	View Errors (button) Add Person (button) Add Job (button)	Automatic updates is on. The person has been added to Personal Data. An error occurred when attempting to save the record to Job.

Note. (USF) When the database is federalized, only the Add Person/Job appears, which will update HR Processing USF. Depending on the PAR Status, Personal Data and Job Data may also be automatically updated. For example, if the PAR Status is *Processed* on the template, Personal Data and Job Data will be automatically updated when the Add Person/Job button is selected and the information is saved. However, if the PAR Status is *Requested* on the template, only the HR Processing USF page will be updated and the hire request will need to go through the standard PAR approval process. If applicable, U.S. Federal customers will also see the View Errors button on the Manage Hires Detail page.

Hire Details

Expand this section to view job and employment fields that were defaulted from the template for this person. If the end user added any comments you will also be able to review that information.

Person Model Information

Search for Matching Persons	Click this link to see if there are matching person's in the system on the Manage Hire Details - Manage Hire page, which enables you to view a persons organizational summary to see if it is a match.
Person Organizational Summary	Click to open the Person Organizational Summary page if a person ID exists.
Organizational Instance and Instance Nbr (instance number)	Select which organizational instance and number should be used to add the job in the system. Options may include Create a new Org Instance or Use existing Org Instance depending. If a person exists and you wish to use an existing organizational instance, the Employee Assignment fields will appear.
Employee Assignment, Empl Record, and Action	Select the employee assignment, record, and action that should be used for this hire or rehire. These fields become available based on the options selected for the Organizational Instance fields.

When the person has all inactive records, determine whether to create a new organizational instance when the record is added to Job or to use an existing organizational instance from the following options:

Option	Org Instance	Assignment	Action
Create a new Org Instance	Defaults to the next available instance number.	Defaults to the next available employee record number.	HIR or ADD
Use existing Org Instance	Select from the available values in the Instance Nbr field.	Select from the available values in the Empl Record field.	HIR, REH or ADD, RNW

When a person has one or more active records in the system, the system enables you to use create a new assignment and additional Action options are available.

View Errors

View Errors	Click this link open the Transaction Errors page and view error messages.

View/Update Person Data

View/Edit Person Click this link to open the Personal Data pages and view or edit information for the person that was successfully uploaded to the system.

Add Personal/Job Data or Add Job Data

The names for the heading and buttons in this section may vary depending upon whether the Personal Data was successfully added to the system.

Add Person/Job or Add Job Click this button to upload Personal Data or Job Data. You may view or update the data before saving it to the system.

Reviewing Organizational Relationships

This section discusses how to view a person's organizational relationships.

Page Used to View a Person's Organizational Relationships

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Person Organizational Summary	PERSON_SUMMARY	Workforce Administration, Personal Information, Person Organizational Summary, Person Organizational Summary	Review a summary of a person's organizational relationships.

Viewing a Person's Organizational Relationships

Access the Person Organizational Summary page (Workforce Administration, Personal Information, Person Organizational Summary, Person Organizational Summary).

Person Organizational Summary

Charles Reid
Person ID: KC0004

Employment Instances
Find | View All First 1 of 1 Last

ORG Instance: 0 Last Hire: 04/02/1981 Termination Date:
HR Status: Active Payroll Status: Active

Assignments
Customize | Find | First 1-2 of 2 Last

Empl Record	Home/Host	HR Status	Payroll Status	Date Last Change	Business Unit	Department	Last Asgn Start	Term Date
0	Home	Active	Active	01/01/2000	CAN01	13000	04/02/1981	
1	Home	Active	Active	04/02/1981	CAN01	10000	04/02/1981	

Person of Interest Instance
Customize | Find | First 1 of 1 Last

Person of Interest Type	Empl Record	Status	Begin Date/	End Date

Person Organizational Summary page

(BRA) Running Brazil Employment Reports

This section provides overviews of the CAGED report and employee registration and discusses how to:

- Generate CAGED reports.
- Generate employee registry reports.

Understanding the CAGED Report

The *Cadastro Geral de Empregados e Desempregados* – CAGED (General Register of Employed and Unemployed Individuals) is a permanent register of employee hirings and dismissals. Every establishment that has had any type of turnover (hiring, dismissing, or transferring employees who have employment contracts ruled by the Consolidated Labor Laws) is required to report that turnover to the Ministry of Labor and Employment.

The CAGED report generates a file containing the monthly turnover of employees by establishment.

Understanding Employee Registration

Employee registration provides evidence of length of service and length of social security contribution and proves the relationship between employee and employer. This information affects social security pensions. Companies must record their employees' data in books or cards.

The employee registry report generates a flat file containing information about the employee's employment data (hire date, retirement date) and contributions. Keep the flat file as a record.

Pages Used to Run Brazil Employment Reports

Page Name	Definition Name	Navigation	Usage
CAGED File/Report BRA	CAGED_RC_BRA	Workforce Monitoring, Meet Regulatory Rqmts BRA, CAGED File/Report BRA, CAGED File/Report BRA	Generate CAGED reports.
Employee Registry Report BRA	EMPL_REG_RC_BRA	Workforce Monitoring, Meet Regulatory Rqmts BRA, Employee Registry Report BRA, Employee Registry Report BRA	Generate employee registry reports.

Generating CAGED Reports

Access the CAGED File/Report BRA page (Workforce Monitoring, Meet Regulatory Rqmts BRA, CAGED File/Report BRA).

CAGED File/Report BRA page

Frequency ID Select the frequency.

Fix File	Select to generate an Fix (rightness) file. You generate a Fix file to send corrections to a previously sent file; it contains the same information as CAGED.
First Declaration	Select to indicate that this is the first statement that the establishment is sending to CAGED.
Include Monthly Salary	Select to include monthly salary in the report.
Media Type	Indicate how you are sending the file to CAGED. Values are: <i>Diskette</i> (floppy disk), <i>Tape</i> (magnetic tape or cartridge), or <i>Other</i> .
Additional Compensation Element	If you use PeopleSoft Enterprise Global Payroll, enter earning components other than salary to report to CAGED.

Run the BRCGED01 process to generate the CAGED report.

Generating Employee Registry Reports

Access the Employee Registry Report BRA page (Workforce Monitoring, Meet Regulatory Rqmts BRA, Employee Registry Report BRA, Employee Registry Report BRA).

Employee Registry Report BRA

Run Control ID: 1 [Report Manager](#) [Process Monitor](#) [Run](#)

Language: English

Report Parameters

Comments Option

☒ No Comments
 ☐ Print Comments
 ☐ Print Box
 ☐ Print Comments and Box

Employee Selection

☒ All Establishments & Employees
 ☐ By Establishment ID
 ☐ By EmplID

With Changes On

Begin Date:
End Date:

☐ Department
 ☐ Establishment
 ☐ Job Code

☐ Job Position
 ☐ Salary

Action / Reason

[Customize](#) | [Find](#) | [View All](#) | | [First](#) | 1 of 1 | [Last](#)

#	*Action Type	Action	Reason	Description
1	Transference	 	 	

Salary Report Option

[Customize](#) | [Find](#) | [View All](#) | | [First](#) | 1 of 1 | [Last](#)

#	Earnings	Description
1	 	

Employee Registry Report BRA page

Comments Option

Select whether the report should not include comments or if it should print comments, print box, or print comments and box.

Employee Selection

Select whether you want the report to include all employees and establishments or to include only a particular establishment or employee.

If you select the By Establishment ID option, the Establishment ID and Department fields appear.

If you select the By EmplID option, the Empl ID field appears.

Establishment ID, Department, and Empl ID

Use these fields to restrict the number of employees for whom you generate an employee registry report.

With Changes On

This group box appears when you select either All Establishments & Employees or Establishment.

Begin Date and End Date

Select the beginning and ending dates for the period for which you want to generate the Employee Registry report.

- Action and Reason** Enter an action and reason to generate employee registry reports only for employees with the specified action reason.
- Salary Report Option** If you use PeopleSoft Enterprise Global Payroll, you can include payroll information in this report. Enter earning components other than salary to include in this report.

Run the BREREG01 process to generate the Employee Registry report.

(CAN) Running the Canadian Hire List Report

This section lists the page used to run the Canadian Hire List report.

Page Used to Run the Canadian Hire List Report

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Hire Report CAN	RUNCTL_FROMTHRU	Workforce Administration, Job Information, Reports, Hire Report CAN, Hire Report CAN	Run the CAN Hire List report (PER100CN). This produces a hire list that provides information on social insurance numbers, effective dates, and badge or payroll numbers that are within the date range that is provided.

(NLD) Running the First Day Notification

This section discusses how to:

- Set up the First Day Notification.
- Generate First Day Notifications.
- View the First Day Notification results.

Understanding First Day Notifications

In the Netherlands, employers send First Day Notifications (*Eerstedagsmelding* [EDM]) to notify the Tax Authority when they hire or rehire employees.

Administer Workforce provides the First Day Notification NLD Application Engine process (HR_EDM_NLD) to generate the notifications. The run control page for the process enables you to search for employees who have been hired or rehired within a given period. You can review and adjust the list of employees before running the process, which creates XML files for transmission to the Dutch Tax Authority. You can view details of the First Day Notifications that have been generated using the Notification Results page.

Before you create First Day Notifications, use the Setup First Day Report NLD component (HR_SETUP_EDM_NLD) to define information required for each company.

Pages Used to Set Up and Generate First Day Notifications

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Setup First Day Report NLD	EDM_TXR_NLD	Set Up HRMS, Product Related, Workforce Administration, Setup First Day Report NLD, Setup First Day Report NLD	For each company that submits first day notifications, set up the tax number suffix to use and specify the employee classes that are not included in the notifications.
First Day Notification	RUNCTL_EDM_NLD	Workforce Administration, Workforce Reports, First Day Notification NLD, First Day Notification	Use this page to search for employees who were hired or rehired within a given period, and generate the First Day notification for those employees. You can also adjust the list of hires and rehires before you run the report.
Notification Results	EDM_RSLT_NLD	Workforce Administration, Workforce Reports, First Day Notification NLD, Notification Results	View details of First Day Notifications that were previously generated using the First Day Notification NLD process.

Setting Up the First Day Notification

Access the Setup First Day Report NLD page (Set Up HRMS, Product Related, Workforce Administration, Setup First Day Report NLD, Setup First Day Report NLD).

Setup First Day Report NLD

Company: KN1

Description: Business Institute Netherlands

Federal Employer Tax ID: 34089699

Tax Number Suffix:

Exclude Employee Classes		Customize	Find	View All	First	1 of 1	Last
Employee Classification							
1	Agency/Temp					+	-

Setup First Day Report NLD page

Federal Employer Tax ID

Displays the company's employer tax ID that is specified on the Company — Default Settings page.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up Organization Foundation Tables," Setting Default Information for Companies.

Tax Number Suffix

Enter the tax number suffix to use for the first day notification. When you run the first day notification, the system combines the tax number suffix and the federal employer tax ID to create the employer ID that is included in the first day notification.

The default suffix is *L01*. If you want to use additional suffixes, name them *L02*, *L03*, and so on.

Exclude Employee Classes

Use this scroll area to define the classes of employees who are not included in first day notifications. Typically, temporary employees who are employed by an agency (*uitzendkrachten*) are not included in first day notifications, but your organization may have other classes of employees that are excluded from reporting.

Employee Classification

Select the employee classes that you want to exclude from reporting. Employee classes are defined by setID on the Employee Class page and assigned to employees on the Job Data - Job Information page.

Generating First Day Notifications

Access the First Day Notification page (Workforce Administration, Workforce Reports, First Day Notification NLD, First Day Notification).

First Day Notification

Notification Results

Run Control ID: 01
[Report Manager](#)
[Process Monitor](#)

Report Request Parameters

Message ID text:

Path:

File Name:

Search Criteria

Begin Date:
End Date:

Company: Business Institute Netherlands
Process Date: 07/02/2009

Empl ID:

Selection:

Employees

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

Hire Dates

Action Reason

Empl ID	Empl Record	Name	Hire Date	Rehire Dt	Company	
1 KN0004	0	Jan Aafjes	03/07/1991	07/04/2006	KN1	
2 KN0011	0	Maarten de Graaf	07/31/2006	07/31/2006	KN1	

First Day Notification page

Message ID text Enter free format text that is combined with the company's federal employer tax ID and the tax number suffix to form the message ID in the XML file. Use the First Day Report Setup page to define the tax number suffix to use.

Path Enter the location of the XML file that is created by the First Day Notification NLD process. Enter an absolute path name, such as c:/temp/, or a relative path such as \\machinename\temp.

File Name Enter the name of the XML file that is created by the First Day Notification NLD process. The process generates files with file names that combine the file name you enter here with the employee ID and employee record number.

Search Criteria

Use this group box to specify the search criteria for the First Day Notification.

Begin Date and End Date Enter the dates for the reporting period. The system searches for hires and rehires that occurred within this period.

Company and Empl ID (employee ID)	Select a company to search for hires and rehires within that company, or select an employee if you want to run the report for a specific person. Leave this field blank to run the report for all companies.
Selection	Select one of these values: <i>New (re-)hires:</i> To include only those hires and rehires that have not been previously reported. <i>All (re-)hires:</i> To include all hires and rehires that occurred in the period defined by the begin and end dates. Use this option if you want to rerun the notification for a period. For example if you have changed employee data and you need to recreate the notification, use this option to run the report.
Select with Matching Criteria	Click this button to search for employees who match the criteria you entered in the Search Criteria group box. The system displays matching employees in the Employees scroll area.

Employees

This scroll area lists the employees who matched the search criteria that you specified. Review the employee details and delete any employees you don't want to include in the report. When you click the Run button to run the First Day Notification NLD process, the system generates a notification for the employees that are listed in the scroll area.

Note. The system includes employees whose Regulatory Region is *NLD* only. Employees' regulatory region is defined on the Job Data - Work Location page.

Hire Date and Rehire Dt (rehire date)	Displays the employee's hire or rehire date.
Action and Reason Code	Displays the action and reason code that were used for the hire or rehire. The system includes employees with the HIR (hire) action or REH (rehire) action codes only.
Empl Class (employee class)	Displays the employee class that is assigned to the employee on the Job Data - Job Information page.

Viewing the First Day Notification Results

Access the Notification Results page (Workforce Administration, Workforce Reports, First Day Notification NLD, Notification Results).

First Day Notification

Notification Results

Search Criteria

Process Date:

08/25/2006

Company:

KN1

Business Institute Netherlands

Empl ID:

Message ID:

Select with Matching Criteria

Employees

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

	Empl ID	Empl Record	Name	Hire Date	Process Date	Time Reported	Message ID
1	KN0004	0	Jan Aafjes	07/04/2006	08/25/2006	7:52AM	KN1JUL06/34089699L01/KN0004/0
2	KN0011	0	Maarten de Graaf	07/31/2006	08/25/2006	7:52AM	KN1JUL06/34089699L01/KN0011/0

Notification Results page

Search Criteria

- Process Date** Enter a process date if you want to view details of the First Day Notifications generated on a given date.
- Company** Select a company to view details of the First Day Notifications that have been generated for employees in that company.
- EmplID** Select an employee ID to view details of that person's First Day Notification.
- Message ID** Enter a message ID if you want to view the employees who were included in a specific message ID.
- Select with Matching Criteria** Click this button to search for employees whose First Day Notifications match the criteria you entered in the Search Criteria group box.

Employees

This scroll area lists the employees whose First Day Notifications match the search criteria.

- Hire Date** Displays the employee's hire or rehire date.
- Time Reported** Displays the time that the notification was generated.
- Message ID** Displays the message ID. This is generated by the First Day Notification process by combining the message ID text you specified on the First Day Notification page, the company's employer tax ID, the tax number suffix, and the employee ID.

Chapter 7

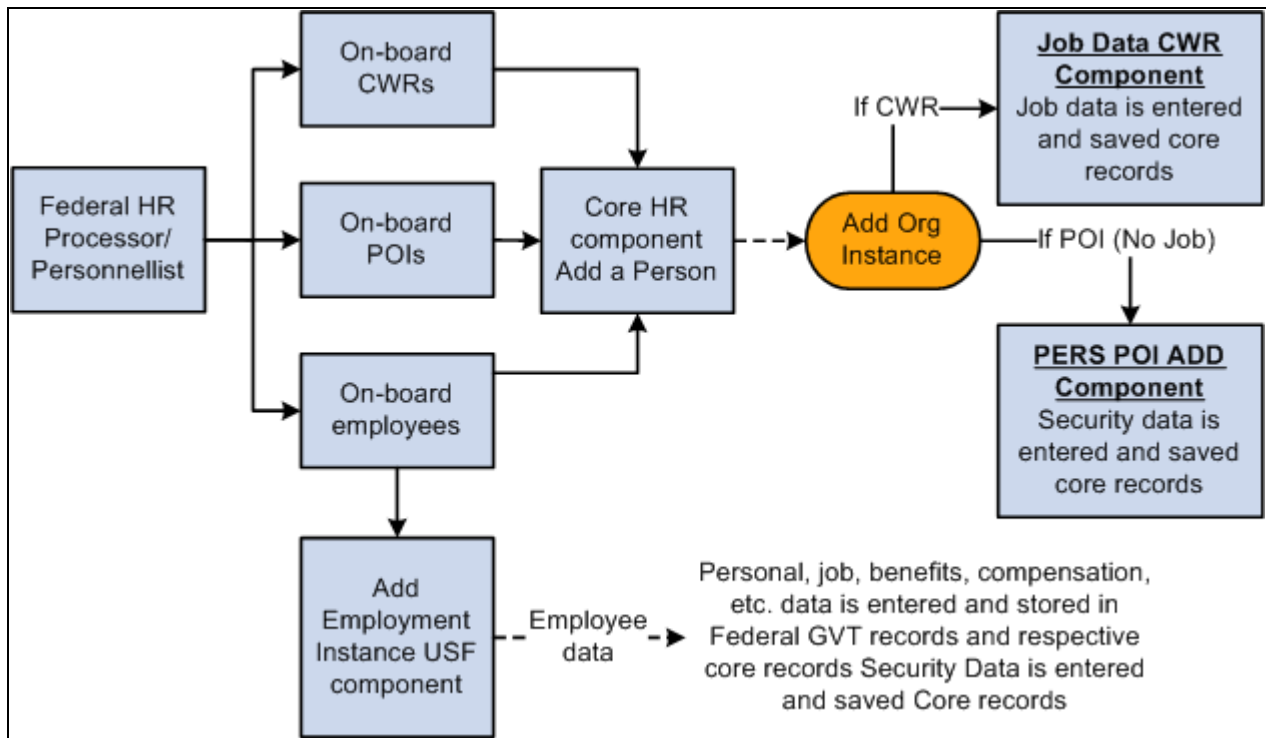
(USF) Adding an Employment Instance

This chapter provides an overview of hiring U.S. federal government employees and discusses how to:

- Add an employment instance.
- Enter education information.
- Assign employees to positions.
- Hire job applicants.
- Add concurrent jobs.
- Print appointment affidavits and preliminary employment data forms.

Understanding U.S. Federal Hiring

This diagram shows the process for hiring U.S. federal government employees, including hiring an existing person of interest (POI) or contingent worker (CWR) or creating additional appointments for existing federal employees:



Hiring U.S. federal government employees

Use the Add Employment Instance USF component to enter federal employment data for hiring an existing person of interest (POI) or contingent worker (CWR) as a federal employee. You also use this component to create additional appointments for existing federal employees.

See [Chapter 5, "Adding a Person in PeopleSoft Human Resources," Adding a Person, page 179.](#)

The pages that are included in the PAR process store specific information and contain links to supplemental pages that provide further details. The following table lists four components:

Component	Navigation Path	When to Use
Add Employment Instance USF	Workforce Administration, Job Information, Add Employment Instance USF	To create a federal employment instance using an existing person of interest (POI) or contingent worker (CWR) data. If a person is already an existing employee, this component will increment the employment record number to accommodate the new federal job.

Component	Navigation Path	When to Use
Supervisor Request	Workforce Administration, Job Information, Supervisor Request USF	See Chapter 17, "(USF) Administering Personnel Action Requests," Tracking and Routing a PAR Through Reviews and Completion, page 813. See <i>PeopleSoft Enterprise eProfile Manager Desktop 9.1 PeopleBook</i> , "(USF) Managing Direct Reports."
Cancel Personnel Action	Workforce Administration, Job Information, Cancel Personnel Action USF	See Chapter 17, "(USF) Administering Personnel Action Requests," Canceling or Correcting a Personnel Action Request, page 820. This component is used when a cancellation (NOA 001) personnel action is necessary.
Correct Personnel Action	Workforce Administration, Job Information, Correct Personnel Action USF	See Chapter 17, "(USF) Administering Personnel Action Requests," Canceling or Correcting a Personnel Action Request, page 820. This component is used when a correction (NOA 002) personnel action is necessary.

Enter personal information, employment information, job data, compensation, job earnings distribution information, and benefit program choices. You must enter this information before you can perform any other human resource tasks in PeopleSoft Enterprise Human Resources. Because many of the fields on these pages are required, enter information in all the pages *before* saving your entries.

See Also

[Chapter 17, "\(USF\) Administering Personnel Action Requests," Understanding the Administering PAR System, page 811](#)

[Chapter 6, "Increasing the Workforce," Understanding SmartHires \(Template-Based Hires\), page 298](#)

Common Elements Used in This Chapter

Transaction Nbr and Sequence	Set by default to 1/1—the correct numbers for new employees. Your agency can use these numbers to track both the individual transactions for this employee and the multiple administrative actions that occur on the same day. This field controls the order in which actions are processed internally and the order in which they are output across interfaces. After you save a request, the system automatically increments it by one for each new action effective on the same day. If human resources personnel perform a correction of the original hire request, the correction's assigned value is 1/2(1 is the transaction number for this particular action for this employee on this day and 2 is the sequence number for any correction of this action for this employee on this day).
PAR Status (Personnel Action Request status)	References the status of this request within the PAR request/approval process. On the Data Control page, this field is set by default to <i>PRO</i> (Processed by HR). If you choose to save with this (PRO) status, the personnel action information is saved and applied as its "finalized" state. The value that remains after you leave this page is the displayed status on other pages within the component.
NOA Code (nature of action code)	The Federal numerical code that applies to this personnel action.
OK	Click to close this page.

Adding an Employment Instance

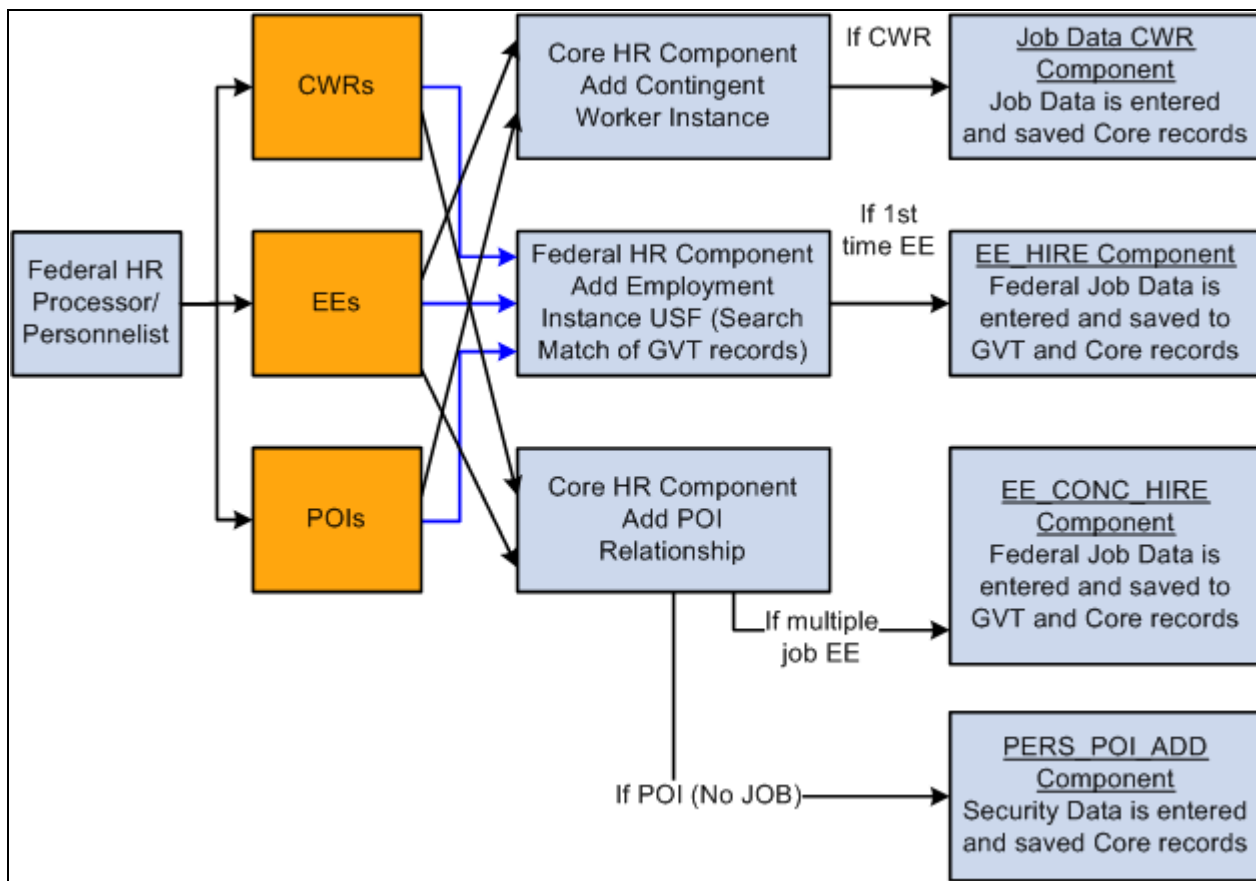
This section provides an overview of adding an employment instance and discusses how to:

- Enter information for the employment instance.
- Enter PAR remarks.
- Enter job tracking information.
- Enter employee personal information.
- Enter birth information.
- Enter address information.
- Enter veteran information.
- Enter marital information.
- Enter education details.
- Enter job information.
- Specify benefit programs.

- Enter retirement data.
- Track information for employees on assignment.
- Enter NFC job information.
- Enter position information.
- Enter employee compensation information.
- Enter additional compensation information.
- View pay rate and compensation calculations.
- View job earnings distributions.
- Enter current and historical employment information.
- Enter expiration dates.
- Enter appointment limits.
- Enter additional employment information.
- Track probation dates.
- Track nonpay status information.
- Enter financial disclosure information.
- View Component Interface exceptions.

Understanding Adding an Employment Instance

The following diagram shows the process flow of hiring an employee and shows the components that are used for hiring employees, contingent workers, and persons of interest:



Process flow for adding different types of federal employment instances

Use the Core HR component "Add Person" as a common starting point for initially entering contingent workers and persons of interest. If your organization allows employees to hold more than one job, use the Concurrent Hire component to enter new jobs for employees who already have one or more jobs. The component consists of the Data Control, Job, Position, Compensation, Employment 1, and Employment 2 pages.

If an employee has more than one job, you may want to designate one job as primary and others as secondary. The primary job designation is used for government reporting.

Before you can add multiple jobs for your workforce, you must:

- Select the Multiple Jobs Allowed check box in PeopleTools.
- Update user security so that users have access to the menu options they'll need.

See Also

Chapter 5, "Adding a Person in PeopleSoft Human Resources," page 179

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Group Definitions"

Pages Used to Add an Employment Instance

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Add Employment Instance USF	FEDERAL_EMP_ADD	Workforce Administration, Job Information, Add Employment Instance USF, Add Employment Instance USF	This component uses existing data from a person of interest or contingent worker in the new federal employment instance. Use existing data for a person of interest or a contingent worker in the new federal employment instance.
Data Control	GVT_JOB0	Enter a valid Person ID on the Add Employment Instance USF page and click Add.	Enter information for the hiring process, such as the NOA code, approving authorities, PAR remarks, and tracking information.
PAR Remarks	GVT_PAR_PROCESS_RK	Click PAR Remarks link on the Data Control page.	Enter or look up comments specific to this position or employee situation.
Award Data	GVT_AWD_DATA	Click the Award Data link on the Data Control page. This link is available only when the Action field is <i>AWD</i> (award - monetary) or <i>BON</i> (bonus), and the Reason Code field is populated.	Assign an award to a federal employee and enter award, informational, and payroll details.
Job Tracking Info	GVT_EE_CNTRL_SEC	Click Tracking Data link on the Data Control page.	View or enter job-tracking information.
Personal Data	GVT_PERS_DATA1	Select the Personal Data page within the Add Employment Instance USF component. If previous personal data exists that is associated with an individual as a Person of Interest or a Contingent Worker, this information is displayed by default on the Personal Data page.	Enter the employee's personal information, such as name, address, birthplace, education, military service, citizenship, veteran, marital status, race or origin, and handicap. Note. The Personal Data page does not appear when you are entering an additional assignment for a federal employee.
Additional Birth Information	GVT_BRTHINF_SEC	Click Additional Birth Info link on the Personal Data page.	Enter birth information.

Page Name	Definition Name	Navigation	Usage
Address Information	GVT_ADDRINF_SEC	Click Mailing Address link on the Personal Data page.	Enter contact (home) and mailing address information.
Personal Phone Numbers	GVT_PERS_PH_SEC	Click Personal Phone Numbers link on the Personal Data page.	Enter employee phone, fax, cellular, and other numbers.
Veterans Info	GVT_VETINF_SEC	Click Veterans Info link on the Personal Data page.	Enter veteran information.
Marital Status	GVT_MARITAL_SEC	Click Marital Info link on the Personal Data page.	Enter marital information.
Education Details	GVT_EDUCINF_SEC	Click Education Details link on the Personal Data page.	Enter education details. Note. This link is valid only for new hires. <i>See PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles, "Managing Profiles," Creating and Updating Person Profiles.</i>
Job Data	GVT_JOB1	Select the Job page from within the Add Employment Instance USF component.	Enter job information, including the employee's position, agency, and department.
Benefits/FEHB Data (Benefits / Federal Employees Health Benefits Data)	GVT_BENDATA_SEC	Click Benefits/FEHB Data link on the Job Data page.	Specify benefit programs in which the employee is enrolled in PeopleSoft Enterprise Human Resources or in PeopleSoft Enterprise Benefits Administration.
FEGLI/Retirement/FICA (Federal Employees Group Life Insurance / Retirement / Federal Insurance Contributions Act)	GVT_BENDATA1_SEC	Click FEGLI/Retirement/FICA link on the Job Data page.	Enter life insurance and retirement data.
Departmental Hierarchy	GVT_DEPTINF_SEC	Click Departmental Hierarchy link on the Job Data page.	View departmental hierarchy for the individual's position.
Detail Assignment	GVT_DETAIL_SEC	Click Detail link on the Job Data page.	Track information for employees on a detail assignment. You probably won't use this page when first hiring an employee.

Page Name	Definition Name	Navigation	Usage
NFC Job Information	GVT_NFC_JOB_SEC	Click the NFC Job Information link on the Job Data page.	Track required National Finance Center (NFC) information for employees. Enter Job, Benefits and Payroll values necessary for processing this employee at NFC.
Position Data	GVT_JOB2	Select the Position Data page from within the Add Employment Instance USF component.	Enter position information like employee type, classification, appointment type, work schedule, and pay group.
Compensation Data	GVT_JOB3	Select the Compensation page from within the Add Employment Instance USF component.	Enter employee compensation information, including pay rate determinant, pay plan/table/grade/step, frequency, and other pay. You can also enter retained pay plan/table/grade and step on this page.
Other Pay Information	GVT_OTH_PAY_SEC	Click Other Pay Information link on the Compensation Data page.	Enter compensation that employees receive that's in addition to base pay.
Expected Pay	GVT_LOC_PAY_SEC	Click Expected Pay link on the Compensation Data page.	View the various pay rate and compensation calculations the system calculates and displays based on the base pay and compensation frequency you enter on the Compensation page.
Accounting Information	GVT_JOBDIST_SEC	Click Accounting Info link on the Compensation Data page.	View a summary of the employee's job earnings distribution.
Employment Data 1	GVT_EMPLOYMENT1	Select the Employment Data 1 page from within the Add Employment Instance USF component.	Enter employment information, such as employee service computation and conversion dates, and within-grade-increase data.
Expiration Dates	GVT_EXPIRDT_SEC	Click Exp Dates link on the Employment Data 1 page.	Enter expiration dates for temporary promotions, position changes, sabbaticals, or detail assignments.

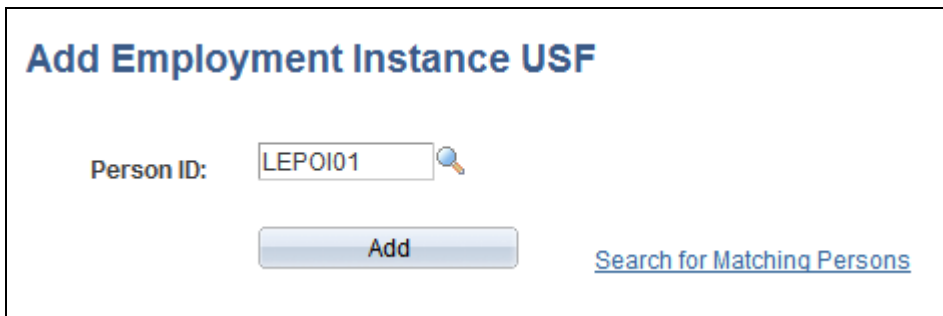
Page Name	Definition Name	Navigation	Usage
Appointment Info	GVT_APPDATA_SEC	Click Appt Data link on the Employment Data 1 page.	Enter appointment limits and indicate if this person is in a special employment program.
Employment Data 2	GVT_EMPLOYMENT3	Select the Employment 2 page from within the Add Employment Instance USF component.	Enter additional employment data including union, probation, RIF, tenure, and security data. Also record the retained grade information.
Probation Dates	GVT_EMPL_PROB_SEC	Click Probation Dates link on the Employee Data 2 page.	Document any probation start and end dates that apply to this person.
Non Pay Data	GVT_NONPAY_SEC	Click Non Pay Data link on the Employment Data 2 page.	Track information related to a status of nonpay. Information on this page affects FEHB eligibility and FEGLI.
Financial Disclosure	GVT_SECURITY_SEC	Click Financial Disclosure link on the Employment Data 2 page.	Indicate if financial disclosure is required and the due date.
Time and Labor Data	TL_EMPL_DATA_FG_S	Click Time Reporter Data on the Employment 2 page.	Review PeopleSoft Time and Labor data for this employee.
CI Exceptions	GVT_PAR_CI_MSG	Select the CI Exceptions page from within the Add Employment Instance USF component.	Warning messages generated during the hire process are displayed on the CI Exceptions page after the transaction has been successfully saved.

See Also

Chapter 6, "Increasing the Workforce," Increasing the Workforce Through SmartHire Templates, page 298

Creating a New Employment Instance

Access the Add Employment Instance USF page (Workforce Administration, Job Information, Add Employment Instance USF, Add Employment Instance USF).



Add Employment Instance USF

Person ID: 

[Search for Matching Persons](#)

Add Employment Instance USF page

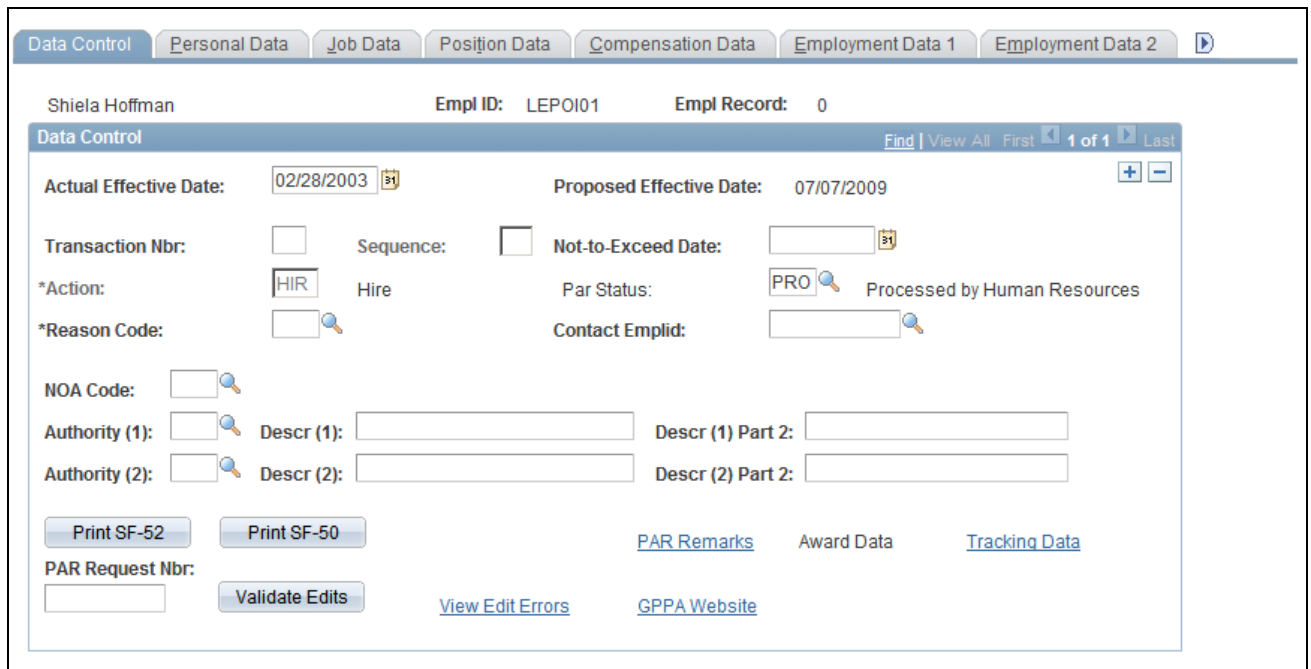
Use this component if you have already entered information about a person, for example, in the Add a Person component.

Enter a Person ID and click Add to create a federal employment instance for a person of interest or to create a concurrent job for an existing federal employee.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Search/Match," Working with Search/Match.

Entering Information for the Employment Instance

Access the Data Control page (enter a PersonID and click Add on the Add Employment Instance USF page).



Shiela Hoffman Empl ID: LEPOI01 Empl Record: 0

Data Control Find | View All First 1 of 1 Last

Actual Effective Date:  Proposed Effective Date: 07/07/2009 + -

Transaction Nbr: Sequence: Not-to-Exceed Date: 

*Action: Hire Par Status:  Processed by Human Resources

*Reason Code:  Contact Emplid: 

NOA Code: 

Authority (1):  Descr (1): Descr (1) Part 2:

Authority (2):  Descr (2): Descr (2) Part 2:

[PAR Remarks](#) [Award Data](#) [Tracking Data](#)

PAR Request Nbr: [View Edit Errors](#) [GPPA Website](#)

Data Control page

Actual Effective Date	Enter the actual effective date, which is used as the default effective date of the action throughout the system. If necessary, change this to reflect the effective date of the new employment instance. When working on other pages, these dates are unavailable, so if you need to change the effective date, return to the Data Control page.
Proposed Effective Date	This field is populated by default with the date that is entered in the Actual Effective Date field. Human resources personnel processing a request have final authority on when the action becomes effective, and they will enter the official actual effective date, but the proposed effective date will remain unchanged.
Not to Exceed Date	(Optional) Enter the ending date of a temporary action (for example, the date a temporary job expires).
Action	The default value for this field depends on whether the employment instance is for a new employee or is based on existing data for a current employee, person of interest, or contingent worker.
Reason Code	A default reason code may display in this field. Otherwise, enter the reason code for this employment instance, such as new position, temporary assignment, or trainee. Note. For agency-to-agency transfers, the request may be submitted by both agencies, and the action and reason for each agency's request depends on whether the employee is arriving or leaving. If the employee is arriving, process the action as a hire. When an employee transfers into your agency from another agency, the action is <i>Hire</i> and the reason is <i>Transfer From</i> (another agency). When an employee transfers out of your agency to another agency, the action is <i>Terminate</i> and the reason is <i>Transfer To</i> (another agency).
Contact Emplid (contact employee ID)	Enter the employee ID of the person to contact with any questions regarding the hire.
Authority (1) and Authority (2)	Select the appropriate legal authority for this NOA code. This field is usually reserved for use by human resources specialists. PeopleSoft provides a list of common legal authority codes and descriptions as provided by the US Office of Personnel Management.
PAR Request Nbr (PAR request number)	(Optional) Enter a PAR request number for each employee request after you save this request. This field is for your agency's information only.
PAR Remarks	Click to view or enter comments specific to this position or employee situation.
Tracking Data	Click this link to view or enter job-tracking information.
Award Data	This link is active only for award and bonus personnel actions. See Chapter 18, "(USF) Processing Personnel Action Requests," <u>Granting Performance Awards</u>, page 839.

Validate Edits	Click this button to initiate online regulatory edits for this PAR row. Edits should be triggered after all hire information is entered. Note. Validation is an optional step. Depending on the state of the transaction, all edits may not run to completion because all data may not have been captured up to that point.
View Edit Errors	Click this link to view regulatory edit errors resulting from the validation process. Correct any errors and validate the transaction again.
GPPA Website	Click this link to open the Personnel Documentation page of the Office of Personnel Management website (http://www.opm.gov/feddata/gppa/gppa.asp).

Entering PAR Remarks

Access the PAR Remarks page (click PAR Remarks link on the Data Control page).

PAR Remarks

PAR Remarks

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

Remark CD

A03

☐ Insertion Required

This appointment is intended to continue for 2 years. Upon satisfactory

completion of 2-year trial period, you will be noncompetitively

converted to career-conditional appointment. If performance is not

satisfactory, or you fail to satisfactorily complete program,

employment will be terminated.

PAR Remarks page

Remark CD (remark code)	Select from the list of descriptions, conditions, and comments about this position or employee action. The remarks that you select appear in the comments box. Edit them as necessary.
Insertion Required	If this remark needs employee-specific information, this check box is selected. The default settings for this box are defined with the codes on the PAR Remarks Table page.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "(USF) Setting Up Human Resources Management Tables."

Entering Job Tracking Information

Access the Job Tracking Info page (click Tracking Data on the Data Control page).

Job Tracking Info

Empl ID:LEPOI01

Empl Record:0

Effective Date:07/07/2009

Current Status:Processed by Human Resources

Action:Hire

Reason Code:

Tracking Information								Customize Find View All First 1 of 1 Last
*Action Taken	Action Date Override	Status	User ID	Override Operator Emplid	Emplid of Tracking Row	Name	Comment	
07/07/2009	☐	Processed	PS	☐	KA0001	Jane Taylor		

Job Tracking Info page

Tracking Information

- Action Taken

Displays the date that the action request was entered.
- Action Date Override

Select to make the Action Taken field available for entry so that you can change the action date.
- Override Operator Emplid (override operator enters data on behalf of a supervisor. employee ID)

(Optional) Select this check box when an administrative assistant, for example, enters data on behalf of a supervisor.
- Emplid of Tracking Row (employee ID of tracking row)

When the Override Operator Emplid check box is selected, this field becomes available for entry. Enter the ID of the person actually performing the data entry.

Entering Employee Personal Information

Access the Personal Data page (Workforce Administration, Job Information, Add Employment Instance USF, Add Employment Instance USF. Enter a Person ID and click Add. Select the Personal Data page).

Note. If a person already exists in the system, as a contingent worker for example, default field entries are displayed in some of the fields on the Personal Data page when you access it through the Add Employment Instance USF component.

Data Control	Personal Data	Job Data	Position Data	Compensation Data	Employment Data 1	Employment Data 2						
Shiela Hoffman Empl ID: LEPOI01 Empl Record: 0												
Personal Data Find View All First 1 of 1 Last												
Effective Date: 02/28/2003 Transaction Nbr / Seq: PAR Status: Processed by Human Resources Action Type: Hire NOA Code: Empl Status: Active												
Prefix: Ms First: Shiela Middle: Lynn Last: Hoffman Suffix:												
Name: Hoffman, Shiela Lynn												
Gender: ☐ MaleMale ☒ FemaleFemale												
Draft Status: Citizenship Status: <table border="1"> <tr> <td>*Country:</td> <td>USA</td> <td>United States</td> </tr> <tr> <td>Citizenship:</td> <td>1</td> <td>Native</td> </tr> </table>							*Country:	USA	United States	Citizenship:	1	Native
*Country:	USA	United States										
Citizenship:	1	Native										
Ethnic Group: E												
*Date of Birth: 06/15/1962 Date of Death:												
Disability Code: 05 No Handicap Date Entitled to Medicare:												
*Highest Education Level: (Invalid Value)												
Additional Birth Info Mailing Address Personal Phone Numbers Veterans Info Marital Info Education Details												
Country: USA *Type/Description: PR National ID: 540-13-3224												

Personal Data page

EmplID

When you create a concurrent job, or an employment instance for a person of interest or contingent worker, the previously assigned Person ID is displayed.

Effective Date

The effective date for all of the pages in this group box is set by default to the effective date that is entered on the Data Control page. Change the effective date by returning to the Data Control page.

Gender

Indicate the employee's gender.

Citizenship Status

Select the appropriate citizenship status.

Draft Status

(Optional) Select a draft status.

Ethnic Group

Select the employee's ethnic group. Values are based on U.S. Federal Equal Employment Opportunity (EEO) ethnic categories. Use ethnic group information to compile the establishment's Affirmative Action (AA) plan and to generate several EEO reports.

Date of Birth	Enter the employee's date of birth. If you do not enter a birth date, a warning message appears when you save the record. Although this field isn't required for the Administering Workforce business process, the system uses the date in some benefit and payroll tasks to calculate an employee's age. If you do not have the birth date currently, after you acknowledge the message, you can continue entering information. However, it is recommended that you enter the information later.
Date of Death	Skip this field when hiring an employee.
Disability Code	Select the disability code from the list, or if none, select the value <i>No Handicap</i> .
Date Entitled to Medicare	(Optional) Enter the date the employee is entitled to Medicare.
Country	Many countries have unique name formats. Select the country with the name format you want to use for this person. When you move out of this field, the system displays the appropriate fields for the country you entered.
Type/Description	Enter the corresponding type/description of the employee's national ID.
National ID	Enter the employee's Social Security Number.
Additional Birth Info	Click to access the Addl Birth Info page and enter the employee's birth information.
Mailing Information	Click to access the Address Information page and enter home and mailing address information.
Personal Phone Numbers	Click to access the Personal Phone Numbers page and enter employee phone, fax, cellular, and other numbers.
Veterans Info (veterans information)	Click to access the Veterans Info page and enter veterans information.
Marital Info (marital information)	Click to access the Marital Status page and enter marital information.
Education Details	Click to access the Education Details page and enter information about the employee's education.

See Also

Chapter 18, "(USF) Processing Personnel Action Requests," Requesting Terminations Due to Death, page 846

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Meet Regulatory Requirements, "(USA) Meeting Regulatory Requirements for the United States"

PeopleSoft Enterprise Human Resources PeopleBook: Manage Base Benefits

Entering Birth Information

Access the Additional Birth Information page (click Additional Birth Info on the Personal Data page).

Additional Birth Information

Birth Location:

Atlanta

Birth State:

Georgia

Birth Country:

USA

United States

Additional Birth Information page

Birth Location	Enter the name of the city.
Birth State	Select the birth state.
Birth Country	Select the birth country.

Entering Address Information

Access the Address Information page (click Mailing Address on the Personal Data page).

Address Information

Contact Address

Country:

USA



United States

Address:

1200 Hunter Ln.
Ridgewood, NJ 11987

Edit Address

Mailing Address

Country:



Address:

Edit Address

Address Information page

Select the country and then click Edit Address. Complete the address fields that appear on the page and click OK. The address information appears in the Address field.

Entering Veteran Information

Access the Veterans Info page (click Veterans Info on the Personal Data page).

Veterans Info

Veterans Preference:

None

Veterans Status:

Not indicated

Uniformed Service:

Military Separation Status:

Military Grade:

Military Service Start Date:

End Date:

Reserve Category:

Creditable Military Service

Years:

Months:

Days:

☐ Military Service Verified

☐ Veterans Preference RIF

☐ Disabled Veteran

Veterans Info page

- Veterans Preference**

Select the veteran's hiring preference that applies. For information about preference guidelines refer to the *U.S. Office of Personnel Management's Vets Info Guide*.
- Veterans Status**

Select the veteran's status.
- Uniformed Service**

Select the type of uniformed service in which this veteran served.
- Military Separation Status**

Select the veteran's military separation status.
- Military Grade**

Select the veteran's military grade.
- Military Service Start Date and End Date**

Enter the veteran's military service start and end dates.
- Reserve Category**

Select the employee's reserve category, or select *Not Applicable*.
- Years, Months, and Days**

Enter the creditable military service in years, months, and days.
- Military Service Verified**

Select if you have received verification of service.
- Veterans Preference RIF**
(veterans preference reduction in force)

Select to indicate the employee is eligible for veteran's preference in instances of Reductions In Force. See the *U.S. Office of Personnel Management's Vets Info Guide* for more information.

Disabled Veteran	Select if the veteran is disabled.
Notify Military Pay Center	Select to notify the military pay center. Note. The system displays this field only when the personnel action effective date is prior to October 1, 1999. Due to S1059, the National Defense Authorization Act for FY 2000, Public Law 106-65, this information is no longer required as of October 1, 1999.

Entering Marital Information

Access the Marital Status page (click Marital Info on the Personal Data page).

Marital Status

*Marital Status:

Married

Marital Status Date:

05/10/1985

Marital Status page

Marital Status	Select the person's marital status.
Marital Status Date	Enter the date on which this status took effect.

Entering Education Details

Access the Education Details page (click Education Details on the Personal Data page).

Education Details page

Note. The Education Details page link is active only during the hiring process. A new profile is created for each new Federal hire when hiring information is saved and in a *PRO* (processed) PAR status. For existing employees, you update education information in the employee's profile.

Degree	Select the degree earned or expected for the employee. Degrees are defined in the content catalog that is part of the Manage Profiles business process.
Year Earned\Expected	Enter the year the degree was earned or is expected to be earned if the employee has not graduated.
GPA(grade point average)	Enter the employee's grade point average from the school.
Graduated	Select if the employee has graduated.
Major Code	Select the major code for the degree earned or being earned. Define major codes on the Majors page.
School Code	Select the code designating the school the employee graduated from or currently attends. Define school codes on the Schools page.
School	Enter a school if there is not a code for it.
State	Enter the state where the school is located.
Country	Select the country where the school is located.
Minority Institution	Select if the employee attended or attends a designated minority institution.
Credit Hours	Enter the credit hours earned either upon completion or to this point if not complete.

Hours Type Select the hours type. Values are: *Continuing Education, Other Pay, Quarter Hours, and Semester Hours.*

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles*, "Setting Up the Content Catalog."

Entering Job Information

Access the Job Data page (Workforce Administration, Job Information, Add Employment Instance USF, Add Employment Instance USF. Enter a Person ID and click Add. Select the Job Data page).

The screenshot displays the 'Job Data' page for employee Shiela Hoffman (Empl ID: LEPOI01, Empl Record: 0). The page is organized into several sections:

- Employee Information:** Name (Shiela Hoffman), Empl ID (LEPOI01), Empl Record (0).
- Job Data Section:**
 - Effective Date: 02/28/2003
 - Action Type: Hire
 - Position: (empty field)
 - *Job Code: (empty field)
 - Reports To: (empty field)
 - *Agency: (empty field)
 - Sub-Agency: (empty field)
 - *Business Unit: FEDBU
 - *Department: (empty field)
 - *Location: (empty field)
 - Tax Location: (empty field)
- Transaction Information:**
 - Transaction Nbr / Seq: (empty field)
 - NOA Code: (empty field)
 - PAR Status: Processed by Human Resources
 - Empl Status: Active
 - Position Management Record: (checkbox)
 - Position Override: (checkbox)
 - Transferred From Agency: (empty field)
 - Transferred To Agency: (empty field)
- Links:** Benefits/FEHB Data, FEGLI/Retirement/FICA, Departmental Hierarchy, Detail, NFC Job Information.

Job Data page

Many values on this page are set by default from values you entered earlier on the Data Control page. If necessary, you can override most of these defaults.

Action Type Set by default depending on the type of employment instance you are creating.

Position	Select a position. When you move out of this field, the system completes position-related fields with default data from the Add/Update Position Info component if the Manage Positions business process is being used. Job code, agency, subagency, business unit, department, and location all are set by default to position management data. In addition, the system inserts a default value in the Supervisor's ID and Reports to Position fields on the Employment 2 page if these are entered when setting up the position. If you've associated agencies with departments on the Department page, the system enters the agency code on the Job Data page and the field is unavailable for entry. It also enters default values on the Position Data page for the Pay Periods/Year, Employee Type, Holiday Schedule (which you define in the Pay Group table), and Pay Group fields (which you associate with a position in the Add/Update Position Info component in the Organizational Development, Position Management, Maintain Positions/Budgets menu). On the Position Data page, the system enters the standard hours that correspond to the job code. If you've associated them with the job code on the Job Code page, the system also enters the pay plan/table/grade, and compensation frequency on the Compensation page. In addition, on the Compensation page, the system enters the grade/step entry (date), which is the date the employee was first assigned to the grade and step. The Position Number, Hire Date, and Position Override fields are discussed in Hiring Employees Into Positions.
Position Management Record	Selected by default if updates to the Position Management record exist. For an initial employment instance (for a new hire), the check box is deselected, as the new hire would not have information to update. If your organization uses the Manage Positions business process and this position were updated, the check box would be selected. The option then would be to select the Position Override check box to make changes to position data that are otherwise locked in by the position data record.
Job Code	If you are not using the Manage Positions business process, enter the job code. Otherwise, the job code is derived from the value established in the Add/Update Position Info component.
Position Override	Select to change any of the position-related fields, such as the Job Code, Department, Agency, and Sub-agency. PeopleSoft Enterprise Human Resources issues a warning message if you assign an employee to a position that has already been filled by another employee or if a new employee appointment exceeds the maximum head count for that position. Note. After you have assigned an employee to a position, you must maintain all employee data manually while the employee is assigned to this position in the system. The system won't update position data automatically for the employee when position information is changed.
Agency, Sub-Agency, Business Unit, Department, and Location	Select the ID types for these fields individually. If the position management hiring process is used, the system enters default values when the Position ID is selected.

Transferred From Agency	If the reason code entered on the Data Control page was <i>Transfer</i>, select the agency from which the employee is transferring. Note. Not valid for a concurrent assignment.
Transferred To Agency	This is not a valid field in the hiring process. This field is used primarily in other types of PAR requests. It becomes active based on the action and reason code entered on the Data Control page. Note. Not valid for a concurrent assignment.
Tax Location	Derived from the department-tax location relationship established on the Department page. You can also select the tax location for this person.

See Also

Chapter 18, "(USF) Processing Personnel Action Requests," page 831

Chapter 2, "Setting Up the Administer Workforce Business Process," Defining Personnel Actions and Reasons, page 5

PeopleSoft Enterprise Payroll Interface 9.1 PeopleBook, "Setting Up Payroll Schedules"

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Positions, "Managing Position Data"

Specifying Benefit Programs

Access the Benefits/FEHB Data page (click Benefits/FEHB Data on the Job Data page).

Benefits/FEHB Data	
Benefits Control Benefit Record Number: 0 Benefits Employee Status: BAS Group ID: *Benefit Program: TQX Flexible Benefit Plan	
FEHB Eligibility ☐ Permanent ☐ Continuing Coverage ☐ Temporary Appointment > 1 yr ☐ Temp Appt < 1yr + FedSvc > 1yr ☒ Not Eligible	Eligibility Elig Fld 1: Elig Fld 2: Elig Fld 3: Elig Fld 4: Elig Fld 5: Elig Fld 6: Elig Fld 7: Elig Fld 8: Elig Fld 9:
FEHB Date FEHB Date:	
Benefits System Benefits System:	

Benefits/FEHB Data page

Benefits Control

Benefit Record Number Benefit record number is used to group several jobs together for benefit purposes. A benefit record number can be assigned to multiple employee record numbers. If the new job entitles the employee to a new set of concurrent benefits, you should use a new benefit record number. If the job does not entitle the employee to new benefits, you should use an existing benefit record number. Each benefit record number must have a designated primary job. The primary job is used to process the benefit information.

BAS Group ID (benefits administration system group ID) (Optional) Enter a BAS group ID.

Benefit Program Enter a benefit program. This is a required field for all PAR transactions.

FEHB Eligibility

In the FEHB Eligibility (federal employees health benefits eligibility) group box, select the appropriate option to indicate the FEHB eligibility.

If you select *Not Eligible*, the FEHB Date field becomes available for entry. This typically applies to temporary employees.

FEHB Date

In the FEHB Date group box, enter the date that the employee is eligible for FEHB.

Eligibility

In the Eligibility group box, enter values in the Elig Fld 1–9 (eligibility field 1–9) fields to further define an employee's benefits eligibility.

Each agency determines its own use of these fields. Contact the agency's Personnel Policy Officials for instruction using these fields.

Benefits System

In the Benefits System group box, enter the benefits system to use.

Entering Retirement Data

Access the FEGLI/Retirement/FICA page (click FEGLI/Retirement/FICA on the Job Data page).

FEGLI/Retirement Data/FICA	
FEGLI	
FEGLI Code:	C0  Basic Only
Post 65 Basic Life Reduction:	
Coverage Amount:	☐ Living Benefits
Retirement	
Retirement Plan:	K  FERS and FICA
FERS Coverage:	Automatically Covered By FERS 
Previous Retirement Coverage:	Never Covered 
Annuitant Indicator:	9  Not Applicable
Annuity Commencement Date:	
CSRS Frozen Service:	0000
FICA Status-Employee	
FICA Status-Employee:	Subject 

FEGLI/Retirement Data/FICA page

FEGLI

FEGLI Code (federal employees group life insurance code)

Enter the FEGLI code.

Post 65 Basic Life Reduction

Select the employee's post-65 basic life reduction coverage.

Living Benefits and Coverage Amount

Use these fields only when selecting living benefits (not during the hiring process).

Retirement

Retirement Plan

Select the employee's retirement plan.

In addition to the retirement plans used for submission to Central Personnel Data File (CPDF), PeopleSoft supplies the following codes that you may use for documentation purposes only:

Code	Explanation
7	For foreign national employees exempt from retirement and from social security and Medicare tax deductions.
8	U.S. Court of Veterans Appeals without election of survivor annuity benefits. Code is for use by the judges of the U.S. Court of Veterans Appeals only.
9	U.S. Court of Veterans Appeals with election of survivor annuity benefits. Code is for use by the judges of the U.S. Court of Veterans Appeals only.
A	Article III judges and justices.
B	Bankruptcy judges and justices under the Judicial Retirement System.
S	U.S. Claims Court Judges Retirement System.
V	Clerks/magistrates (CSRS).
U	Bankruptcy judges (full FICA/partial CSRS).
Y	Bankruptcy judges (full FICA/full CSRS).

FERS Coverage (Federal Employees Retirement System coverage)	Select the employee's FERS coverage.
Previous Retirement Coverage	Select the employee's previous retirement coverage.
Annuitant Indicator	Select the employee's annuitant indicator.
Annuity Commencement Date	If a new employee is a reemployed annuitant, enter the annuity commencement date.
CSRS Frozen Service (Civil Service Retirement System frozen service)	Enter the total years and months of civilian and military service that is creditable in a CSRS component of a FERS employee, or, in the case of a CSRS offset employee, the service that would be included in a CSRS component if the employee ever becomes covered by FERS.

FICA Status-Employee

FICA Status-Employee Indicate whether the employee is exempt, subject, or subject to Medicare only.

See Also

Chapter 18, "(USF) Processing Personnel Action Requests," Requesting Terminations Due to Death, page 846
PeopleSoft Human Resources PeopleBook: Manage Base Benefits

Tracking Information for Employees on Assignment

Access the Detail Assignment page (click Detail on the Job Data page).

Detail Assignment

Govt Detail Position Number:



Govt Detail Bargaining Unit:



Govt Detail Union Code:



Detail Assignment page

GVT Detail Position Number (government detail position number) Select the employee's detail position number.

GVT Detail Bargaining Unit Select the employee's detail bargaining unit.
(government detail bargaining unit)

GVT Detail Union Code Select the employee's detail union code.
(government detail union code)

Entering NFC Job Information

Access the NFC Job Information (National Finance Center information) page (click the NFC Job Information link on the Job Data page).

NFC Job Information	
Job Information	
Previous Sub-Agency:	
Classification Action Code:	
Retained Occ Function:	Not Applicable
Retained Occ Series:	
Benefits	
LI Coverage Amt (In Thousands):	TSP Eligibility:
Payroll	
Annual Leave Category:	☐ Leave Earning Status
Salary Share Code:	Not Applicable ☐ Annual Leave 45-Day Indicator
COLA/Post Differential:	None
Special Employee Pay Code:	Not Applicable
Wage Board Shift Rate:	
Quarters Deduction Code:	Quarters Deduction Amount:

NFC Job Information page

Note. The NFC Job Information link appears on the Job Data page only if NFC (National Finance Center) product specific data is turned on at installation. The NFC Job Information link must appear on the Job Data page for you to access the NFC Job Information page described here.

Job Information

Previous Sub-Agency	Enter the previous sub-agency when the employee moves to another sub-agency within the same Department.
Classification Action Code	Provides a method for processing a classification and personnel action at the same time. Used for reassignments, promotions or change to a lower grade.
Retained Occ Function (retained occupational functional classification)	Records the occupational functional classification corresponding to an employee's retained occupational series. This field is required only if the series specified as the retained occupational series is one for which OPM requires an occupational functional classification.
Retained Occ Series (retained occupational series)	Records the occupational series on which an employee's salary is to be based when that series is not the series of the position the employee held immediately before being placed on grade retention. This would occur, for example, when an employee was returned to an unexpired period of grade retention at the end of a temporary promotion.

Benefits

LI Coverage Amt (In Thousands) [life insurance coverage amount (in thousands)]	The amount of basic life insurance coverage for an employee who is covered under the Federal Employees Group Life Insurance (FEGLI) plan. Complete this field only if one or more of the following conditions are met: • The employee works at such different rates of pay that the payroll/personnel system is unable to calculate or project the rates of pay on an annual basis. • The employee is paid on a piecework basis. • The employee is paid at different rates of pay during the year.
TSP Eligibility	Specify the type of eligibility for the employee to participate in the Federal Thrift Savings Plan (TSP) for FERS, CSRS, or Offset employees.

Payroll

Annual Leave Category	Select the code that identifies the annual leave earning status in the NFC payroll system. If the employee is eligible to earn annual leave, the code represents the appropriate earning category.
Leave Earning Status	Select the check box to identify employees who are entitled to leave accruals for the first and last pay period of employment in the NFC payroll system.
Salary Share Code	Identifies the source, in addition to the agency, that contributes to paying the employee's salary.

Annual Leave 45-Day Indicator	Select the check box to identify employees who are stationed at an overseas foreign post of duty and are entitled to carry forward from one leave year to another a maximum annual leave accumulation of 45 days.
COLA/Post Differential	Select the option that identifies the type of cost of living allowance (COLA) or post differential, in addition to the base salary, that the employee is entitled to receive.
Special Employee Pay Code	Identifies the employee as belonging to a special category of pay processing not accommodated in any other part of the NFC payroll/personnel system. This code enables certain operations to be performed which would not otherwise be applicable to this type of employee.
Wage Board Shift Rate	Enter the rate that NFC uses to compute pay for the varied shift time reported on the T&A for wage system employees.
Quarters Deduction Code	Select the code to identify the type of quarters deduction for the employee.
Quarters Deduction Amount	The monetary amount that is to be deducted through NFC payroll, either per day or per pay period, from the salary of an employee who is being furnished quarters, utilities, or other in kind allowances.

Note. The information entered on this page is for NFC reporting purposes only. Benefit or payroll information that is entered on this page is *not* integrated with PeopleSoft Enterprise benefit or payroll applications.

Entering Position Information

Access the Position Data page (Workforce Administration, Job Information, Add Employment Instance USF, Add Employment Instance USF. Enter a Person ID and click Add. Select the Position Data page).

The screenshot displays the 'Position Data' page for employee Shiela Hoffman (Empl ID: LEPOI01, Empl Record: 0). The page is divided into several sections with various input fields and dropdown menus. Key fields include: Effective Date (02/28/2003), Action Type (Hire), LEO Position (dropdown), POI (text field), Pay Group (text field), Pay Frequency (text field), Earnings Program (text field), Employee Type (text field), Classification (dropdown), Reg/Temp (dropdown), Supervisor Level (text field), Transaction Nbr / Seq, NOA Code, SF-113G Ceiling (checked), Empl Status (Active), Regular Shift (Not Applicable), Rate / Factor (text fields), Work Period (text field), Holiday Schedule (text field), Type Appt (Career (Competitive Svc Perm)), Posn Occupied (text field), Work Schedule (Full Time), FLSA Status (No FLSA), Job Indicator (Primary), Adds to FTE Actual Count (checkbox), Standard Hours (text field), and FTE (text field). The page also includes a search bar and navigation links like 'Find', 'View All', 'First', '1 of 1', and 'Last'.

Position Data page

LEO Position (law enforcement officer position)

If this is a law enforcement officer position, a value appears from the Job Code page.

SF-113G Ceiling

If this position is reportable for the SF-113G ceiling, select this check box.

POI (personnel office identifier)

Set by default from the Add/Update Position Info component or the Job Code page.

Regular Shift and Rate/Factor

If the employee is working shifts, select the appropriate shift, and specify the rate or factor for that shift type.

Pay Group

(Required) A value appears here if you defined one on the Position Data page. Otherwise, select a pay group.

Pay Frequency

Set by default from the Pay Group page.

Work Period

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

Holiday Schedule

If you linked an established holiday schedule on the Pay Group page, it appears here.

Employee Type

Depends on the pay group and is set by default from the Pay Group page. If an employee type doesn't exist for this pay group, establish one on the Pay Group page or enter one here.

Employee Classification	Provides another method of grouping employees.
Reg/Temp (regular/temporary)	Indicate whether the new hire is a regular or temporary employee. The Manage Base Benefits business process of PeopleSoft Enterprise Human Resources uses this value when determining eligibility requirements.
Supervisor Level	If the employee is in a supervisory position, this value is set by default from the Position Data page.
Type Appt (type of appointment)	Enter the employee's type of appointment, such as <i>Career</i> (Competitive Service Permanent), <i>Limited</i> , <i>Executive</i> , or <i>Schedule A - C</i> .
Posn Occupied (position occupied)	This field identifies the type of appointment which can occupy the position. Values are <i>Competitive</i> , <i>Excepted Senior Executive Service (SES) Career Reserved</i> and <i>SES General</i> . This is a CPDF reported field.
Work Schedule	Set by default from the Add/Update Position Info – Description page.
FLSA Status (Fair Labor Standards Act status)	Set by default from the position data on the Job Code page.
Adds to FTE Actual Count (adds to the full-time equivalency actual count)	Select to include this employee's job when processing FTE edits for budgeting purposes.
Standard Hours	The field is populated by default with the standard hours for the agency as specified in the Installation tables. You can change this information manually.
FTE (full-time equivalency)	The percentage of full-time the employee should normally work in this job. The system calculates this value based on the standard hours entry for this job and the standard work period. However, you can override the system-calculated FTE and enter a new value less than 1.0.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Frequencies"

Entering Employee Compensation Information

Access the Compensation Data page (Workforce Administration, Job Information, Add Employment Instance USF, Add Employment Instance USF. Enter a Person ID and click Add. Select the Compensation Data page).

The screenshot displays the 'Compensation Data' page for employee Shiela Hoffman (Empl ID: LEPOI01, Empl Record: 0). The page is divided into several sections:

- Header:** Includes tabs for Data Control, Personal Data, Job Data, Position Data, Compensation Data, Employment Data 1, and Employment Data 2.
- Employee Information:** Shows Empl ID: LEPOI01 and Empl Record: 0.
- Compensation Data Section:**
 - Effective Date: 02/28/2003
 - Transaction Nbr / Seq: (blank)
 - PAR Status: Processed by Human Resources
 - Action Type: Hire
 - NOA Code: (dropdown menu)
 - Empl Status: Active
 - Pay Rate Determinant: Regular Rate
 - Pay Basis: Per Annum
 - Pay Plan/ Table/Grade: (three input fields)
 - Step: 0
 - Step Entry Date: (calendar icon)
 - Rtnd PP/Table/Grade: (three input fields)
 - Step: 0
 - Grade Entry Date: (calendar icon)
- Quoted Pay Section:**
 - Base Pay: (input field)
 - Loc/LEO Adjust: 0.00
 - Adjusted Base Pay: (input field)
 - Total Pay: (input field)
 - Compensation Frequency: Monthly
 - Annuity Offset Amount: (input field)
 - Benefit Base Override: ☐ (checkbox)
 - FGLI Base: (input field)
- Navigation Links:** Other Pay Information, Expected Pay, Accounting Info.

Compensation Data page

Note. Multiple Components of Pay, Derivation of Rates, and related features are not currently supported by PeopleSoft Enterprise Human Resources USF functionality.

Many values on this page are set by default from values you entered in the Department and Job Code fields on the Job Data page. Override these values if necessary.

Pay Rate Determinant Select a pay rate determinant.

Pay Plan/Table/Grade Select the pay plan, table, and grade.

Step Assign the correct step for the employee.

Note. For certain Pay Rate Determinants this is not an option and the field does not accept data.

Step Entry Date The effective date of the request for this action.

If the Multi-Step/Grade check box is selected on the Installation table and you select a step on this page, the system automatically enters the base pay for that step.

Rtnd PP/Table/Grade (retained pay plan/table/grade) There are several instances where retained grade or pay is authorized based on prior federal experience within the employing agency or at another federal agency. After selecting the appropriate pay rate determinant (for example, Retained Grade-Diff Posn), you can enter information in this field.

Step and Grade Entry Date Enter the step and the date the employee was first assigned to the grade and step.

Base Pay	If you are using partial or full position management, a value is set by default here based on your prior assignment in the Step field. A GM pay plan position is the exception to this rule. Because the GM pay plan has no steps, you must enter the base pay amount. If you selected the Position Override check box on the Job Data page, you may also enter a base pay amount for a position with steps. This is appropriate in cases where the base pay amount is beyond the step 10 level. Enter the base pay amount based on the compensation frequency period indicated. For example, if the frequency period is one month, the base pay entered would be the pay earned for one month. The system calculates and displays the value in the Loc/LEO Adjustment (if appropriate) and Total Pay fields after you have provided the compensation data.
Adjusted Base Pay	The system calculates and displays the adjusted base pay by applying the Loc/LEO adjustments to the employee's base pay. This field is used for pay limits computation of the locality pay.
Compensation Frequency	Set by default from the Job Code page; override if necessary.
Annuity Offset Amount	If the employee is an annuitant, enter a CSRS annuity offset amount.
Benefit Base Override and FEGLI Base	The system calculates the FEGLI base rate. Select the Benefit Base Override check box to override this default and then enter a new amount.
Other Pay Information	Click to access the Other Pay Information page and enter compensation that employees receive that's in addition to base pay.
Expected Pay	Click to access the Expected Pay page and view the various pay rate and compensation calculations the system calculates and displays based on the base pay and compensation frequency that you enter on this page.
Accounting Info	Click to access the Accounting Information page and view a summary of the employee's job earnings distribution.

If you selected the Multi-currency check box on the Installation table and entered the base pay in a different currency from your base currency, the system converts the rates to the base currency and compares them with the ranges specified for this salary grade in the Salary Grade table. If the rates exceed the salary range, a warning message appears.

Default Values for Employment Data

After you enter job and position data, pay information is populated by default on the Compensation Data page. If you associated pay plans with job codes, the Pay Plan field is populated by default from the data in the Job Code table. The Grade field is populated by default from the Job Code page. After the values in the Pay Plan and Grade fields appear, the system also displays the Grade Entry Date field, which is the date the employee first joined the grade. When a value is entered in the Step field, the value in the Step Entry Date field populates by default. You can override these values if you choose.

The system verifies any combinations of pay plans and grades that you select. If the combination doesn't exist, a warning message appears.

Entering Additional Compensation Information

Access the Other Pay Information page (click Other Pay Information on the Compensation Data page).

Other Pay Information

Other Pay						Customize Find View All First 1-2 of 2 Last	
	Earnings Code	Description	Quoted Annualized Amount	Expected Amount			
1	A10	Admin Uncontrollable OT 10%					
2	R05						

Other Pay Information page

Earnings Code

Select the code for the additional pay type, such as automobile and beeper allowances. The system issues a warning indicating that the earnings code may be applicable to pay limits, at which time the employee's earnings calculation within payroll may be reduced.

Note.

A message appears when you enter premium pay that is subject to a pay limit. During payroll calculation, if the premium earnings plus adjusted base pay exceed the pay limit, the premium pay is reduced.

Viewing Pay Rate and Compensation Calculations

Access the Expected Pay page (click Expected Pay on the Compensation Data page).

Expected Pay			
Geog Location Code:			
Locality Pay Area:			
LEO Special Pay Area:			
Locality Percentage:	0.00		
Change Percent:	0.000	Change Amount:	0.00
	Base Pay	With Locality/LEO Adjustment	
Hourly:	0.00	0.00	
Daily:	0.00	0.00	
Biweekly:	0.00	0.00	
Monthly:	0.00	0.00	
Annual:	0.00	0.00	
Total Other/Premium Pay:		0.00	
Total Pay:		0.00	

Expected Pay page

Locality Percentage or LEO Percentage (law enforcement officer percentage)

Displays the locality or LEO percentage. This field shows the LEO Percentage label when the *Primary FEPCA* or *Secondary FEPCA* is selected in the LEO Position field.

Change Percent

Displays information regarding a percent change when new rows are inserted that change the base salary amounts.

Base Pay

Based on the base pay and compensation frequency you enter, the system calculates and displays the hourly, daily, biweekly, monthly, and annual rates for this employee.

With Locality/LEO Adjustment

The system calculates the same base pay figures using the locality/LEO adjustment listed at the top of the page.

Total Other/Premium Pay

The total of annual expected pay for the items you entered on the Other Pay Information page.

Total Pay

The system calculates total pay by summing the annual pay with the locality/LEO adjustment and the total other/premium pay contributions.

Note. The Rate Change Amount and Rate Change Percent fields are used when awarding increases (not for new hires).

If expected pay exceeds the pay cap, a message appears at the bottom of the page warning that the pay cap has been reached and pay was reduced.

Note. In the case of an employee that is subject to reaching a pay cap/limit, the compensation rate is displayed correctly, however, the change amount and change percent are displayed differently depending on whether you view this information on the USF Compensation Data – Expected Pay page or on the commercial compensation pages.

Understanding Expected Pay and Quoted Pay Within PeopleSoft Human Resources Management for U.S. Federal Government

The difference between expected pay and quoted pay occurs as a result of the conversion factors used when comparing yearly and hourly pay rates on the Pay Plan page in the Pay Plan Table component and the Expected Pay Rate page.

Rather than using the hourly conversion factor of 2080, as is often used as a business calculation factor, the U.S. federal government uses 2087.

The Expected Pay page calculates the daily, biweekly, monthly, and annual rates using the base pay amount from the Compensation Data page. These figures are based on the hourly conversion factor you set for the pay plan on the Pay Plan table, typically 2087.

It also breaks out into separate columns the pay into base pay (no locality, no adjustments), pay with locality, and LEO pay. Total other/premium pay is also calculated based on the amounts entered on the Other Pay Information page. So, as a result of using 2087 in these calculations, the estimated quoted pay on the Compensation Data page is slightly higher than what the federal employee actually receives in a year.

These two fields for expected and quoted pay may not match. The procedures that the federal government has for deannualizing and reannualizing quoted compensation rates are the cause of the difference. To deannualize a quoted rate of pay (convert to hourly), you divide the quoted rate of pay by 2087. To reannualize a quoted rate of pay to determine the expected pay, you multiply the derived hourly rate by the employee's scheduled weekly tour of duty and then multiply that by 52 weeks.

Following are two examples:

Example 1

Full-time employee (40 hours per week) with quoted rate of 41,740 USD per year.

Quoted rate = 41,740 USD.

Hourly rate = quoted rate/2087 hours = 41,740 USD/2087 hours = 20 USD/hour.

Expected pay = hourly rate × standard weekly tour × 52 weeks = 20 USD/hour × 40 hours/week × 52 weeks = 41,600 USD.

Difference between quoted and expected pay on an annual basis = 140 USD.

Example 2

Part-time Employee (20 hours per week) with quoted rate of 41,740 USD per year

Quoted rate = 41,740 USD.

Hourly rate = quoted rate/2087 hours = 41,740 USD/2087 hours = 20 USD/hour.

Expected pay = hourly rate × standard weekly tour × 52 Weeks = 20 USD/hour × 20 hours/week × 52 weeks = 20,800 USD.

Difference between quoted and expected pay on an annual basis = 20,940 USD.

See Also

Chapter 18, "(USF) Processing Personnel Action Requests," page 831

Viewing Job Earnings Distributions

Access the Accounting Information page (click Accounting Info on the Compensation Data page).

Accounting Information

Job Earnings Distribution: ☐ By Hours ☐ By Percent ☒ None

Compensation Rate: 0.00 USD **Standard Hours:**

GL Pay Type: **Combination Code:** [Edit ChartFields](#)

Data

[Find](#) | [View All](#) First 1 of 1 Last

Position	Business Unit	Department	Job Code	Shift	*Earn Code
				N/A	

Std Hrs/Wk

Distrb %

GL Pay Type

Combination Code

[Edit ChartFields](#)

Accounting Information page

Job Earnings Distribution	Select the appropriate option to indicate the job earnings distribution frequency: by hours, by percent, or not at all. When you select the By Hours or By Percent options, the GL Pay Type and Account Code fields are unavailable for entry. Use the scroll bar to distribute earnings among departments. If you select the By Hours option, then enter the hours to be distributed to each department in the Standard Hours field corresponding to each department entered. If you select the By Percent option, enter a percentage corresponding to each department in the Percent of Distribution field. Percentages must total 100 percent and must equal the value in the Standard Hours field.
Compensation Rate	The annual salary, including the locality and LEO adjustments.
Standard Hours	Set by default from the Job Code page.
GL Pay Type (general ledger pay type)	Enter the GL pay type that has been established by your agency.
Position, Business Unit, Department, Job Code, and Shift	Select the business unit, department, job code, position, and shift to which to charge the earnings.
Earn Code (earnings code)	Specify the earnings code. This will default to the Regular Earnings code defined on the Paygroup Table.
Std Hrs/Wk (standard hours per week)	If you select the By Hours option, then specify how many hours will be charged to the corresponding earnings code.
Distrb % (percent of distribution)	If you select the By Percent job earnings distribution option, enter the percent to be charged to the corresponding earnings code.

Entering Current and Historical Employment Information

Access the Employment Data 1 page (Workforce Administration, Job Information, Add Employment Instance USF, Add Employment Instance USF. Enter a Person ID and click Add. Select the Employment Data 1 page).

Data Control	Personal Data	Job Data	Position Data	Compensation Data	Employment Data 1	Employment Data 2

Shiela Hoffman Empl ID: LEPOI01 Empl Record: 0

Employment Data 1 Find | View All First 1 of 1 Last

Effective Date: 02/28/2003 Transaction Nbr / Seq: PAR Status: Processed by Human Resources

Action Type: Hire NOA Code: Empl Status: Active

EOD Date: Hire NTE Dt: Mand Retire Dt: 31 [Exp Dates](#)

Rehire Dt: Separation Date: Next Review Dt: 31 [Appt Data](#)

Service Computation Dates		Service Conversion Dates	
*Leave: 02/28/2003 31	Retire: 02/28/2003 31	Conv Begin Date: 31	
RIF: 02/28/2003 31	TSP: 02/28/2003 31	Career Conv Date: 31	
LEO: 31	Sev Pay: 02/28/2003 31	Career-Cond Conv Date: 31	

Within-Grade Increase Data			
WGI Status: Waiting	Non-Pay Hours: 0.00	Last Increase Date: 31	
WGI Due Date: 31	WGI:	Intermittent Days Worked: 0	
LEI Date: 31			

Employment Data 1 page

Many values on this page are set by default from values entered in the Department and Job Code fields on the Job Data page. When adding an employment instance, the system populates most of the dates on this page with the effective date of the action. These dates are used later in various ways to calculate the employee's service time. Override these values as necessary.

If at a later date you change the status of an employee's employment, depending on the administrative action you select in the Job Data pages, the system will display the rehire date.

The Separation Date field is display-only, and shows the date that the employee left employment.

EOD Date (entered on duty) Reflects the effective date of the hire request after you save the request. This date is distinct from the SCD dates in that it describes when the employee started federal employment with the employing agency; it does not reflect total federal service involving the employee's total career.

Hire NTE Dt (hire not to exceed date) Set by default from the Not to Exceed Date field on the Data Control page. In the case of a temporary hire, it designates the length of time the temporary employment can last.

Mand Retire Date (mandatory retirement date) If applicable, enter the employee's mandatory retirement date.

Exp Dates (expiration dates) Click to access the Expiration Dates page and enter expiration dates for temporary promotions, position changes, sabbaticals, or detail assignments.

Next Review Dt (next review date) Enter the next review date. This date, while informational only, can serve as a tickler date for employee performance review.

Appt Data (appointment data) Click to access the Appointment Info page and enter appointment limits.

Service Computation Dates

Leave	Enter the service computation date for beginning the employee's leave computation.
Retire	Enter the service computation date for beginning the employee's retirement computation.
RIF (reduction in force)	Enter the computation date for establishing the employee's RIF position.
TSP (thrift savings plan)	Enter the computation date for beginning the employee's thrift savings plan eligibility computation.
LEO (law enforcement officer)	Enter the computation date for beginning the employee's law enforcement officer retirement computation.
Sev Pay (severance pay)	Enter the service computation date for establishing the employee's severance pay computation.

Service Conversion Dates

Conv Begin Date (conversion begin date), Career Conv Date (career conversion date), and Career Cond Conv Date (career-conditional conversion date)	Enter the conversion begin date, the career conversion date, and the career-conditional conversion date. If the employee is hired using a career-conditional appointment, the conversion begin date is the effective date of the hire. Upon completion of the three-year period, the personnel office processes a PAR converting the employee to a career appointment and enters that effective date in the Career Conv Date field. If the employee was hired under a temporary appointment, the conversion begin date is the effective date of the hire. When the personnel office processes a PAR to convert the temporary employee to a permanent employee with a conversion to career conditional competitive appointment, the Career-Cond Conv Dt field is the effective date for that transaction.

Within-Grade Increase Data

WGI Status (within-grade increase status)	Enter the WGI status, such as <i>(none)</i> , <i>Approved</i> , <i>Waiting</i> , <i>Denied</i> , <i>N/A</i> , or <i>Postponed</i> . For a new employee, the default value is <i>Waiting</i> . <i>Created</i> is an option for WGI status, which is reserved for the automatic WGI process. Do not change this online, as the WGI process won't select it unless the status is <i>Waiting</i> or <i>Approved</i> .
Non Pay Hours WGI and Intermittent Days Worked	Leave these informational fields blank at hire. After running the WGI/Tenure Update process for leave without pay and processing a PAR, update the Non Pay Hours WGI field with nonpay hours from the WGI/Tenure Update report.

Note. The WGI/Tenure Update process is a North American Payroll process specific to U.S. Federal government customers.

Last Increase Dt (last increase date), **WGI Due Date**, and **LEI Date** (last equivalent increase date)

The system automatically enters the last increase date, LEI date, and WGI due date. For certain actions, the WGI Due Date field is set by default to the pay period begin date based on the pay calendar tables that your organization has established. For WGI due date calculation, it is imperative that you set up your pay calendars for this year, plus three years in advance of the current year. For example, if the current year is 1999, then your pay calendars need to be set up for 1999, 2000, 2001, and 2002.

If you enter a date that isn't the beginning of a pay calendar, the system displays a message suggesting valid pay calendar begin dates into which your date falls. If the system suggests a date of January 1, 1899, this indicates that your pay calendars do not exist. See your implementation project manager about creating additional pay calendars.

After running the WGI/Tenure Update process for leave without pay and processing a PAR, update the WGI Due Date field with the extended due date from the WGI/Tenure Update report.

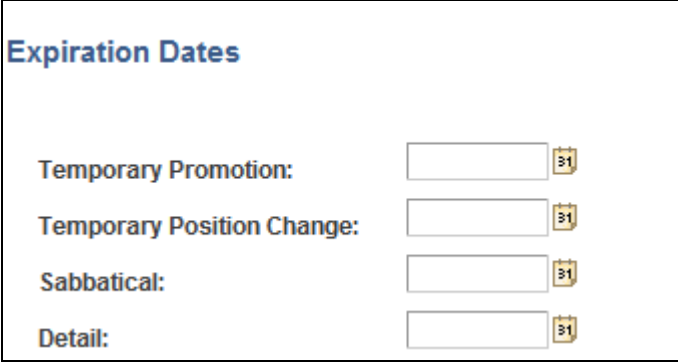
See Also

[Chapter 19, "\(USF\) Processing Automatic Actions for Probation, Tenure, and WGIs," page 847](#)

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up Pay Calendars"

Entering Expiration Dates

Access the Expiration Dates page (click Exp Dates on the Employment Data 1 page).



Expiration Dates

Temporary Promotion: 

Temporary Position Change: 

Sabbatical: 

Detail: 

Expiration Dates page

The following fields, which are updated by the user, are informational only.

Temporary Promotion Enter the temporary promotion date.

Temporary Position Change Enter the temporary position change expiration date.

Sabbatical Enter the sabbatical expiration date.

Detail

Enter the detail assignment expiration date.

Entering Appointment Limits

Access the Appointment Info page (click Appt Data on the Employment Data 1 page).

Appointment Info

Nature of Action Code:

Current Appointment Auth Nbr 1:

Current Appointment Auth Nbr 2:

Benefit Record Number:

0

Severance Pay Previous Weeks:

0

Appointment Limits

Amount:

Hours:

Days:

Special Employment Program:

Not Applicable

Appointment Info page

Nature of Action Code, Current Appointment Auth Nbr 1 (current appointment authorize number 1) and Current Appointment Auth Nbr 2 (current appointment authorize number 2)	CPDF reportable fields maintained to reflect historic data on the employee's current appointment authority used to authorize the employee's hire.
Benefit Record Number and Severance Pay Previous Weeks	For a new hire, you do not need to enter the benefit record number and the number of severance pay previous weeks. If changes occur to the employee's employment status, you must update these fields (for example, RIF).
Special Employment Program	Indicate the special employment program: <i>Not Applicable, Other, Presidential Management Intern, SES Candidate Development, or Veteran's Readjustment Program.</i>

Appointment Limits

Amount, Hours, and Days

Depending on the type of appointment used to hire the employee, enter the appointment limits amount, hours, or days.

Entering Additional Employment Information

Access the Employment Data 2 page (Workforce Administration, Job Information, Add Employment Instance USF, Add Employment Instance USF. Enter a Person ID and click Add. Select the Employment Data 2 page).

Data ControlPersonal DataJob DataPosition DataCompensation DataEmployment Data 1Employment Data 2

Shiela HoffmanEmpl ID: LEPOI01Empl Record: 0

Employment Data 2Find | View AllFirst1 of 1Last

Effective Date: 02/28/2003Transaction Nbr / Seq:PAR Status: Processed by Human Resources

Action Type: HireNOA Code:Empl Status: Active

Bargaining Unit:Union Code:Union Anniversary Date:Tenure:

Permanent Data - RIF

Pay Plan/Grade:Comp/Area Level:RIF Series:

Retained Grade Expires

Begin Date:Expires Date:

Probation DatesNon Pay DataFinancial DisclosureTime Reporter Data

Employment Data 2 page

Bargaining Unit

Select a code representing the bargaining unit to which the employee belongs.

Union Code

If your new employee belongs to a union, select the appropriate union code.

Union Anniversary Date

If the bargaining unit covers the position and the employee has elected to join, enter the date on which the employee's seniority ranking within the union is based.

Tenure

Indicate the type of tenure.

Retained Grade Expires

Begin Date and Expires Date

Where appropriate, enter the employee's retained grade begin date and expires date. These are informational fields provided for the agency to track the employee's eligibility to maintain retained grade.

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Permanent Data-RIF

These informational fields enable the agency to track the employee relative to RIF processing.

- Pay Plan/Grade**
- Enter the employee's pay plan and pay grade.
- Comp/Area Level**
- Enter the employee's compensation area and level.
- RIF Series**
- Select the employee's RIF series.

Links

- Probation Dates**
- Click to access the Probation Dates page and enter information related to probation periods.
- Non Pay Data**
- Click to access the Non Pay Data page and enter information related to a status of non-pay.
- Financial Disclosure**
- Click to access the Financial Disclosure page and enter information related to the employee's financial disclosure requirement.
- Time Reporter Data**
- Click to review PeopleSoft time and labor data for this employee. If you aren't using PeopleSoft Enterprise Time and Labor, the link is unavailable.

See Also

Chapter 19, "(USF) Processing Automatic Actions for Probation, Tenure, and WGIs," page 847

Tracking Probation Dates

Access the Probation Dates page (click Prob Dates on the Employee Data 2 page).

Probation Dates

Probation Dates

Supervisor/Mgr Prob Reqd Code:

Not Required

SES Probation End Date:

Supervisor/Mgr Probtn Start Dt:

Supervisor/Mgr Probtn End Date:

Probation Start Date:

Probation End Date:

Probation Dates page

Supervisor/Mgr Probtn Req Cd (supervisor manager probation required code)	Identifies whether a supervisory/managerial probationary period is required, served, or waived.
SES Probation End Date (Senior Executive Service probation end date)	Enter the applicable probation end date.
Supervisor/Mgr Probtn Start Dt (supervisor/manager probation start date)	The starting date for the supervisory/managerial probationary period, or for the SES probationary period.
Supervisor/Mgr Probtn End Dt (supervisor/manager probation end date)	Enter the applicable probation end date.
Probation Start Date	Identifies whether the employee's appointment is subject to completion of a one year probationary (or trial) period and to show the commencing date of the probationary period.
Probation End Date	Enter the applicable probation end date.

Tracking Nonpay Status Information

Access the Non Pay Data page (click Non Pay Data on the Employment Data 2 page).

Non Pay Data

NOA Code:

Expiration Date:

SCD Hours:

Probation Hours:

Last Date Worked:

Career Tenure Hours:

Non Pay Data page

NOA Code	Indicates the PAR processed to place the employee in a nonpay status.
Expiration Date	The nonpay expiration effective date, which reflects the projected expiration of nonpay status and consequent processing of a PAR to return to pay status.
Last Date Worked	Enter the date last worked prior to being placed in a nonpay status.
SCD Hours, Probation Hours, and Career Tenure Hours	Enter and track SCD hours, probation hours, and career tenure hours in these informational fields.

Entering Financial Disclosure Information

Access the Financial Disclosure page (click Financial Disclosure on the Employment Data 2 page).



Financial Disclosure page

Financial Disclosure Required and **Due Date** If a financial disclosure is required, select this check box, and enter the due date for receipt.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Positions, "Setting Up Positions," (USF) Setting Up Position Titles

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Positions, "Setting Up Positions," Creating Positions

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up Jobs," Classifying Jobs

Viewing Component Interface Exceptions

Access the CI Exceptions page (Workforce Administration, Job Information, Add Employment Instance USF, Add Employment Instance USF. Enter a Person ID and click Add. Select the CI Exceptions page).

After you insert your personnel action, and have completed it to the best of your knowledge, update the PAR status to *PRO* (processed), and click the Save button. The system updates all the relevant tables with the new data. The system uses a series of Component Interfaces (CIs) to make these updates. Should the CIs encounter an Error, the personnel action update will stop and roll back to the original state and thus no updates will be saved until you address the Error and click Save again.

Should the CIs encounter any warning messages, the update will continue while the warning messages are displayed for you in the CI Exceptions page after the transaction has been successfully saved. These warnings are relevant to the processed transaction and will be automatically deleted after another personnel action is processed. It is good practice to note the warnings and contact your PeopleSoft Technical Administrator to help resolve them. The CI Exceptions page displays an auto-generated step-by-step documentation of what the CIs are executing which provides valuable insight into the back-end technology used in the Federal product.

Assigning Employees to Positions

If you organizing part or all of PeopleSoft Enterprise Human Resources by position (using PeopleSoft Enterprise Human Resources Manage Positions), you can hire some or all new employees into positions on the Hire Employee pages, accessed from the Workforce Administration, Increase Workforce menu. If you're not using PeopleSoft Enterprise Human Resources Manage Positions, you can also use position numbers but the system won't process position-related data.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Positions, "Setting Up Positions"

Hiring Job Applicants

You can initiate the hire process from the Recruiting component. After an applicant is selected you can take the action of "Prepare for Hire" to submit the hire request. The hire transaction is completed using the Manage Hires transaction in the Workforce Administration component. Both Recruiting and Template-Based Hire use the Manage Hires page.

See [Chapter 6, "Increasing the Workforce," Increasing the Workforce Through SmartHire Templates, page 298.](#)

See *PeopleSoft Enterprise Talent Acquisition Manager 9.1 PeopleBook, "Hiring Applicants," Hiring Applicants.*

See Also

PeopleSoft Enterprise Talent Acquisition Manager 9.1 PeopleBook, "Hiring Applicants"

Printing Appointment Affidavits and Preliminary Employment Data Forms

This section lists the pages used to run the Appointment Affidavits (FGSF61) and Request for Prel Employment Data (request for preliminary employment data) (FGSF755) reports.

Pages Used to Print the Forms

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Appointment Affidavits USF	RUNCTL_FGSF61	Workforce Administration, Job Information, Reports, Appointment Affidavits USF	Produces an Appointment Affidavit STANDARD FORM 61 form to be signed by an appointee.
Request Prelim Empl Data USF	RUN_CNTL_FGSF75	Workforce Administration, Job Information, Reports, Request Prelim Empl Data USF	Produces a Request for Preliminary Employment Data form.

Chapter 8

Entering Additional Data in Human Resources Records

This chapter provides an overview of additional worker data and discusses how to:

- Locate personnel records.
- Track workforce contracts.
- Enter temporary assignments.
- Track teleworkers.
- Track disabilities.
- Handle company credit cards.
- Handle company property.
- Manage names data.
- Track dependent and beneficiary data.
- Track emergency contacts.
- Manage citizenship and visa or permit information.
- Manage driver's license information.
- Enter bank account information.
- Track volunteer activity.
- Track military discharge dates
- Set up and track military availability.
- Enter and track additional workforce data.
- Set up and track security clearance and badge access.

Understanding Additional Worker Data

After you've entered a worker's basic personal information and created one or more organizational instances for them, use other pages in the Workforce Administration menu to add and track a broad range of other information for that person.

While many of the pages covered in this chapter are optional, you may find them useful for tracking and reporting, and for maintaining compliance with government regulations. You can also provide other people, such as your employees or industrial relations representatives, with information that helps them perform their jobs more effectively.

Locating Personnel Records

When you open an additional information page, the system displays the dialog box for you to select the person. If you don't know the person's employee ID, there are alternate ways to locate the person's record:

- Use the search dialog box to search for the correct record by name or partial last name or middle name.
Advanced search options may also be available.
- Use the Search for People page to search for a person ID by name, address, city, date of birth, gender, or national ID.
- Use the Search by National ID page to find a person's person ID by using a national ID.

After you have the person's employee ID, enter it in the dialog box for the page you are accessing.

This section discusses how to:

- Search with the search dialogue.
- Search for person information.
- Search by national ID.

Pages Used to Locate Personnel Records

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Search/Match	HCR_SM_SEARCH	Workforce Administration, Personal Information, Search for People	Search for and select a person.
Search by National ID	NID_LOOKUP	Workforce Administration, Personal Information, Biographical, Search by National ID	Locate a person's employee ID by using the national ID. When you find the person's employee ID, use it when you move to other search pages.

Searching with the Search Dialogue

Use the following search dialog box to find a person's information. You encounter this sort of dialog box when you enter most pages in the Workforce Administration menu. You can also enhance the component's underlying search record to expose other fields as alternate search criteria or as list box items. These fields may include relevant additional fields such as: middle name, alternate character name, department, setID, organizational relationship, POI type, military rank, and so on.

Find an Existing Value

Maximum number of rows to return (up to 300): 300

Empl ID:

begins with

Empl Record:

=

Name:

begins with

Last Name:

begins with

Second Last Name:

begins with

Alternate Character Name:

begins with

Middle Name:

begins with

☐ Include History

☐ Correct History

☐ Case Sensitive

Search dialogue

You must have already created job records in PeopleSoft Enterprise Human Resources for the person for whom you are searching. In other words, you must have already added the person to the system and created an organizational instance for the person.

Empl Record	If the person has more than one organization instance or job record, enter the record that you want to access. If you do not know which record you want to access, do not enter a value in this field. The system lists all the job records in the search results, enabling you to select the appropriate one.
Name, Last Name, and Middle Name	If you're not sure of the entire employee ID or name, make a partial entry in one of these fields and click Search to search for the correct name and ID. You cannot use this field to search for last names using special characters, such as double-byte Japanese characters.
Alternate Character Name	If you selected the Alternate Character option for your user ID on the Primary Permission List Preferences table, you can also search for employee names by using the Alternate Character search feature in PeopleSoft Enterprise Human Resources.
Organizational Relationship	Select the organizational relationship to narrow your search to <i>Employees</i>, <i>Contingent Workers</i>, or <i>Person of Interest</i>.

Military Service, Rank, and Worn Rank Enter the military information to search for people associated with a military service or rank. The military fields must be activated after installation or upgrade if you choose to have these fields appear as an alternate search key or list box attribute.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Working with System Data Regulation in HRMS"

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Languages," Working with Alternate Character Sets

Searching for Person Information

Access the Search/Match page (Workforce Administration, Personal Information, Search for People).

Search/Match page

This page enables users of an application to search for and select a person to process. Using this system, an application can easily render a UI that prompts the user for partial names and displays a list of candidates from which the user can select. Additional features include optional drill-down to additional non-sensitive data.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Working with Common Components," Configuring Person Search.

Searching by National ID

Access the Search by National ID page (Workforce Administration, Personal Information, Biographical, Search by National ID).

Search by National ID

National ID:

*Search in: 

Lookup by National ID				
National ID	Empl ID	Name	Country	National ID Type
123-12-1234	0029	James john	United States	Social Security Number

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

Search by National ID page

National ID

Enter the national ID of the person whose records you want to view.

Search In

Select *Employees / Contingents / POI* or *Dependents and Beneficiaries* to narrow your search.

Note. *Employees / Contingents / POI* includes all people who were added to the system on the Personal Information component, including contingent workers and people of interest.

Search

Click to have the system display a list of the records that match the ID that you entered.

Tracking Workforce Contracts

This section discusses how to:

- Add basic contract information.
- Add special contract clause information.
- View task order information.
- Add signature date, responsible party, and probation information.
- Generate the Contract Information report.

Note. Contracts are driven by regulatory region (and that region's setID) on the job data record associated with the contract. On the Update Contracts component, you must select the regulatory region that is on the person's job data record and the system only makes available contract clauses and types that share the setID of this regulatory region.

See Also

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "(E&G) Administering Contract Pay"

Chapter 2, "Setting Up the Administer Workforce Business Process," Setting Up Workforce Contracts, page 78

Pages Used to Track Workforce Contracts

Page Name	Definition Name	Navigation	Usage
Contract Status/Content	CONTRACT1	Workforce Administration, Job Information, Contract Administration, Update Contracts, Contract Status/Content	Add or update basic information about the contract between your organization and a worker, including the contract duration, type, and content. You must have previously set up contract template IDs on the Define Contract Templates page.
Contract Type/Clauses	CONTRACT2	Workforce Administration, Job Information, Contract Administration, Update Contracts, Contract Type/Clauses	Add or update any special contract clause information to the standard contract language for this worker.
Original Contract Data	CONTRACT_BEL_SEC	Click Original Contract on the Contract Type/Clauses page.	(BEL) Enter information about the original contract that the new contract is replacing.
Task Order Information	CONTRACT4	Workforce Administration, Job Information, Contract Administration, Update Contracts, Task Order Information	Track contractor work to a more detailed line item, rather than at the contract level. This may enable more accountability and tracking of contractors. This page is optional.
Signature Date/Probation Info	CONTRACT3	Workforce Administration, Job Information, Contract Administration, Update Contracts, Signature Date/Probation Info	Add or update the signature date, responsible party, and probation information. View basic job data.

Page Name	Definition Name	Navigation	Usage
Contract Information Report	RUNCTL_CNT001	Workforce Administration, Job Information, Contract Administration, Contract Information Report	Generate the Contract Information report (CNT001) that lists all contracts and task orders (subcontracts) for a worker or the contract history for all workers within a designated period.

Adding Basic Contract Information

Access the Contract Status/Content page (Workforce Administration, Job Information, Contract Administration, Update Contracts, Contract Status/Content).

Contract Status/Content
Contract Type/Clauses
Task Order Information
Signature Date/Probation Info

Clara Brusati
Person ID: KI0001

Contract Data

Contract Number: 0001
*Contract Status: Active
Contract Begin Date: 05/07/1999
Contract Expected End Date:
Contract End Date: 05/07/2003
*Regulatory Region: ITA
Comment:
Contract Template ID:
Initialize Contract
Provider ID:
Contract Content: Contract for Assistant of CEO
Additional Contract
More than one year expected
Waive Working Time Compliance

Belgium

Contact Name:
Telephone:
RSZ-Category:
RSZ-Submitted
Reduced Charges Category:
Start Date:
End Date:
Social Balance Category:

Contract Status/Content page (1 of 2)

 Spain

Probation/Vacation Info

Probation Period: Months
 Vacation Period: Months

Other Information

Begin/End Week: Monday /: Friday

Comp Rate Descr:

Hiring Center:

Scheme ID:

Social Sec Contrib:

Reduction Information

Reduction ID:

Effective Date: 07/02/2009

Status: Active

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

Contract Status/Content page (2 of 2)

Contract Status Indicate whether the contract is *Active* or *Inactive*.

Contract Begin Date Enter the date when the contract begins. The current date is the default.

Contract Expected End Date Enter the date when you expect the contract will end.

Contract End Date Enter the date when the contract actually ended. This date may differ from the date that you expect the contract to end.

Regulatory Region	Enter a regulatory region. The regulatory region must share the setID of the contract type and be the regulatory region on the person's job data record for this contract.

Comment Enter a comment for this contract.

Additional Contract Select if the worker already has at least one contract. Leave this field blank if this is the worker's only contract.

More than one year expected Select if you expect that this contract will result in more than one year of employment for this worker.

Note. This field is required for contracts with Japanese workers.

Waive Working Time Compliance	Select if the contract allows working time compliance to be waived by the worker.

Contract Template ID and Initialize Contract	If you have defined a template for the contract, select an ID from the list of valid templates stored on the Define Contract Templates page, and click Initialize Contract. The system displays a description of the contract and its default contents. Note. If there are any task orders associated to the contract template, only those task orders with an effective date on or after the individual's Contract Begin Date will default to the individual contract level.
Provider ID	If this contract is with a contingent worker, specify the person's provider, agency, or employer.
Contract Content	If you entered a contract template code and clicked the Initialize Contract button, the system automatically completes this field with the content that was entered on the Define Contract Templates page. Otherwise, enter the contract language.
(BEL) Belgium	
RSZ-Category	If you're entering a contract and you selected <i>Employment</i> as the contract type on the Contract Type / Clauses page, choose an RSZ category from the valid RSZ category codes stored on the RSZ Categories page (CNT_RSZ_TBL_BEL).
RSZ-Submitted	Select to indicate that social insurance premiums need to be paid by the worker to the Belgian RSZ governing body for this job contract.
Reduced Charges Category	Select from among the categories, if appropriate. Employers can lower their RSZ premium contributions if they are offering a job for one of the two reduced charges categories. Companies that employ workers who qualify for the reduced charges category enjoy lower employee costs.
Social Balance Category	Select the appropriate social balance category. This information is included on the BEL Social report.
(ESP) Spain	
Probation Period	If this worker's contract includes a probation period, use these two fields to specify how long it is. Use the first field to enter the appropriate quantity and the second field to select a unit of time. Units of time are <i>Days</i> , <i>Months</i> , or <i>Years</i> . For example, if the probation period is six months, enter 6 in the first field, and then select <i>Months</i> in the second field.
Vacation Period	Use these two fields to specify how much vacation the worker receives per year. Use the first field to enter the appropriate quantity and the second field to select a unit of time. Units of time are <i>none</i> , <i>Months</i> , <i>Natrl Days</i> (natural days), <i>Weeks</i> , or <i>Work Days</i> . For example, if the vacation period is 20 work days, enter 20 in the first field, and then select <i>Work Days</i> from the options in the second field.

Refresh Vacation	Click to enter the default value for vacation periods from the Labor Agreement page in the Vacation Period field.
Begin/End Week	Specify the days when the worker's work week begins and ends. The default values are <i>Monday</i> and <i>Friday</i> .
Comp Rate Descr (compensation rate description)	Enter a free-form description of the worker's compensation rate.
Hiring Center	Select the hiring center that is responsible for hiring this person.
Scheme ID	Select a scheme ID.
Social Sec Contrib (social security contribution)	Select a social security contribution ID for the selected contract and scheme ID. The system uses both the scheme ID and the contribution ID for social security calculations, to determine the percentage or fixed amount that is applied to the calculation of a worker's contribution.
Reduction ID	If the worker is entitled to a reduction in social security contributions, select the reduction that applies. Define reduction ID values on the Reductions ESP component. See <i>PeopleSoft Enterprise Global Payroll for Spain 9.1 PeopleBook</i>, "Setting Up Social Security Contributions," Defining Reductions.
Effective DateandStatus	Enter the effective date and status of the specified reduction.

See Also

[Chapter 3, "Setting Up Country-Specific Tables," \(ESP\) Setting Up Spanish Workforce Tables, page 128](#)

[Chapter 3, "Setting Up Country-Specific Tables," Defining Maximum and Minimum Social Security Ceilings, page 134](#)

Adding Special Contract Clause Information

Access the Contract Type/Clauses page (Workforce Administration, Job Information, Contract Administration, Update Contracts, Contract Type/Clauses).

Contract Status/Content

Contract Type/Clauses

Task Order Information

Signature Date/Probation Info

Clara Brusati

Person ID: KI0001

Contract Data

Contract Number: 0001

Begin Date: 05/07/1999

Contract Status: Active

Contract Type

Effective Date: 05/07/1999

Contract Type: 001

Limited Contract

☒ Extend Contract

Belgium

Duration:

Statute:

Substatute:

Independent Profession:

Profession:

Contract Type/Clauses page (1 of 3)

France

Category TDS:

Multiple Employer Rate: 100.00

Work Contract / Activity Caract:

Gross Reduction Percentage: 0.00

Social Security Code:

Employee Professional Status:

Category Status:

Mandatory Base Scheme:

Population Category:

AGIRC / ARRCO

*Membership Number	Membership Number	Description	Institution Number	Description	Fund Code	Description
1		Membership Number				

Others

*Membership Number	Membership Number	Description	Institution Number	Description	Fund Code	Description	Covered Population	Contract Event	Population Category
1		Membership Number							

Contract Type/Clauses page (2 of 3)

Italy

Plan ID:

Reason:

Duration (Months):

Spain

INEM Contract ID:

Contract Template:

Communication

☐ Contract

☐ Basic Copy

☐ Extension

Contract Clauses

Find | View All | First 1 of 1 Last

Seq Nbr:

1

Clause:

K08

Non-Competing Clause

Clause Status:

Required

Long Descr:

Company agrees that Employee will not at any time or in any manner solicit, contract, employ (collectively "Engage

Comment:

Company agrees that Employee will not at any time or in any manner solicit, contract, employ (collectively "Engage") and/or Engage any customer, client, employee (collectively "Anybody") and/or Anybody doing business with Company. Unless, agreed by Company and granted permission through written acknowledgment by Company.

Contract Type/Clauses page (3 of 3)

- Contract Type

Select the contract type.
- Extend Contract

Indicate if the individual's original contract has been extended beyond it's original date or purpose.
- Contract Clauses

Seq Nbr (sequence number)

When you add a clause to the contract, the system assigns a sequence number automatically.

Clause

Select a clause.

Clause Status

The status that is associated with the clause that you selected appears by default.
- (BEL) Belgium

Duration

Select a duration period for the workforce contract.

Original Contract

If *Replacement* defines the duration period, the Original Contract link appears. Click to access the Replace Contract BEL page to enter the employee ID and original contract number.

Statute	Select a contract statute, or employment category, for this worker.
Independent Profession	If you selected <i>Self employed</i> as the contract type, provide the worker's independent profession here.
Substatute	Select a substatute, or employment subcategory. The system displays only those substatutes that are associated with the statute code that you selected.
Profession	If you selected <i>Member of the Professions</i> as the contract type, indicate additional profession information here.
(FRA) France	
Category TDS	Select a worker category: <i>Apprentice</i> , <i>Executive</i> , and <i>Manager</i> . This field is used to prepare the DADS TDS report.
Social Security Code	Select a social security code. The social security code is the contribution class, or régime, of the worker. Any worker who is eligible for a contribution must be associated with a social security code.
Multiple Employer Rate	The earnings ceiling is reduced if an employee has multiple contracts active at the same time. The reduction appears here as a percentage. If a worker has more than one employer, use the multiple employer rate to indicate the percentage of contributions that should be taken from each employer to avoid over-taxing. The earnings ceilings are prorated using this rate. For example, suppose that a worker has two employers, and he receives 40 percent of his salary from employer A and 60 percent of his salary from employer B. In the Multiple Employer Rate field, employer A enters 40 and employer B enters 60.
Employee Professional Status	Select the profession that is designated for this worker.
Work Contract/Activity Caract	Used to prepare the DADS TDS report. Values are <i>Full Time</i> , <i>Home</i> , <i>Intermitt.</i> , <i>Part Time</i> , <i>Seasonal W</i> , <i>Temporary</i> , and <i>Wo Ctc Cpl</i> .
Category Status	Select the category status. The category status affects the type of pension/contingency fund to which the employee contributes.
Gross Reduction Percentage	The gross reduction percentage is applied to the gross salary for specific job categories, such as for journalists and artists. These workers do not pay their contributions on their gross salaries. Instead, their gross salaries are reduced by the percentage indicated here. For example, suppose that a worker is entitled to a 30 percent reduction. If he has a salary of 1500 EUR, he contributes for only 1000 EUR. This field has a default value of 0.
Mandatory Base Scheme	Select the base compensation scheme for this workforce contract.

Population Category	Displays the population category that applies to the employee. The system determines the population category from the INSEE code associated with the employee's job code. INSEE codes are linked to population categories on the INSEE Table page.
AGIRC / ARRCO	Use this group box to assign the employee to an AGIRC or ARRCO pension contract, if you want to override the contracts defined for the employee's company or establishment. Use the Pension/Cont. Contracts Review page to view a list of the pension and contingency funds for which an employee is eligible. Select the AGIRC/ARRCO contract in the Membership Number field and the system completes the remaining fields in this group box. Click the link in the Membership Number column to view the contract details. The system displays the Pension/Contingency Contracts page. Note. Employees should be assigned to only one contract with an institution type of AGIRC or ARRCO on any given date. See Chapter 3, "Setting Up Country-Specific Tables," (FRA) Setting Up French Workforce Tables, page 109. See Chapter 10, "Managing Country-Specific Workforce Data," (FRA) Providing Additional Information for French Workers, page 523.
Others	Use this group box to assign the employee to a contingency fund contract. Contingency funds defined on this page are in addition to any contingency funds defined for the employee's company or establishment. Use the Pension/Cont. Contracts Review page to view a list of the pension and contingency funds for which an employee is eligible. Select the contingency contract in the Membership Number field and the system completes the contract details fields. Click the link in the Membership Number column to view the contract details. The system displays the Pension/Contingency Contracts page. Select a value in the Covered Population field that indicates who is covered by the contract. Select a value in the Contract Event field to indicate whether this is a new contract or the type of change in contract. Contract events are required for DADS reporting. Select a value in the Population Category field to indicate the population category that applies. This value is required for DUCS reporting. The default value is the population category for the employee's job code but you can override it. See <i>PeopleSoft Enterprise Global Payroll for France 9.1 PeopleBook</i>, "Generating DADS." See <i>PeopleSoft Enterprise Global Payroll for France 9.1 PeopleBook</i>, "Generating DUCS."

(ITA) Italy

Plan ID	If the worker was assigned a contract type of <i>Training and Labor</i> , you must select a plan ID.
Reason	If the worker was assigned a contract type of <i>001: Limited Contract</i> , you must enter a reason for the contract.
Empl ID Replaced	If the reason for the determined period contract type is <i>Maternity</i> or <i>Replacement</i> , select the employee ID of the worker who is being temporarily replaced by this contract worker.

The following fields appear in the Target Categorization group box only if the contract type is *Training and Labor*.

Labor Agreement	Select the labor agreement for this contract and plan ID.
Category	Select the labor category for this contract.
Subcategory	Select the subcategory for this contract.
Subcategory 2	If the subcategory selected above has further divisions, select the subcategory 2 here.

(ESP) Spain

INEM Contract ID	Enter the contract ID for this employee contract. The contract ID is a unique identifier issued by INEM (<i>Instituto Nacional de Empleo</i>) national employment institute, and is required by INEM in all communications regarding the contract.
Contract Template	Select a contract template to use to print the contract. Contract templates are defined on the Contract Printing Mapping page.
Communication	Select the types of Contrata XML files to use when communicating with INEM about the creation or change of this specific employee contract. Values include Contract, Basic Copy, and Extension. The default value is Contract.

See Also

[Chapter 9, "\(BEL\) Entering Additional Data for Belgian Workers," Setting Up Belgian Employment Contract Statutes for Claeys Calculations, page 489](#)

Viewing Task Order Information

Access the Contract Data - Task Order Information page (Workforce Administration, Job Information, Contract Administration, Update Contracts, Task Order Information).

Contract Status/ContentContract Type/ClausesTask Order InformationSignature Date/Probation Info

Clara Brusati

Person ID: KI0001

Contract Data

Contract Number:0001Begin Date:05/07/1999Contract Status:Active

Task Order Information

CustomizeFindView All1 of 1FirstLast

	Task Order Number	Description	Begin Date	End Date	Comments	
☐					Comments	

Deselect All

Select All

Delete Selected

Contract Data - Task Order Information page

If you are using Contract Templates, this page enables you to manage the task orders, such as subcontracts, with which an individual is associated with under the primary contract template. Once you enter the contract template ID and initialize the contract, the system will enter any task orders that have a begin date on or after the contract begin date. You can then manage the specific task orders and enter comments associated with this person.

Adding Signature Date, Responsible Party, and Probation Information

Access the Contract Data - Signature Date/Probation Info page (Workforce Administration, Job Information, Contract Administration, Update Contracts, Signature Date/Probation Info).

Contract Status/Content		Contract Type/Clauses		Task Order Information		Signature Date/Probation Info	
Clara Brusati				Person ID:		KJ0001	
Contract Data							
Contract Number:		0001		Begin Date:		05/07/1999	
				Contract Status:		Active	
Workforce Information Find View All First 1 of 1 Last							
Effective Date:		01/01/2000		Empl Record:		0	
Job Indicator:		Primary					
Action:		Promotion					
Reason:		Outstanding Performance					
Company:		Business I		Pay Group:			
Business Unit:		ITA BU		Pay Group:			
Department:		Head		Work Period:		Weekly	
Location:		MI Down		Std Hrs:		40.00	
Reg Region:		Italy		Hourly Rate:		46730.769231	
Reg/Temp:		Regular		Monthly Rate:		8100000.000	
Category:		Area 3		Annual Rate:		97200000.000	
Labor Agreement:		Credito					
Signature Date:							
Responsible ID:							
Minimum Hours:							
Maximum Hours:							
Probation Information Find First 1 of 1 Last							
*Probation Date:				Reason:			

Contract Data - Signature Date/Probation Info page

The display-only data at the top of this page is derived from the Job Data component.

- Signature Date** Enter the contract's signature date. This information is required in some European countries, including Germany.
- Responsible ID** Enter the company agent who drafted the contract and who is responsible for its language.
- Minimum Hours and Maximum Hours** The system supplies default values from the Installation table for this contract.
- Probation Date** Enter multiple probation dates if they are required for this worker.
The probation date that you enter here also appears on the job data record for this worker.

Reason

Indicate a probation reason, including *New Date* and *Un-perform* (indicating additional probation time for failure to perform within expectations for the position).

Generating the Contract Information Report

Access the Contract Information Report page (Workforce Administration, Job Information, Contract Administration, Contract Information Report).

Contract Information Report

Run Control ID: SM

Report Manager

Process Monitor

Run

Language: English

Person ID:

Contract Begin Date

From Date:

31

End Date:

31

Contract Information Report page

Person ID

Enter the person ID of the worker for whom you want to list contracts. If you leave this field blank, the report prints the contract history (within the date range that you specify) for all workers.

From DateandEnd Date

Enter the date range for which you want contract information.

Entering Temporary Assignments

This section provides an overview of temporary assignments and substantive jobs and discusses how to:

- Enter a temporary assignment.
- Run the temporary assignment termination and substantive job reactivation process.
- Add a partial temporary assignment.

See Also

Chapter 8, "Entering Additional Data in Human Resources Records," Entering a Temporary Assignment, page 403

Understanding Temporary Assignments and Substantive Jobs

This section discusses:

- Substantive jobs.
- Temporary assignments.
- Data row impacts.
- Additional considerations for temporary assignments and data processing.

Substantive Jobs

The substantive job assignment is the worker's original job, created when the first employment or contingent worker instance was added.

Temporary Assignments

When a worker covers the responsibilities of another job besides the substantive job, the worker works a temporary assignment. Temporary assignment data must be tracked the same way that substantive job data is tracked.

For example, a person hired into a teaching appointment takes this as the substantive job. The person then receives a one month temporary assignment as a department head. The original teaching position is suspended for the duration of the temporary assignment.

It is also possible that the person takes a temporary assignment on a partial basis. The person might retain the substantive teaching position for twenty hours a week while also working the temporary assignment as department head for the other twenty hours. The person cannot work beyond the forty-hour workweek, but any combination of assignments might be entered to fill the forty hours.

Data Row Impacts

The Temporary Assignments feature requires that the system insert data rows at various stages throughout the process. For example, when selecting *Temporary Assignment* as the action or reason, the system inserts a second data row that puts the substantive job on hold. When a data row has been inserted by the system, the word *system* appears next to the employment record number (ERN) when viewed later. These data rows show an action or reason of *SUB* (hold substantive job), *RFA* (return from temporary assignment), or *RTS* (return to substantive job).

The substantive job retains its ERN while it is suspended and the temporary assignment is identified by a new ERN. This process enables the system to uniquely identify both job data records and maintain them simultaneously.

Additional Considerations for Temporary Assignments and Data Processing

Review these additional considerations when creating temporary assignments:

- When position data changes, the system updates position data for all workers in the affected position regardless of whether the assignment is temporary or substantive.

This update does not alter the active or inactive status of the workers in the affected position.

Similarly, when the substantive position changes, the system does not change the temporary assignments for the worker. The only exception is the unlikely possibility that a worker's temporary and substantive assignments are in the same position.

- The worker's pay rate matches the active assignment.

If a worker works multiple assignments beyond the substantive job, the system prorates the pay for each assignment. For example, if the employee teaches for twenty hours a week and acts as department head for twenty hours a week, payroll processes each job at 50% of the standard pay. To change the pay rate, you can override the position data manually on the Compensation Data page.

Note. Use the Job Data component pages for creating temporary assignments. For temporary assignments, to put the substantive job on hold, the handler Copy_SubstantiveJob and WORKFORCE_SYNC service operation must be active on the PERSON_DATA Message Channel, which comes with the PeopleSoft Application Messaging feature.

See Also

[Chapter 8, "Entering Additional Data in Human Resources Records," Entering a Temporary Assignment, page 403](#)

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Working with Integration Points in Enterprise HRMS"

Pages Used to Process Temporary Assignments

Page Name	Definition Name	Navigation	Usage
Work Location	JOB_DATA1	Workforce Administration, Job Information, Job Data, Work Location	Enter a temporary assignment
Add Additional Assignment	PER_ORG_INST_ASGN	Workforce Administration, Job Information, Add Additional Assignment, Add Additional Assignment	Add a partial temporary or additional assignment.
Reactivate/Update Termination	RC_TEMP_ASSGN_UPDT	Workforce Administration, Job Information, Temporary Assignments, Reactivate/Update Termination, Reactivate/Update Termination	Run the temporary assignment termination and substantive job reactivation process.

Page Name	Definition Name	Navigation	Usage
Temp Assignmnt w/out End Date	RUNCTL_TAS001	Workforce Administration, Job Information, Temporary Assignments, Temp Assignmt w/out End Date, Temp Assignmt w/out End Date	Run the Temp Assignment w/out End Date report (TAS001). The report lists workers currently on temporary assignment where end dates have not been defined.
Temp Assignmt due to Complete	RUNCTL_TAS002	Workforce Administration, Job Information, Temporary Assignments, Temp Assignmt due to Complete, Temp Assignmt due to Complete	Run the Temp Assignment due to Complete report (TAS002). This report lists workers due to complete temporary assignments within the user specified date range.

See Also

Chapter 2, "Setting Up the Administer Workforce Business Process," Defining Personnel Actions and Reasons, page 5

Entering a Temporary Assignment

Access the Job Data - Work Location page (Workforce Administration, Job Information, Job Data, Work Location).

To enter a temporary assignment:

1. Locate the substantive job that will be put on hold during the temporary assignment.
2. Insert a new data row with the following parameters:

- Enter the effective date that the temporary assignment begins.
- Enter *Temporary Assignment* in the Action/Reason field.

When you use this value in the Action/Reason field, the system suspends the worker's substantive job, transferring the substantive job data, including payroll and benefits information, to the next job record for this worker. The Reactivation/Termination process reactivates the substantive job upon termination of the temporary assignment.

- Enter the temporary assignment position number, if applicable.
3. (Optional) On the Job Data – Job Information page (Workforce Administration, Job Information, Job Data, Job Information), enter the termination date for the temporary assignment in the Expected Job End Date field.
 4. (Optional) Select the End Job Automatically check box to end the job on the termination date.

This action also reactivates the substantive job when you run the Reactivation/Termination process.

5. Select the type of duties in the Duties Type field for this temporary assignment.

Note. You must enter the expected job end date *and* select the End Job Automatically option for the Reactivation/Termination process to run automatically for each assignment. If you do not complete these fields, the termination of the temporary assignment and reactivation of the substantive job must be handled manually.

Whereas the previous procedure outlines the required actions for entering temporary assignments, you can also make other adjustments, as necessary, on any of the pages in the component. For example, it might be necessary to adjust the pay rate on the Compensation Data page. You should make this adjustment while creating the temporary assignment. When you save this information, the system suspends the substantive position.

Running the Temporary Assignment Termination and Substantive Job Reactivation Process

Access the Reactivate/Termination Update page (Workforce Administration, Job Information, Temporary Assignments, Reactivate/Update Termination).

Complete the Company and Expected Job End Date up to fields and run the Reactivate/Termination Update process (HR_REACTVTER).

This process must be run periodically to terminate temporary assignments (with job end dates) and to reactivate substantive positions. This process inserts new data rows into the job data record. These data rows have reason codes of *SUB* (hold substantive job), *RFA* (return from temporary assignment) and *RTS* (return to substantive job), and the designation *system* next to the employee record number when viewed later.

Adding a Partial Temporary Assignment

You can add a temporary assignment that is fewer than 40 hours per week while maintaining the substantive job that fills the remaining hours. For example, an employee who is assigned to a temporary position that requires only 10 hours a week retains the substantive position for the other 30 hours. In this case, both jobs must remain active.

To allow both jobs to remain active, use the Add Additional Assignment component to enter the temporary assignment. You must then adjust the standard hours of the substantive position so that the hours for both jobs—substantive and temporary—equal 40 hours. You can still enter an end date for the temporary assignment and have that job end automatically. However, you must manually readjust the standard hours for the substantive position after the temporary assignment ends.

To replace a substantive job with two or more temporary assignments, choose one of the temporary assignments to replace the substantive job following the same procedure for assigning one temporary job, adjusting the hours appropriately. Then assign the second temporary position as a concurrent job.

If a worker has multiple substantive positions and is assigned one temporary position, the temporary assignment can only be assigned to one of the substantive positions. The other substantive positions must be manually suspended and reactivated using *Hold Substantive Job* and *Return to Substantive Job* as the action or reason.

Note. When assigning any combination of temporary assignments, you can still select the End Job Automatically check box on the Job Information page for the temporary assignment. However, if you have adjusted the standard hours for the substantive position, you must manually set the standard hours to the original setting when the temporary assignment has ended.

See Also

Chapter 6, "Increasing the Workforce," Adding Additional Assignments, page 287

Tracking Teleworkers

This section provides an overview of the teleworker tracking functionality and prerequisites, and discusses how to:

- Maintain teleworker status.
- Identify teleworkers actual location.
- Enter teleworker agreement data.

Understanding Tracking Teleworkers

Telecommuting is often a recruiting and retention factor for many organizations. The teleworker functionality in Human Resources enables you to track jobs, positions, and workers that are allowed to work remotely. This feature is also useful for US customers that may base local or state tax based on a person's typical work location.

This feature addresses US Federal Government regulations that require federal organizations to provide the U.S. Congress with information regarding legislatively-required teleworker data.

Note. Agreement details can be captured as a contract within Contract Administration or documented in other forms and locations, depending upon your organization's rules and policies regarding teleworkers and telecommuting. This feature only captures the fact that there is an agreement in place.

Prerequisites

Before you can use the new teleworker functionality with your employees and contingent workers, you must:

- Identify jobs eligible for telework arrangements.

Use the Available for Telework field on the Job Code Table - Job Code Profile page to indicate that a job is available for telework.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up Jobs," Adding New Job Codes.

- Identify positions eligible for telework arrangements, if your organization uses the Position Management business process.

Use the Available for Telework field on the Position Data - Specific Information page to indicate that a position is available for telework.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Positions*, "Setting Up Positions," Entering Position-Specific Information.

- Specify any telework locations.

Your organization may have dedicated locations for the express purpose of teleworkers. A location may also be considered a "Telework Location" if staff that may not normally report out of that location are able to work from that office. Indicate this using the Telework Location field on the Location Profile page.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up Organization Foundation Tables," Setting Up a Location Profile.

Pages Used to Enter Telework Details

Page Name	Definition Name	Navigation	Usage
Maintain Teleworkers - Telework Status	TELEWORK_STATUS	Workforce Administration, Job Information, Maintain Teleworkers, Telework Status	Capture the telework dates and recurrence information. Identify if the telework arrangement is due to a permanent or temporary disability. Note. Only temporary disabilities are identified here. Permanent disabilities should be captured under Personal Information, Disability, Disabilities.
Maintain Teleworkers - Location	TELEWORK_LOCATION	Workforce Administration, Job Information, Maintain Teleworkers, Location	Identify the worker's actual work location when telecommuting.
Maintain Teleworkers - Agreement	TELE_AGREEMENT	Workforce Administration, Job Information, Maintain Teleworkers, Agreement	Note how telecommuting equipment and services costs are handled, and monitor and track status changes associated to a telework request.

Maintaining Teleworker Status

The Maintain Teleworkers component can track current teleworkers and any workers that request to telecommute. Access the Maintain Teleworkers - Telework Status page (Workforce Administration, Job Information, Maintain Teleworkers, Telework Status).

Telework Status

Location

Agreement

Melissa Moore

Contingent Worker

Empl ID: FGCWR01

Empl Record: 0

Job Information

Job Title: Consultant-Senior

☒ Job Eligible for Telework

Position Title:

☐ Position Eligible for Telework

Full/Part Time: Full-Time

Regular/Temporary: Regular

Telework Details

Find | View All First 1 of 1 Last

*Start Date:

31

End Date:

31

+

-

*Recurring Days/Week:

*Average Days/Month:

Disability Arrangements

☐ Not Related to Disability

☐ Accommodates a permanent disability

☒ Accommodates a temporary disability

Identify Temporary Disability

Customize | Find | First 1 of 1 Last

	*Regulatory Region	*Diagnosis Code	Description		
1	USA			+	-

Maintain Teleworkers - Telework Status page

Job Eligible for Telework	Displays as selected if the Available for Telework field is selected at the Job Code
Start Date	Enter the date that the telework arrangement begins.
End Date	Enter the date that the telework arrangement is anticipated to end. No end date implies that this arrangement is on-going.
Recurring Days/Week	Enter the anticipated days per week that the teleworker works remotely. The maximum value is 7.
Average Days/Month	Enter the anticipated days per month that the teleworker works remotely. The maximum value is 31.
Disability Arrangements	Select an option to specify whether this teleworker arrangement is to suit a person's permanent or temporary disability. Select Accommodates a temporary disability to display the Identify Temporary Disability region.

Identify Temporary Disability	Enter information regarding the temporary disability. This is an existing grid from the Disabilities component on the Accommodations Request (ACCOMM_REQUEST) page. Note. PeopleSoft captures a person's permanent disabilities in other components. Due to the potentially sensitive and private nature of that information, it is not displayed in this component.

Identifying Teleworkers Actual Location

Access the Maintain Teleworkers - Location page (Workforce Administration, Job Information, Maintain Teleworkers, Location).

Telework StatusLocationAgreement

Melissa MooreContingent WorkerID: FGCWR01Empl Record: 0

Telework DataFind | View All First1 of 1Last

Start Date:End Date: + -

Telework LocationFind | View All First1 of 1Last

Worksite: *Location: + -

Country: + -

Address 1:

Address 2:

Address 3:County: + -

City:State: + -Postal: + -

Maintain Teleworkers - Location page

Worksite	Choose the regular worksite for this teleworker. Values are <i>Home</i> , <i>Other</i> , or <i>Telework Location</i> .
Location	Select the teleworker's commuting location, if the worksite is a designated as Telework Location. The page displays the address information when a value is entered in this field. Values are only available if the location is specified as a valid telework location in the Location Table.
(USF) Geographic Location	Displays the teleworker's geographic location code. This appears only for US Federal and Military installations.

(USF) View Location Select to access the Location Description page, based on the selected geographic location. This link only appears for US Federal and Military installations.

Enter Teleworker Agreement Data

Access the Maintain Teleworkers - Agreement page (Workforce Administration, Job Information, Maintain Teleworkers, Agreement).

Telework Status Location Agreement

Melissa Moore Contingent Worker Empl ID: FGCWR01 Empl Record: 0

Telework Location Find | View All First 1 of 1 Last

Start Date: End Date: + -

Equipment/Services Costs

☐ No associated equipment/service costs incurred

☐ Organization provides/purchases all equipment/services

☐ Teleworker purchases all equipment/services

☐ Costs are shared or negotiated between organization and teleworker

☐ Other

Telework Agreement

☐ Telework Agreement is in place Agreement Date: 31

Telework Agreement Status Customize | Find | First 1 of 1 Last

	*Status	*Status Date	Reason		
1		31		+	-

Maintain Teleworkers - Agreement page

Equipment/Services Costs Select an option to denote how the telecommuting equipment and services costs will be handled. This section allows users to capture who the responsible party is based on the Telework agreement, or company policy. This should be agreed upon between the organization and the teleworker ahead of time, as part of the Telework Agreement.

Telework Agreement Status

Organizations may want to monitor and track status changes associated to a telework request. There are four delivered statuses for this feature. The US Federal Government requires these values and reasons. Other customers can modify or use these values as their organizational policy deems fit.

For the *Approved* status, a value in the Reason field is not required.

For the *Denied* status, the values in the Reason field are: *Handles secure materials*, *Perform on-site activities*, *Performance or conduct issues*, or *Other*.

For the *Terminated by Employee* status, the Reason values are: *Change in work assignments*, *Decreased performance or conduct issues*, and *Other*.

For the *Terminated by Manager* status, the Reason values are: *Change in work assignments*, *Decreased performance or conduct issues*, and *Other*.

Tracking Disabilities

To set up tracking disabilities, use the Accommodation Type (ACCOM_TYPE_TABLE) component.

You can track any disabilities that your workers may have, as well as check your own facilities' accessibility. Administer Workforce includes a number of reports that list disability information.

This section discusses how to:

- Enter disability information.
- Document disability accommodations.
- (ITA) Run the ITA Disability report.

Pages Used to Track Disabilities

Page Name	Definition Name	Navigation	Usage
Accommodation Types	ACCOM_TYPE_TABLE	• Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Accommodation Types • Workforce Monitoring, Meet Regulatory Rqmts, Define Regulatory Rqmts Data, Accommodation Types, Accommodation Types	Define the types of workplace accommodations that your organization makes for disabled workers.
Disability	DISABILITY	Workforce Administration, Personal Information, Disability, Disabilities, Disability	Enter disability information. Indicate if a worker is disabled and record details of the disability.

Page Name	Definition Name	Navigation	Usage
Accomm Request	ACCOMM_REQUEST	Workforce Administration, Personal Information, Disability, Disabilities, Accomm Request	Enter accommodation requests that a worker or applicant makes of your organization. You can also enter diagnosis codes for worker disabilities.
Accomm Option	ACCOMM_OPTION	Workforce Administration, Personal Information, Disability, Disabilities, Accomm Option	Enter the options that the organization or the person with a disability is considering to resolve each accommodation request.
Accomm Job Task	ACCOMM_JOB_TASK	Workforce Administration, Personal Information, Disability, Disabilities, Accomm Job Task	Enter the job tasks that you are accommodating, classified by job code and, where necessary, by location. If you create essential job tasks in the Job Code Task table, you can enter multiple job tasks for each accommodation.
Disability BRA	DISABILITY_BRA	Workforce Administration, Personal Information, Disability, Disabilities BRA, Disability BRA	Enter disability details.
Disability Category Setup DEU	DSB_EMP_CAT_SETUP	Workforce Administration, Personal Information, Disability, Disability Category Setup DEU, Disability Category Setup DEU	Set up disability categories.
Heavily Disabled DEU	RUNCTL_PER039GR	Workforce Administration, Personal Information, Disability, Heavily Disabled DEU, Heavily Disabled DEU	Run the Heavily Disabled report (PER039GR). This report lists heavily disabled workers and additional information about their disabilities.
Disability Report ITA	RUNCTL_PER060	Workforce Administration, Personal Information, Disability, Disability Report ITA	Run the Disability Report - ITA (PER060). This run control page runs the Annual, Name List, or Disability Statistics reports.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Meet Regulatory Requirements, "(GBR, USA, and USF) Meeting Disability Regulatory Requirements," Managing Accommodation Data

Entering Disability Information

Access the Disability page (Workforce Administration, Personal Information, Disability, Disabilities, Disability).

Disability

Accomm Request

Accomm Option

Accomm Job Task

Alex Grün

Person ID: KD0003

Disability Status

☐ Disabled

Switzerland

Disability

Find | View All | First 1 of 1 Last

*Effective Date:07/02/2009

Handicap Percent:

Germany

Disability

Find | View All | First 1 of 1 Last

*Effective Date:07/02/2009

Handicap Percent:

Evaluate:

Card Number:

Disability Status Office:

City:

*Disabled Type:Not Disabled

Disabled Position Count:0

Part Time Work Details:None or Other

*Card Issue Date:

Expiry Date:

Postal Code:

Apprentice

☐ Apprentice

Apprentice Begin Date:

Apprentice End Date:

Disability page (1 of 4)

 Spain

Disability

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

Effective Date:

31

Disability Type:

+ -

Handicap Percent:

Help to Go to Work

☐

Evaluate:

31

Card Issue Date:

31

Card Number:

Expiry Date:

31

Disability Status Office:

City:

Postal Code:

 France

Disability

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

Disability Type:

COTOREP

+ -

*Begin Date:

31

End Date:

31

Title Number:

Notification Date:

31

Known as COTOREP

COTOREP Category:

☐ Previous Placement

Previous Placement Type:

Work Accident/Prof Disease

☒ Work Accident

☐ Disease

Professional Disease:

Disability Rate:

Comment:

Disability page (2 of 4)

United Kingdom	
Disability	
Registered Disabled Number:	
Disability:	
Italy	
Disability	
Disability:	
Disability Percentage:	
Japan	
Disability	
Disability Code:	
Disability Grade:	
Workers Compensation Disability Grade:	
Workers Compensation Injury and Sickness Grade:	
Comment:	
Netherlands	
Disability	
☐ Young Handicapped	
*Effective Date:	07/02/2009
Handicap Percent:	
USA	
Disability	
☐ Disabled Veteran	

Disability page (3 of 4)

New Zealand	
Disability	
☐ Young Handicapped	
*Effective Date:	07/02/2009
*Disability:	
Disability Note:	
☐ Disability Program	
Australia	
Australian Public Service	
☐ Information Not Given	

Disability page (4 of 4)

Track information regarding worker disabilities using the Disability component, which consists of the Disability page and the three Accommodation Data pages. Using these pages, record information regarding disabled workers, and the impact on accommodation requirements for your organization. The information can also be used for regulatory reporting and protecting your organization from claims of disability discrimination.

Disabled Select if the worker is disabled.

(CHE) Switzerland

Handicap Percent Enter a percentage of disability from 0 to 100.

(DEU) Germany

Use this group box to track worker disability information that your company needs to demonstrate compliance with the Handicapped Workers Act of 1961. For your company's purposes, the act defines a handicapped person as someone who is registered as handicapped and who is disabled to the degree that it impacts earning capacity. When registered as handicapped, the individual is issued a disability card, and your company must track the disability card number, who issued the card, the issue date, and the expiration date.

Disabled Type Identify the worker's disability type.

Handicap Percent Enter the degree of the disability.

Disabled Position Count Enter the degree to which this worker's disability can be applied to the total number of positions filled by disabled workers. Not every disabled worker may count as a full disabled position.

Evaluate Enter the date that the person's disability was evaluated or reviewed. The evaluation date can be different from the effective date for the disability entry. To maintain a history of evaluation date records, such as past and future evaluations, insert additional data rows and use the scroll bar to navigate between rows.

Part Time Work Details Identify the workers part time work details.

Card Number, Card Issue Date, and Expiry Date Enter the worker's disability card number, card issue date, and card expiration date.

Disability Status Office For each disability card, enter the disability status office that issued the card.

City and Postal Code Enter the city and postal code of the disability office.

Apprentice Select the check box if the person is or has been an apprentice.

Apprentice Begin Date and Apprentice End Date Select the begin and end dates of the apprenticeship.

(ESP) Spain

Disability Type	Select a disability type: • <i>Non Disability</i> (none) • <i>Physical Disability</i> • <i>Psychological Disability</i> • <i>Sensorial Disability</i>
Handicap Percent	Spanish law requires you to track a disabled worker's percentage of disability. Enter a percentage from 0 to 100.
Help to Go to Work	Select if the worker needs physical assistance to go to work. This check box is available only to workers whose disability percentage is between 33% and 65%, and is used to calculate a tax deduction for that worker.
Evaluate	Enter the date when the disability was evaluated.
Card No. (card number), Card Issue Date , and Exp. Date (expiration date)	The Spanish government issues to people with disabilities a card that certifies their percentage of disability. Enter the card number, the date when the disability card was issued, and the disability card's expiration date.
Disability Status Office	Select the office in charge of monitoring the worker's disability status.
City and Postal Code	Enter the city and postal code of the disability office.

(FRA) France

Use this group box to track worker disability information that your company needs to demonstrate compliance with French regulations regarding disability hiring quotas, and to provide notifications to the disabled worker's social security commission, or *Commission Technique d'Orientation et de Reclassement Professionnel* (COTOREP).

Disability Type	Indicate the worker's disability type, which identifies whether the worker is classified by COTOREP as disabled, or instead collects a financial stipend from the social security commission for some other similar reason. These reasons may include widows, orphans, or spouses of a disabled person, and war widows. This information is tracked so that your company can complete the required report of this information in a manner similar to the French Disability report.
Begin Date	Enter the date that the disability started.
End Date	If the disability wasn't permanent, enter the disability end date.
Title Number	Enter the worker's disability number, assigned by COTOREP.

Notification Date	Record the date that your company notified the social security commission that you hired the worker.
Disability Rate	In the specific case of a disability due to a work accident or a professional disease, the National Social Security Administration (not COTOREP) assigns a percentage of disability to the worker. The purpose of this percentage is to enable a calculation for an allowance that is paid by the National Social Security Administration. A worker can be recognized as a disabled person by COTOREP and also be a victim of a work accident or disease. When applicable, enter the percentage of disability (0 to 100 percent).

(FRA) Known as COTOREP

When you open the page, the fields in this group box are display-only. If you select *COTOREP* as the disability type, the fields become available.

COTOREP Category	Enter the level of severity of the worker's disability, as defined by the social security commission. Values are: <i>COTOREP A</i>: Light disability. <i>COTOREP B</i>: Medium disability. <i>COTOREP C</i>: Severe disability.
Previous Placement	Select to indicate that the worker had a prior disability placement through COTOREP.
Previous Placement Type	If the worker had a previous placement, indicate the previous placement type.

(FRA) Work Accident/Prof. Disease

When you first open the page, the fields in this group box are display-only. If you select *WrkAcc/Dis* (work accident/disabled) as the disability type, the fields become available.

Work Accident and Disease	Select whether the disability is the result of a work accident or a disease.
Prof. Dis. (professional disease)	If the disability is the result of a disease, select the type of disease.

(GBR) UK

Use this group box to track disability data for United Kingdom (UK) workers and to demonstrate compliance with the fair hiring and employment provisions of the Disability Discrimination Act of 1995.

Registered Disabled Number	Enter the worker's Registered Disabled Number.

Disability Select the worker's disability type.

(ITA) Italy

Disability Select the worker's disability type.

Disability Percentage Enter the worker's disability percentage, as determined by the examining doctor.

(JPN) Japan

Use this group box to track a worker's disability category and grades. This information is used for regulatory and tax reporting purposes.

Disability Code Enter the worker's disability code (values are legal disability categories that are set by the Ministry of Labor): *Disabled*, *Heavily disabled*, *Heavy mental disorder*, and *Mental disorder*.

Worker Comp Disability Grade (workers' compensation disability grade) Select a value from *Grade 1* through *Grade 14*.

Disability Grade Select a value from *Grade 1* through *Grade 7*.

WC Injury and Sickness Grade (workers' compensation injury and sickness grade) Select a value from *Grade 1* through *Grade 3*.

(NLD) Netherlands

Use this group box to record disability information for your workforce, and then use this information to document compliance with regulations under the Disabled Employees Act of 1985 (*Wet Arbeid Gehandicapte Werknemers*).

Handicap Percent Enter the percentage degree to which the worker is handicapped.

Young Handicapped Select to indicate that the worker qualifies for the tax reduction rule for young handicapped people (*Wet arbeidsongeschiktheidsvoorziening jonggehandicapten*, *Wajong*).

(USA) USA

Disabled Veteran Select only if the worker is a disabled veteran.

(NZL) New Zealand

Disability	Select the worker's disability type. These values come from the NZL Disability table.
Disability Program	Select if there is an association between the worker and a disability program.
Disability Note	Enter additional comments about the disability.

(AUS) Australia

Information Not Given	Select if worker disability information is not provided.

Documenting Disability Accommodations

Use these three accommodation data pages to document that your company doesn't have discriminatory practices against people with disabilities:

- Accommm Request page (Workforce Administration, Personal Information, Disability, Disabilities, Accommm Request)
- Accommm Option page (Workforce Administration, Personal Information, Disability, Disabilities, Accommm Option)
- Accommm Job Task page (Workforce Administration, Personal Information, Disability, Disabilities, Accommm Job Task)

When workers or applicants request that you make accommodations to enable them to perform job tasks, you can track all the steps that are involved in resolving those requests.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Meet Regulatory Requirements, "(GBR, USA, and USF) Meeting Disability Regulatory Requirements," Managing Accommodation Data

(ITA) Running the ITA Disability Report

Access the Disability Report ITA page (Workforce Administration, Personal Information, Disability, Disability Report ITA).

Disability Report ITA page

Annual	Select this option if you want to run the annual report, which lists the number of disabled workers sorted by disability type and gender.
Name List	Select this option if you want to run the report that lists the names of disabled workers by location and gender.
Statistics	Select this option if you want to run the report that lists locations and the number of disabled and able-bodied workers. Part and full-time disabled workers are counted as one. Part-time, able-bodied workers are counted using their full time equivalent (FTE) value. If an able-bodied employee has an FTE value of 0.5, then that employee is counted as 0.5 on this report. Full-time, able-bodied workers are counted as 1.
SetID	Select the setID of the company for which you are reporting disability statistics.
Location Code	Select the location code of the location for which you are reporting disability statistics.

Handling Company Credit Cards

In PeopleSoft Enterprise Human Resources, you can identify company credit cards and then assign those cards to employees.

This section provides an overview of credit card encryption, lists prerequisites, and discusses how to:

- Enter credit card vendors.
- Assign cards to workers.
- Encrypt preexisting credit card numbers.

Understanding Credit Card Encryption

PeopleSoft Enterprise Human Resources uses PeopleTools Pluggable Cryptography framework and encryption/decryption profiles (called encryption schemes) to encrypt and decrypt all credit card numbers stored in the database.

PeopleTools Pluggable Cryptography is an advanced security framework that provides a security model for applications to encrypt credit card data. Pluggable Cryptography provides a way for you to secure critical PeopleSoft data and communicate securely with other businesses. It enables you to extend and improve cryptographic support for your data in PeopleTools, giving you strong cryptography with the flexibility to change and grow, by incrementally acquiring stronger and more diverse algorithms for encrypting data. In PeopleTools, pluggable cryptography capability is provided by PeopleSoft pluggable encryption technology (PET).

By using the PeopleTools Pluggable Cryptography for strong encryption/decryption, the Human Resources system encrypts data using 3DES algorithms and 168-bit encryption keys. The system displays an *X* in place of each credit card number other than the last four digits. This includes credit card numbers that are display-only as well as those that are editable. The system encrypts all credit card numbers as soon as they are entered into the system on the Maintain Employee Credit Card page.

Use of the stronger Credit Card Encryption solution supports compliance with the cardholder data protection requirements of the Payment Card Industry (PCI) Data Security Standard and with Visa's Cardholder Information Security Program (CISP).

PeopleSoft Enterprise Human Resources delivers the system data necessary for credit card encryption. Encryption of credit card numbers within the Human Resources system requires no additional setup.

Note. When the system publishes any messages that contain a credit card number (such as the CORPORATE_CARD_DATA_SYNC message) the system uses clear text rather than encrypted data for the credit card number because the message is being sent via a secured queue. The secured queue likewise meets the requirement of the PCI Data Security Standard. The message CORPORATE_CARD_DATA_FULLSYNC also comes delivered but is not implemented in the system. To use this message you must write code to decrypt the credit card number before publishing the message.

See Also

Enterprise PeopleTools PeopleBook: Security Administration, "Securing Data with Pluggable Cryptography"

Prerequisite

You must have defined credit card types on the Translate table before entering credit card vendors.

Pages Used to Handle Company Credit Cards

Page Name	Definition Name	Navigation	Usage
Credit Card Vendors	CC_CARD_TBL	Set Up HRMS, Product Related, Workforce Administration, Credit Card Vendors, Credit Card Vendors	Enter vendors of credit cards that you'll assign to workers. A vendor that you identify here can be linked to an actual vendor in the Accounts Payable Vendor table.
Maintain Employee Credit Card	CC_CARD_DATA	Workforce Administration, Job Information, Maintain Employee Credit Card, Maintain Employee Credit Card	Assign company credit cards to workers.
Process Credit Card Encryption	CC_ENCRYPT_CRD_NBR	Set Up HRMS, System Administration, Utilities, Process Credit Card Encryption	Encrypt preexisting credit card numbers according to the latest encryption standards of the system.

Entering Credit Card Vendors

Access the Credit Card Vendors page (Set Up HRMS, Product Related, Workforce Administration, Credit Card Vendors, Credit Card Vendors).

Credit Card Vendors

Set ID: SHARE Credit Card Vendor: K003

Credit Card Vendor Find | View All First 1 of 1 Last

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

*Description: Bank of America

*Short Desc: BofA

Vendor ID: KUBOFA BOFA-001

Corporate Number: 000000000000000008

☒ Bill Includes Tax if Applied

Grace Period: Days After Billing Date

Credit Card Vendors page

Vendor ID Enter the vendor ID.

Corporate Number Enter your company's corporate number. This isn't a credit card number.

Bill Includes Tax if Applied Select if the bill includes tax.

Grace Period and Days After Billing Date Enter the number of days allowable after the billing date to avoid additional charges.

Assigning Cards to Workers

Access the Maintain Employee Credit Card page (Workforce Administration, Job Information, Maintain Employee Credit Card, Maintain Employee Credit Card).

Maintain Employee Credit Card

Leo Puddephatt Person ID: K0G006

Credit Card Data Find | View All First 1 of 1 Last

*Business Unit:	GBIBU		
*Credit Card Vendor:	K003	Bank of America	
Card Type:	Visa		
Credit Card Number:		Function:	Procurement Card
Issued Date:	07/02/2006	*Expiration Date:	07/02/2009
Limit Amount:	5000.00	Currency:	USD
Limit Per Trans:		Bill To:	

Maintain Employee Credit Card page

Credit Card Vendor Select the card's vendor.

Card Type Select the card type.

Credit Card Number Enter the card number. The system masks the credit card number except for the last four digits. The masking of the credit card number is visible only after saving the data and then accessing the page again for that employee. To update an existing credit card number you must delete the existing number and enter the new number in its entirety, even if you are only modifying the last four digits.

See [Chapter 8, "Entering Additional Data in Human Resources Records," Understanding Credit Card Encryption, page 421.](#)

Function Select the main function for this card (for example, debit card, phone card, or corporate card).

Issued Date Enter the date that the card was issued.

Expiration Date Enter the date that the card expires.

Limit Amount	Enter the credit card limit amount.
Currency	Enter the currency of the credit card.
Limit Per Trans (limit per transaction)	Enter the limit amount per transaction.
Bill To	Select whom to bill for this credit card.

Encrypting Preexisting Credit Card Numbers

Access the Process Credit Card Encryption page (Set Up HRMS, System Administration, Utilities, Process Credit Card Encryption, Process Credit Card Encryption).

Process Credit Card Encryption

Groupbox

Enter the record and field name and select Encrypt. The data in the field will be encrypted per HCM Release 9 standards.

Record Name:

CC_CARD_DATA_E

Field Name:

CRDMEM_ACCT_NBR

Encrypt

Process Credit Card Encryption page

Note. Run this process one time to encrypt preexisting credit card numbers only if you have unsecured data in the Credit Card Number field on the Maintain Employee Credit Card page.

Record Name	Select the record that contains the field for which you want to encrypt preexisting data with the system's latest encryption standards. To encrypt preexisting credit card numbers found on the Maintain Employee Credit Card page, select the <i>CC_CARD_DATA_EX</i> record.
Field Name	Select the field (within the selected record) for which you want to encrypt preexisting data with the system's latest encryption standards. To encrypt preexisting credit card numbers found on the Maintain Employee Credit Card page, select the <i>CRDMEM_ACCT_NBR</i> field.
Encrypt	Click this button to encrypt the preexisting data for the selected field.

Handling Company Property

To set up the handling of company property, use the Company Property (COMPANY_PROP_TBL) component.

This section discusses how to:

- Identify company property.
- Assign values to company property.
- Assign company property to workers.

Pages Used to Handle Company Property

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Company Property - Company Property	COMPANY_PROP_TBL1	Set Up HRMS, Product Related, Workforce Administration, Company Property, Company Property	Identify company property, such as vehicles, computer equipment, tools, or uniforms.
Property Value	COMPANY_PROP_TBL2	Set Up HRMS, Product Related, Workforce Administration, Company Property, Property Value	Assign values to company property.
Job Information - Company Property	COMPANY_PROPERTY	Workforce Administration, Job Information, Company Property	Assign company property to workers.

Identifying Company Property

Access the Company Property - Company Property page (Set Up HRMS, Product Related, Workforce Administration, Company Property, Company Property).

The screenshot shows a web-based form titled 'Company Property'. At the top, there are two tabs: 'Company Property' and 'Property Value'. The 'Company Property' tab is active. Below the tabs, there is a header bar with 'Company Property' on the left and 'Find | View All First 1 of 1 Last' on the right. The main form area contains several fields: 'Property Code' with value 'F001', '*Effective Date' with value '06/11/1993' and a calendar icon, '*Status' with a dropdown menu showing 'Active', '*Description' with value 'Toshiba 6400 Portable', 'Short Description' with value 'Tosh 6400', 'Property Type' with a dropdown menu showing 'Computer Equipment', 'Make / Manufacturer' with value 'Toshiba', and 'Model' with value '6400'. There are also '+' and '-' buttons next to the '*Status' field.

Company Property - Company Property page

- Property Code** Displays the property code for this item.
- Property Type** Select a type of property, such as *Vehicle* or *Computer Equipment*.
- Make / Manufacturer** Enter the make and manufacturer for this item.
- Model** Enter the model.

Car Identification

If you select *Vehicle* as the property type, this group box appears in place of the Make/Manufacturer and Model fields.

- Car Identification** When you enter a car ID, the system automatically completes the Registration Number, Make/Model, and Color fields based on the values stored for that car ID.
- Make/Model** Enter the make and model for this car.
- Registration Number** Enter the car's registration number.
- Color** Enter the car's color.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Company Cars, "Getting Started with Administer Company Cars"

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Monitor Health and Safety, "Tracking Personal Data for People Involved in Incidents," Entering Non-Employee Data

Assigning Values to Company Property

Access the Property Value page (Set Up HRMS, Product Related, Workforce Administration, Company Property, Property Value).

Company Property

Property Value

Property Value

Find | View All | First 1 of 1 Last

Property Code:	F001	Description:	Toshiba 6400 Portable
Effective Date:	06/11/1993	Status:	Active
Business Unit:	PSFED		
Dept Id (Issued To):			
Serial Number:	T64-899056788		
Property Value:	\$8,000.00	USD	
Asset Number:	100		
Malaysia			
Purchase Date:		Purchase Price:	
Benefit Value:		Life Span (years):	
☐ Benefit in Kind			

Property Value page

Dept ID (Issued To)

Enter the identification number of the department to which the property was issued.

Serial Number

Enter the serial number.

Property Value

Enter the value of the property and the currency that you are using.

Asset Number

Enter the asset number.

(MAL) Malaysia

Purchase Date

Enter the date the company property was purchased.

Purchase Price

Enter the purchase price.

Benefit Value

Enter the value of the benefit to be used in calculations.

Life Span (years)

Enter the number of years expected for the life span of the company property.

Benefit in Kind

Select to specify if this property is a Benefit in Kind (BIK).

Assigning Company Property to Workers

Access the Job Information - Company Property page (Workforce Administration, Job Information, Company Property).

Company Property

Ginger Buckalew Person ID: K0G005

Property Assignment						Customize	Find	1-2 of 2	First	Last
	*Property Code	Description	*Issue Date	Date Returned	Serial Number					
1	F001	Toshiba 6400 Portable	07/02/2009		T64-899056788					
2	F011	Cellular Phone	07/02/2009							

Job Information - Company Property page

- Property Code** Enter the property code for the item that you've assigned to the worker.
- Issue Date** Enter the date that you issued the property to the worker.
- Date Returned** After the worker returns the property, enter the date that it was returned.
- Serial Number** The system displays the serial number of the item that you've assigned to the worker.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Monitor Health and Safety, "Tracking Personal Data for People Involved in Incidents," Entering Non-Employee Data

Managing Names Data

This section provides an overview of additional name types and discusses how to:

- Enter additional name types.
- Maintain name history.

Understanding Additional Name Types

Whether you're managing a global workforce or a workforce in a single country, you'll need to track a variety of names and titles as part of your records.

When you create a Personal Data record, the system automatically creates a primary name for the person you have added. The system also enables you to track other name types such as legal, preferred, maiden, or some other name for the person. For example, when the divorced Ms. Edith Jones advises your organization that she has remarried and changed her last name to Brown, you can maintain her preferred and primary name, Edith Carter; her former name, Edith Jones; and her maiden name, Edith Brown. You can determine when these name changes occurred by reviewing the history of each name type in the Additional Names component.

Pages Used to Enter Additional Names

Page Name	Definition Name	Navigation	Usage
Additional Names	NAMES_OTHER	Workforce Administration, Personal Information, Biographical, Additional Names, Additional Names	View or create additional name types and names for an individual.
Name History	NAME_HISTORY_SEC	Workforce Administration, Personal Information, Biographical, Additional Names Click the Add Name Data, View Name History, or Edit Name History, link on the Additional Names page.	View the history of an individual's name type and update or add a new effective date for that name type.

Entering Additional Name Types

Access the Additional Names page (Workforce Administration, Personal Information, Biographical, Additional Names, Additional Names).

Additional Names

Arthuro Erickson Person ID: KU0006

Current Names

Data						Customize	Find	View All			First	1-2 of 2	Last
	Type of Name	As Of Date	Name	Status									
1	Primary	11/30/1999	Erickson,Arthuro	Active	View Name History								
2	Other	04/15/1991	Erickson,Arthuro D	Active	View Name History								

Additional Names page

Type of Name

Displays the individual's current name types. The *Primary* name type displays from personal data. To add another name type, insert a new row and select the type of name, such as *Preferred*, *Legal*, or *Maiden*, to add for this individual. Only those remaining name types that are not yet displayed on the page will be available for selection. Values for this field are set up on the Name Type Table page.

Note. Although the Additional Names page displays the *Primary* name information for the person, maintenance of this name type should be done in personal data in the Modify a Person component. When you click the link to view or edit name history, you are unable to add additional rows for the *Primary* type row from this component.

Name

Displays the individual's name as it appears in the default display name format for the selected name type.

Add Name Data, View Name History, or Edit Name History

The name of the link varies depending up on if you have inserted a new type of name row or entered the page using the Correct History action.

Click the link to access the Name History page and view or update data for an existing name type.

Maintaining Name History

Access the Name History page (Click the View Name History link from the Additional Names page).

The screenshot shows the 'Name History' page. At the top, there is a header 'Name History'. Below it, a section titled 'Name History' contains the following information:

- Type of Name:** Primary
- Name:** Erickson, Arthuro (with a [View Name](#) link)
- Effective Date:** 11/30/1999
- Status:** Active
- Name Format:** English

At the top right of the details section, there is a navigation bar with 'Find', 'First', '1 of 1', and 'Last'.

Name History page

The system displays the history of the selected name type. You can view or add data as permitted by the mode (add, update/display, include history, or correct history) that you select. To update the current name type for the individual, insert a new row, specify the effective date, name format, and status, and click the Edit Name link to update the related name fields.

Edit Name or View Name

Click this link to view or edit related name fields.

The name of the link varies depending on if you are adding a new name type, correcting a name, or viewing an existing name.

Note. When viewing the *Primary* name type of an individual, the add a new row and delete buttons are not available. Updates to the *Primary* name of an individual should be done in personal data in the Modify a Person component.

Tracking Dependent and Beneficiary Data

This section provides an overview of dependent and beneficiary data and discusses how to:

- Enter dependent and beneficiary name information.
- Enter dependent address information.
- Enter dependent and beneficiary information.
- Enter information about court-ordered benefits for dependents.
- (NLD) View an employee's dependents and beneficiaries.
- Enter dependent citizenship and passport information.
- Enter dependent visa and permit data.

Understanding Dependent and Beneficiary Data

Use the Dependent Information component to record important information for dependents that may accompany an employee on an international assignment or international travel. You must also have these pages set up prior to enrolling employees in specific benefit programs.

The Name and Address pages define the relationship of the person to the employee and determine whether the person is a dependent, beneficiary, or both. This definition affects the person's eligibility to be enrolled in health benefits or to be assigned as a beneficiary in certain benefit plans.

The Personal Profile page defines the personal information about the person. This data also affects whether the person is eligible for benefits.

Pages Used to Track Dependent Identification Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Dependent Information - Name	DEPEND_BENEF1	- Workforce Administration, Personal Information, Personal Relationships, Dependent Information, Name - Workforce Administration, Global Assignments, Track Assignment, Dependent Data, Name	Enter or update information about a dependent's name.
Dependent Information - Address	DEPEND_BENEF_ADDR	- Workforce Administration, Personal Information, Personal Relationships, Dependent Information, Address - Workforce Administration, Global Assignments, Track Assignment, Dependent Data, Address	Enter or update information about a dependent's address.
Dependent Information - Personal Profile	DEPEND_BENEF2	- Workforce Administration, Personal Information, Personal Relationships, Dependent Information, Personal Profile - Workforce Administration, Global Assignments, Track Assignment, Dependent Data, Personal Profile	Enter or update information about a dependent.
Dependent/Beneficiary Riders	DEPBEN_RIDERS	Click the Riders/Orders link on the Dependent Information - Personal Profile page.	Enter detailed information about the court-ordered benefit for the specified dependent or beneficiary.
Personal Profile - Phone Numbers	DEP_BENEF_PHON_SEC	Click Phone Numbers on the Dependent Information - Personal Profile page.	Enter additional dependent and beneficiary phone numbers.

Page Name	Definition Name	Navigation	Usage
Dependent/Beneficiary Summary Review Dep/Ben Summary	DEPEND_BENEF_SUMM	- Workforce Administration, Benefit Information NLD, Review Benefits, Dependent/Beneficiary Summary, Dependent/Beneficiary Summary - Benefits, Employee/Dependent Information, Review Dep/Ben Summary, Dependent/Beneficiary Summary	View an employee's beneficiaries and dependents.
Depdnt Identification Details - Depdnt Citizenship/Passport	CITIZEN_PP_DEP	Workforce Administration, Personal Information, Personal Relationships, Depdnt Identification Details, Depdnt Citizenship/Passport	Enter or update dependent citizenship and passport data.
Depdnt Identification Details - Depdnt Visa/Permit Data	VISA_PERMIT_DEP	Workforce Administration, Personal Information, Depdnt Identification Details, Depdnt Visa/Permit Data	Enter or update dependent visa and permit data.

Entering Dependent and Beneficiary Name Information

Access the Dependent Information - Name page (Workforce Administration, Personal Information, Personal Relationships, Dependent Information, Name).

The screenshot displays the 'Dependent Information - Name' page. At the top, there are three tabs: 'Name', 'Address', and 'Personal Profile'. The 'Name' tab is selected. Below the tabs, the name 'Antonio Santos' is displayed next to the 'Person ID: KU0010'. A section titled 'Dependent/Beneficiaries' contains a search bar for '*Dependent/Beneficiary ID:' with the value '01'. Below this is a 'Name History' table with one entry. The table has columns for 'Effective Date', 'Format Type', and 'Name'. The entry shows 'Effective Date: 09/12/1997', 'Format Type: English', and 'Name: Santos, Megan'. A 'View Name' button is located to the right of the name field. Navigation links like 'Find', 'View All', 'First', '1 of 1', and 'Last' are visible at the top of the table.

Dependent Information - Name page

The system displays the name and the employee ID for the employee.

Dependent/Beneficiary ID The system assigns the dependent or beneficiary ID. You can change it, although you can't have duplicate IDs for dependents or beneficiaries of the same employee. You can, however, use these same IDs for a different employee's dependents and beneficiaries.

Effective Date The system enters the current system date in this field, and this date is carried through to all pages of the component. You can change this date if necessary, however in the first row of data for this dependent/beneficiary, the effective date must be the same on all of the pages in this component.

Edit Name Click to access the Edit Name page. On this page, enter the dependents name and click Refresh to update the fields that display the dependents' name.

Note. When running a calculation, the system determines if an employee is married by reviewing the dependent and beneficiary table to determine whether there is a dependent identified as the spouse. It is possible for the dependent and beneficiary pages to show more than one spouse, to show a former spouse as a current spouse, to show no spouse even if the employee's marital status is married, or to show a spouse even though the employee's marital status is single. These and other inconsistencies in the dependent and beneficiary data can cause problems with pension calculations. It is best to verify dependent and beneficiary information when calculating pension benefits.

(FRA) French Public Sector

The page displays this section when French Public Sector is enabled on the Installation Table.

Civil Servant Status Select to indicate that this dependent is a civil servant.

Same Public Service Select if the dependent is in the same public service as the employee.

Employee ID of the Dependent When the Same Public Service field is selected, this field is editable. Select the Employee ID of the dependent that is in the same public service as the employee.

Employer Name Enter the employer name of the dependent.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Benefits, "Entering Dependent and Beneficiary Information," Entering Dependent and Beneficiary Information

Entering Dependent Address Information

Access the Dependent Information - Address page (Workforce Administration, Personal Information, Personal Relationships, Dependent Information, Address).

Name | **Address** | **Personal Profile**

Antonio Santos **Person ID:** KU0010

Dependent/Beneficiaries Find | View All First 1 of 5 Last

Dependent/Beneficiary ID: 01 **Name:** Santos, Megan

Address History Find | View All First 1 of 1 Last

***Effective Date:** 09/12/1997

☒ **Same Address as Employee** **Address Type:** Home

Employee's Current Address

Country: USA United States
Address: 4689 Z Street
 Sacramento, CA 94246

☒ **Same Phone as Employee** **Phone Type:** Home

Employee's Phone

Phone: 925/694-7910

Dependent Information - Address page

The employee's name and employee ID, as well as this dependent or beneficiary's ID, relationship to the employee, and dependent or beneficiary type appear at the top of the page.

Same Address as Employee and Address Type

Select if the dependent has the same address information as the employee, and then select the employee's address type that matches the dependent or beneficiary's address. If selected, you don't need to complete any of the address fields.

Same Phone as Employee and Phone Type

Select if the dependent has the same phone information as the employee and then select the employee phone type that is the same as this beneficiary's. If selected, you don't need to complete any of the phone fields. A beneficiary can have the same address as the employee but a different phone number.

Edit Address

Click to enter or edit the dependent's contact address information.

Contact Phone

Enter the dependent's contact phone information in this group box.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up Local Country Functionality," (NLD) Loading Dutch Postal Codes

Entering Dependent and Beneficiary Information

Access the Dependent Information - Personal Profile page (Workforce Administration, Personal Information, Personal Relationships, Dependent Information, Personal Profile).

Name
Address
Personal Profile

Antonio Santos
Person ID: KU0010

Personal Profile
Find | View All First 1 of 5 Last

Dependent/Beneficiary ID: 01 Santos, Megan

Date of Birth: 10/12/1965
Birth Country: USA
Date of Death:
Medicare Entitled Date:

Birth Location:
Birth State: CA

Riders/Orders
Phone Numbers

Personal History
Find | View All First 1 of 1 Last

*Effective Date: 09/12/1997
*Relationship to Employee: Spouse
*Dependent Beneficiary Type: Both
*Gender: Female

*Marital Status: Married
As of: 09/19/1985

☐ Student
☐ Disabled
☐ Smoker

Occupation:

Dependent Information - Personal Profile page (1 of 5)

 Malaysia

Full Time Student

☐ Within Malaysia☐ Outside Malaysia

 Argentina

Family Allowance

Annual Allowance School Aid

Education Level:

☐ School Cert Start Year☐ School Cert End Year

Certificate Start Year:Certificate End Year:

Family Allowance Data

☐ Eligible for Family AllowanceFamily Allowance Term Date:

31

Income Tax

Income Tax Dependent:

Income Tax Begin Date:

31

Income Tax End Date:

31

Social Security

Social Security Condition:

Social Security Begin Date:

31

Social Security End Date:

31

 Canada

☐ Eligible for CSB

Dependent Information - Personal Profile page (2 of 5)

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 Belgium

Fiscal Data

Find | View All | First 1 of 1 Last

Effective Date:

07/02/2009

Fiscally Dependent

Fiscal Situation Spouse:

Fiscally Disabled

Profession Category Spouse:

Orphan

 France

Personal Status France

Find | View All | First 1 of 1 Last

*Effective Date:

☐ Family Supplement

☐ CHIC

☐ Status 7

☐ IJSS Calc

☐ Garnishment

☐ Schooling

☐ Status 8

☐ AFB Allowance

☐ Holiday Premium

☐ Collective Agmt

 United Kingdom

☐ Eligible for Parental Leave

☐ Adopted Dependent

☐ Certificate(s) Verified

Adoption Date:

Dependent Information - Personal Profile page (3 of 5)

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 **Brazil**

Data Find | View All First 1 of 1 Last

*Effective Date: 07/02/2009 

Education Level: Analphabet

☐ Disabled ☐ Vaccination Certificate

☐ Student ☐ University or Technical Level

Family Allowance

Termination Cd:

Termination Dt: 

Birth Data

Mother Name:

Office Name: Registry Number:

Book Number: Page Number:

Date Received: 

Vaccination Data Find | View All First 1 of 1 Last

*Date: 

Type:

*Dose: First

Dependent Information - Personal Profile page (4 of 5)

 **US Federal Government**

☐ FEHB Participant Dependent's Fed Plan Type:

Medicare Indicators Find | View All First 1 of 1 Last

*Effective Date: 07/02/2009 

☐ Medicare A Indicator Medicare Number:

☐ Medicare B Indicator Medicare Reason A:

☐ Medicare D Indicator Medicare Reason B:

Medicare Reason D:

National ID Customize | Find | View All  First 1 of 1 Last

*Country	*National ID Type	Description	National ID	Primary ID
USA 	PR 	Social Security Number	388-92-0284	☒

Dependent Information - Personal Profile page (5 of 5)

Date of Birth

Enter the dependent or beneficiary's birthdate. Certain benefit plans, such as life insurance, require the birthdate to determine an individual's eligibility.

Birth Location	Enter a city, county, or both, to further define the place in which the dependent or beneficiary was born.
Birth Country	Enter the country in which the dependent or beneficiary was born. Depending on the country you enter, additional fields may appear that require more data entry.
Date of Death	When the dependent or beneficiary dies, enter the date of the death.
Medicare Entitled Date	Enter the date on which the dependent or beneficiary will become eligible for Medicare coverage.
Riders/Orders	Click to access the Dependent/Beneficiary Riders page.
Phone Numbers	Click to access the Dependent Information - Personal Profile: Phone Numbers page.
Relationship to Employee	Enter the dependent or beneficiary's relationship to the employee. If you've set up the Dependent Relationship table, the system automatically completes the Relationship to Employee field according to the relationships in the table.
Dependent Beneficiary Type	Select the type of dependent or beneficiary. Your selection determines whether you can enroll this person into a benefit plan as a dependent or assign this person as a beneficiary. If you have set up the Dependent Relationship table, the system uses that information to populate and validate this field. Values are: <i>Beneficiary:</i> Beneficiary only. <i>Both:</i> Dependent and beneficiary. If you plan to enroll the person as a dependent <i>and</i> assign the person as a beneficiary, you must select this option. <i>COBRA Dependent Only:</i> COBRA dependent or beneficiary only. <i>Dependent:</i> Dependent only. <i>None:</i> The person is neither a dependent nor a beneficiary. This option is typically used when the person is a co-owner of a U.S. savings bond, or to make a person ineligible to participate in a benefit plan. <i>QDRO Estate:</i> If the beneficiary of a life plan is the estate of an employee, enter this value. <i>QDRO Representative - Employee:</i> Used for PeopleSoft Enterprise Pension Administration. <i>QDRO Representative - Recipient:</i> Used for PeopleSoft Enterprise Pension Administration. Note. (USA) (CAN) The values <i>COBRA Dependent Only</i>, <i>None</i>, <i>QDRO Representative - Employee</i>, and <i>QDRO Representative - Recipient</i> are Canadian and United States values only.
Marital Status	Enter the dependent or beneficiary's marital status.

Marital Status - As of	When adding a new dependent, enter the as of date for marital status. When an individual undergoes a subsequent change in status, the effective date for the change is recorded and the system no longer uses the as of date. This field is critical for determining eligibility for benefits enrollment.
Student	Select if the dependent or beneficiary is a student.
Student - As of	When adding a new dependent, enter the as of date for the individual's student status. When an individual undergoes a subsequent change in status, the effective date for the change is recorded and the system no longer uses the as of date. This field is critical for determining eligibility for benefits enrollment.
Disabled	Select if the dependent or beneficiary is disabled.
Disabled - As of	When adding a new dependent, enter the as of date for the individual's disability status. When an individual undergoes a subsequent change in status, the effective date for the change is recorded and the system no longer uses the as of date. This field is critical for determining eligibility for benefits enrollment.
Smoker	Select if the dependent or beneficiary smokes. The Smoker check box is necessary for dependents who are enrolled in benefit plans that use calculation rules. The system calculates age-graded rates for individuals differently depending on whether they smoke.
Smoker - As of	When adding a new dependent, enter the as of date for the individual's smoker status. When an individual undergoes a subsequent change in status, the effective date for the change is recorded and the system no longer uses the as of date. This field is critical for determining eligibility for benefits enrollment.
Occupation	Enter the dependent or beneficiary's occupation, if known.
<i>National ID</i>	
Use this group box to enter the dependent or beneficiary's national identification number. Dependents and beneficiaries with citizenship in more than one country can have more than one national ID. Add as many rows as required.	
Country	Select the country that issued the dependent's national ID.
National ID Type	The system populates this field automatically with the default value that you established for this country on the National ID Type Table page. You can select another valid type.

National ID	Enter the dependent's national ID number. The system automatically checks the format of your entry against the default format that you entered on the National ID Type Table page.
Primary ID	Select if the national ID is the dependent's primary ID. If this is the only data row for this person, the system selects the check box by default. You can override this default.
<i>(MYS) Malaysia</i>	
Full Time Student - Within Malaysia	Select if the dependent is a full time student in Malaysia.
Full Time Student - Outside Malaysia	Select if the dependent is a full time student outside of Malaysia.

(ARG) Argentina**Education Level**

Select the dependent's education level. Values are:

- *Two Years Old Kindergarten*
- *Three Years Old Kindergarten*
- *Four Years Old Kindergarten*
- *Five Years Old Kindergarten*
- *Elementary First Year*
- *Elementary Second Year*
- *Elementary Third Year*
- *Elementary Fourth Year*
- *Elementary Fifth Year*
- *Elementary Sixth Year*
- *Elementary Seventh Year*
- *Elementary Eighth Year*
- *Elementary Ninth Year*
- *Polimodal First Year*
- *Polimodal Second Year*
- *Polimodal Third Year*
- *High School First Year*
- *High School Second Year*
- *High School Third Year*
- *High School Fourth Year*
- *High School Fifth Year*
- *High School Sixth Year*
- *Special Education*

School Cert Start Year
(school certificate start
year)

Select to indicate that the employee has presented the dependent's school certificate for the current year.

Certificate Start Year

Enter the year of the current year certificate.

School Cert End Year (school certificate end year)	Select to indicate that the employee has presented the dependent's school certificate for the previous year.
Certificate End Year	Enter the year of the previous year certificate.
Eligible for Family Allowance	Select to indicate that the dependent is eligible for family allowance. The dependent must be a child, disabled child, or spouse
Family Allowance Term Date	Enter the end date for the dependent to be eligible for family allowance.
Income Tax Dependent	Select the type of taxable dependents for income tax. Valid Values are <i>Child</i> , <i>Other Dependents</i> , and <i>Spouse</i> .
Income Tax Begin Date	Enter the begin date for the dependent to be eligible for income tax.
Income Tax End Date	Enter the end date for the dependent to be eligible for income tax.
Social Security Condition	Specify whether the dependent is part of the primary family group or is an adherent of the employee for Social Security benefits.
Social Security Begin Date	Enter the starting date of Social Security benefits for the dependent.
Social Security End Date	Enter the end date of social security benefits for the dependent.

(CAN) Canada

Eligible for CSB	If you are entering dependent and beneficiary information for a Canadian employee, select this check box to indicate that the dependent or beneficiary is an eligible registrant for an employee who is purchasing Canadian Savings Bonds (CSBs). The PeopleSoft Payroll-CSB Registrant page verifies the selection of this check box.

(BEL) Belgium

Fiscally Dependent	Select if the employee is fiscally responsible for the dependent.
Fiscal Situation Spouse	Select the appropriate fiscal situation from the list.
Fiscally Disabled	Select if applicable.
Profession Category Spouse	Select the appropriate category from the list.
Orphan	Select if applicable.

(FRA) France

Use this group box to store information that can be passed to your payroll system for payroll processing.

Family Supplement	For numerous families, payroll calculates the family allowance amount that your organization gives to an employee based on their family dependents. This calculation is based on the number and type of employee dependents. Select this check box to indicate that the corresponding dependent has to be considered in the calculation of the supplemental family allowance.
Garnishment	This option is for court orders that require that an employee's wages be garnished. When an employee is under a court order, payroll can calculate the percentage and amount of the employee's salary that has to be transferred to the relevant government agency in each pay period. Depending on the number of dependents, this amount is reduced. The greater the number of dependents, the lower the percentage of frozen salary. Select this check box to indicate that the corresponding dependent has to be considered in the calculation of the frozen garnishment amount.
AFB Allowance (French Banking Association allowance)	The French Banking Association delivers a special allowance based on the number of dependents. Select to indicate that the corresponding dependent has to be considered in the calculation of this allowance.
CHIC	CHIC is a medical insurance company that employees can opt to use to supplement their medical insurance coverage. This insurance company delivers a special allowance based on the number of dependents. Select this check box to indicate that the corresponding dependent has to be considered in the calculation of this allowance.
Schooling	See Family Supplement.
Holiday Premium	See Family Supplement.
Status 7 and Status 8	Configure these fields to capture additional payroll related status information.
Collective Agmt	Select if applicable.
IJSS Calc. (Indemnités Journalières de Sécurité Sociale)	IJSS is the social security daily allowances. Select if the dependent should be taken into account in the calculation of the employee's entitlement for IJSS. The IJSS is calculated by PeopleSoft Enterprise Global Payroll for France.

(GBR) United Kingdom

Eligible for Parental Leave	Select if the dependent qualifies the employee for parental leave. Select the Disabled check box on the top page if it also applies here.
Adopted Dependent	Select if the employee adopted the dependent.
Adoption Date	If adopted, enter the adoption date.

Certificate(s) Verified	Select to indicate that appropriate certificates have been provided to verify this dependent information.
(BRA) Brazil	
Education Level	Select the education level of the dependent.
Disabled	Select to indicate that the dependent is disabled and the employee can receive the family allowance and income tax benefits for the dependent for additional years.
Vaccination Certificate	Select if you have received the dependent's vaccination certificate. This information is used for reporting purposes.
Student	Select to indicate that the dependent is a student. Employees receive income tax benefits for all students up to 21 years old. If the dependent is a student and is less than six years old, the employee should provide a vaccination certificate to the company to receive the income tax benefit.
University or Technical Level	Select to indicate that the dependent is a student at the university or technical level and the employee can receive the income tax benefit for the dependent for additional years (for students up to 24 years old).
Termination Cd (termination code)	Enter the reason code for the family allowance termination. Values are: <i>Child Abandonment:</i> Abandonment of child. <i>Dependent exceeds ceiling:</i> Dependent's age exceeds maximum age. <i>Court Decision:</i> Court decision (in case of divorce or separation). <i>Dependent's Death:</i> Dependent's death. <i>End Disability:</i> Disability ended. <i>Child Custody:</i> Custody has been awarded to the other parent. <i>Termination:</i> Termination.
Termination Dt (termination date)	Enter the family allowance termination date.

Enter information from the dependent's birth certificate in the Birth Data group box. This information is used for reporting purposes.

Enter the type of vaccination, the dose, and the date received for each vaccination on the dependent's vaccination certificate in the Vaccination Data group box. This information is used for reporting purposes.

(USA) US Federal Government

FEHB Participant	Enter a value to indicate that the dependent has Federal Employee's Health Benefits (FEHB).

Dependent's Fed Plan Type	If the dependent is a FEHB Participant, enter the federal plan type. Valid Values are: • <i>CHA</i>: Campus. • <i>FEH</i>: FEHB. • <i>MCA</i>: Medicare Plan A. • <i>MCB</i>: Medicare Plan B. • <i>OTH</i>: Other Federal Health Plans.
Medicare Number	If the dependent is on Medicare, enter their Medicare number.
Medicare A Indicator, Medicare B Indicator, and Medicare D Indicator	Select if the indicator if the dependent is in a Medicare A, Medicare B, or Medicare D program.
Medicare Reason A, Medicare Reason B, and Medicare Reason D	If the dependent is a Medicare recipient, enter the reason they have Medicare A, Medicare B, or Medicare D.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Benefits, "Getting Started with PeopleSoft Enterprise Manage Base Benefits"

Entering Information About Court-Ordered Benefits for Dependents

Access the Dependent/Beneficiary Riders page (click the Riders/Orders link on the Dependent Information - Personal Profile page).

Dependent/Beneficiary Riders

Employee ID: KU0010 Dependent/Beneficiary ID: 01

Riders/Orders Find | View All First 1 of 1 Last

*Plan Type:

*Start Date:

State:

Exception Type:

Comment:

*Sequence:

End Date:

Status: ☒ Active ☐ Inactive

Court Order Number:

Dependent/Beneficiary Riders page

The Dependent/Beneficiary Riders page enables you to enter any court-ordered benefits or spousal waivers. This page enables the system to validate any changes or omissions in benefit enrollments with a recorded rider. When an employee enrolls in a benefit plan and there is a court-ordered mandate specifying that a benefit be provided, the system does not complete the enrollment.

Plan Type	Enter the type of plan to which the court order relates.
Start Date	Enter the date on which the court order becomes effective.
Sequence	Prioritizes court orders when you have more than one that takes effect on the same day. Enter a number that indicates which court orders take precedence over others. If there is only one court order, enter a sequence of 1.
Status	Select whether the court order is <i>Active</i> or <i>Inactive</i> . This field is typically used to void a court order before the end date takes effect. If the status is <i>Inactive</i> , the system won't enforce any validations against this court order.
Exception Type	Select whether this is a court order (a legal document that grants a dependent the right to receive benefit coverage), spousal waiver (document that formally waives a spouse's claim to a minimum beneficiary allocation of funds from a life insurance policy or savings plan), or neither.
End Date	Enter the date on which the court order ends. When the court order expires, the system won't enforce any validations against this court order.
Court Order Number	Enter the official number that is issued by the state for this court order.

(NLD) Viewing an Employee's Dependents and Beneficiaries

Access the Dependent/Beneficiary Summary or Review Dep/Ben Summary page (Benefits, Employee/Dependent Information, Review Dep/Ben Summary, Review Dep/Ben Summary).

Review Dep/Ben Summary			
Jane Taylor		Person ID:	KA0001
Dependent / Beneficiary Summary			
		Customize Find	First 1-3 of 3 Last
ID	Name	Dependent Beneficiary Type	Relationship to Employee
01	Taylor, Geoff P	None	ExSpouse
02	Harrison, Suzanne	None	Child
03	Taylor, Sandy	Dependent	Child

Review Dep/Ben Summary page

Dependent/Beneficiary Summary

This group box displays a summary of all dependent and beneficiary data for an employee.

ID This column displays the ID of the dependent or beneficiary.

Name This column displays the name of the dependent or beneficiary.

Dependent Beneficiary Type Indicates whether the person is a dependent or beneficiary.

Relationship to Employee Describes the relationship of the dependents and beneficiaries to the employee.

Note. Over time, changes occur and you need to terminate dependent enrollments or beneficiary statuses. Remember, you enroll dependents and assign beneficiaries when you enroll employees. As with employees, to terminate a dependent enrollment or beneficiary status, you must enter a row of data with the termination date. Don't make such a change using the Dependent/Beneficiary Data page. Make the change using the benefit detail page for the benefit in question.

Warning! If you delete dependent or beneficiary data by using the Dependent/Beneficiary Data pages, you destroy historical data. When you change enrollment data, it won't matter that the dependent or beneficiary data is available here. It must remain if your system is to provide correct historical information.

Entering Dependent Citizenship and Passport Information

Access the Depdnt Identification Details - Depdnt Citizenship/Passport page (Workforce Administration, Personal Information, Personal Relationships, Depdnt Identification Details, Depdnt Citizenship/Passport).

The screenshot displays the 'Depdnt Citizenship/Passport' page. At the top, there are two tabs: 'Depdnt Citizenship/Passport' (selected) and 'Depdnt Visa/Permit Data'. Below the tabs, the employee's name 'Douglas Lewis' and 'Person ID: KU0001' are shown. The main section is titled 'Depdnt Identification Details - Depdnt Citizenship/Passport page'. It contains several sections: 'Dependent Info' with 'Lydia Lewis' and 'Dependent ID: 01'; 'Citizenship Details' with fields for '*Country:' and 'Citizenship Status:'; 'Passport Details' with fields for '*Passport Number:', 'Issue Date:', and 'Expiration Date:'. Below these is the 'Issued By' section, which includes 'Country: USA' (with a dropdown arrow), 'State:', 'City:', and 'Authority:'. At the bottom is a 'Comment:' field. Navigation links like 'Find', 'View All', 'First', '1 of 2', and 'Last' are visible at the top right of the dependent info and citizenship details sections.

Depdnt Identification Details - Depdnt Citizenship/Passport page

Enter information on this page in the same manner that you enter data on the Citizenship/Passport page.

See [Chapter 8, "Entering Additional Data in Human Resources Records," Tracking Employee Passport and Citizenship Information, page 455.](#)

Note. (DEU) If you administer a workforce in Germany, use the Visa/Permit table to record OECD work permits for OECD nationals who want to work in a protected industry. Because permit types are keyed by country, if you track a German employee's OECD work permit information on the Identification, Visa/Permit table in the Track Global Assignments menu, select *DEU* as the country code from among your valid OECD permit types.

Entering Dependent Visa and Permit Data

Access the Depdnt Visa/Permit Data page (Workforce Administration, Personal Information, Depdnt Identification Details, Depdnt Visa/Permit Data).

Depdnt Citizenship/Passport

Depdnt Visa/Permit Data

Douglas Lewis

Person ID: KU0001

Dependent Info

Find | View All | First 1 of 2 Last

Name: Lydia Lewis

Dependent ID: 01

Visa/Permit Data

Find | View All | First 1 of 1 Last

Country:

*Type:

Get Supporting Documents

Visa / Permit History

Find | View All | First 1 of 1 Last

Number:

*Effective Date: 07/02/2009

*Status: Applied

*Status Date: 07/02/2009

Duration:

Issue Date:

*Type of Duration: Months

Entry Date into Country:

Expiration Date:

Issuing Authority:

Issue Place:

Supporting Documents Needed

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

*Supporting Document ID	Description	Request Date	Date Received
1			

Depdnt Visa/Permit Data page

Enter information on this page in the same manner that you enter data on the Visa/Permit Data page.

See [Chapter 8, "Entering Additional Data in Human Resources Records," Entering an Employee's Visa or Permit Information, page 457.](#)

Tracking Emergency Contacts

This section discusses how to enter primary address and phone information for emergency contacts.

Pages Used to Track Emergency Contacts

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Contact Address/Phone	EMERGENCY_CONTACT	Workforce Administration, Personal Information, Personal Relationships, Emergency Contact, Contact Address/Phone	Enter names, addresses, and primary phone information for people to contact in the event of a worker emergency.
Other Phone Numbers	EMERGENCY_CONTACT2	Workforce Administration, Personal Information, Personal Relationships, Emergency Contact, Other Phone Numbers	Record additional phone numbers at which the emergency contact can be reached, such as a work or cellular phone number.
Emergency Contacts	PRCSRUNCNTL	Workforce Administration, Personal Information, Personal Relationships, Emergency Contacts Report	Generate the Emergency Contacts report (PER004). This report lists all contacts on the Emergency Contact table. Run the Refresh Employees Table process before running this report.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "PeopleSoft Application Fundamentals for HRMS Reports"

Entering Primary Address and Phone Information for Emergency Contacts

Access the Contact Address/Phone page (Workforce Administration, Personal Information, Personal Relationships, Emergency Contact, Contact Address/Phone).

Contact Address/Phone **Other Phone Numbers**

Douglas Lewis **Person ID:** KU0001

Emergency Contact [Find](#) | [View All](#) First **1 of 1** Last

***Contact Name:** [+](#) [-](#)

☒ **Primary Contact** ***Relationship to Employee:**

☒ **Same Address as Employee** **Address Type:**

☒ **Same Phone as Employee** **Phone Type:**

Employee's Current Address

Country: USA United States

Address: 3569 Malta Ave
Newark, NJ 07112

Employee's Phone

Phone: 973 622 1234

Contact Address/Phone page

Contact Name	Enter the name of the emergency contact person.
Relationship to Employee	Select the option that indicates the contact's relationship to the worker.
Primary Contact	Select if this is the <i>first</i> person whom you should try to contact in an emergency. Select for only one contact.
Same Address as Employee and Address Type	Select if the contact has the same address information as the worker, and then select the worker address type that is the same as this contact's. If selected, you don't need to complete any of the address fields.
Same Phone as Employee and Phone Type	Select if the contact has the same phone information as the worker, and then select the worker phone type that is the same as the contact's. If selected, you don't need to complete any of the phone fields. An emergency contact can have the same address as the worker but a different phone number.
Change Country	Click to enter or edit the contact's country.
Edit Address	Click to enter or edit the contact's address.
Contact Phone	Enter the contact's phone information.

Managing Citizenship and Visa or Permit Information

This section provides a list of common elements and discusses how to:

- Track employee passport and citizenship information.
- Enter an employee's visa and permit information.

Common Elements Used to Manage Citizenship and Visa or Permit Information

Expiration Date	Enter the expiration date of the visa or permit.
Issue Date	Enter the date on which the visa or permit was issued.
Issue Place	Enter the location where the visa or permit was issued.

Pages Used to Manage Citizenship and Visa or Permit Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Citizenship/Passport	CITIZEN_PASSPORT	Workforce Administration, Personal Information, Citizenship, Identification Data, Citizenship/Passport	Track passport and citizenship information for employees. Enter multiple countries of citizenship and multiple passports for employees and their dependents.
Visa/Permit Data	VISA_PERMIT_DATA	Workforce Administration, Personal Information, Citizenship, Identification Data, Visa/Permit Data	Enter an employees visa or permit information.

Page Name	Definition Name	Navigation	Usage
Passport/Visa Expiration Audit	PRCSRUNCNTL	Workforce Administration, Personal Information, Citizenship, Passport/Visa Expiration Audit	Generate the Passport/Visa Expiration report (PER032). This report lists employees and dependents that have passports, visas, or work permits on file that expire in 90 days of the report run date. The report is divided into two sections. The first section lists passport information including country, passport number, issue date, and expiration date. The second section lists visa and work permit information including country, visa and work permit number, type of permit, issue date, and expiration date.
Citizenship/Country/Visa Audit	PRCSRUNCNTL	Workforce Administration, Personal Information, Citizenship, Citizenship/Country/Visa Audit	Generate the Citizenship/Country/Visa Audit report (PER033). This report lists discrepancies between employee citizenship country status and visa data. The report displays various discrepancies found for the employee citizenship status in the Personal Data table.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "PeopleSoft Application Fundamentals for HRMS Reports"

Tracking Employee Passport and Citizenship Information

Access the Citizenship/Passport page (Workforce Administration, Personal Information, Citizenship, Identification Data, Citizenship/Passport).

The screenshot displays the 'Citizenship/Passport' page for employee Douglas Lewis (Person ID: KU0001). The page has three tabs: 'Citizenship/Passport', 'Visa/Permit Data', and 'Employee Photo'. The 'Citizenship/Passport' tab is active, showing a form with the following fields:

- *Country:** USA (United States)
- Citizenship Status:** Native
- Passport Information:**
 - *Passport Number: (empty)
 - Issue Date: (empty)
 - Expiration Date: (empty)
 - Country: USA (United States)
 - State: (empty)
 - City: (empty)
 - Authority: (empty)
 - Comment: (empty)
- Singapore:**
 - Worker Type: (empty)
 - Permanent Status Date: (empty)

Citizenship/Passport page

Country Enter the employee's country of citizenship.

Citizenship Status Indicate the employee's citizenship status. An employee's birth country and country of citizenship can be different. To track *birth* country information, use the Identity/Diversity page.

Note. (DEU) If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV directive. This information is used in DEUEV processing and DEUEV reporting for German organizations or companies doing business in Germany. DEUEV processes and reporting are available only if you are using a German compliant payroll system.

Passport Information

Passport Number Enter the passport number.

Country Enter the originating country for this passport.

Authority Enter the issuing authority, such as the U.S. Passport Agency.

(SGP) Singapore

Worker Type Select the type of worker for the employee.

Permanent Status Date Enter the date the employee became a permanent worker for your organization.

See Also

PeopleSoft Enterprise Global Payroll for Germany 9.1 PeopleBook

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Track Global Assignments, "Setting Up Global Assignments"

Entering an Employee's Visa or Permit Information

Access the Visa/Permit Data page (Workforce Administration, Personal Information, Citizenship, Identification Data, Visa/Permit Data).

Citizenship/Passport		Visa/Permit Data		Employee Photo	
Douglas Lewis			Person ID: KU0001		
Visa/Permit Data Find First 1 of 1 Last					
*Country:	CHE	Switzerland	Go To Row + -		
*Type:	G	Crss-brdr	Work/Residence Permit	Get Supporting Documents	
*Effective Date:	07/02/2009	Number:			
*Status:	Applied For	*Status Date:	07/02/2009		
Duration:		*Type of Duration:	Months		
Issue Date:					
Date of Entry into Country:		Expiration Date:			
Issuing Authority:					
Issue Place:					
Switzerland					
Cross Border Return Frequency:		Cross Border Commuter Permit:			
Supporting Documents Needed Customize Find View All First 1 of 1 Last					
*Sup Doc ID	Description	Request Date	Date Received		
1				+	-

Visa/Permit Data page

Type Select a type of visa or permit. The system prompts you with only types that are associated with the selected country.

Get Supporting Documents Click to have the system enter a list of the appropriate supporting documents that are needed to obtain the visa or permit type that you entered.

Number	Enter the visa or permit number.
Status	Select the visa or permit status: <i>Applied</i> , <i>Granted</i> , <i>Renewal in Progress</i> , <i>Cancelled</i> (for people in Indonesia and Singapore only), and <i>Renewed</i> .
Status Date	Enter the date on which the status of the visa or permit changed.
Duration	Enter the number of days, months, or years that the employee stayed in the country. Select the unit of duration (<i>Days</i> , <i>Months</i> , or <i>Years</i>) in the adjacent field.
Date of Entry into Country	Enter the date on which the employee entered the country.
Issuing Authority	Enter the agency that issued the visa or permit, such as the U.S. Department of State or the French Consulate.

(CHE) Switzerland

Cross Border Return Frequency	Enter the frequency this employee travels to their home outside of Switzerland: <i>D</i> : daily. <i>W</i> : weekly. This is a required field when the type of permit is: <i>G</i> : Cross Border Commuter. <i>PG</i> : Border Crossing Permit.

Cross Border Commuter Permit Enter the permit number for the Cross Border Commuter Permit.

Note. (DEU) If you're administering a workforce in Germany, use the Visa/Permit table to record OECD work permits for OECD nationals who want to work in a protected industry. Because permit types are keyed by country, if you're tracking a German employee's OECD work permit information on the Identification - Visa/Permit Table page in the Administer Workforce menus, select *DEU* as the country code to select from among your valid OECD permit types.

Supporting Documents Needed

Sup Doc ID (supporting document ID)	If additional documents are required for this employee to obtain the visa or permit type, select a supporting document ID.
Request Date	Enter the date on which the documents were requested.
Date Received	Enter the date on which the documents were received.

See Also

Chapter 3, "Setting Up Country-Specific Tables," Entering German Nation DEUEV Codes, page 118

Managing Driver's License Information

This section discusses how to enter license numbers and other driving record information.

Page Used to Manage Driver's License Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Driver's License Data	DRIVERS_LIC_GBL	Workforce Administration, Personal Information, Biographical, Driver's License Data, Driver's License Data	Enter license numbers or other data from a worker's driving record.

Entering License Numbers and Other Driving Record Information

Access the Driver's License Data page (Workforce Administration, Personal Information, Biographical, Driver's License Data).

Driver's License Data

Antonio Santos

Person ID: KU0010

Driver's License Information

Find | View All | First 1 of 1 Last

*Driver's License Nbr: ☐ License Suspended

Country: United States

State: California

Issue Location: Issuing Authority:

Valid from: Valid To:

Number of Violations: Number of Points:

Comment:

License Type

Find | View All | First 1 of 1 Last

License Type: Class C

Driver's License Data page

Driver's License Nbr (Driver's License Number)	Enter the license number.
License Suspended	Select if the worker's driver's license is currently suspended.
Issue Location	Enter the location where the license was issued.
Issuing Authority	Enter the agency that issued the driver's license, such as the Department of Motor Vehicles.
Valid from and Valid To	Enter the dates on which the driver's license remains valid. The <i>to</i> date must be in the future.
Number of Violations	Enter the number of traffic violations cited on the worker's driving record.
Number of Points	Enter the number of points accumulated on the worker's driving record.
License Type	Enter the type of license held by the worker.

If you need to enter more than one driver's license for a worker, add a new data row.

Entering Bank Account Information

This section discusses how to:

- Record a person's bank account information.
- (GBR) Enter a worker's building society roll number and name.
- (MEX) Specify the inter-bank payment code.

Pages Used to Enter Bank Account Information

Page Name	Definition Name	Navigation	Usage
Bank Accounts Maintain Bank Accounts	PYE_BANKACCT	• Workforce Administration, Personal Information, Biographical, Bank Accounts, Bank Accounts • Global Payroll & Absence Mgmt, Payee Data, Net Pay / Recipient Elections, Maintain Bank Accounts, Maintain Bank Accounts	Enter bank account information for a payee. Use this information to track worker direct deposit information.
International Bank Account Nbr	BANKACCT_IBAN_SEC	Click the Edit IBAN link on the Bank Accounts page.	(BEL, CHE, DEU, ESP, FRA, GBR, ITA, and NLD) Generate and edit the International Bank Account Number (IBAN). See <i>PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook</i>, "Setting Up Banks and Bank Branches," Setting Up IBAN Information.
Building Society Details	PYE_BS_SP_UK	Click the Other Required Information link on the Bank Accounts or Maintain Bank Accounts page.	(GBR) For this page to appear, the country code must be <i>GBR</i> and the building society ID must have a value. Enter a person's building society roll number and name.
Inter-bank Payment Scheme	GPMX_PYE_BANKACCT	Click the Other Required Information link on the Bank Accounts or Maintain Bank Accounts page.	(MEX) Enter the Clave Bancaria Estandarizada (CLABE) number associated with the payee's bank account.

Page Name	Definition Name	Navigation	Usage
Bank Prenote Information USA	GPUS_PRENOTE	Click the Prenote Information link on the Bank Accounts or Maintain Bank Accounts page. This link is available only if you select the Prenote Process Allowed check box on the Installation Settings USA page.	Indicate whether prenotification files (used in Federal Schedule Reconciliation) need to be generated. See <i>PeopleSoft Enterprise Global Payroll for United States 9.1 PeopleBook</i> , "Defining Banking," Updating Prenote Information for Payees.
Specify Net Pay Elections	GP_NET_DIST	Click the Specify Net Pay Elections link on the Bank Accounts or Maintain Bank Accounts page.	Define how a person's net pay is distributed between the their bank accounts. See <i>PeopleSoft Enterprise Global Payroll 9.1 PeopleBook</i> , "Defining Banking Instructions," Specifying Net Pay Elections.

Recording a Person's Bank Account Information

Access the Bank Accounts page (Workforce Administration, Personal Information, Biographical, Bank Accounts, Bank Accounts).

Bank Accounts

Antonio Santos

Person ID: KU0010

Bank Accounts

Find | View All | First 1 of 1 Last

Account ID: 1

Status: Active

Type: Checking

Bank Details

Country Code: USA United States

☐ International ACH Bank Account

*Bank ID: T87654321 Wells Fargo Bank

Bank Branch ID:

*Account Number: 1010101010101

Account Name: Antonio Santos

[Prenote Information](#)

*Currency Code: USD US Dollar

AC Account Name:

[Specify Net Pay Elections](#)

Bank Accounts page

Note. Before you can enter a person's bank details, first set up the bank branch or building society on the Bank/Branch Table page.

Account ID	The system creates an account ID when you enter a new bank or building society account for a person. This field is for information only.
Type	Select the type of account that you are tracking. Options are <i>Building Society Roll Number,Checking, Current Account,Giro Account,Regular, and Savings.</i>
Country Code	Enter the country where the bank account is located. When you move out of this field, the system populates the Currency Code field with the appropriate currency.
International ACH Bank Account (international automatic clearing house bank)	Select to indicate that the bank is located outside the territorial jurisdiction of the United States. Note. This field appears only if you have PeopleSoft Enterprise Payroll for North America or PeopleSoft Enterprise Global Payroll for United States installed.
Bank ID	Enter the bank ID.
Bank Branch ID	Enter the bank branch ID for the account.

Building Society ID	(GBR) If you entered <i>GBR</i> in the Country Code field, this field replaces the Bank Branch ID field. See details below. See Chapter 8, "Entering Additional Data in Human Resources Records," (GBR) Entering Banking Information for UK Workers, page 464.
Account Number	Enter the account number for the person.
Check Digit	(BEL, BRA, ESP, FRA, and ITA) Enter the check digit for the account.
Account Name	Enter the account name for the person.
Prenote Information	(USA) Click this link to access the Bank Prenote Information USA page. This link is available only if you select the Prenote Process Allowed check box on the Installation Settings USA page.
IBANandEdit IBAN	(BEL, CHE, DEU, ESP, FRA, GBR, ITA, and NLD) Displays the IBAN number for the account. Click the Edit IBAN link to access the International Bank Account Number page where you can generate and edit the IBAN for the bank account.
Other Required Information	(MEX) Click this link to access the Inter-bank Payment Scheme page, where you can enter the Clave Bancaria Estandarizada (CLABE) number. This link is available only for Mexican banks. See Chapter 8, "Entering Additional Data in Human Resources Records," (MEX) Specifying the Inter-bank Payment Code, page 467. (GBR) Click this link to access the Building Society Details page and enter roll information. This link is available only when <i>GBR</i> is the country code and a value is entered in the Building Society ID field. See Chapter 8, "Entering Additional Data in Human Resources Records," (GBR) Entering a Worker's Building Society Roll Number and Name, page 466.
AC Account Name (alternate character account name)	Enter the alternate character account name, if applicable. Appears if you enabled alternate character (AC) functionality in the Org Defaults by Permission Lst component.
Specify Net Pay Elections	Click this link to access the Specify Net Pay Elections page where you can view and update net pay details for the person.

(GBR) Entering Banking Information for UK Workers

UK customers also use this page to record workers' building society account information. When you enter *GBR* in the Country field, the Bank Branch ID field becomes the Building Society ID field.

UK customers who enter details of UK bank and building society accounts should enter the following information in the fields on the Bank Accounts page:

Field	UK Bank and Building Society Information
Type	Select an account type: <i>Current Account:</i> Select for a bank account. <i>Building Society Roll Number:</i> Select for a building society account. <i>Savings:</i> Not applicable to the UK. <i>Checking:</i> Not applicable to the UK.
Country Code	Enter <i>GBR</i> .
Bank ID	If the worker has a bank account, select the bank branch from the list of branches set up in the Bank table. If the worker has a building society account, leave this field blank.
Building Society ID	If the worker has a building society account, select the building society from the list of societies set up in the Branch table. When you select a building society, the system automatically completes the Bank ID field with the bank that handles clearing for the selected building society. If the worker has a bank account, leave this field blank.
Account Number	Enter the worker's bank account number. If you selected a building society in the Building Society ID field, the system automatically completes the Account Number field with the building society's account at the clearing bank and makes the field display-only. Note. To enter the worker's building society account details, click Other Required Information.
Account Name	Enter the account name. If you selected a building society in the Building Society ID field, the system makes this field display-only. Click Other Required Information to display the Building Society Details page where you enter the account name.
Currency Code	The system provides a default value of <i>GBP</i> (Pound Sterling). Override this default if necessary.

<i>Field</i>	<i>UK Bank and Building Society Information</i>
Other Required Information	Click to display the Building Society Details page, where you enter the worker's building society account details. The system does not display this link if you select a normal bank branch in the Bank ID field.

Note. For more information about the account number formats for a country, see the corresponding PeopleSoft Enterprise Global Payroll local country documentation.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up Banks and Bank Branches"

PeopleSoft Enterprise Global Payroll for United States 9.1 PeopleBook, "Defining Banking," Managing the Prenotification Process

PeopleSoft Enterprise Global Payroll 9.1 PeopleBook, "Defining Banking Instructions"

(GBR) Entering a Worker's Building Society Roll Number and Name

Access the Building Society Details page (click the Other Required Information link on the Bank Accounts or Maintain Bank Accounts page).

Building Society Details page

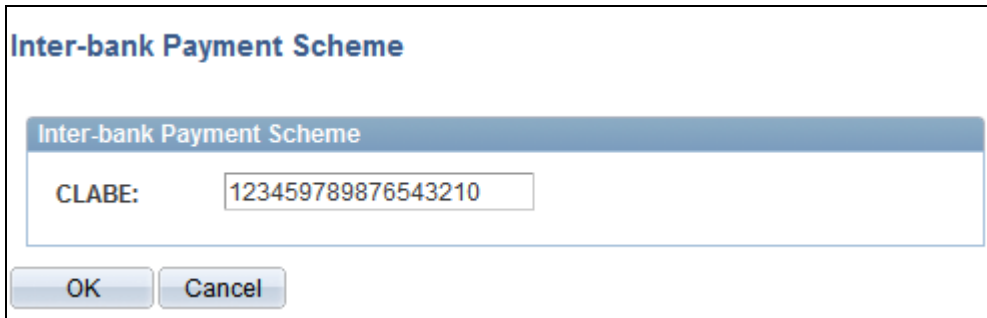
When you select a building society ID, the Other Required Information link appears on the page.

Roll Name Enter the roll name of the worker's building society account.

Roll Number Enter the worker's building society account number.

(MEX) Specifying the Inter-bank Payment Code

Access the Inter-bank Payment Scheme page (click the Other Required Information link on the Bank Accounts or Maintain Bank Accounts page).



Inter-bank Payment Scheme page

CLABE

Enter the Clave Bancaria Estandarizada (CLABE) number associated with the payee's bank account. The CLABE number is a numeric 18-digit standardized bank code for domestic Inter-bank fund transfers.

Tracking Volunteer Activity

This section discusses how to enter information on worker volunteer activities.

Page Used to Track Volunteer Activity

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Volunteer Activities	VOLUNTEER_ACTIVITY	Workforce Administration, Personal Information, Biographical, Volunteer Activities, Volunteer Activities	Enter information on worker volunteer activities. Track multiple volunteer organizations for workers and multiple start dates with the same organization.

Entering Information on Worker Volunteer Activities

Access the Volunteer Activities page (Workforce Administration, Personal Information, Biographical, Volunteer Activities, Volunteer Activities).

Volunteer Activities

Antonio Santos Person ID: KU0010

Volunteer Activities Find | View All First 1 of 1 Last

*Volunteer Organization: KU3 Peace Corps

Chapter Name:

*Start Date: End Date:

*Type of Volunteer: Other

Is Volunteer on Leave

Volunteer Status

☒ Part-time ☐ Full-time

Volunteer Activities page

- Volunteer Organization** Select a volunteer organization code.
- Chapter Name** Enter the chapter name of the organizations in which the employee volunteers, if applicable.
- Start Date and End Date** Enter the start and end date of the worker participation.
- Type of Volunteer** Select the type of volunteer activity in which the worker is participating: *Administrative, Canvasser, Executive, Fund Raise, or Other.*
- Is Volunteer on Leave** Select if the volunteer is on leave.
-
- Note.** This check box is for informational purposes only. If you select this check box, you don't affect any Monitor Absences business process functionality.
-
- Volunteer Status** Select either *Part Time* or *Full Time* to indicate the volunteer status.

Note. This information is useful when you need to track workers' additional skills and knowledge, and when you measure the effectiveness of company-sponsored volunteer and charitable programs.

Setting Up and Tracking Military Service Availability

To set up military service availability tracking, use the Deployment Reasons (MIL_DEPL_REASON) and Reassignment Reasons (MIL_REASSGN_RSN) components.

This section discusses how to track military service availability.

Pages Used to Enter and Track Military Service Availability

Page Name	Definition Name	Navigation	Usage
Deployment Reasons	MIL_DEPL_REASON	Set Up HRMS, Product Related, Workforce Administration, Workforce Data MIL, Deployment Reasons, Deployment Reasons	Enter reasons military members are either unavailable for deployment or are available in a limited capacity.
Reassignment Reasons	MIL_REASSGN_RSN	Set Up HRMS, Product Related, Workforce Administration, Workforce Data MIL, Reassignment Reasons, Reassignment Reasons	Enter reasons military members are either unavailable for reassignment or are available in a limited capacity.
General Availability MIL	MIL_AVAIL_DEFN	Workforce Administration, Personal Information, Biographical, General Availability MIL, General Availability MIL	Track military service availability for deployment and retirement. Use this page to also enter a compulsory retirement date, if applicable.

Tracking Military Service Availability

Access the General Availability MIL page (Workforce Administration, Personal Information, Biographical, General Availability MIL, General Availability MIL).

General Availability MIL

Person ID: KUHM11 [Kimberly Peterson](#)

Availability Details
Find | View All First 1 of 1 Last

***Effective Date:** 05/27/2009 **Notes:** + -

Availability

***Deployment:** No **Deployment Reason:** K03 Personal

***Reassignment:** Limited **Reassignment Reason:** K001 Medical Limitation (Self)

Compulsory Dates

Retirement Date:

General Availability MIL page

Effective Date	Enter the effective date of a member's deployment and reassignment availability to keep historical track of when the member's availability changes.
Notes	Click the Maintain/View Notes icon to enter additional notes about the person's availability. The system tracks the date you enter a comment. You can also search for comments by entering a date range and selecting them for review, deletion, or transferring the comment to another person.
Deployment	Identify whether this service member is ready for deployment. Valid values are defined on the Translate table as <i>Yes</i> , <i>No</i> , and <i>Limited</i> . When you select <i>No</i> or <i>Limited</i> to specify that the service member is not fully available for deployment, the Deployment Reason field displays.
Deployment Reason	Provide the reason the service member is not deployable. This field is available when you select <i>No</i> or <i>Limited</i> in the Deployment field. Valid values are defined in the Deployment Reasons table.
Reassignment	Identify whether this service member is available for reassignment. Valid values are defined on the Translate table as <i>Yes</i> , <i>No</i> , and <i>Limited</i> . When you select <i>No</i> or <i>Limited</i> to specify that the service member is not fully available for reassignment, the Reassignment Reason field displays.
Reassignment Reason	Select a reassignment reason to track military members who are either unavailable for reassignment or are available only in a limited capacity. This field is available when you select <i>No</i> or <i>Limited</i> in the Reassignment field. Valid values are defined in the Reassignment Reasons table.
Retirement Date	Enter the compulsory retirement date, or absolute date, the member must retire from the military.

Tracking Military Discharge Dates

This section discusses how to track military discharge dates.

Page Used to Track Military Discharge Dates

Page Name	Definition Name	Navigation	Usage
Maintain Military Dischrg Date (maintain military discharge date)	PERS_MILIT_USA	- Workforce Monitoring, Meet Regulatory Rqmts, Maintain Military Dischrg Date, Maintain Military Dischrg Date - Workforce Administration, Personal Information, Biographical, Add a Person, Regional Click the Edit Discharge Date link on the Regional page.	Enter an employee's military discharge date.

Tracking Military Discharge Dates

Access the Maintain Military Dischrg Date page (Workforce Monitoring, Meet Regulatory Rqmts, Maintain Military Dischrg Date).

Maintain Military Dischrg Date

Bernard Blessinger
Person ID: KUHM02

Military Discharge Date:


Maintain Military Dischrg Date page

Military Discharge Date Enter the employee's military discharge date. This date is used by the VETS-100 report to determine which veterans qualify for the Newly Separated Veteran designation.

Entering and Tracking Additional Workforce Data

This section discusses how to:

- Record badge numbers.
- Track a worker's business expenses.

- Track prior work experience.
- Enter worker images.

Pages Used to Enter and Track Additional Workforce Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Badge	BADGE	Workforce Administration, Personal Information, Badge	Record badge numbers that you issue to a person, including employees, contingent workers, or persons of interest.
Business Expenses	BUSINESS_EXPENSES	Workforce Administration, Job Information, Business Expenses	Track a worker's business expenses, such as travel, meals, entertainment, and relocation costs.
Prior Work Experience	PRIOR_WORK_EXPER	• Workforce Administration, Personal Information, Biographical, Prior Work Experience • Workforce Development, Career Planning, Manage Person Profiles, Prior Work Experience	Track prior work experience. Enter the details of a worker's previous employers and jobs.
Employee Photo	EMPLOYEE_PHOTO	Workforce Administration, Personal Information, Citizenship, Identification Data, Employee Photo	Enter a worker image into the system by copying and pasting images into image fields.
General Comments	GENL_COMMENTS	Workforce Administration, Personal Information, Biographical, General Comments	Enter a miscellaneous comment about a worker.

Recording Badge Numbers

Access the Badge page (Workforce Administration, Personal Information, Badge).

Badge

Douglas Lewis EMP Empl ID: KU0001

Badge Type Find | View All First 1 of 1 Last

Badge Type: CLK Clock Empl Record: 0

Badge Information Find | View All First 1 of 1 Last

*Effective Date: 07/02/2009 *Status: Active

*Badge Number: Expiration Date:

Comment:

Badge page

You must have previously entered Badge Type data on the Translate table before using this page.

Badge Type

Select the type of badge number that you want to enter:

BA (Building Access).

CCA (Computer Center Access).

CLK (Clock).

GB (General Badge).

PA (Parking Access).

Add more values if you want or enter more than one badge type for a particular worker and employment record number.

Badge Number

Enter the badge number that corresponds to the badge type that you selected. The system ensures that the number that you enter isn't currently assigned to another worker. It also ensures that the number hasn't been assigned for future use by someone else.

For each badge type, only one badge number per worker and employment record number can be active at the same time. Badge numbers can be reused. If a combination of badge type and badge number was previously assigned to a worker, but is currently inactive and hasn't been assigned for future use, you can use it for a different worker and employment record number.

See [Chapter 8, "Entering Additional Data in Human Resources Records," Setting Up Expiration Notification, page 481.](#)

Expiration Date

Include the expiration date, if the badge expires.

Tracking a Worker's Business Expenses

Access the Business Expenses page (Workforce Administration, Job Information, Business Expenses).

Business Expenses

Douglas Lewis EMP ID: KU0001 Empl Record: 0

Employee Business Expense Time Find | View All First 1 of 1 Last

*Expense Period End Date: 07/02/2009

Expense Period Total: 19.00 USD

Business Expense Details Customize | Find | First 1-2 of 2 Last

Charge Date	*Expense Code	Expense Amount	*Currency Code	Business Purpose
07/02/2009	Parking	12.00	USD	Off-Site Meeting
07/02/2009	Mileage	7.00	USD	Off-Site Meeting

Business Expenses page

Before you can track a worker's business expenses, you must set up:

- Valid expense codes on the Translate table.
- User IDs on the Primary Permission List Preferences table.
- Currency codes on the Currency Code table.
- Departments on the Department table.

Expense Period End Date Enter the expense period end date for the period to which these expenses apply.

Charge Date Enter the date of the actual expense charge.

Expense Code Select an expense code, such as *Airfare*, for the charge.

Expense Tab

Expense Amount Enter the amount of the expense.

Currency Code The currency that is specified for your user ID on the Primary Permissions List Preferences table appears by default. If there is no To Currency for your user ID, then the system uses the base currency that you specified for your implementation on the Installation table. Override the default currency if necessary by using the values in the Currency Code table.

Dept ID Tab

Select the Dept ID tab.

Business Expenses

Douglas Lewis

EMP

ID: KU0001

Empl Record: 0

Employee Business Expense Time

Find | View All | First 1 of 1 Last

*Expense Period End Date: 07/02/2009

Expense Period Total: 19.00 USD

Business Expense Details

Customize | Find

First 1-2 of 2 Last

Expense

Dept ID

Charge Date	*Expense Code	Business Unit	Department	Description		
07/02/2009	Parking	GBIBU			+	-
07/02/2009	Mileage	GBIBU			+	-

Business Expenses page: Dept ID tab

- Business Unit

Enter the business unit to which the expense should be charged.
- Department

Select the specific department to which the expense should be charged.

Warning! The information that you enter here isn't related to PeopleSoft Enterprise Payroll for North America processing of business expenses.

Tracking Prior Work Experience

Access the Prior Work Experience page (Workforce Administration, Personal Information, Biographical, Prior Work Experience).

Prior Work Experience

Catherine Moore
Person ID: KC0005

Years of Work Experience: 0.0

Prior Work Experience		Find View All	First	1 of 1	Last
Sequence Number:	1				
*Start Date:	09/06/1984	End Date:	06/30/1988		
Employer:	Jamison & Adamson		☐ Relevant Work Experience		
Country:	USA	United States			
City:	San Francisco				
State:	CA	California			
Phone:					
Ending Job Title:	Senior Administrative Assistan				
Ending Pay Rate:		9.5	*Currency Code:	USD	
*Pay Frequency:	Hour				
Description:					

Prior Work Experience page

If you've tracked an applicant through the Recruiting business process in PeopleSoft Enterprise Human Resources, the information that you entered for an applicant becomes part of the employee record when you hire the person. For other workers, entering prior work experience information helps you establish a complete profile for reporting purposes. It's also useful for career and succession planning.

Years of Work Experience The system calculates this value if you select the Relevant Work Experience check box. If so, you must enter a start date and end date.

Sequence Number Enter a sequence number for each prior work experience record.

Start Date and **End Date** Enter the beginning and end of the worker's tenure with the employer.

Relevant Work Experience Select if the experience was relevant to the worker's responsibilities with your organization.

Employer Enter the name of the worker's previous employer.

Ending Job Title Enter the title in which the worker ended employment.

Ending Pay Rate Enter the pay rate at which the worker ended employment.

Pay Frequency The pay Frequency field contains a default value of *Month*, which you can change if the pay amount reflects a different frequency.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Plan Careers and Successions, "Planning Careers"

PeopleSoft Enterprise Talent Acquisition Manager 9.1 PeopleBook, "Setting Up Recruitment Sources and Third Party Integrations"

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "PeopleSoft Application Fundamentals for HRMS Reports"

Entering Worker Images

Access the Employee Photo page (Workforce Administration, Personal Information, Citizenship, Identification Data, Employee Photo).

Click Add Photo Button to access the File Attachment page where you can browse to and upload an image (such as an employee photograph) to the Employee Photo page.

To delete an uploaded image, click Delete Photo Button or upload another image to overwrite the existing one.

Only one image per employee is allowed.

Note. Full imaging capabilities may not be supported on all database platforms.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer

Setting Up and Tracking Security Clearance and Badge Access

This section provides an overview of security clearance and badge access and discusses how to:

- Set up security clearance.
- Track badge history.
- Track security clearance history.
- Set up expiration notification.
- Search for pending expirations.

Understanding Security Clearance and Badge Access

PeopleSoft provides the capability to track the security status of employees, contingent workers, and persons of interest and revoke their access levels and badges should be revoked. Using this feature, the system notifies security clearance administrators when the security status or badge clearance has expired.

Pages Used to Track Security Clearance and Badge Access

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Security Clearance	HR_EE_SEC_CLR	Workforce Administration, Personal Information, Security Clearance	Select the security clearance type and information for a selected individual.
Badge History	HR_EE_BADGE_HIST	Workforce Administration, Personal Information, Badge/Clearance Access Summary, Badge History	View the complete history of a selected individual's badges.
Clearance History	HR_EE_SEC_CLR_HIST	Workforce Administration, Personal Information, Badge/Clearance Access Summary, Clearance History	View the complete history of a selected individual's security clearances.
Email History	HR_EE_EMAIL_HIST	Workforce Administration, Personal Information, Badge/Clearance Access Summary, Email History	Show a selected individual's most recent email address.
Expiration Notification	RC_EE_EXPIR_NOTIF	Workforce Administration, Personal Information, Expiration Notification	Set up a list of people who will be notified of pending expiration of contracts, contract task orders, assignments, badges and security clearances within a specified date range.
Expiration Inquiry	HR_EE_EXPIR_INQ	Workforce Administration, Personal Information, Expiration Inquiry	Search for pending expiration of contracts, contract task orders, assignments, badges and security clearances within a specified date range.

Setting Up Security Clearance

Access the Security Clearance page (Workforce Administration, Personal Information, Security Clearance).

Security Clearance

Franklin Smith EMP **Empl ID: LE0001**

Security Clearance Find | View All | First 1 of 1 Last

Security Clearance Type: Secret ☒ Primary + -

Clearance Information Find | View All | First 1 of 1 Last

*Effective Date: + -

*Status:

*Clearance Number:

Expiration Date: + -

Sponsor:

Background Investigation Customize | Find | View All | First 1-2 of 2 Last

Investigation Status	Status Date		
Approved	01/09/2004	+ -	
Initiated	03/01/2003	+ -	

Security Clearance page

Security Clearance Type Select the security clearance type. Individuals can have more than one security clearance type.

Security clearance type values are determined on the Security Clearance Type page.

Primary Select to determine the primary security clearance type if an individual has more than one security clearance type.

Effective Date Displays the date the individual's security clearance was granted.

Status Specify whether this security clearance is *Active* or *Inactive*.

Clearance Number Enter the number associated with the clearance assignment.

Expiration Date Select the expiration date of the security clearance.

Sponsor Enter the sponsor who granted the security clearance. This can be the individual's current or previous agency, or an entirely separate agency. Each security clearance can have only one sponsor.

Background Investigations

Investigation Status Track the status changes in the investigation process associated with getting the security clearance. There is no default for this field. Values include *Approved*, *Denied*, *In Progress*, or *Initiated*.

Status Date Select the date that the investigation status changes.

Tracking Badge History

Access the Badge History page (Workforce Administration, Personal Information, Badge/Clearance Access Summary, Badge History).

Badge History

Clearance History

Email History

Nancy Jackson

EMP

Empl ID: LE0005

Access History Details

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

Badge Type	Effective Date	Status	Badge Number	Expiration Date
Computer	10/01/2004	Active	63636-012	09/30/2010

Badge History page

Badge Type Displays the badge type held by the individual.
 Badge types are defined using the PeopleTools Translate Values component (PSXLATMAINT).
 See *Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer*.

Effective Date Displays the date the individual's badge was issued.

Status Displays whether the badge is *Active* or *Inactive*.

Badge Number Displays the badge number.
 Badge numbers are determined on the Badge page.

Expiration Date Display the badge expiration date.

Tracking Security Clearance History

Access the Clearance History page (Workforce Administration, Personal Information, Badge/Clearance Access Summary, Clearance History).

Badge History

Clearance History

Email History

Nancy Jackson

EMP

Empl ID: LE0005

Access History Details

Customize

Find

View All

First

1 of 1

Last

	Effective Date	Status	Clearance Nbr	Expiration Date	Sponsor
Not Reqrd	01/11/2004	Active	Y	01/11/2005	

Clearance History page

Clearance Type	Displays the history of security clearance types held by the individual. Security clearance types are determined on the Security Clearance page.
Effective Date	Display the grant date for the individual's security clearance.
Status	Displays whether the security clearance is <i>Active</i> or <i>Inactive</i> .
Clearance Nbr	Displays the number associated with the security clearance assignment.
Expiration Date	Displays the security clearance expiration date.
Sponsor	Identifies the sponsor who granted the security clearance.

Setting Up Expiration Notification

Access the Expiration Notification page (Workforce Administration, Personal Information, Expiration Notification).

Expiration Notification

Run Control ID: 01

[Report Manager](#) [Process Monitor](#) Run

Company:

AC

Advisory Coms on Intrgvn Reltn

Business Unit:

Location Code:

*Expiration Date:

07/31/2009

Expiration Type

☒ Contracts

☒ Badges

☒ Contract Task Order

☒ Security Clearance

☒ Assignments

Notification User List

Customize | Find | 1 of 1

User List	Description		
HCDLUserlist	Delegation User List	+	-

Expiration Notification page

- Company

Select the company for which to generate the notification.
- Expiration Date

Select the date of expiration for which your company wants to notify managers of expiration types. Any people with expiring expiration types on or before this date will be returned.
- Expiration Type

Select the type of expiration for which to generate notification.
- User List

Select the users who will be notified of impending expiration.

Searching for Pending Expirations

Access the Expiration Inquiry page (Workforce Administration, Personal Information, Expiration Inquiry).

Expiration Inquiry

Enter the search criteria to filter the Expiration information.

Search Criteria

Begin Date:

31

End Date:

31

Person ID:

Org Relation:

Name:

Begins with

Last Name:

Begins with

Second Last Name:

Begins with

Alternate Char Name:

Begins with

Expiration Type

☒ Contracts

☒ Contract Task Order

☒ Assignments

☒ Badges

☒ Security Clearance

Search

Expiration Inquiry page

- Begin DateandEnd Date

Select the date range for which to search for pending expirations.
- Person ID

Select a person ID to limit the search to the selected person.
- Org Relation
(organizational relationship)

Select the limit the search to a *Contingent Worker*, *Employee*, or *Person of Interest*.
- Name, Last Name, Second Name, and Alternate Char Name
(alternate character name)

Enter a value to search for a particular person.
- Expiration Type

Select the type of expiration for which to search.
- Search

Select the Search button to begin the search for pending expirations.

Chapter 9

(BEL) Entering Additional Data for Belgian Workers

This chapter discusses how to:

- Track Claeys formula calculations.
- Prepare for severance calculations.
- Perform the Claeys calculation.
- Generate *Déclaration Immédiate - Onmiddellijke Aangifte* (DIMONA) notifications.
- Run the Social Report.

Tracking Claeys Formula Calculations

To track Claeys formula calculations, use the Define Contract End BEL (END_CONT_TBL_BEL), Define Contract End Reason BEL (REAS_END_TBL_BEL), Statute Table (STATUTE_TBL_BEL), Reduced Charged Table (RED_CHRG_TBL_BEL), RSZ Categories (CONTR_RSZS_BEL), Terminate Contract BEL (CONTRACT_END_BEL), and Replace Contract BEL (CONTRACT_REPL_BEL) components.

If you're administering a Belgian workforce, you need to set up codes for events or conditions that may play a role in the termination of a Belgian worker's employment contract, and for the special reasons that are associated with those conditions. You also specify employment contract statutes and substatutes, and track special jobs that allow for lower premiums than are normally required by Belgian labor regulations.

Many of the tables that you set up for these purposes contain information that you use when performing Claeys formula calculations. Employers use the Claeys formula to calculate the cost of terminating a worker's contract based on number of service years, salary, age, seniority, type of employment contract, and so on.

This section discusses how to:

- Enter codes for events and conditions that result in terminating employment contracts.
- Define reason codes for ending employment contracts.
- Set up Belgian employment contract statutes for Claeys calculations.
- Link contract statutes to Rijksdienst Sociale Zekerheid (RSZ) categories.
- Record information that is necessary for terminating a Belgian worker.
- Enter a replacement worker for the employment contract.

Pages Used to Track Claeys Formula Calculations

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Define Contract End BEL	CNT_END_TBL_BEL	- Set Up HRMS, Product Related, Workforce Administration, Workforce Data BEL, Contract End Types, Define Contract End BEL - Workforce Administration, Job Information, Contract Administration, Define Contract End BEL	Enter or update codes for events and conditions that could result in the termination of employment contracts.
Define Contract End Reason BEL	CNT_ENDRSN_TBL_BEL	- Set Up HRMS, Product Related, Workforce Administration, Workforce Data BEL, Contract End Reasons - Workforce Administration, Job Information, Contract Administration, Define Contract End Reason BEL, Define Contract End Reason BEL	Define the reasons that are associated with event codes by adding or updating employment termination reason codes. First define contract termination event types.
Statutes	STATUTE_TBL_BEL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data BEL, Statutes, Statutes	Set up and maintain Belgian employment contract statutes and substatutes, and associate contract types with statutes.
Reduced Charges	RED_CHRG_TBL_BEL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data BEL, Reduced Charges, Reduced Charges	Set up the page that you use to update or add reduced charges job categories. Under Belgian employment law, these are job categories that enable you to pay reduced taxes and premiums on the compensation to workers who hold those jobs.
RSZ Categories	CNT_RSZS_TBL_BEL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data BEL, RSZ Categories, RSZ Categories	Link contract statutes to <i>Rijksdienst Sociale Zekerheid</i> (RSZ) categories.

Page Name	Definition Name	Navigation	Usage
Terminate Contract BEL	CONTRACT_END_BEL	Workforce Administration, Job Information, Contract Administration, Terminate Contract BEL, Terminate Contract BEL	Record information that is necessary for terminating a Belgian worker.
Replace Contract BEL	CONTRACT_REPL_BEL	Workforce Administration, Job Information, Contract Administration, Replace Contract BEL, Replace Contract BEL	Enter the person who replaces the worker in the employment contract.

Entering Codes for Events and Conditions that Result in Terminating Employment Contracts

Access the Define Contract End BEL page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data BEL, Contract End Types, Define Contract End BEL).

Define Contract End BEL page

The end contract type codes can cover a wide range of events, including the employee's death, a voluntary or involuntary separation from your organization caused by retirement or relocation, or promotion into another job that has a different employment contract associated with it.

Mandatory Replacement Select if the reason for ending an employment contract with one employee requires mandatory replacement of the former worker with another worker in the same employment contract.

Number of months

If you selected Mandatory Replacement, enter the period of time (in months) required to position the replacement.

Note. Belgian employment law mandates these requirements.

Defining Reason Codes for Ending Employment Contracts

Access the Define Contract End Reason BEL page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data BEL, Contract End Reasons, Define Contract End Reason BEL).

Define Contract End Reason BEL

End Contract Reason:05

End Contract Reason

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

*Effective Date:01/01/1980

*Status:Active

*Description:End of temporary contract

*End Type:008Contract ending

☐ Mandatory Replacement

Number of months:

Define Contract End Reason BEL page

End Type

Select an end type from the list of end contract type codes that were entered on the Define Contract End BEL page.

Note. If you move out of the End Type field and then decide to change the end type code, deselect and reenter the Mandatory Replacement and Number of months fields.

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Mandatory Replacement and Number of months

If you selected an end type that requires mandatory replacement, when you move out of the End Type field, the system automatically selects this check box. The system then enters the number of months that you have to replace the current employee with another employee in this contract.

If you didn't select an end type associated with mandatory replacement information, indicate if the reason for ending an employment contract with one employee requires mandatory replacement of the former worker with another worker in the same employment contract. Then enter the number of months that can pass before you have to find the replacement employee.

Note. Belgian employment law mandates these requirements.

Setting Up Belgian Employment Contract Statutes for Claeys Calculations

Access the Statutes page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data BEL, Statutes, Statutes).

Statutes

Statute:02

Statute

Find | View All | First1 of 1Last

*Effective Date:01/01/1900

*Status:Active

Description:Employee

*Contract Type:

Regulatory Region:BEL

Substatute

Customize | Find | View All | First1-4 of 4Last

Not Applicable		
Regular Employee		
Sales Representative		
Executive		

Statutes page

Contract Type

Select a contract type for the statute. Values are *Employment*, *Member of the professions*, *Non applicable*, and *Self Employed*.

Substatute

Select the statute code with which the system should associate this substatute code.

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Linking Contract Statutes to RSZ Categories

Access the RSZ Categories page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data BEL, RSZ Categories, RSZ Categories).

RSZ Categories

Contract Type:Employment

Statute:Employee

Substatute:Regular Employee

Results in

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

*Effective Date:01/01/1980

*Status:Active

*RSZ-Category:090Entitled Office Worker

☒ RSZ-Submitted

RSZ Categories page

Use the government-defined RSZ categories to maintain social security records for your Belgian employees. Associate each combination of contract type, statute, and substatute with an RSZ category for Claeys formula calculations.

- RSZ-Submitted

Select to indicate that the contract is subject to RSZ. Before selecting this check box, determine whether RSZ premiums have to be paid to the Belgian social security system for the pay (wage or reimbursement) that is associated with this contract.
- RSZ-Category

Select an RSZ category from the list.

Recording Information that Is Necessary for Terminating a Belgian Worker

Access the Terminate Contract BEL page (Workforce Administration, Job Information, Contract Administration, Terminate Contract BEL, Terminate Contract BEL).

Terminate Contract BEL

Francois Leclercq Person ID: KB0005

Contract Data Find | View All | First 1 of 1 Last

Contract Number: 0001 Begin Date: 06/02/1999 End Date:

Contract Type Find | View All | First 1 of 1 Last

Employment 01 Employee

End Contract Find | View All | First 1 of 1 Last

*End Contract Type: 008 Contract ending + -

End Contract Reason: 05 End of temporary contract

Notification Period Months: Notification Period Weeks: 6

*Start Date: 03/13/2006 *End Date: 04/23/2006

Start Date Worked: 03/20/2006 End Date Worked: 04/23/2006

Start Date Payment: End Date Payment:

☐ Mandatory Replacement End Date Mandatory Replacement: 04/23/2006

Terminate Contract BEL page

Use this page to:

- Specify that the worker's employment contract has ended, and the reason that your organization has chosen to end the contract.
- Set up and track the worker's termination notification period.
- Track the worker's replacement if a replacement is mandatory based on the contract type.

End Contract Type Select a valid end contract type (such as death, disability, or early retirement with mandatory replacement).

End Contract Reason Select an end contract reason (such as disrupted employee relations, family reasons, a company specific program, or contract expiration).

Notification Period Months Enter the number of months of notice that the employee must be given prior to the contract end date. The notification period that you enter here affects Claeys calculations in the Create Notification component. If you enter an amount here and move out of the field, the Notification Period Weeks option becomes display-only.

Notification Period Weeks Enter the number of weeks of notice that the employee must be given before the contract end date. The notification period that you enter here affects Claeys calculations in the Create Notification component.

If you enter an amount here and move out of the field, the system makes the Notification Period Months option display-only.

Start Date and End Date	Enter the date that the notification period begins, and the date on which the notification period ends and the employment contract terminates.
Start Date Worked	Record the employee's start date for this job contract, which should be the same as the date that you record for a job change in the worker's job record.
End Date Worked	Enter the employee's last working day on this job contract, which should be the same as the date that you record for a job change in the worker's job record—whether the worker is terminating with your company or leaving one job contract to move into another.
Start Date Payment and End Date Payment	Track the start and end payment dates, which the system stores and uses for payroll.
Mandatory Replacement	If the end contract type that you selected requires mandatory replacement, the system automatically selects this check box and makes it display-only. Specify whether an end contract type requires replacement on the Define Contract End BEL page.
End Date Mandatory Replacement	If the end contract type requires mandatory replacement, the system calculates the end date of the mandatory replacement period based on the end date on which the employee is terminated. It also calculates the number of months that you specified on the End Employment Terms table (CNT_END_TBL_BEL) as the length of the replacement period.

See Also

Chapter 9, "(BEL) Entering Additional Data for Belgian Workers," Defining Reason Codes for Ending Employment Contracts, page 488

Entering a Replacement Worker for the Employment Contract

Access the Replace Contract BEL page (Workforce Administration, Job Information, Contract Administration, Replace Contract BEL, Replace Contract BEL).

Replace Contract BEL

Francois Leclercq Person ID: KB0005

Contract Data		Find View All First 1 of 1 Last	
Contract Number:	0001	Begin Date:	06/02/1999
Contract Type		Find View All First 1 of 1 Last	
Employment	Employee		
End Contract		Find View All First 1 of 1 Last	
☐ Mandatory Replacement		End Date:	
Structural Absence		Find View All First 1 of 1 Last	
Absence Type:	☐ Mandatory Replacement	Empl Record:	0
Begin Date:	End Date:		
Contract Replacement		Find View All First 1 of 1 Last	
*Effective Date:	03/07/2006	+ -	
*Replacing ID:	KB0003	Sabine Overbeeke	
Replacing Contract Nbr:	0001	☐ Mandatory Replacement	
End Replacement:		End Date Mandatory Replacement:	
*Replacement Percentage:	100.00		

Replace Contract BEL page

Replacing ID

Select the ID of the employee who replaces the terminated employee in this contract. The system displays all employees who have been tagged as replacement employees for Belgian employment contracts in your human resources system. Select any applicant or employee with employment terms. If you want to hire someone as a replacing employee, you must create employment terms for that person first.

Replacing Contract Nbr
(replacing contract number)

Select the number for this contract, based on the replacing employee ID that you selected.

Mandatory Replacement

Select to indicate that mandatory replacement is required.

End Replacement

If you selected Mandatory Replacement, enter the date for the end replacement. You may want to track this date if you have an earlier than expected end date for a fixed term employment contract.

End Date Mandatory Replacement

Enter the end date for mandatory replacement.

Preparing for Severance Calculations

Employers in Belgium and organizations that employ a Belgian workforce are required to track worker information that is used in the Claeys formula calculation. This calculation determines the amount of severance compensation that your organization must pay a worker if you terminate employment. The formula considers factors such as the employee's seniority, age, and annual compensation (including salary, vacation pay, and so on) to determine your organization's liability to the employee.

This section provides overviews of how Claeys calculates severance and of how to prepare for the Claeys calculation, and discusses how to:

- Track additional seniority.
- Enter protected job leave information.

See Also

[Chapter 9, "\(BEL\) Entering Additional Data for Belgian Workers," Performing the Claeys Calculation, page 498](#)

Understanding How Claeys Calculates Severance

The Claeys formula calculates months of severance salary that are owed to an employee as follows:

$$0.89 \times (\text{seniority}) + 0.08 \times (\text{employee's age}) + 0.0013 \times [\text{yearly compensation in EUR divided by } 1000 \times (\text{reference index divided by actual index})] - 2 = \text{notification period, or months of severance salary that is owed to the employee.}$$

For example, an employee with 13 years of seniority with a company, who is 38 years of age, and who is making 82,500 EUR is entitled to 13 months of severance pay. The calculation works as follows:

$$0.89 \times 13 = 11.57 \text{ (seniority factor)}$$

$$0.08 \times 38 = 3.04 \text{ (age factor)}$$

$$0.0013 \times (82,500 / 1000) \times (125.30 / 126.00) = .1066 \text{ (compensation factor)}$$

$$11.57 \text{ (seniority factor)} + 3.04 \text{ (age factor)} + .1066 \text{ (compensation factor)} - 2 = 13 \text{ months of severance}$$

Note. The value for compensation is the employee's yearly compensation. This amount is based on the employee's monthly wage multiplied by the factor that is designated in the company table for your organization. The Belgian regulated factor amount is approximately 13.9.

Understanding How to Prepare for the Claeys Calculation

Preparing for the Claeys employment compensation calculation in PeopleSoft Enterprise Human Resources involves:

- Establishing default company level information that is used for Claeys formula employee compensation calculations on the Company table (COMPANY_TBL), including factoring information defaults for calculating worker seniority, age, compensation, and so on.

You can override this data at the employee level in the Create Notification component, where you perform the Claeys calculation for a specific worker.

- Entering and maintaining information about the employee's:
 - Seniority with your organization (stored in the PER_ORG_ASGN table).
 - Age (stored in the PERSON table).
 - Compensation (stored in the JOB table).
- Entering and maintaining employment contract information for the employee on the Contract Data pages (stored in the CONTRACT_DATA table).
- Entering and maintaining end employment terms information about required notification periods for workers your company may terminate (stored in the CNT_END_TBL_BEL table).
- Maintaining additional information that is used to record Belgian seniority, including protected job leave information (stored in the SENIORITY_BEL table).

See Also

Chapter 9, "(BEL) Entering Additional Data for Belgian Workers," Performing the Claeys Calculation, page 498

Pages Used to Prepare for Severance Calculations

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Identify Seniority	SENIORITY_BEL	Workforce Administration, Collective Processes, Administration BEL, Identify Seniority, Identify Seniority	Track additional seniority for an employee. Seniority affects the Claeys calculation that you perform in the Create Notification component.
Create Protection	PROTECT_BEL	Workforce Administration, Collective Processes, Administration BEL, Create Protection, Create Protection	Enter protected job leave information for a Belgian employee. You can assign protection to employees who are union delegates, who take part in elections, or who have other qualifying characteristics.

Tracking Additional Seniority

Access the Identify Seniority page (Workforce Administration, Collective Processes, Administration BEL, Identify Seniority, Identify Seniority).

Identify Seniority

Francois Leclercq EMP ID: KB0005 Empl Record: 0

Hire Date: 06/02/1999 Termination Date:

Seniority Type View All First 1 of 1 Last

*Seniority Type: Legal Seniority

Seniority Find View All First 1 of 1 Last

*Eff Date: 03/07/2006 End Date: 05/06/2006 Nbr Months: 2 ☒ Included

Remark:

Identify Seniority page

The system uses the seniority information for the employee recorded on this page when performing Claeys formula processing to determine the employee's months of service. If no information about service months is available on the Seniority page for an employee, the system references the employee's service months calculation on the Job Data - Job Information page.

For example, seniority in another organization may or may not count towards an employee's company seniority, depending on your own organization's business rules, but it does count towards legal seniority, which affects the Claeys calculation. This distinction is particularly important in the case of mergers between organizations, where you decide if the seniority of employees from one organization is recognized by the other organization and, if so, to what extent. Using this page, you can specify the number of months of seniority that workers can carry over to your organization from their former companies.

Seniority Type

Select the seniority type method that you want to use to determine this employee's seniority in your organization. Values are:

Company Seniority: When figuring seniority, this method doesn't account for periods of leave time that employees may use while remaining in a job, pension calculation issues, recognized service time, and so on.

The system does *not* take into account company seniority months when performing the Claeys calculation for an employee. If you enter a period for company seniority, the Claeys calculation uses only the months of seniority based on the employee's service time on their Job Data record.

Legal Seniority: The system accounts for this seniority amount when calculating the Claeys formula, which is used to calculate base pay for Belgian employees.

If you enter a period for legal seniority, the Claeys calculation takes the number of service months displayed in the Nbr Months field and adds it to the months of service from the employee's Job Data record, and displays the sum of the two amounts on the Create Notification - Base page.

Eff Date (effective date)	Enter the effective date to record the beginning of the employee's additional seniority period. The system supplies a default date, usually today's date, which you can modify to reflect the additional seniority period.
End Date	Enter the end date for the seniority period.
Nbr Months (number of months)	When you move out of the End Date field, the system calculates the number of months of seniority. The system doesn't calculate partial months. If an employee's seniority period is 100 months and 16 days, the system calculates <i>100</i> months of seniority.
Included	Select to ensure that the system adds the months of seniority that you entered here to the employee's seniority based on their Job record (JOB) when it performs the Claeys calculation. If you deselect this check box and enter <i>Legal Seniority</i> months, the system <i>subtracts</i> the seniority period from the employee's seniority when it calculates the Claeys formula.
Remark	Enter relevant remarks about the additional seniority that you are tracking.

Entering Protected Job Leave Information

Access the Create Protection page (Workforce Administration, Collective Processes, Administration BEL, Create Protection, Create Protection).

Create Protection

Francois Leclercq

EMP

ID: KB0005

Empl Record: 0

Protection				Customize Find View All [grid icon] First 1 of 1 Last	
*Protection Type	*Effective Date	*End Date	Nbr Months		
Paternity leave	03/07/2006 [calendar icon]	05/07/2006 [calendar icon]	2	+	-

Create Protection page

Protection Type	Select a protection type to indicate why this leave of absence is protected. Note. Belgian employment law mandates these protection types.
End Date	Enter the date on which the employee will return to work.

Nbr Months (number of months)

When you move out of the End Date field, the system calculates the duration of the protected absence.

Note. The system calculates the absence period only to the nearest month and doesn't allow for partial months. If the protected leave duration period is 45 days, the system indicates that the employee's absence covers *one* month only.

Note. The system does *not* take into account protection months when it calculates Claey's formula seniority, in part because protection isn't limited to absences from work that might affect seniority months.

Performing the Claey's Calculation

After you've hired a Belgian employee into your human resources system and established employment contract terms, end employment terms, seniority, and protected leave (protection) information, you can perform the Claey's calculation to determine your potential severance pay liability if you were to terminate the employee.

This section discusses how to:

- Review Claey's calculation variables.
- Calculate the severance amount.
- Run the Notification report.

Pages Used to Perform the Claey's Calculation

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Base	NOTIF_CALC_BEL	Workforce Administration, Collective Processes, Administration BEL, Create Notification, Base	Review and set Claey's calculation variables, including the employee's compensation, default factor information, and months of service.
Results	NOTIF_CALC2_BEL	Workforce Administration, Collective Processes, Administration BEL, Create Notification, Results	Calculate the severance amount.
Report	RUNCTL_PER066_BEL	Workforce Administration, Collective Processes, Administration BEL, Create Notification, Report	Run the Notifications report (PER066BE).

Reviewing Claeys Calculation Variables

Access the Create Notification - Base page (Workforce Administration, Collective Processes, Administration BEL, Create Notification, Base).

BaseResultsReport

Francois LeclercqEMPID: KB0005Empl Record: 0

Contract Number: 0001EmploymentFirst Hire Date: 06/02/1999

Contract Begin Date: 06/02/1999Employee

Probation Date:Effective end probation: ☐ Mandatory Replacement

Comp Rate:3075.503333MonthlyM/Yr Factor13.8500000Annual Rt42595.721

Commissions:Factor0.000

Value extra benefits:13.85000000.000

☒ Above Salary LimitTotal: 42595.721

Months service time: 122

Start date notification period: 08/01/200931Act index:Date: 12/31/200831

Ref index: 97.9600000Date: 07/01/199731

Create Notification - Base page

The system displays the employee's name, employee ID, and the employment record number for your reference. This information comes from the person's personal data record.

The system displays employment and end employment contract terms information for the employee that you entered on the Contract Data and Terminate Contract BEL pages. The system displays the person's hire date from the Job Data record and indicates whether, according to the end employment terms for the worker, the contract requires mandatory replacement.

Determining the Employee's Base Compensation Amount (Jaarloon)

Comp Rate (compensation rate)	The system calculates the employee's monthly compensation rate based on the employee's compensation rate information on the Job Data - Compensation page and displays it here. Adjust the rate information as necessary. The system uses this amount when determining the employee's monthly pay variable for the Claeys calculation.
M/Yr Factor (month/year factor)	The system multiplies the month base amount by the month/year factor of 13.85000 to calculate a value for the employee's Annual Rt (annual rate) income amount field. The default factor displayed here comes from the default employee compensation factors that you entered on the Company table. The Belgian government determines this factor amount, but you can override the default here if the factor amount changes.

Commissions	Enter any commissions amount that the system should add to the employee's month base as part of the Claeys calculation income amount.
Value extra benefits	Add value extra benefits amounts, including other components of nonbase pay, such as any benefits that the employee receives (for example, salary, vacation pay, 13th month, meal checks, and so on). The system multiplies the value extra benefits amount by the value extra month/year factor of <i>13.85000</i> to calculate the employee's yearly extra income amount.
Total	The system displays the total compensation amount (<i>jaarloon</i>) based on the year base, the commission, and extra benefit results. Adjust the system calculated total as necessary.

Understanding the Above Salary Limit Setting

Above sal. limit (above salary limit)	The system indicates if the employee's compensation total is above salary limit by accounting for the contract type. Select this check box to override the factor values on the Create Notification - Results page. To change the salary limit setting, ensure that the notification period start date falls <i>after</i> the effective end probation date that appears with the employee's contract information at the top of the page. In this case, the system fixes the salary limit for a longer period (the system uses the factors in the Claeys Defaults group box on the Create Notification - Results page to calculate the notification period, and makes the factors available for entry). If the date is <i>before</i> the effective end probation date, you can't change the salary limit setting.

Note. The compensation currency on the Create Notification - Base and Create Notification - Results pages is the same as the employee's job currency that is set on the employee's Job record (JOB).

Determining the Employee's Seniority

Months service time	The system calculates and displays the employee's number of months service time. The system determines service month information by considering both the employee's service months information on the Job Information page (JOB_DATA) and the number of months service time on the Seniority page (SENIORITY_BEL) if the seniority type is set to <i>Legal Seniority</i>. The system adds the two seniority amounts and displays them as the months service time amount. The system doesn't consider partial months in this calculation and doesn't round up. If the employee's service time is 9 months, 16 days, the system displays 9 as the employee's months service time. Adjust the months service time as necessary. Note. If you enter seniority information on the Seniority page for an employee and the seniority type is set to <i>Company Seniority</i>, the system uses the months of seniority calculation on the Job Information page to set the number of months service time on the Create Notification - Base page.

Start date notification period

Set the start date notification period for the employee's termination notification to the first day of the *next* month if you're not performing the Claeys calculation for this employee on the first day of the *current* month. The default value is the first day of the month following the effective date that appears with the contract information at the top of the page.

For example, if you start your Claeys calculation for an employee on April 14, the system enters a start date for the notification period of May 1. Override this date as necessary.

Note. The start date notification period that appears on the Base page affects the way the system performs the Claeys calculation on the Results page. If the start date notification period begins before the effective end probation date on the Base page, the system uses a notification period of *Days* on the Results page when you click the Calculation button. If you enter a start date notification period that begins after the employee's effective end probation date, the system uses a notification period of *Days*, *Weeks*, or *Months*, depending on the statute information for that employee on the Contract Data - Contract Type/Clauses page, as follows. If the employee is classified as a *Worker* on the Employment Terms Type page, the notification period appears in *Weeks*. The classification of *Employee* results in a notification period of *Months*. The classification of *Not Applicable* results in a notification period of *Days*.

Act. Index (actual index)

The actual index if one is assigned for this company in the Company table. The actual index is a monthly reference number to be held against the reference index number.

The actual index is used in the Claeys calculation to calculate the notification period term that is related to the yearly base on the Create Notification - Results page:

$$(\text{Yearly base salary} / 1000) \times (\text{factor yearly base} / \text{actual index}) \times \text{correction factor}$$
Date

The last day of the year preceding the year in which you're performing the Claeys calculation for an employee. This date is for your reference only, and isn't saved when you save the page.

Ref. Index (reference index)

You can also update the reference index or accept the system default that is based on the factor yearly base index that is set up on the Company Table- Default Settings, Claeys Defaults for this company. The reference index is a yearly reference amount to be compared against the actual index amount.

Date

The system also displays the reference index date. The system sets this date to the beginning of the last half of the year prior to the year in which you're performing the Claeys calculation. This date is for your reference only, and isn't saved when you save the page. The system doesn't use the reference index as part of the Claeys calculation.

Calculating the Severance Amount

Access the Create Notification - Results page (Workforce Administration, Collective Processes, Administration BEL, Create Notification, Results).

Base		Results		Report	
Francois Leclercq		EMP	ID:	KB0005	Empl Record: 0
Contract Number:	0001	Contract Begin Date:	06/02/1999		
Claeys Defaults			Notification Period		
Factor Seniority:	0.8800000		8.9408000	+	
Factor Age:	0.0600000		2.3400000	+	
Correction Factor:	0.0330000		4.5899445	+	
Term Correction:	1.0		1.0	-	
Factor Yearly Base:	97.9600000				
			Total:	15	Calculation
Calculation					
Notification period:	15	Months	End compensation:	53244.651	
Protection period:	0		Revenue compensation:	0.000	
Protection End Date:			Total:	53244.65	

Create Notification - Results page

The system displays the Claeys defaults for Factor Seniority, Factor Age, Correction Factor, Term Correction, and Factor Yearly Base from the Company table for this employee's company. You assigned the company on the Job Data - Work Location page. Change these factors at the employee level on this page *only* if you selected the Above sal. limit check box on the Create Notification - Base page.

Note. The system uses these Claeys default factors as part of the Claeys calculation only when the Above sal. limit check box is selected on the Create Notification - Base page.

When you first open this page, the Notification Period and Calculation group boxes are empty. This is where the system displays the results of the Claeys calculation for this employee after you perform the calculation by selecting the Calculation link.

The system displays the calculated notification period for this employee in the Calculation group box and shows how it calculated the notification period in the Notification period group box.

How the System Calculates the Notification Period

The system calculates the notification period in one of two ways depending on whether the employee's yearly base salary is above the salary limit:

- If the employee's yearly base salary is *above the salary limit* (Sal limit check box selected), the notification period that appears in the Calculation group box is based on the calculations that appear in the Notification Period group box.

The system calculates the notification period based on the employee's seniority, age, and compensation:

Seniority term = (months service time / 12) × factor seniority

Note. For the Seniority Term amount, the system rounds the division by 12 differently for each month.

Age term = employee's age on notification start date × factor age.

Compensation term = (base total / 1000) × (factor yearly base / actual index) × correction factor.

Total notification period = seniority term + age term + compensation term - term correction.

You can tell if you're using the above salary limit method by the way the page looks when you perform the calculation. If the system used the above salary limit method to determine the notification period, it displays the notification period calculation in the Notification Period group box. The Claeys defaults that appear on the page are also available for entry, though these come from the company defaults for the employee's company and probably shouldn't be changed.

- If the employee's base isn't above the salary limit (the Above sal. limit check box is deselected), the notification period amount is based on the statute, service time, probation end date, and notification start date—without accounting for any of the Claeys defaults factors that appear on the page. In this case, the system calculates the employee's notification period as follows:

If the Statute is "Worker"

if Notification Start Date <= Effective Probation End Date, then Period is "0"

if the Service Time is lower than 240 Months (20 years) the Period is "4"

else the Period is "8"

If the Statute is "Employee"

if Notification Start Date <= Effective Probation End Date, then Period is "7"

else the Period is (((Service Time / 12) / 5) + 1) × 3 ⇒
(each division is truncated with zero decimals)

Else the Period is "0"

The unit of time for the notification period information is based on the employee's statute type that you established on the Contract Data - Contract Type/Clauses page (CONTRACT2) as defined on the Statute Table page (STATUTE_TBL_BEL). When the statute type is set to *Worker*, the period unit is in *Weeks*. When the statute is for an *Employee*, then the period unit is in *Months*. If the statute is anything other than worker or employee, the period unit is *Days*. Whenever the notification start date falls within the probation period, the unit of time is always *Days*.

Understanding Protection Period Information

The system compares the end date for any of this employee's qualifying protection periods that you recorded on the Create Protection table (PROTECTION_BEL) to the notification start date recorded on the Belgian Notification Calculation table (NOTIF_CALC_BEL) to determine the value for the Protection period field. This method of comparison ensures that the employer respects the employee's protection rights.

Note. The protection period isn't included in the Claeys calculation process.

The system also displays the Protection End Date field, which is the *actual* end date of the protection period if any protected leave time is entered for this employee on the Create Protection page. This is the date that you set as the end date for any qualifying protection period that you specified on the Create Protection page.

Working with the End Compensation Amount

The End compensation field displays the resulting Claeys calculation amount that you owe this employee as severance pay, as calculated by the system.

Depending on the notification period unit of time, the system calculates the end compensation by dividing the yearly base total (displayed on the Create Notification, Base page) by 12 if the notification period is months, 52 if weeks, or 365 if days. The result is then multiplied by the notification period amount to arrive at the end compensation amount. For example, the end compensation amount calculation for Guido Peeters is:

$$(31576.25 / 12) * 11 = 28944.89$$

Any amount that you enter in the Revenue compensation field is added to the total severance amount for the employee.

If you need to change the notification data and rerun the calculation, make your changes and click the Calculation link again. The system deselects the old results and calculates the Claeys amount based on your changes.

Warning! The system does not save this data. You must run the Notification report to maintain records for each calculation.

Running the Notification Report

Access the Create Notification - Report page (Workforce Administration, Collective Processes, Administration BEL, Create Notification, Report).

After completing the Claeys calculation, run the termination notification report. The report page displays the employee's ID and record number together with the notification period that is calculated by the Claeys formula.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up Organization Foundation Tables," (BEL) Entering Default Information and Salary Factors

Generating DIMONA Notifications

This section provides an overview of DIMONA notifications and discusses how to:

- Create DIMONA notifications.
- Review DIMONA notifications.

Understanding DIMONA Notifications

The Belgian E-government Social Security plan requires companies to report social insurance data for workers employed under Belgium regulations. DIMONA notifications contain the required data.

The Create DIMONA Notification process (HRBEL_DIM_AE) generates DIMONA notifications as flat files. The PeopleSoft system supports employee hire and employee termination DIMONA notifications, including corresponding updates and cancellations. You can generate notifications for a single employee, for a company, or for a business unit.

After you have generated flat files containing the notifications, you can transfer the flat files to the National Office for Social Security (NOSS), known as RSZ or ONSS in Belgium, using the NOSS file transfer protocol server. After you transfer data to the NOSS, you can consult and update employee data by using the NOSS database system.

Pages Used to Generate DIMONA Notifications

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Create DIMONA Notification	HR_DIMONA_CNTL_BEL	Workforce Administration, Collective Processes, Administration BEL, Create DIMONA Notification, Create DIMONA Notification	Create DIMONA notifications.
Review DIMONA Notification	HR_DIMONA_RVW_BEL	Workforce Administration, Collective Processes, Administration BEL, Review DIMONA Notification, Review DIMONA Notification	Review DIMONA notifications.

Creating DIMONA Notifications

Access the Create DIMONA Notification page (Workforce Administration, Collective Processes, Administration BEL, Create DIMONA Notification, Create DIMONA Notification).

Create DIMONA Notification

Run Control ID: 01 [Report Manager](#) [Process Monitor](#)

Language:

Report Request Parameter(s)

From Date: End Date: Version:

Company: Global Business Institute 9999

Business Unit: Belgium Business Unit

☐ Re-start
 Start Date:

☐ Create DIMONA Start File

Demand Information

Sender Nr: Name:

Address: Postal:

Community: Country Code:

Comment:

Contact

Name: Tel:

Function:

Create DIMONA Notification page

Report Request Parameters

From Date and **End Date** Enter begin and end dates for the period to include in the DIMONA notification.

Version Enter the DIMONA version number (from the first page of the Glossarium) used when creating the DIMONA file.

Company and **Business Unit** Enter the company or business unit for which to create a DIMONA notification.

Create DIMONA Start File Select to indicate that this is the initial DIMONA creation. When selected, the DIMONA file contains all employees and workers.

Restart Information

Re-start Select to indicate that an existing notification needs to be recreated. The system processes only those notifications that have been reviewed and set to *Re-do* on the Review DIMONA Notification page.

Start Date Select the process date of the original notification that needs to be recreated.

Demand Information

Enter information about the person who is sending the notification.

Sender Nr (sender number)	Enter the number that the NOSS assigned to the person who is sending the notification.
Community	Enter the sender's city.
Country Code	Enter the sender's National Institute for Statistics (<i>Nationaal Instituut voor de Statistiek</i>) (NIS) country code.

Contact

Name, Function, and Tel. (telephone number)	Enter the name, function, and telephone number of the person whom the NOSS can contact in case a problem occurs with the file.

HRBEL_DIM_AE Process

The HRBEL_DIM_AE process selects all employees that have been hired or terminated, based on personal and job data, and creates a notification for them. The process creates notification flat files according to the NOSS standard, and names the file according to NOSS naming conventions.

Reviewing DIMONA Notifications

Access the Review DIMONA Notification page (Workforce Administration, Collective Processes, Administration BEL, Review DIMONA Notification, Review DIMONA Notification).

Review DIMONA Notification

Selection Criteria

Process Date:

07/08/2009

Empl ID:

First Start Date:

Status:

Action:

NOSS Portal

Select with Matching Criteria

Payees

Customize

Find

View All

First

1 of 1

Last

	Process Date
1	07/08/2009

Review DIMONA Notification page

Process Date	(Optional) Enter the date that the notification was processed.
EmplID	(Optional) Enter the employee ID of the notification to review.

First Start Date	(Optional) Enter the hire date of the notification to review.
NOSS Portal	Click to access the NOSS website. From this page, you can log on to the NOSS web server to check the latest information about the DIMONA notification or other information about Belgian social security.
Status	(Optional) Select the status of the notification to review: <i>Cancel</i> , <i>Delete</i> , <i>Done</i> , or <i>Re-do</i> .
Action	(Optional) Select the action reported by the notification: <i>Cancel</i> , <i>Hire</i> , <i>Terminate</i> , or <i>Update</i> .
Select with Matching Criteria	Click to populate the Payees group box with information on the notifications that match your criteria.
DIMONA Nr (DIMONA number)	Enter the notification number that is assigned by NOSS.

Update and Termination Notifications

Using this page and the Create DIMONA Notification page, you can create update and termination notifications.

To create single employee update and termination notifications:

1. Access the Review DIMONA Notification page.
2. Enter the process date and the employee ID.
3. Click Select with Matching Criteria.
4. Set the notification action to *Update* or *Terminate*.
5. Set the notification status to *Re-do*.
6. Save the page.
7. Access the Create DIMONA Notification page.
8. Select the Re-start check box and enter the process date in the Start Date field.
9. Run the HRBEL_DIM_AE process.

To create update and termination notifications for more than one employee, follow the same steps as for a single employee notification, except:

- In step 2, enter the process date and any additional criteria.
- Perform steps 4 and 5 for all employees to include in the notification.

Running the Social Report

This section lists the page used to run the Belgian Social report.

Page Used to Run the Social Report

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Social Report BEL	RUNCTL_PER067_BEL	Workforce Administration, Workforce Reports, Social Report BEL, Social Report BEL	Run the Social Report (PER067BEL), which reports a variety of employer and employee information that is required by the government.

Chapter 10

Managing Country-Specific Workforce Data

This chapter discusses how to:

- (ARG) Provide additional information for Argentinean employees.
- (BRA) Provide additional information for Brazilian employees.
- (CHN) Provide personal file information for Chinese employees.
- (CAN) Provide additional information for Canadian employees.
- (CHE) Run the Company Statistics report.
- (FRA) Provide additional information for French workers.
- (NLD) Record and report diversity information for Dutch workers.
- (ITA) Record additional hiring data for Italian workers.
- (ITA) Record end of employment information for Italian workers.
- (ITA) Run the Equal Opportunities report.
- (USA) Manage I-9 Information.
- (USA) Determine U.S. residency status for foreign nationals.

(ARG) Providing Additional Information for Argentinean Employees

This section discusses how to:

- Enter Early Registration code information.
- Declare health provider data.
- Manage Integral Retirement and Pension System data.

Pages Used to Provide Additional Information for Argentinean Employees

Page Name	Definition Name	Navigation	Usage
Additional Information ARG	ADDL_INFO_ARG	Workforce Administration, Job Information, Additional Information (ARG), Additional Information ARG	Enter additional employee information.
Health Benefits	ADDL_HB_ARG	Workforce Administration, Job Information, Additional Information (ARG), Health Benefits	Declare the Social Security Plan and health provider data for each employee
SICOSS	ADDL_SIJP_ARG	Workforce Administration, Personal Information, Additional Information (ARG), SICOSS	Manage the Integral Retirement and Pension System data required by the government of Argentina.

Entering Early Registration Code Information

Access the Additional Information ARG page (Workforce Administration, Job Information, Additional Information (ARG), Additional Information ARG).

Additional Information ARG | Health Benefits | SICOSS

Employee ID: K2ARG000001 Empl Record: 0 Name: Javier Martinez

Information Details Find | View All First 1 of 1 Last

*Effective Date: 10/15/2010 *Status: Active

CAT Entry Date: 10/15/2010

CAT ID: 12-12345678-1

Termination Data

Termination Notification Date:

Termination Reason:

Additional Information ARG page

CAT Entry Date (Clave Alta Temprana Entry Date) Enter the date that the early registration code was assigned to the employee.

CAT ID (Clave Alta Temprana ID) Enter the early registration code requested by the employer.

Declaring Health Provider Data

Access the Health Benefits page (Workforce Administration, Job Information, Additional Information (ARG), Health Benefits).

Additional Information ARG

Health Benefits

SICOSS

Employee ID: K2ARG000001 Empl Record: 0 Name: Javier Martinez

Health Benefits Details

Find | View All First 1 of 1 Last

*Effective Date: 10/15/2010

*Status: Active

Social Security Plan

*Social Security Code: 106807 SS Private Education Personnel

*Social Security Plan Code: 000001 Unique Plan

SS Affiliate Number: 3452-98577383-0987

SS Card Expiration Date: 01/12/2012

Health Provider Plan

Health Provider Code: 000001 Docthos

Health Provider Plan Code: 000002 Docthos Family

HP Affiliate Number: 85-000000898-03

HP Card Expiration Date: 01/01/2012

Health Benefits page

Social Security Plan

- Social Security Code

Select the code for the employee's Social Security entity.
- Social Security Plan Code

Select the plan code for the employee's Social Security entity.
- SS Affiliate Number
(Social Security Affiliate Number)

Enter the employee's identification number for the Social Security entity.
- SS Card Expiration Date
(Social Security Card Expiration Date)

Enter the expiration date of the employee's Social Security card.

Health Provider Plan

- Health Provider Code

Select the code for the employee's health provider entity.
- Health Provider Plan Code

Select the code for the employee's health provider plan.

- HP Affiliate Number**
(Health Provider Affiliate Number)

Enter the employee's identification number for the health provider entity.
- HP Card Expiration Date**
(Health Provider Card Expiration Date)

Enter the expiration date for the employee's health provider card.

Managing Integral Retirement and Pension System Data

Access the SICOSS page (Workforce Administration, Personal Information, Additional Information (ARG), SICOSS).

Additional Information ARG

Health Benefits

SICOSS

Employee ID: K2ARG000001

Empl Record: 0

Name: Javier Martinez

SICOSS Details

Find | View All | First 1 of 1 | Last

*Effective Date: 10/15/2010

*Status: Active

SICOSS

*Report Worked Time as: Pay Group default value

*Retirement Plan: Government Retirement Plan

*Hire Modality Code: 007 Test Prd Law 24.465 and 25.013

*Employee Situation Code: 01 Active

*Condition Code: 02 Retired

*Accident Code: 00 Non Disabled

*Geographic Zone Code: 01 Buenos Aires - Almirante Brown

*Activity Type Code: 03 Buildings Construction

SICOSS page

- Retirement Plan**

Select the employee's retirement plan. The default value is *Government Retirement Plan*.

Corporate Retirement Plan is available for selection only when the effective date is before January 1, 2009.
- AFJP Code**
(Administradoras de Fondos de Jubilaciones y Pensiones Code)

Select the employee's AFJP code. This field is displayed only when the value in the Retirement Plan field is *Corporate Retirement Plan*. This is possible only when the effective date is before January 2, 2009.
- Hire Modality Code**

Select the employee's Hire Modality Code value.
- Employee Situation Code**

Select the employee's Employee Situation Code value.
- Condition Code**

Select the employee's Condition Code value.

- Accident Code** Select the Accident Code value.
- Geographic Zone Code** Select the Geographic Zone Code.
- Activity Type Code** Select the corresponding Activity Type Code.

(BRA) Providing Additional Information for Brazilian Employees

This section discusses how to:

- Enter additional SEFIP data for Brazilian employees.
- Manage national ID history for Brazilian employees.

Page Used to Enter Additional Data for Brazilian Employees

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Additional Information BRA	ADDL_INFO_BRA	Workforce Administration, Job Information, Additional Information BRA, Additional Information BRA, Additional Information BRA	Enter additional worker information.
National ID History	PERS_NID_HI_BRA	Workforce Administration, Job Information, Additional Information BRA, National ID History	Enter the effective dated national ID. This information is used in SEFIP reporting.

Entering Additional SEFIP Data for Brazilian Employees

Access the Additional Information BRA page (Workforce Administration, Job Information, Additional Information BRA, Additional Information BRA).

Additional Information BRA		National ID History	Additional Contract Data
Employee ID:	KR0011	Empl Record:	0
		Name:	<u>Claudio Flaquer</u>
Information Details Find View All First 1 of 1 Last			
*Effective Date:	08/25/2009	Establishment ID:	
*Status:	Active		
*SEFIP Risk Level:	Default		
*Unhealthy Indicator:	Default		
*Risk Indicator:	Default		
	☐ Multiple Jobs		
*Registration Number:			

Additional Information BRA page

Note. If you have Global Payroll for Brazil installed, you can override the values on this page using the Payee Parameters page.

See *PeopleSoft Enterprise Global Payroll for Brazil 9.1 PeopleBook*, "Defining Country Data."

SEFIP Risk Level	Select the appropriate risk level for the employee's activities. The system uses this information to generate the SEFIP report and to determine the employee's retirement deduction.
Unhealthy Indicator	Select the appropriate health risk level for the employee's activities. The system uses this indicator to calculate an earning that compensates for this health risk factor. Values are <i>Default</i>, <i>Maximum Grade</i>, <i>Middle Grade</i>, <i>Minimum Grade</i>, and <i>Not Applicable</i>.
Risk Indicator	Select the appropriate hazard level for the employee's activities. The system uses this indicator to calculate an earning that compensates for this hazardous factor. Values are <i>Applicable</i>, <i>Default</i>, and <i>Not Applicable</i>.
Multiple Jobs	Select to specify whether this person has one or more jobs outside of this company.
Registration Number	Enter the employee's registration number. This number acts as an alternate employee ID.

Manage National ID History for Brazilian Employees

Access the National ID History page (Workforce Administration, Job Information, Additional Information BRA, National ID History).

The screenshot shows the 'National ID History' tab selected in a web application. At the top, there are three tabs: 'Additional Information BRA', 'National ID History', and 'Additional Contract Data'. Below the tabs, the following information is displayed: Employee ID: KR0011, Empl Record: 0, and Name: Claudio Flaquer. Below this is a table titled 'Employee National ID History'. The table has columns: *Date Created, *National ID Type, *National ID, Issued Date, Series, and State. The first row shows a record for 08/25/2009. The table also includes a 'Customize' link, a 'Find' button, and a 'View All' button. The page number '1 of 1' is displayed at the bottom right of the table.

*Date Created	*National ID Type	*National ID	Issued Date	Series	State
08/25/2009					

National ID History page

Enter a Brazilian employee's PIS and CTPS (work card) national IDs and supporting data on the Biographical Details and Regional pages of personal data. When one of these national IDs is updated in personal data, a new history record, containing the national ID as well as the additional related data found on Regional page, are entered on the National ID History page. These values can be modified or deleted on this page.

Date Created	Displays the date the national ID was entered in the system. This date is used in SEFIP reporting.
National ID Type	The national ID comes from the Biographical Details page of personal data. The national ID history only allows the <i>CTPS</i> (work card) and <i>PIS</i> values.
National ID	Displays the historical national ID number.
Issued Date	Specifies the date this ID was issued. This information comes from the Regional page of personal data. Data entered in the CTPS group box of the Regional page displays for the CTPS (work card) national ID type. The issue date for the PIS national ID type comes from the date entered in the Inscription Date field on the Regional page of personal data.
Series	Enter the work card number. This value comes from the Regional page of personal data in the CTPS group box.
State	Enter the political subdivision of the CTPS issuing agency. This value comes from the Regional page of personal data in the CTPS group box. This information is required if a CTPS number is provided.

(CHN) Providing Personal File Information for Chinese Employees

This section discusses how to define personal file information.

Page Used to Provide Personal File Information for Chinese Employees

Page Name	Definition Name	Navigation	Usage
Personal Information CHN	GPCN_FILE_INFO	Workforce Administration, Personal Information, Biographical, Personal Information CHN, Personal Information CHN	Define personal file information.

Defining Personal File Information

Access the Personal Information CHN page (Workforce Administration, Personal Information, Biographical, Personal Information CHN, Personal Information CHN).

Personal Information CHN

Jon Yee
Person ID: K0HU23

Personal File Information
[Find](#) | [View All](#) | [First](#) | **1 of 1** | [Last](#)

***Effective Date:** 08/25/2009

Personal File Information

File Number: 1234567

Archive Format: Original Copy

Transfer In Date: 08/25/2009

Transfer Out Date: 01/01/2015

Target Organization: China Business Institute

Transfer In Source:

Transfer Out Destination:

Store Location (Original Copy):

Store location (Second Copy):

Personal Information CHN page

File Number Enter the employee's personal file number.

Archive Format	Specify the format of the employee's archived file information. Valid values are: • <i>Film</i> • <i>No File Existing</i> • <i>Original Copy</i> • <i>Original Copy and Film</i> • <i>Original Copy, Secondary Copy</i> • <i>Original, Secondary Copy & File</i> • <i>Other</i> • <i>Secondary Copy</i> • <i>Secondary Copy and Film</i>
Transfer In Date and Transfer Out Date	Enter the dates on which the file was transferred in and transferred out.
Target Organization	Enter the organization to which the file was transferred.
Transfer In Source	Enter the source of the file that was originally transferred in.
Transfer Out Destination	Enter the destination to which the file was transferred out.
Store Location (Original Copy)	Enter the location in which the original copy of the file is stored.
Store Location (Second Copy)	Enter the location in which the secondary copy of the file is stored.

(CAN) Providing Additional Information for Canadian Employees

There are a few issues that are unique to a Canadian workforce.

Note. While the Ontario Employment Equity Commission (OEEC) no longer requires employees in Ontario to complete workforce surveys, the PeopleSoft system continues to offer Ontario Employment Equity (OEE) reporting functionality.

This section discusses how to:

- Enter OEEC workforce survey responses.
- Record employee-level information about official language use.

Pages Used to Provide Additional Information for Canadian Employees

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Workforce Survey Result	CAN_OEE_SURVEY	Workforce Administration, Personal Information, OEE Workforce Survey CAN, Workforce Survey Result, Workforce Survey Result	Enter OEEC workforce survey responses.
Official Languages	PERS_OFFLNG_CAN	Workforce Administration, Personal Information, OEE Workforce Survey CAN, Official Languages, Official Languages	Record employee-level information about the use of official languages. The information stored in this page is used for the Official Languages reports that you submit to the Canadian government, in accordance with the Official Languages Act.
Groups by OCC Group Report	RUNCTL_FTCANAC	Workforce Administration, Personal Information, OEE Workforce Survey CAN, Groups by OCC Group Report, Groups by OCC Group Report	Generate the OEE Groups by OCC Group report (PER103CN). The report lists the totals of active employees, within the defined area codes, employed within the date range.
Groups by Emplmt Type Rpt	RUNCTL_FTCANAC	Workforce Administration, Personal Information, OEE Workforce Survey CAN, Groups by Emplmt Type Rpt, Groups by Emplmt Type Rpt	Generate the OEE Groups by Employment Type report (PER104CN).
Groups / Jobs Filled/Vacated	RUNCTL_FTCANAC	Workforce Administration, Personal Information, OEE Workforce Survey CAN, Groups / Jobs Filled/Vacated, Groups / Jobs Filled/Vacated	Generate the OEE Groups by Jobs Filled/Vacated report (PER106CN), which lists the totals of active employees, within the defined area codes, employed within the date range.
Workforce Survey Stats	RUNCTL_PER105CN	Workforce Administration, Personal Information, OEE Workforce Survey CAN, Workforce Survey Stats, Workforce Survey Stats	Run the OEE Work Force Survey Stats report (PER105CN). The OEE Work Force Survey Stats report lists the number of surveys received and the numbers that were completed.

Entering OEEC Workforce Survey Responses

Access the Workforce Survey Result page (Workforce Administration, Personal Information, OEE Workforce Survey CAN, Workforce Survey Result, Workforce Survey Result).

Workforce Survey Result

Martina GriffithsEMPID: KC0001Empl Record: 0

Canadian OEE Workforce SurveyFind | View AllFirst1 of 1Last

*Date Survey Received:06/15/2000

☐ Completed

Survey Data

☐ Aboriginal☐ Minority☐ Disabled☒ Female

Workforce Survey Result page

- Date Survey Received

Enter the date on which the survey was received. The default is the system date, which is usually today's date. Change this date if necessary.
- Completed

Select to indicate that the survey was completed.
- Survey Data

Indicate whether the survey respondent is *Aboriginal*, *Minority*, *Disabled*, or *Female*.

Recording Employee-Level Information About Official Language Use

Access the Official Languages page (Workforce Administration, Personal Information, OEE Workforce Survey CAN, Official Languages, Official Languages).

Official Languages

Martina Griffiths

Person ID: KC0001

*Service to Public: Eng. Only

Language of Internal Service

*Montreal: Eng. Only

*Quebec: Eng. Only

*New Brunswick: Eng. Only

*Ontario: Eng. Only

*NCR: Eng. Only

Supervisory Communication Reqt

*Montreal: Other

*Quebec: Required

*New Brunswick: Other

*Ontario: Other

*NCR: Other

Official Languages page

Service to Public Indicate which languages the employee uses to provide service to the public.

Language of Internal Service

Montreal, Quebec, New Brunswick, Ontario, and NCR (National Capital Region) For the locations listed in this group box, indicate which languages the employee uses to communicate internally. Select *N/A (not applicable)* for those locations that don't apply.

Supervisory Communication Reqt (Supervisory Communication Required)

Montreal, Quebec, New Brunswick, Ontario, and NCR (National Capital Region) For the locations listed in this group box, indicate which languages the employee requires for supervisory communication. Select *N/A (not applicable)* for those locations that don't apply.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Meet Regulatory Requirements, "(CAN) Meeting Regulatory Requirements for Canada," Running Official Languages Reports

(CHE) Running the Company Statistics Report

The Swiss Federal Department of Statistics requires all Swiss companies to create this report every 10 years.

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Page Used to Run the Company Statistics Report

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Company Statistics CHE	RUNCTL_PER001_CHE	Workforce Monitoring, Company Statistics CHE, Company Statistics CHE	Run the Company Statistics report (PER001CH). This report provides information on employee wages, occupations, and other data necessary for the Company Statistics report (<i>Betriebszaehlung</i>). If GP Switzerland is installed, the payroll offers two statistic reports that replace this one—the BESTA Statistics (GPCHST01.SQR) and Salary Structure Analysis (GPCHST02.SQR) reports. See <i>PeopleSoft Enterprise Global Payroll for Switzerland 9.1 PeopleBook</i>, "Generating Payslips and General Payroll Reports," Creating the BESTA Employment Statistics Report.

(FRA) Providing Additional Information for French Workers

This section discusses how to:

- Track mandate information.
- Enter worker military service information.

Pages Used to Provide Additional Information for French Workers

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Mandates FRA	MANDATES_FRA	Workforce Administration, Job Information, Mandates FRA, Mandates FRA	Track mandate information for French workers.

Page Name	Definition Name	Navigation	Usage
Military Situation FRA	MILIT_SITUATN_FRA	Workforce Administration, Personal Information, Biographical, Military Situation FRA, Military Situation FRA	Enter worker military service information, including the branch of the armed forces in which the worker served, and the worker's ID number, grade, and reserve status.

Tracking Mandate Information

Access the Mandates FRA page (Workforce Administration, Job Information, Mandates FRA, Mandates FRA).

Mandates FRA

Jean-Pierre Levasseur Person ID: KF0015

Mandates - France Customize Find First 1 of 1 Last

	*Mandate Type	Mandate Begin Date	*Mandate End Date	Establishment ID	Hours
1	Staff Representative	06/02/1997	06/01/1999	KF001	20

Mandates FRA page

Mandate Type Select a mandate type.

Mandate Begin Date and Mandate End Date Enter the mandate begin and end dates during which the worker was associated with the mandate type.

Establishment ID Select an establishment ID.

Hours Indicate the number of hours for the mandate, if appropriate.

Entering Worker Military Service Information

Access the Military Situation FRA page (Workforce Administration, Personal Information, Biographical, Military Situation FRA, Military Situation FRA).

Military Situation FRA

Jean-Pierre Levasseur Person ID: KF0015

Military Status:

Begin Date:  To: 

Arm:  Rank: 

Military Number:

Position:

☒ Military Appointment ☐ Individual Appointment ☐ None

Notify by Military Reserve: Date: 

Arm in the Reserve:  Rank: 

Position in the Reserve:

Notify by Individual Reserve: Date:

Individual Position (Reserve):

Military Situation FRA page

Begin Date and To Date Indicate the begin and end date for the worker's military service.

Arm Select the arm of the military in which the worker served.

Rank, Military Number, and Position Indicate the worker's rank, military number, and position if known.

Military Appointment, Individual Appointment, and None Indicate if the service was the result of a military appointment, an individual appointment, or none (to indicate that the worker wasn't appointed to the position).

If the worker had a military appointment, enter additional reserve information.

Notify by Military Reserve Enter the appropriate Notify by Military Reserve information.

Date Enter the date of notification.

Arm in the Reserve Enter the worker's arm in the reserve.

Rank Enter the worker's rank.

If the worker has an individual appointment, enter additional information.

Notify by Individual Reserve Enter the appropriate Notify by Individual Reserve information.

Date	Enter the date of notification.
Individual Position (Reserve)	Enter the worker's individual position in the reserve.

(NLD) Recording and Reporting Diversity Information for Dutch Workers

This section provides an overview of the diversity reporting and discusses how to:

- Establish a worker's ethnic status.
- Running the Diversity Report NLD report.

Note. Since December 31, 2003, the SAMEN law is now longer a legislative requirement. However, PeopleSoft application maintains the functionality to allow you to track diversity in your company.

Understanding Diversity Reporting

If you have a Dutch workforce, you may need to track information on the national origin of an employee's birth parents. This information establishes the ethnic status of workers and provides for diversity reporting in the Netherlands.

Diversity reporting provides for equal employment opportunities for immigrant workers or their children or both. The birth country of either the employee or one of the employee's parents can be recorded for reporting to the Dutch government.

When you select a birth country for the employee's parents, you can choose only from among those countries stored in the Country Table - HR (HR_COUNTRY_DEFN) table. The system indicates if the birth country is one of the target countries stored in the Country Table - HR table. When the selected country is *IDN* (Indonesia), an additional category appears, which indicates an additional choice to record diversity information.

Pages Used to Record and Report Diversity Information for Dutch Workers

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Diversity Registration	SAMEN_NLD	Workforce Administration, Personal Information, Diversity Compliance NLD, Diversity Registration, Diversity Registration	Establish worker ethnic status to comply with diversity laws for a qualifying Dutch worker.

Page Name	Definition Name	Navigation	Usage
Diversity Reporting	RUNCTL_PER038_NL	Workforce Administration, Personal Information, Diversity Compliance NLD, Diversity Reporting, Diversity Reporting	Run the <i>Diversiteit Rapport</i> (Diversity Report NLD) report (PER038NL).

Establishing a Worker's Ethnic Status

Access the Diversity Registration page (Workforce Administration, Personal Information, Diversity Compliance NLD, Diversity Registration, Diversity Registration).

Diversity Registration

[Jeroen van de Berg](#)

Person ID: KN0001

Date of Birth: 02/28/1946

☐ Objection Registration

☒ Included in Target Group

Target Group - Diversity Mgmt

Birth Country:

NLD

Netherlands

☒ In Target Group

Father's Birth Country:

NLD

Netherlands

☒ In Target Group

Mother's Birth Country:

NLD

Netherlands

☒ In Target Group

Diversity Registration page

Objection Registration Select if the employee objects to being included in the diversity reporting to the Dutch government. If selected, the system won't include the employee when you generate the diversity report.

Included in Target Group Select to include the employee in the diversity reporting to the Dutch government. This field is available for entry only when one parent comes from a target group.

Target Group - Diversity Mgmt

Birth Country Displays the employee's birth country.

Note. The system always displays the employee's birth country and indicates if it is one of the target countries stored in the Country Table - HR table.

Father's Birth Country and Mother's Birth Country Select the birth country of the employee's father and mother.

Category This field appears if a birth country is *IDN* (Indonesia). Select one of these values to fulfill diversity requirements:

- *Former Netherlands East Indies*: (born in Indonesia before December 27, 1949).
- *Incl. Law Rietkerk-uitkering*: (in Register 1b, *Rietkerk-uitkering* law).
- *Indonesia (after 27-12-1949)*: (born in Indonesia after December 27, 1949).

In Target Group The system automatically selects this check box if the birth country for the employee, employee's father, or employee's mother is one of the countries stored in the Country Table - HR table.

Running the Diversity Report NLD Report

Access the Diversity Reporting page (Workforce Administration, Personal Information, Diversity Compliance NLD, Diversity Reporting, Diversity Reporting).

The *Diversiteit Rapport* (Diversity Report NLD - PER038NL) produces the required diversity statistics information. The reports lists the number of people in the workforce who were born in a target country, or one of whose parents was born in one.

Note. This report is only available in Dutch.

(ITA) Recording Additional Hiring Data for Italian Workers

This section discusses how to run the Matricula Book Calculation process.

Pages Used to Record Additional Hiring Data for Italian Workers

Page Name	Definition Name	Navigation	Usage
Employment Categorization IT - Documents	EMPL_DOC_ITA	Workforce Administration, Job Information, Employment Categorization ITA, Documents, Documents	Record an employee's workbook code and employment eligibility, or C1 declaration code and release date.

Page Name	Definition Name	Navigation	Usage
Employment Categorization ITA - Job Letters	EMPL_JOBLTR_ITA	Workforce Administration, Job Information, Employment Categorization ITA, Job Letters, ITA Employee Job Letter	Use the Employment Categorization ITA - Job Letters page to print the hiring letter to be signed by both employee and employer on or before the first day of employment. The page displays company, labor agreement, and employee category information. Select the Print Letter check box and enter the date. Select Save to print the letter.
Employment Categorization ITA - Company Codes	EMPL_COMP_CD_ITA	Workforce Administration, Job Information, Employment Categorization ITA, Company Codes, Company Codes	Use the Employment Categorization ITA - Company Codes page to link employees with company INAIL, INPS, PREV, INPDAI, and CIA codes.
Matricula Book - Personal/Job Data	EMPL_MATR_BOOK_ITA	Workforce Administration, Job Information, Employment Categorization ITA, Matricula Book, Personal/Job Data	View or update data to be included in the Matricula book.
Matricula Book - Address Data	EMPL_MTRBKADDR_ITA	Workforce Administration, Job Information, Employment Categorization ITA, Matricula Book, Address Data	View or update Matricula book address data.
Matricula Calculation	RUNCTL_MATRBK_ITA	Workforce Administration, Job Information, Employment Categorization ITA, Matricula Calculation, Matricula Calculation	Run the Matricula Book Calc process to update the Matricula table.

Running the Matricula Book Calculation Process

Access the Matricula Calculation page (Workforce Administration, Job Information, Employment Categorization ITA, Matricula Calculation, Matricula Calculation).

ITA Matricula Book Calc

Matricula Calculation

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

Report Request Parameters

Company:	K11	Business Institute - Italy

Employee Classes [Find](#) | [View All](#) | [First](#) | [1 of 1](#) | [Last](#)

Regulatory Region:	ITA	Italy	+ -
Employee Classification:	3	White Collar	

Allow Retro Calculation: ☐

From Date:	08/25/2009	Thru Date:	

Last Matricula: 0

Update: ☐

Matricula Calculation page

Employee Classification Select the employee classification for this book.

Allow Retro Calculation Select to enable retroactive calculations to capture previously lost or missed matricula data.

Last Matricula and Update Select if you want the process to check for new matricula data only.

(ITA) Recording End of Employment Information for Italian Workers

This section discusses how to record employee resignation dates and normal notice periods.

Page Used to Record End of Employment Information for Italian Workers

Page Name	Definition Name	Navigation	Usage
Terms	EMPL_TERMS_ITA	Workforce Administration, Job Information, Employee Categorization ITA, Terms, Terms	Record the date on which an employee resigns from your company, and the normal notice period as required by the employee's contract.

Recording Employee Resignation Dates and Normal Notice Periods

Access the Terms page (Workforce Administration, Job Information, Employee Categorization ITA, Terms, Terms).

Terms

Mauro Doria EMP ID: KI0003 Empl Record: 0

Notification Period Find | View All First 1 of 1 Last

Effective Date: 09/13/2000 Effective Sequence: 0

Reason Code: TAF Transfer to Affiliate

Notification Date: 08/25/2009 Last Day at Work: 09/08/2009

Notification Start Date: Notification End Date:

Special Termination Bonus: Withhold Notification Period: ☐

Comment:

Customize | Find | View All First 1 of 1 Last

***Termination Carryover Item**

Vacation + -

Customize | Find | View All First 1 of 1 Last

***Termination Payment Item**

Last Salary + -

Terms page

Notification Date Enter the date on which the employee gave notice of intent to end the contract.

Last Day at Work Enter the last day the employee will be at work.

Notification Start Date and Notification End Date Enter the start and end dates of the notification (*preavviso*) period, that is, the period for which the employer still pays contributions after termination. If the employment is terminated by the payee and notification is to be withheld, this is the period for which the amount should be withheld.

Special Termination Bonus Enter any bonus incentive owed to the employee.

Withhold Notification Period	Indicates whether the employee's salary is to be withheld during the period between the notification start and end dates. This is an information-only field.
Termination Carryover Item	Enter items that the employee can carry over for a termination. For example, during terminations such as a term for transfer to an affiliate, the employee and the employer can decide to "freeze" some items that can be transferred to the same employee for the new hiring process in the new affiliate company.
Termination Payment Item	Enter items that should be paid after termination.

(ITA) Running the Equal Opportunities Report

This section discusses how to run the Equal Opportunities report.

Page Used to Run the Equal Opportunities Report

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Equal Opportunities ITA	RUNCTL_PER053	Workforce Administration, Labor Administration, Reports, Equal Opportunities ITA, Equal Opportunities ITA	Run the ITA Equal Opportunities report (PER053). This report is submitted every two years and consists of eight different tables. All companies with 100 or more employees are required to submit this report.

Running the Equal Opportunities Report

Access the Equal Opportunities ITA page (Workforce Administration, Labor Administration, Reports, Equal Opportunities ITA, Equal Opportunities ITA).

Equal Opportunities ITA

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

Language:

Report Request Parameter(s)

From Date: End Date:

Company: Business Institute - Italy

City:

Desired Reports

☒ Table 1	☐ Table 3	☐ Table 5	☐ Table 7
☒ Table 2	☐ Table 4	☐ Table 6	☐ Table 8

Productive Units [Find](#) [First](#) [Last](#)

Unita' Produttiva Milano 1

Equal Opportunities ITA page

Desired Reports

Select the Equal Opportunities report tables that you want to populate.

Table 1 (*Informazioni Generali Sull'azienda*)

This table contains:

- Company and location information.
- Total number of employees as of December 31st of the second year of the reported period.
- Economic activity, including IVA organization codes.
- All CCNL information that applies.

Table 2 (*Informazioni generali sulle unità nell'ambito comunale*)

This table contains:

- Location address.
- Total number of employees at that location as of the reporting date.
- Number of employees as of December 31st of the second year of the reported period.

Table 3 (<i>Entrate e uscite nel biennio</i>)	This table contains: • Number of employees as of December 31st of the first year of the reported period. • The number of hires as of December 31st of the first year of the reported period. • The number of terminations as of December 31st of the first year of the reported period. • Number of employees as of December 31st of the second year of the reported period.
Table 4 (<i>Occupati al 31.12 del secondo anno del biennio e promozioni e assunzioni nell'anno</i>)	Lists the number of employees in each of the following categories: <i>dirigenti</i> , <i>quadri</i> , <i>impiegati</i> , and <i>operai</i> . Within each category, the report lists the number of employees per category level.
Table 5 (<i>Occupati al 31.12 del secondo anno del biennio per tipo contratto. CIG e aspettativa</i>)	Lists, per contract type, the number of employees in each of the following categories: <i>dirigenti</i> , <i>quadri</i> , <i>impiegati</i> , and <i>operai</i> .
Table 6 (<i>Elenco delle entrate, uscite e trasformazioni contratto (secondo anno del biennio)</i>)	This table contains the following information listed by category (<i>dirigenti</i>, <i>quadri</i>, <i>impiegati</i>, and <i>operai</i>): • Hires, including employees transferred from another location of the company, employees changed from another category, and new hires. • Terminations, including employees transferred to another location of the company or transferred to another category, and termination of the labor relation (pension, resignation, contract expiration, individual or collective dismissal, death, and disability). • Contract changes, including from <i>Determine Period</i> to <i>Undetermined</i>, from part-time to full-time, and vice versa.
Table 7 (<i>Formazione del personale svolta nel corso del secondo anno del biennio</i>)	This table contains the following information listed by category (<i>dirigenti</i>, <i>quadri</i>, <i>impiegati</i>, and <i>operai</i>): • Number of training participants. • Total hours of training participation per category.
Table 8 (<i>Retribuzione annua (secondo anno del biennio) per livello e categoria professionale</i>)	This table contains the annual gross salary amount subdivided by category (<i>dirigenti</i> , <i>quadri</i> , <i>impiegati</i> , and <i>operai</i>) and contractual level.

Productive Units

Select the productive units of the employees on whom you're reporting.

(USA) Managing I-9 Information

This section provides an overview of managing I-9 information and discusses how to:

- Complete and submit Section 1 of the I-9 form. (This section is completed by the employee.)
- Complete the Preparer/Translator Certification. (Applicable only in specific situations.)
- Complete Sections 2 and 3 of the I-9 form. (These sections are completed by the employer.)
- Update or request a new I-9 form.
- Print I-9 forms.
- Run the I-9 Receipt/Expiration report.
- Archive I-9 data.

Understanding I-9 Information Management

The Immigration and Nationality Act requires United States employers to complete and store I-9 forms. The law was modified in 2005 to allow employers to manage I-9 forms electronically. Employers may continue to process paper I-9 forms and store them in electronically or complete and retain the I-9 forms solely in electronic format.

PeopleSoft Enterprise Human Resources enables you to collect, store, and manage all I-9 information in compliance with the Immigration and Nationality Act. This includes employee self service functions to complete and submit the employee I-9 information, and functionality for the employer to complete the required employer sections of the I-9 form. The application provides components to report and process I-9 information, including notification of expiration dates, storing, printing, and archiving.

Pages Used to Manage I-9 Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
I-9 Form - Employee Information and Verification	HR_I9_EE	Self Service, Personal Information, Complete and Submit I-9 Form, Employee Information and Verification	Enter employee information for the I-9 form.
I-9 Form - Preparer Notification	HR_I9_PREP_NOTE	Select one or more check boxes on the I-9 Form - Employee Information and Verification page and click the Accept button.	Notify employee that the Preparer/Translator Certification page must be completed.

Page Name	Definition Name	Navigation	Usage
I-9 Form - Preparer/Translator Certification	HR_I9_PREPARER	Click the OK button on the I-9 Form - Preparer Notification page.	This page is completed by the person who assisted the employee in the completion of the I-9 Form page. This page is displayed only if you selected one or more check boxes in the employee section of the I-9 Form page.
I-9 Form - Submit Confirmation	EO_SUBMIT_CONFIRM	This page appears after the employee and preparer or translator successfully complete required information and submit the self service I-9 form.	Notification that you have successfully submitted the employee portion of the I-9 form.
I-9 Form - Employer Review and Verification	HR_I9_ADMIN_SEC2	Workforce Administration, Personal Information, I-9 Forms, Complete/Reverify EE I-9 Form, Employer Review and Verification	Complete sections 2 and 3 of the I-9 form. These sections are completed by the employer.
I-9 Form - Updating and Reverification	HR_I9_ADMIN_SEC3	Workforce Administration, Personal Information, I-9 Forms, Complete/Reverify EE I-9 Form, Updating and Reverification	Update a completed I-9 form or request that the employee submit a new form.
Print I-9 Forms	HR_RUNCTL_I9_FORM	Workforce Administration, Personal Information, I-9 Forms, Print I-9 Forms, Print I-9 Forms	Generate the I-9 forms in PDF format.
I-9 Receipt/Expiration Report	HR_RUNCTL_I9_VERIFY	Workforce Administration, Personal Information, I-9 Forms, I-9 Receipt/Expiration Report, I-9 Receipt/Expiration Report	Identify I-9 forms that require re-verification and notify administrators.

Completing and Submitting Section 1 of the I-9 Form

Access the I-9 Form - Employee Information and Verification page (Self Service, Personal Information, Complete and Submit I-9 Form, Employee Information and Verification).

I-9 Form

Employee Information and Verification

Betty Locherty

Global Business Institute 9999

Social Security Nbr: 341-95-7245

Date of Birth: 07/06/1945

You must complete the Employment Eligibility Verification form (I-9) by the end of your first day of work. Please read instructions carefully before completing this form. The instructions must be available during completion of this form. ANTI-DISCRIMINATION NOTICE: It is illegal to discriminate against work eligible individuals. Employers CANNOT specify which document(s) they will accept from an employee. The refusal to hire an individual because of a future expiration date may also constitute illegal discrimination.

To open the complete instructions in a separate browser window, select [I-9 Instructions](#)

Home Address

643 Robinson St

Buffalo, NY 74940

[Update Home Address](#)

Maiden Name

Maiden Name:

(Last, First)

I-9 Form - Employee Information and Verification page, Section 1 (1 of 2)

Citizenship and Employment Authorization	
I attest, under penalty of perjury, that I am (select one of the following):	
☒ A citizen of the United States	
☐ A noncitizen national of the United States	
☐ A lawful Permanent Resident	(Alien Nbr) A:
☐ An alien authorized to work	(A # or Admission #):
until (expiration date,if applicable --month/day/year)	
Minor and Special Placement Details	
If a parent or legal guardian of a minor (individual under age 18) OR a representative or a legal guardian of a person who meets the Special Placement criteria, as defined by the INS, completes this form, please select the following as they apply.	
☐ Special Placement Employee unable to present a List A or List B document	
☐ Minor unable to present a List A or List B document	
☐ Prepared and/or translated by a person other than the Employee	
Accept	I am aware that federal law provides for imprisonment and/or fines for false statements or use of false documents in connection with the completion of this form.

I-9 Form - Employee Information and Verification page, Section 1 (2 of 2)

Employees use this page to complete and submit Section 1 of their I-9 forms. Employees can complete and submit more than one I-9 form. Employees cannot modify I-9 forms after submission and can view only the most recent submission.

I-9 Instructions	Click this link to open a new browser window with the I-9 form in PDF format that has instructions for completing the form.
Home Address	This information is loaded from the employee's address record.
Update Home Address	If the address information is not current, click this link to open the Home and Mailing Address page in employee self service. Edit address information and return to the employee I-9 form.
Maiden Name	This is an optional field that stores maiden name, if applicable. The field is automatically populated by the employee's name record, if available.

Citizen and Employment Authorization

Select the option for your eligibility type. You must select one of the options and provide any additional data that is associated with the selected option.

(Alien Nbr) A (alien number)	Enter your lawful Permanent Resident alien number. This field is mandatory if you select the option stating that you are A lawful Permanent Resident.

(A # or Admission #) (alien number or admission number) Enter your assigned number. This field is mandatory if you select the option stating that you are an alien authorized to work.

until (expiration date, if applicable – month/day/year) Enter the date until which you are authorized to work. This field is mandatory if you select the option stating that you are an alien authorized to work.

Minor and Special Placement Details

Select the appropriate check boxes. You can select more than one check box, if applicable. If you select any check box in this section, the preparer or translator must complete the Preparer/Translator page before submitting the form.

Submitting the Form

Accept Click this button to save and submit this form, trigger appropriate workflow notifications to the administrator, and generate the confirmation page.

Completing the Preparer/Translator Certification

Access the I-9 Form - Preparer/Translator Certification page (select one or more check boxes on the I-9 Form - Employee Information and Verification page and click the Accept button; then click the OK button on the I-9 Form - Preparer Notification page).

I-9 Form

Preparer/Translator Certification

Betty Locherty

Global Business Institute 9999

Social Security Nbr: 341-95-7245

Date of Birth: 07/06/1945

To open the complete instructions in a separate browser window, select [I-9 Instructions](#)

Preparer's Name:

Preparer's Address:

City:

State:

Zip:

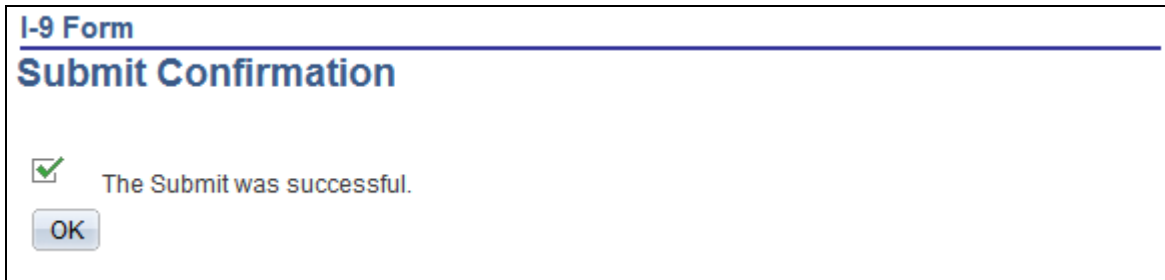
Accept

I attest, under penalty of perjury, that I have assisted in the completion of this form and that to the best of my knowledge the information is true and correct.

I-9 Form - Preparer/Translator Certification page, Section 1

Preparer's Name Enter the preparer's name in this field. This field is required.

Preparer's Address, City, State and Zip Enter the preparer's address in these fields. These fields are required.



I-9 Form
Submit Confirmation

 The Submit was successful.

OK

I-9 Form - Submit Confirmation page, Section 1

This message appears after you complete and successfully submit all of the required I-9 Form information.

Completing Sections 2 and 3 of the I-9 Form

After the employee has completed and submitted the I-9 form, the employer completes the remaining sections.

Access the I-9 Form - Employer Review and Verification page (Workforce Administration, Personal Information, I-9 Forms, Complete/Reverify EE I-9 Form, Employer Review and Verification).

I-9 Form	
Employer Review and Verification	
Betty Locherty 643 Robinson St Buffalo, NY 74940	Social Security Nbr: 341-95-7245 Date of Birth: 07/06/1945 Maiden Name: Employee Sign Date: 08/26/2009
Citizenship and Employment Authorization	
☒ A citizen of the United States ☐ A noncitizen national of the United States ☐ A lawful Permanent Resident (Alien Nbr) A: ☐ An alien authorized to work (A # or Admission #): until (expiration date,if applicable --month/day/year)	
Minor and Special Placement Details	
☐ Special Placement Employee unable to present a List A or List B document ☐ Minor unable to present a List A or List B document ☐ Prepared and/or translated by a person other than the Employee	

I-9 Form – Employer Review and Verification page 1 of 4

Document Verification	
To be completed and signed by the employer. Examine one document from List A OR examine one document from List B and one from List C, as listed in the instructions, and record the title, number and expiration date, if any, of the document (s).	
To open the complete instructions in a separate browser window, select I-9 Instructions	
☒ List A	
Document Title:	Receipt
Issuing Authority:	
Document Number:	Exp Date (if any): 31
Document Number:	Exp Date (if any): 31

I-9 Form – Employer Review and Verification page 2 of 4

☐ List B AND List C

Document from List B

Document Title: ☐ Receipt

Issuing Authority:

Document Number: Exp Date (if any):

Document from List C

Document Title: ☐ Receipt

Issuing Authority:

Document Number: Exp Date (if any):

I-9 Form – Employer Review and Verification page 3 of 4

Employer Representative Details

Employer Rep's Name: Betty Locherty

Title: Director-Finance

Address: 500 George Washington Pkway
New York, NY 07666

I attest under penalty of perjury, that to the best of my knowledge, this employee is eligible to work in the United States, and if the employee presented document(s), the document(s) I have examined appear to be genuine and to relate to the individual.

I-9 Form – Employer Review and Verification page 4 of 4

This page is automatically configured depending on employee entries on the form:

- If the employee selected the Special Placement option, then the List B AND List C option is selected by default and the text *Special Placement* appears in the Document Number field.
- If the employee selected the Minor check box, then the List B AND List C option is selected by default and the text *Individual under age 18* appears in the Document Number field.
- If the employee selected both the Special Placement and the Minor check boxes, then the List B AND List C option is selected by default and both the *Special Placement* and *Individual under age 18* text entries appear in the Document Number field.

Document Verification

I-9 Instructions

Click this link to open a new browser window that contains the I-9 form with instructions in PDF format.

List A or List B AND List C	Select the option that corresponds to the type of citizenship document provided by the employee. You must select either List A or List B AND List C and enter the information. If List A is chosen, at least one of the two document number fields is required. These options are mutually exclusive; after you select one, the fields associated with the other are grayed out.
Document Title	Record the type of documentation provided by the employee. There are separate fields for each document type (A, B and C).
Issuing Authority	Enter the name of the agency that issued the document.
Receipt	Select this check box to indicate that the employee has applied for the document. The default setting is deselected, which hides the Receipt Document Number field and corresponding Expiration Date field. When the Receipt check box is selected, the Receipt Document Number and Exp Date (if any) fields are visible. After you save this page you cannot deselect this check box.
Receipt Doc Nbr (receipt document number)	Enter the receipt number of the documentation application. The receipt document number may be different from the actual document number. This field appears only if the Receipt check box is selected.
Exp Date (if any)	Optional field to record the expiration date, if any, of the receipt document entered.
Document Number	Enter the number of the actual document.
Exp Date (if any)	Optional field to record the expiration date, if any, of the document entered.

Employer Representative Details

Employer Rep's Name (employer representative's name)	This field is populated with the name of the administrator who is submitting the data.
Title	This field is populated with the job title of the administrator who is submitting the data.
Address	These fields are populated with the current company address.
Accept	Click this button to save the information you entered.

Updating or Requesting a New I-9 Form

Access the I-9 Form - Updating and Reverification page (Workforce Administration, Personal Information, I-9 Forms, Complete/Reverify EE I-9 Form, Updating and Reverification).

I-9 Form

Updating and Reverification

Robyn Lancaster

1178 Gaither Rd.

Gathiersburg, MD 20878

Montgomery

Social Security Nbr:

589-65-4123

Date of Birth:

05/03/1982

Maiden Name:

Employee Sign Date:

04/14/2006

Citizenship and Employment Authorization

☒ A citizen of the United States

☐ A noncitizen national of the United States

☐ A lawful Permanent Resident (Alien Nbr) A:

☐ An alien authorized to work (A # or Admission #):

until (expiration date,if applicable --month/day/year)

Minor and Special Placement Details

☐ Special Placement Employee unable to present a List A or List B document

☐ Minor unable to present a List A or List B document

☐ Prepared and/or translated by a person other than the Employee

I-9 Form - Updating and Reverification page (1 of 3)

Document Verification

▼ List A

Document Title:

US Passport

☐ Receipt

Issuing Authority:

United States Government

Document Number:

#123456789

Exp Date (if any):

01/31/2004

Document Number:

Exp Date (if any):

▼ List B AND List C

Document from List B

Document Title:

☐ Receipt

Issuing Authority:

Document Number:

Exp Date (if any):

Document from List C

Document Title:

☐ Receipt

Issuing Authority:

Document Number:

Exp Date (if any):

I-9 Form - Updating and Reverification page (2 of 3)

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Employer Representative Details	
Employer Rep's Name:	Betty Locherty
Title:	Director-Finance
Employer Sign Date:	04/14/2006
Address:	500 George Washington Pkway New York, NY 07666
Updating and Reverification	
To open the complete instructions in a separate browser window, select I-9 Instructions	
New Name:	
Date of Rehire:	
Current Employment Eligibility:	
Document Title:	Receipt
Document Number:	Exp Date (if any): 
Accept	I attest under penalty of perjury, that to the best of my knowledge, this employee is eligible to work in the United States, and if the employee presented document(s), the document(s) I have examined appear to be genuine and to relate to the individual.
Request employee to complete and submit a new I-9 Form.	
Select	

I-9 Form - Updating and Reverification page (3 of 3)

HR Administrators use this page to view completed I-9 documentation and enter additional information, if applicable. If an employee is rehired within three years of termination, or if the original document has expired, employers may reverify or update the original I-9 after it is submitted. An I-9 form can only be updated or reverified one time (including receipt and actual documentation).

If new information needs to be entered and actual documentation information already exists, all fields will be display only and the employee and employer must complete a new I-9 form. The administrator can send an email notification to the employee requesting a new I-9 form from this page. The administrator is able to view all forms completed by employees, including history.

The employer is not allowed to make any changes to the form after it is saved unless the Receipt check box is selected. In this case, you can enter the actual information for the specific document that was flagged as Receipt, but only the Document Number and Expiration Date fields. The entry in the Document Title field cannot be changed. After the additional field entries are completed and the form is saved, the Receipt check box and Receipt Document Number field are grayed out and cannot be edited.

Updating and Reverification

I-9 Instructions

Click this link to open an I-9 form in PDF format that includes instructions for completion.

New Name This field is automatically populated by the employee's current name if it is different from the name initially saved on the form.

Date of Rehire The most current rehire date appears by default in this field if it exists.

Current Employment Eligibility

Document Title Enter the type of documentation being reverified or updated.

Receipt Select this check box to indicate that the employee has applied for the reverified or updated document. The default setting is deselected, which hides the Receipt Document Number field and corresponding Expiration Date field. When the Receipt check box is selected, the Receipt Document Number and Expiration Date fields are visible. After you save this page you cannot deselect this check box.

Receipt Document Number Enter the receipt number for the document application receipt.

Document Number Enter the actual document number.

Exp. Date (if any) Use this optional field to record the expiration date, if any, of the document entered.

Accept Click this button to save the form.

Select Click this button to send an email notification to the employee requesting a new I-9 form.

Printing I-9 Forms

Access the Print I-9 Forms page (Workforce Administration, Personal Information, I-9 Forms, Print I-9 Forms, Print I-9 Forms).

Print I-9 Forms

Run Control ID: 1 [Report Manager](#) [Process Monitor](#)

Language: English

Report Request Parameter(s)

From Date: 11/01/2008 ☐ By Company

Thru Date: 11/30/2008 ☐ By Employee

Print I-9 Forms page

From Date and Thru Date	Use these fields to determine effective dates to extract when running the report. Both fields are required.
By Company or By Employee	Run the report using one of these options. Use the lookup icon to enter a company code or an employee ID.

Running the I-9 Receipt/Expiration Report

Access the I-9 Receipt/Expiration Report page (Workforce Administration, Personal Information, I-9 Forms, I-9 Receipt/Expiration Report, I-9 Receipt/Expiration Report).

I-9 Receipt/Expiration Report

Run Control ID: PS

Report Manager

Process Monitor

Run

Language: English

Report Request Parameter(s)

From Date:

Thru Date:

Company:

☒ Expired Documents

☒ Application Update Needed

☐ Add into Worklist

I-9 Receipt/Expiration Report page

From Date and Thru Date	Use these fields to define the effective dates for the report. Both fields are required.
Company	This is an optional field. Entering a value will limit the report output to employees for a specific company as of the date that the employee submitted the I-9 form.
Expired Documents	Select this check box to have the report list I-9 forms with expiration dates within the specified date range.
Application Update Needed	If selected, the process will find all documents that have a Receipt check box selected and that do not have corresponding actual data saved. The process compares the I-9 submission date with the date range and includes all employees whose I-9 date plus 90 days is within the date range.

Note. You must select either the Expired Documents or the Application Update Needed check box to run the report.

Add into Worklist	Select this check box to have the administrator receive a worklist entry for each employee form listed in the report.

Archiving I-9 Data

See *Enterprise PeopleTools PeopleBook: Data Management*, "Using PeopleSoft Data Archive Manager."

(USA) Determining U.S. Residency Status for Foreign Nationals

This section discusses how to run the Substantial Presence test.

Page Used to Determine U.S. Residency Status for Foreign Nationals

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Employee Presence Test USA	PRESENCE_TEST	Workforce Administration, Personal Information, Citizenship, Employee Presence Test USA, Employee Presence Test USA	Run the Substantial Presence test to determine if alien employees are considered U.S. residents for tax purposes for a particular calendar year.

Running the Substantial Presence Test

Access the Employee Presence Test USA page (Workforce Administration, Personal Information, Citizenship, Employee Presence Test USA, Employee Presence Test USA).

Employee Presence Test USA	
<u>Douglas Lewis</u>	Person ID: KU0001
Calendar Information Find View All First 1 of 1 Last *Calendar Year: 2009 Days Present in Calendar Year: 0 Days Present in First Prior Year: 0 Days Present in Second Prior Year: 0 Total Days Used in Presence Test: 0	
Visa Information Find View All First 1 of 1 Last Visa/Permit Type: Visa/Permit Status: A Applied Start Date: Expiration Date:	
Substantial Presence Test ☐ Alien Registration "Green" Card Perform Presence Test ☐ Passed 183 Day Test ☐ 31 Days in Calendar Year ☒ Did Not Pass 183 Day Test	
Information Do not count days in which the employee was: - In US less than 24 hours in transit - Commuting from residence in Canada or Mexico - Unable to leave US due to medical condition that developed in US - An exempt individual: - Student with F, J, M Q visa - Exempt for five years - Teacher, trainee, researcher on J or Q visa - Exempt for two years	

Employee Presence Test USA page

Under this test, a foreign national is considered a resident for tax purposes if the person is present in the U.S. at least 31 days in the current year and 183 days during the current year and the two preceding years, as determined under a weighted formula.

Nonresident aliens may make a special election to be treated as residents for the first year in which they are present in the U.S. This election is subject to several restrictions, one of which is that the nonresident alien must satisfy the Substantial Presence test in the year following the election.

Rules that govern which days don't count towards an employee's Substantial Presence test appear in the Do not count days in which the employee was group box. This test is only valid for current or previous years.

Calendar Information

Calendar Year Enter the appropriate calendar year.

Days Present in Calendar Year, Days Present in First Prior Year, and Days Present in Second Prior Year

Enter the number of days present in the current year, the previous year, and the year previous to that.

The actual days present in the first prior year equal 1/3 of 365 minus the value in the Days Present in First Prior Year field. The actual days present in the second prior year equal 1/6 of 365 minus the value in the Days Present in Second Prior Year field.

For example, enter the number of days present in 1998, followed by the number of days present in 1997, followed by the number of days present in 1996.

The Total Days Used in Presence Test field automatically displays the total number of days after all of the previous fields are completed.

Note. If you are entering Substantial Presence test information for multiple years, the First Prior Year and Second Prior Year fields are based on the prior year information.

Visa Information

If the employee has a visa or permit, this group box provides information about the visa or permit.

Substantial Presence Test

Alien Registration "Green" Card

Select if the employee has been issued an alien registration card, or green card. If you select this check box, the Substantial Presence test isn't necessary; the employee is considered a U.S. resident for tax purposes.

31 Days in Calendar Year

This check box is automatically selected if the employee has been present 31 days in a calendar year.

Perform Presence Test

Click to see if the employee passed the Substantial Presence test. The system calculates the total number of days present and selects either the Passed 183 Day Test or Did Not Pass 183 Day Test option.

In the 183 Day Test calculation, the system uses 100 percent of the days present in the calendar year.

Chapter 11

(ESP) Managing Spanish Reporting

This chapter discusses how to:

- Set up XML files.
- Manage Contrata communications.
- Manage Delta communications.
- Confirm the sending of XML files.
- Manage Contract Printing.
- Generate Affiliation to Social Security (AFI) flat files.

Setting Up XML Files

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

- Set up XML code tables.
- Define XML sets.
- Set up XML node tables.
- Set up node mapping.
- Define XML templates.
- Map contracts to XML nodes.

Understanding XML File Setup

This overview discusses the XML file setup necessary to generate XML files. The system uses the XML file setup for Delta (Sistema Delt@) reporting, Contrata (Sistema Contrat@) reporting, contract printing, and Tripartite Foundation reporting.

Note. Tripartite Foundation reporting is documented in the PeopleSoft Enterprise Human Resources Administer Training PeopleBook

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Training*, "(ESP) Managing Tripartite Foundation Communications."

General XML Setup Steps

Before you can generate XML files for reporting, you must set up the components for XML file creation.

To set up XML files:

1. Set up XML code tables.
2. Define XML sets.
3. Set up XML node tables and node mapping.
4. Define XML templates.
5. Map contracts to XML nodes (Contrata reporting only).
6. Map contract-level nodes to the appropriate contract type (Contract Printing only).
7. Perform the steps to generate the XML file.

The XML generation process uses this dynamic setup data to create the XML files based on the specific needs of the report you are generating.

XML Code Tables

XML code tables are tables that list the valid values of an XML node. Code tables enable you to compile setup data through a single menu entry point. Use the XML Code Table (XML_CODE_TBL) component to define the auxiliary XML code tables and the valid values that your company uses. Once you define the XML code tables, you can use them to:

- Map system values to XML code table values for a node.
- Serve as validation tables for the values of a node.

You can perform both of these options when defining XML nodes through the XML Node Table component. Later in the business process, when you are completing a person's node data for an XML file during XML file generation, the system prompts you to select from the valid values that you have defined in the code table for the node.

XML Sets

An XML set is a group XML files. You can associate XML sets with functional areas. Human Resources for Spain delivers an XML set for the Contrata, Delta, Contract Printing, and Tripartite Foundation functional areas. Use the XML Set Table component to define XML set definitions for XML files. You associate XML sets with XML nodes and XML templates. Assign XML sets to XML nodes through the XML Node Table component and to XML templates through the XML Template Table component.

XML Node Tables

XML nodes are the core of the XML file setup. XML nodes are sets of tags within an XML file that determine the hierarchical structure of the file. They represent the XML tags that are mapped to Human Resources data. All tags between the open tag and closed tag of a node comprise the node. Use the XML Node Table component to define XML nodes and create the relationships between the nodes. The nodes that you create and relate to each other define the XML file structure. Through the XML generation process the system can retrieve data that is already stored in the Human Resources database and write the data into the appropriate XML nodes.

You can define complex nodes or simple nodes. Complex nodes are composed of other simple or complex nodes. Complex nodes can be root nodes or children nodes. There can only be one root node per XML template that you define. A root node defines a specific XML file layout. For further embedding of XML tags, children nodes can also contain their own children nodes. Simple nodes are associated with values. To derive the values of simple nodes, you can use as source data manual values that you enter or system values.

Sometimes the data with the system as the source from which you are deriving the values of the nodes does not match the data that you need for the XML file. In cases such as these, you can also use the XML Node Table component to map the system data values to alternate values that fit your reporting needs. For example, PeopleSoft system data uses as gender values M (male) and F (female). However, I.N.E.M. uses H (hombre/male) and M (mujer/female). You can use the XML Node Table component to map these PeopleSoft system values to the corresponding I.N.E.M. values.

XML Templates

XML templates define the type of communications within each functional area, identifying the complete XML structure of the XML file that you generate for each communication. An XML template holds the keys and root node for runtime data retrieval for the XML generation process. When defining each template, you assign a root node. The root node thus contains the whole information for all of the nodes in the template thereby defining the XML file structure. At runtime the system uses these keys to retrieve the correct values for the fields as part of the SQL Select statement when retrieving the data for the children nodes of the root node that you associate with the XML template in its definition.

Contract Mapping

Contract mapping is the means of associating a contract type with XML templates and XML nodes. Within the Contrat@ Mapping component, you select the Contrata template ID for which you want to perform mapping and then link selected contract types to specific XML starting nodes. Through this action you are thus assigning a specific XML format to each contract type. You must assign a specific XML node to each contract type because each contract type could report different information. Delta XML file generation does not use contracts and therefore does not require mapping.

Contract Printing Mapping

Contract printing mapping is the means of associating a contract type with XML templates and XML nodes. Within the Contract Printing Mapping component, you select the Contrata template ID for which you want to perform mapping and then link selected contract types to specific XML starting nodes. Through this action you assign a specific format to each contract type. You must assign a specific XML node to each contract type because each contract type could report different information. Delta XML file generation does not use contracts and does not require mapping.

Note. Contract Printing generates reports in PDF format, not XML format. But the system takes advantage of the functionality of XML generation used in Contrat@ and Delt@ to provide a flexible way to set up and customize the content of the PDF files. So the system uses the XML setup tables to define the data that Contract printing functionality needs to extract

Pages Used to Set Up XML Files

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
XML Code Tables	XML_CODE_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, XML Code Tables, XML Code Table	Define the auxiliary XML code tables and the valid values that your company uses for XML nodes.
XML Set Table	XML_SET_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, XML Set Table, XML Set Table	Maintain XML set definitions.
XML Template	XML_TEMPLATE	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, XML Template Table, XML Template	Define templates for use during XML file generation.
Node Table	XML_NODE_TBL1	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, XML Node Table, Node Table	Define the nodes that comprise the XML file structure for Delta and Contrata reporting, or for contract printing of specific contract types.
Node Mapping	XML_NODE_TBL2	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, XML Node Table, Node Mapping	Map existing system values for nodes to alternate values that the XML file requires.
Contrat@ Mapping	CTTA_MAPPING_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Contrat@ Mapping, Contrat@ Mapping	Define the root node that corresponds to each contract type for Contrata XML file generation.

Setting Up XML Code Tables

Access the XML Code Tables page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, XML Code Tables, XML Code Tables).

XML Code Tables

Set ID:

ESP

Code Table:

SSEXOXC

Description:

Gender

Code - Description		Customize Find View All		First	1-2 of 2	Last
	XLAT Value	Description				
1	1	Man				
2	2	Woman				

XML Code Tables page

- Code Table

The name of the code table.
- Description

Enter the description of the code table.
- Code - Description
- XLAT Value

Enter the translate value for the code table.
- Description

Enter the description of the translate value.

Defining XML Sets

Access the XML Set Table page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, XML Set Table, XML Set Table).

XML Set Table

XML Set: C01

*Description:

Details Customize Find View All First 1-9 of 9 Last				
	Record (Table) Name	Record Description		
1	COMPDATA_ESP_V	Company Data	+	-
2	CONTRACT_DATA	Contract Info	+	-
3	JOBDATA_ESP_VW	Job Data ESP	+	-
4	PERSDATA_ESP_V	Personal Data ESP	+	-
5	PERS_NID	PERS_NID Record	+	-
6	WKF_CNT_CLAUSE	Work Force Contract Clause	+	-
7	WKF_CNT_TYP_ES	Contract Info	+	-
8	XML_IPF_ESP_VW	IPF for Contrat@ and Delta	+	-
9	XML_SSN_ESP_VW	SS Number for Employee	+	-

XML Set Table page

Human Resources for Spain provides XML sets for both Delta and Contrata reporting. Human Resources for Spain also delivers the XML set P01 for use with all contract printing.

Setting Up XML Node Tables

Access the Node Table page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, XML Node Table, Node Table).

Node Table

Node Id:

C0 01

XML Set:

Contrat@

Description:

Contract

*Tag:

CONTRATOS

*Node Type:

Complex

☒ Root Node

Preview XML

Children Nodes

Customize

Find

View All

First

1-10 of 30

Last

	Sequence Number	*Node Id	Description	Node Type	Required Field	Print if Blank	Iterative Node	Edit Table
1	1	C1 01	Contract_100	Complex	☐	☐	☐	+ -
2	2	C1 02	Contract_130	Complex	☐	☐	☐	+ -
3	3	C1 03	Contract_150	Complex	☐	☐	☐	+ -
4	4	C1 04	Contract_200	Complex	☐	☐	☐	+ -
5	5	C1 05	Contract_230	Complex	☐	☐	☐	+ -
6	6	C1 06	Contract_250	Complex	☐	☐	☐	+ -
7	7	C1 07	Contract_300	Complex	☐	☐	☐	+ -
8	8	C1 08	Contract_330	Complex	☐	☐	☐	+ -
9	9	C1 09	Contract_350	Complex	☐	☐	☐	+ -
10	10	C1 10	Contract_401	Complex	☐	☐	☐	+ -

Node Table page (complex node type)

Node Table

Node Mapping

Node Id:

C0 01

XML Set:

Contrat@

Description:

Contract

*Tag:

CONTRATOS

*Node Type:

Simple

☐ Concatenate

Source Data:

System

Record Name:

XML_IPF_ESP_VW

IPF for Contrat@ and Delta

Field Name:

EMPLID

Empl ID

Node Table page (simple node type)

- Node Id

When creating a new node, enter a code to identify the node.
- XML Set

Select the XML set to specify the functional area for which you are defining this node.
- Description

Enter a description of the node.
- Tag

Enter the name of the XML tag for the node.
- Node Type

Select whether the node is *Simple* or *Complex*. Simple nodes are associated with values, whereas complex nodes are composed of other simple or complex nodes.

Root Node	Select this check box to indicate that this complex node is a root node, meaning that it is the node from which all other nodes in the XML file structure are derived. This field appears only when the node type is <i>Complex</i>.
Preview XML	Click this button to access the XML Preview ESP page, where you can preview the XML file structure for the complex node. You can only preview XML files structure for complex node types. This button appears only when the node type is <i>Complex</i>.
Concatenate	Select this check box if the data in this node is the concatenation of two or more fields in the database. The system displays the Node ID field for you to select the concatenated node. This check box becomes available for edit only for simple nodes.
Node Id	Select the concatenated node. This field becomes available only if you select the Concatenate check box.
Source Data	Select how you want to define the source data for the node. During XML file generation, the system uses the option that you select to retrieve and validate node values in the XML file. This field becomes available for edit only for simple nodes. Valid values are: • <i>Manual</i>: Select this option for those nodes for which the data is not stored in the HR system, so the system will request its value to be entered manually when generating the file. Selecting this option enables you to validate a node value against the specific XML code table, translate field, or date format that you specify. Or you can specify that there be no validation, enabling the user to enter any node value into an open entry field. • <i>System</i>: Select this option to indicate that the valid values for the node already exist in the application as part of a special view designed specifically for XML files. After selecting this option, you then need to specify which record (view) and field contains the valid values for the node. The Record Name field, Field Name field, and Node Mapping page become available for edit. You must select this option if you need to map a system value to an alternate value.

Record Name and Field Name

The system displays these fields when you select system data as the as source data of a simple node. If you select the *System* value in the Source Data field, you then need to specify which record and field contain the valid values for the XML node. To specify a record and field, first select a record from the list of valid views. Then select a field from the list of available fields in the view. The system uses your selection to validate data when generating XML files.

When selecting a valid record and field, you cannot use any record. You must use special views built for this purpose. The delivered special views and any that you create must meet the following two conditions:

1. Name.Record name must start with XML_ and end with _VW.2.
2. Keys.Record keys must be defined using only the fields defined in the template.

Validation Type

Manually select the type of data validation that you want to occur when the system validates the node values that users enter for a person in an XML file.

This field becomes available only when the Source Data field value is manual.

Valid values are:

- *Code Table*: Select this option if you want the node value to come from a table of values as defined on the XML Code Table page. The system displays the Code Table field for you to select the specific table.
- *Date*: Select this option if you want the node value to be a date. The system displays the Formatted field for you to select the date format.
- *None*: Select this option if you do not need validation of the node value. The system displays the Node Value field as an open entry field on the Details page of the XML file generation pages. Users can enter any value for the node because the field that has no edits for validation.
- *Xlat Field* (translate field): Select this option if you want node value to come from a translate table for a specific field. The system displays the Field Name field for you to select the field from which the system prompts users with translate values.

Default Value

For a simple node where the source is manual you can set up a default value.

Reg Region (regulatory region)

Select the regulatory region to use to filter possible code tables to a specific setID. Code tables contain a setID. By selecting the regulatory region, the system enables you to select only the code tables with the same setID as the regulatory region.

This field is available only for simple node types that use code tables.

Code Table

If you select a validation type of code table, select the table from which you want the system to prompt users with values to select for a node.

This field is available only for simple node types that use code tables.

Formatted	Select how you want the date field to be formatted. This field is available only if you select a validation type of <i>Date</i> .
Field Name	Select the field from which the system prompts users with translate values. This field is available only if you select a validation type of <i>Xlat Field</i> .

Children Nodes

Use this group box to define the children node members of a complex node. All children nodes that you define for a given node appear at the same level in an XML file structure. If children nodes are complex nodes that require their own children nodes, you must define members for these nodes in their own node definition.

This group box appears only when the node type is *Complex*.

Sequence Number	Enter the sequence in which you want the children nodes to appear in the file structure within the parent node. The system arranges the children nodes in order from lowest to highest.
Node ID	Select the child node. Define child nodes using this same component.
Description	The system displays the description of the child node.
Node Type	The system displays the node type of the child node, either simple or complex.
Required Field	Select this check box to make this node a required field in the XML file. When you validate the XML file through the appropriate reporting component, the system requires that the user enter a value for this field before generating the XML file.
Iterative Node	Select this check box to indicate that you can repeat this node inside the XML file.
Print if Blank	Select this check box if you want an XML file to contain a specific node even if the value is null.

Setting Up Node Mapping

Access the Node Mapping page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, XML Node Table, Node Mapping).

Node Table

Node Mapping

Node Id:

C3 05

Gender

Node Type:

Simple

Source Data:

System

Mapping From:

Record

Edit Table:

Mapping To:

Code Table

Reg Region:

ESP

Code Table:

Gender

Details

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

	System Value	Description	Node Value	Description		
1	F	Female	2		+	-
2	M	Male	1		+	-

Node Mapping page

Note. This page becomes available only when you define the Node Type as Simple and the Source Data as System on the Node Table page.

Use this page is cases where the values for the node exists in the application but the system values do not match the values that the XML file requires. Through this page you can map the existing system values to other, more appropriate values that you must use for the XML file.

Mapping From

For the field that you are mapping from, select how the field derives its valid values. After you make a selection, use the System Value field in the grid below to specify the system field values from which you want to map to alternate values. Your choices are:

- *Manual*: Select this option if the system values are derived manually through user entry and you want to map these values to other values. Fields such as these are defined as having no edit, thus enabling manual entry. The System Values field in the grid prompts you to manually enter each system value that you want to map to another value.
- *None*: Select this option if there is no need to map system values for the field that you specify in the Field Name field on the Node Table page to another value.
- *Record*: Select this option if the system values are derived from a prompt table and you want to map values in the prompt table to other values. Then use the Edit Table field, which becomes available, to specify the prompt table from which the field derives its valid values. The System Values field in the grid prompts you to select each prompt table value that you want to map to another value.
- *Xlat (translate)*: Select this option if the system values are derived from a translate table and you want to map these translate values to other values. The System Values field in the grid prompts you to select each translate value that you want to map to another value.

Note. To successfully map system values to an alternate value, you must know the type of table edit that is associated with the field that you are mapping. In this way you preserve data integrity so that the system is able to accurately remap values during data validation of an XML file. You select the field on the Node Table page in the Field Name field.

Edit Table

If you select to map field values from a record, select the prompt table from which the field derives its valid values.

Mapping To

Select how you want to define the new valid field values that you are mapping to. After you make a selection, use the Node Value field in the grid below to specify the new value to replace the system value. Your choices are:

- *Code Table*: Select this option to map values to a value that exists on an XML code table. The Code Table field becomes available for edit.
- *Manual*: Select this option to map system values to a value that you manually define.
- *None*: Select this option there is no need to map system values to another value.

Reg Region (regulatory region)

Select the regulatory region to use to filter possible code tables to a specific setID. Code tables contain a setID. By selecting the regulatory region, the system enables you to select only the code tables with the same setID as the regulatory region.

Code Table	If you select to map new field values to values from an XML code table, select the code table. Define XML code tables on the XML Code Table page.
System Value and Description	Specify the system field value from which you are mapping to another more appropriate value for the XML file. If you are mapping from a field where the valid values are derived from translate tables or prompt tables, select the value that you want to change. If you are mapping from fields where the valid values are derived by manual entry into the system, enter the value that you want to change. The value that you enter manually must be identical to the value defined through user entry. For translate values and table record values, the system displays the description of your selection.
Node Value and Description	Select or enter the node value to which you are mapping the system value. If you have selected to map to a code table in the Mapping To field, the system prompts against the values in the XML code table that you specify. For XML code table values, the system displays the description of your selection.

Defining XML Templates

Access the XML Template page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, XML Template Table, XML Template).

XML TemplateXML Response

XML Set:

C01

Contrat@

Template Type:

C01

*Description:

Contrata - Contracts

Key 1 Field Name:

EMPLID

Empl ID

Key 2 Field Name:

EFFDT

Effective Date

Key 3 Field Name:

Root Node:

C0 01

Contract

XML Version:

<?xml version="1.0" encoding="ISO-8859-1"?>

XML Template page

XML Set	When defining new XML Templates, select the XML set to which the template belongs.
Template Type	The identifying code of the template.

Description	Enter a description of the XML template.
Key 1 Field Name, Key 2 Field Name and Key 3 Field Name	Specify the fields that you want to use as keys for the different levels of data that you are reporting with the XML template. These fields indicate the key structure of the table from which the system retrieves data for reporting through XML files. For example, with Contrata reporting you define EmplID and EFFDT as the key fields to indicate that you are reporting employee information based on the effective date of the contracts. With Delta reporting, you define three levels—company, employee, and effective date (or the incident) — to deliver XML files that include information keyed at the company level, employee level, and incident level. When you map a node to a record and field that exist in the database through the XML Node Table component, the record that you select must have at least one of these keys as a record key because the Where clause is built dynamically to use these fields. The system also uses the key fields that you define here as filter criteria when you confirm or unconfirm the sending of XML files that are based on this XML template. Confirm XML files through the XML File Confirmation ESP component.
Root Node	Select the root node for the XML template. By identifying the root node for the XML template you are setting the whole structure of the XML file because the root node contains in a recursive mode the whole structure. The root node is the starting point of the XML structure. Define root nodes on the XML Node Table page.
XML Version	Specify the version of the XML files that are based on this template. Each XML file needs to include a first line that states the version.

Mapping Contracts to XML Nodes

Access the Contrat@ Mapping page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Contrat@ Mapping, Contrat@ Mapping).

Contrat@ Mapping

Template Type: C01 Contrata - Contracts

Mapped Contracts								Customize	Find	View All			First	1-3 of 3	Last	
	Set ID	Contract Type	Description	*Node Id	Description											
1	ESP	001	Unlimited Contract	C1 01	Contract_100											
2	ESP	003	Part Time Contract	C1 01	Contract_100											
3	ESP	036	Apprenticeship	C1 07	Contract_300											

Contrat@ Mapping page

Template Type	You can access this page for templates that you have already defined. Define templates on the XML Template page.
SetID	Select the setID of the contract type. The system selects ESP by default.
Contract Type and Description	Select the contract type for which you want to specify the starting node. The system prompts you to select from contract types that are defined for the selected setID.
Node ID and Description	Select the Contrata node to which you want to map the specified contract type. By associating this node to each contract type, you are defining the XML file format and structure for the contract type. Each contract type can require different information to be reported so you must assign different XML structure to each of them.

Managing Contrata Communications

This section provides an overview of Contrata (Sistema Contrat@) communication management, lists steps to manage Contrata XML file generation, lists prerequisites, and discusses how to:

- Define the XML file.
- Populate the XML file for Contrata reporting.
- Load Contrata XML file data.
- Edit Contrata XML file data.
- Generate the Contrata XML file.
- Preview generated XML.
- Confirm Contrata XML file data.

- Delete Contrata XML files.

Understanding Contrata Communication Management

Contrata is a web service of the Public Service of Employment (I.N.E.M.) that enables companies to file new employees' employment contracts, change an employee's situation from temporary to permanent, notify I.N.E.M. of extensions to contracts, and carry out other legally required processes. When companies submit the communication online to I.N.E.M. they receive an immediate response notifying them of errors. Companies can then correct the errors before confirming the communication. It is mandatory that companies communicate contract data to I.N.E.M.

Human Resources for Spain provides Contrata communication functionality that enables you to track multiple persons' labor contract data and to generate an XML flat file to send to I.N.E.M. This feature combined with the Contrata web service eliminates the paper communication between companies and I.N.E.M. and enables companies to communicate data for multiple persons at once, thus reducing time and costs.

Contrata XML files contain all of the data related to the hiring of employees between two dates for a specific type of contract communication. Human Resources for Spain delivers the templates to create XML files to use for Contrata communications of labor contracts, basic copy, and extensions. The XML file generation process obtains data from the HRMS database and from data that you enter when generating the XML file. Once you generate the XML file you can then upload the file through the Contrata web service.

To use the Contrata communication management functionality you must first review the delivered XML file setup data during implementation to ensure that it complies with your company's requirements. This setup includes defining the XML sets, code tables, nodes, and templates necessary for the XML generation process to gather data and generate the XML file. Human Resources for Spain delivers a large percentage of this setup data to facilitate implementation.

Once you complete the XML setup, you can then use the Create Contrata XML Id ESP component to search for and select the persons for whom you need to report Contrata data, load their data into an XML file template, add additional required data, validate the data, and generate the XML file.

Next you can send your completed XML files to I.N.E.M. through the Contrata web service. Use the XML File Confirmation ESP component to confirm the sending status of communications. The system automatically tracks which persons you have included in communications in order to avoid situations where you report data multiple times for the same person, resulting in unintentional overriding and overlapping of data.

After I.N.E.M. sends your company a response XML file regarding your Contrata communication, you can use the Create Contrata XML Id ESP component to review the XML response file for errors and make necessary changes. Depending on the error and communication status, you can then communicate the correct data either by contact I.N.E.M. or regenerate the XML file communication for persons whose data is in error.

Delivered XML Codes for Contrata Reporting

The Spanish social security administration (I.N.E.M.) delivers tables with a simple structure of code equals value, with each of these tables containing numerous values. Human Resources for Spain delivers the social security tables as XML code tables for Contrata reporting, providing many of the table values as sample data. During implementation, you must review the setup data to ensure that it complies with your company's requirements.

The following table describes the data tables within the XML Code Tables component that relate to the Contrata communication functionality:

<i>XML Code Table</i>	<i>Description</i>	<i>Used By</i>
TELCOLBO	Bonification Groups	Contrata
TEKLEYBO	Bonification Law	Contrata
TDPMUNIC	City Codes	Contrata
TERFIRCB	Clause Signature	Contrata
TEHTPCTO	Contract Codes	Contrata
TERRORES	Contrata Errors	Contrata
TEVACTCL	Council Activity	Contrata
TEUECCLL	Council Codes	Contrata
SPAISXTC	Country	Contrata
STIACATC	Degree	Contrata
THITIACA	Degree (SISPE)	Contrata
TEJINDIS	Disability Types	Contrata
TESCETCO	ET / CO / TE Contracts	Contrata
TBONVFOR	Education Level	Contrata
TETPGMEM	Employment Program	Contrata
SSEXOXC	Gender	Contrata
SACECOTC	Industrial Activity	Contrata
TEIINTER	Interim Reasons	Contrata
STDIDETC	NID Type	Contrata
TAICLAOC	Official Occupation Codes CNO-4	Contrata
SOCUPATC	Official Occupation Codes CNO-8	Contrata
TEQPTIEM	Period	Contrata
TAUCOMAU	Region	Contrata
THYDISLE	Regulations	Contrata
TEYTRELE	Relieve Employee	Contrata

XML Code Table	Description	Used By
TEXTINVE	Research Employee	Contrata
TEWEINVE	Research Employer	Contrata
TFGGRCOT	SS Work Groups	Contrata
SREGCOTC	Scheme	Contrata
SPROVITC	States	Contrata
THPCOLFO	Training Contract Groups	Contrata
TENLEYDE	Unlimited Contract Regulation	Contrata
TEOCOLDE	Unlimited Contract Regulation Groups	Contrata
ONE_TWO	Yes/No Table (1/2)	Contrata and Delta
YESNO	Yes/No Table (S/N)	Contrata and Delta

Delivered XML Nodes for Contrata Reporting

Human Resources for Spain delivers XML file structures for Contrata communication management functionality. You can also define your own XML file structures through this component by creating additional nodes and relating them to each other.

Delivered XML Templates for Contrata Reporting

Human Resources for Spain delivers three different types of communications for Contrata reporting. Use the XML Template Table component to define templates for the types of communication that you use for XML file generation. You can define as many XML templates as necessary to meet your company needs. Human Resources for Spain delivers as system data the following XML templates:

XML Template	Description
Contrat@ - Contracts	Used to communicate new contracts.
Contrat@ - Extensions	Used to communicate extension of a contract.
Contrat@ - Basic Copy	Used to communicate the clauses of a contract.

After you have defined XML templates, you can use the Contrat@ Mapping component to link Contrata contract types with XML root nodes.

Steps to Manage Contrata XML File Generation

Once you have entered all of the data necessary for Contrata reporting, you can use the Create Contrat@ Report ESP component to create the Contrata report in XML file format for reporting to I.N.E.M.

To complete the Contrata XML file generation process:

1. Select the template (type of communication) to use for the XML file on the Create Contrata XML Id ESP - Definition page.
2. Specify report parameter and search for persons to include in the report using the Create Contrata XML Id ESP - Population page.
3. Select from the search results on the Population page, the persons to include in the report.
4. Run the load process on the Load Contrata Data ESP page to load data for the selected persons into the XML file.
5. View and edit the loaded data on the Edit Contrata Data ESP page. (Click the Details link to edit a person's data details for the XML file and enter additional information.)
6. Generate the XML file by specifying parameters and running the print process on the Print Contrata Data ESP page.
7. Preview the generated XML file for an employee on the Generated XML file page.
8. Send the XML file to I.N.E.M through the Contrata web service.
9. Confirm or unconfirm the sending of the XML file and evaluate the I.N.E.M. node status of each person included on the Contrata XML file using the Confirm Contrata XML File ESP page.
10. View any errors on the Contrat@ Error page, and then manually fix the errors in the system either at the source or through the Edit Contrata Data ESP - Details page.
11. Regenerate and resend the Contrata XML file for persons with errors as necessary.
12. Confirm or unconfirm the sending of the XML file through Confirm Contrata XML File ESP page.

The XML file generation process stores a record of the data sent in the communication to track which persons you have already processed. Note that you can include only one type of communication per XML file.

Prerequisites

Before you can use the Contrata communications functionality you must first define Spanish workforce data related to Contrata XML files in the appropriate setup pages. This Spanish workforce data includes XML templates, codes, and nodes.

See Also

[Chapter 11, "\(ESP\) Managing Spanish Reporting," Setting Up XML Files, page 553](#)

Pages Used to Manage Contrata XML File Generation

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Create Contrata XML Id ESP - Definition	CTTA_DEFN_XML1_ESP	Workforce Administration, Workforce Reports, Create Contrata XML Id ESP, Definition	Set up the XML file definition for the Contrata communication.
Create Contrata XML Id ESP - Population	CTTA_CRET_XML2_ESP	Workforce Administration, Workforce Reports, Create Contrata XML Id ESP, Population	Search for and select the employees for whom you need to communicate contract data to I.N.E.M.
Load Contrata Data ESP	XML_RC_ESP	Workforce Administration, Workforce Reports, Load Contrata Data ESP, Load Contrata Data ESP	Load Contrata contract data into the XML file to send to I.N.E.M.
Edit Contrata Data ESP	XML_EDIT_DATA_ESP	Workforce Administration, Workforce Reports, Edit Contrata Data ESP, Edit Contrata Data ESP	Edit data loaded into the Contrata XML file to send to I.N.E.M.
Print Contrata XML File ESP	XML_RC_ESP	Workforce Administration, Workforce Reports, Print Contrata XML File ESP, Print Contrata XML File ESP	Specify the template type and XML file ID, and run the process to generate the XML file to send to I.N.E.M.
Confirm Contrata XML File ESP	XML_CONFIRM_ESP	Workforce Administration, Workforce Reports, Confirm Contrata XML File ESP, Confirm Contrata XML File ESP	Confirm the employee IDs to including in the XML file to send to I.N.E.M.
Read External XML File ESP	XML_RC_READING	Workforce Administration, Workforce Reports, Read External XML File ESP	View and manage I.N.E.M. responses to the Contrata XML files that you submit.
Delete a Contrata XML File ESP	XML_RC_ESP	Workforce Administration, Workforce Reports, Delete a Contrata XML File ESP, Delete a Contrata XML File ESP	Delete a Contrata XML file.

Defining the XML File

Access the Create Contrata XML Id ESP - Definition page (Workforce Administration, Workforce Reports, Create Contrata XML Id ESP, Definition).

Definition	
XML File ID:	CONTRATA
Description:	Contract of May
XML Set:	Contrat@
Template Type:	Contrata - Contracts

Create Contrata XML Id ESP - Definition page

XML File ID	When generating a new XML file, enter an identifier for the XML file generation upon entering the component. You use this identifier to confirm or unconfirm the sending of an XML file on the Confirm Contrata XML File ESP page.
Description	Enter a description for the XML file that you are generating.
Template Type	Select the XML template that you want the XML file generation process to use when generating the XML file. The valid values that you can select depend on the component through which you are generating the XML file. You define XML templates on the XML Template Table page.

Populating the XML File for Contrata Reporting

Access the Create Contrata XML Id ESP - Population page (Workforce Administration, Workforce Reports, Create Contrata XML Id ESP, Population).

Definition
Population

XML File ID: CONTRATA Contract of May Status: XML File Created

XML Set: C01 Contrat@

Temp Type: C01 Contrata - Contracts

Filter Data

From Date: 01/01/1900 To Date: 01/01/2010 Search

Filter By: None

Employee Data

Select All Deselect All

Employee Selection

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

	Employee Id	Name	Effective Date	Contract Type	Node Status	Description
☐	0050	Amalia García Ortiz	2009-05-20	100	Data OK	Contract_100

Create Contrata XML Id ESP - Population page

Status

Shows the status of the communication for the XML file. Possible values are:

- *XML File No Generated:* The XML file has not yet been generated.
- *XML File Created:* The XML file has been generated. The system updates the field to this value when you generate the XML file or when you click the Unconfirm All button on the Confirm Contrata XML File ESP page.
- *XML File Sent and Confirmed:* The XML file has been sent and confirmed as sent. The system updates the field to this value when you click the Confirm All button on the Confirm Contrata XML File ESP page.

This is the same field that appears on the Confirm Contrata XML File ESP page. Upon saving your changes, the system reflects the new value on that page as well.

Filter Data

Use this group box to search for persons who have contract information that you need to report to I.N.E.M. Use the search criteria to narrow your search results.

From Date and To Date Enter the date range to search for persons within that timeframe who require XML file generation for Contrata reporting.

Filter By	Use the filter by option to narrow your search results to a specific social security number (CCC), company, or employee. If you select one of these filter options, the system displays a Filter List grid for you to enter the additional search criteria.
Company and Description	If you select to filter by <i>Company</i> , then select a specific company to search for persons within that company who require XML file generation for Contrata reporting. The system displays the description of the company that you select.
Employee Id and Name	If you select to filter by <i>Employee</i> , then select a specific employee to search for his or her contracts that require XML file generation for Contrata reporting. The system displays the name of the employee that you select.
Company, Description, and Social Security Number	If you select to filter by <i>CCC</i> , then select a specific company and social security number to filter your search results to based on social security number. The system displays the name of the company that you select.
Search	Click this button to search for persons who require XML file generation for Contrata reporting based on your filter criteria.

Employee Data

Use this group box to view the results of your search and select the persons to include in the XML file for Contrata reporting.

Select All	Click this button to select all rows in your search results. Otherwise, select the check box for each person that you want to include in the XML file.
Deselect All	Click this button to deselect the selection check box for all persons in the search results grid.
Employee Id and Name	The system displays the ID and name of the persons that meet your search criteria. Select the check box for persons that you want to include in the XML file.
Effective Date	The system displays the date when the contract type is associated with the employee. You associate contract types with employees through the Contract Type/Clauses page of the Update Contracts component.
Contract Type	The system displays the type of legal contract associated with the employee. You associate contract types with employees through the Contract Type/Clauses page of the Update Contracts component.

Node Status	The system automatically displays the status of data for each employee being reported. Possible values are: • <i>Data OK:</i> The employee's data has been successfully loaded but the XML file has not yet been sent and confirmed. • <i>XML Sent Confirmed:</i> The employee's data has been successfully included in the XML file and there is confirmation that the XML file has been sent. You must use the Confirm Contrata XML File ESP page to update the XML file status to this value. • <i>Required Data:</i> The employee's data has been included in the XML file but there is still data required for the employee before the XML file can be sent. • <i>Not Validated:</i> The employee's data has been loaded in the XML structure but not yet validated. This is the same field that appears on the Confirm Contrata XML File ESP page. Upon saving your changes, the system reflects the new value on that page as well.
Description	The system displays the description of the node that is mapped to the contract type of the employee, as defined on the Contrata Mapping page.
Validate	Note. You must enter all required data and have a Node Status value of Data OK for all of the selected employees before you can generate the XML file. When you validate the required data, the Preview XML button becomes available. Once you have a node status of successful for all of the selected employees and save the page, the XML Generation button becomes available. Click the Validate button to have the system validate that the required data for each person is included in the XML file. The system displays the status of the validation in the Node Status field for each of the selected persons. Note. You must save the page before generating an XML file.
Preview XML	Click this button to access the XML Preview page, where you can preview the XML file for the Delta service or Contrata service before generating the XML file. This button becomes available only after you load data into the XML file.
XML Generation	Click this button to generate the XML file with the contract data for the selected persons. The system executes the XML file generation batch process, which creates the XML file based on the selected template ID. The batch process saves the XML file to the location that you specify in the run parameters. The batch process also updates the Status field to the XML File Created value for the XML file ID. Provided that you have not confirmed the sending of the XML file through the Confirm Contrata XML File ESP page, you can change or add data and rerun the process as many times as necessary. The Status field indicates whether the sending of the XML file is confirmed.

Loading Contrata XML File Data

Access the Load Contrata Data ESP page (Workforce Administration, Workforce Reports, Load Contrata Data ESP, Load Contrata Data ESP).

Load Contrata Data ESP

Run Control ID: aa

[Report Manager](#) [Process Monitor](#) [Run](#)

Additional Data			Customize Find View All  First 1 of 1 Last
Template Type	XML File ID	Description	
Contrata - Contracts	CONTRATA	Contract of May	+ -

Load Contrata Data ESP page

Specify the template type and XML file ID into which you want to load the data that is specified on the Create Contrata XML Id ESP - Population pages for the template type and file ID.

Editing Contrata XML File Data

Access the Edit Contrata Data ESP page (Workforce Administration, Workforce Reports, Edit Contrata Data ESP, Edit Contrata Data ESP).

Edit Contrata Data ESP

XML File ID: CONTRATA

Contract of May

Status: XML File Created

XML Set: C01

Contrat@

Temp Type: C01

Contrata - Contracts

Additional Data						Customize Find View All  First 1 of 1 Last
Employee Id	Name	Effective Date	Node Status	Description	Details	
0050	Amalia García Ortiz	2009-05-20	Data OK	Contract_100	Details	

Edit Contrata Data ESP page

View a list of the data that was loaded into the specified XML file. Click the Details link to view the details that will be reported to I.N.E.M. for that person.

Generating the Contrata XML File

Access the Print Contrata XML File ESP page (Workforce Administration, Workforce Reports, Print Contrata XML File ESP, Print Contrata XML File ESP).

Print Contrata XML File ESP

Run Control ID: aa

[Report Manager](#) [Process Monitor](#)

Additional Data						Customize Find View All First 1 of 1 Last	
	Template Type	XML File ID	Description	File Path	File Name		
1	Contrata - Contracts	CONTRATA	Contract of May	\\GSMAS01\DFS\USERSQF	contrata	+	-

Print Contrata XML File ESP page

Enter the path where you want the process to store the Contrata XML report file, and enter the name that you want to process to give the XML file that it places at that path.

Previewing Generated XML

After you run the process from the Print Contrata XML File ESP page to create the Contrata.xml file, you can go to Process Scheduler and click Details, View Log/Trace to view the XML that was generated for the selected person. Use the template ID that you selected on the Definition page of this component.

Note that to generate the XML file with the correct template, you must select the correct template type and use the appropriate XML file ID.


```

<?xml version="1.0" encoding="ISO-8859-1" ?>
- <CONTRATOS>
- <CONTRATO_100>
- <DATOS_EMPRESA>
- <CIF_NIF_EMPRESA>
  <CIF_NIF>B81473118</CIF_NIF>
</CIF_NIF_EMPRESA>

  <CODIGO_CUENTA_COTIZACION>011128214365546</CODIGO_CUENTA_COTIZACION>
</DATOS_EMPRESA>
- <DATOS_TRABAJADOR>
  <IDENTIFICADORPFISICA>D34567543S</IDENTIFICADORPFISICA>
- <NOMBRE_APELLIDOS>
  <NOMBRE>Amalia</NOMBRE>
  <PRIMER_APELLIDO>García</PRIMER_APELLIDO>
  <SEGUNDO_APELLIDO>Ortiz</SEGUNDO_APELLIDO>
</NOMBRE_APELLIDOS>
  <SEXO>2</SEXO>
  <FECHA_NACIMIENTO>19730101</FECHA_NACIMIENTO>
  <NACIONALIDAD>724</NACIONALIDAD>
  <MUNICIPIO_RESIDENCIA>28079</MUNICIPIO_RESIDENCIA>
  <PAIS_RESIDENCIA>724</PAIS_RESIDENCIA>
  <NUMERO_SEGURIDAD_SOCIAL>282342341283</NUMERO_SEGURIDAD_SOCIAL>
</DATOS_TRABAJADOR>
- <DATOS_GENERALES_CONTRATO>
  <FECHA_INICIO>20090520</FECHA_INICIO>
  <IND_CONVENIO_COLECTIVO>N</IND_CONVENIO_COLECTIVO>
  <NIVEL_FORMATIVO>23</NIVEL_FORMATIVO>
  <IND_DISCAPACIDAD>S</IND_DISCAPACIDAD>
  <CODIGO_OCUPACION>1012</CODIGO_OCUPACION>
  <ID_OFERTA>OFER</ID_OFERTA>
  <CODIGOPROGRAMAEMPLEO>08</CODIGOPROGRAMAEMPLEO>
  <NACIONALIDAD_CT>724</NACIONALIDAD_CT>
  <MUNICIPIO_CT>08002</MUNICIPIO_CT>
  <OTRAS_LEGISLACIONES>001</OTRAS_LEGISLACIONES>
</DATOS_GENERALES_CONTRATO>
- <DATOS_MEDIDAS_FOMENTO>
  <IND_COSTE_DESPIDO>2</IND_COSTE_DESPIDO>
  <CODIGO_COLECTIVO_DESPIDO>05</CODIGO_COLECTIVO_DESPIDO>
</DATOS_MEDIDAS_FOMENTO>
</CONTRATO_100>
</CONTRATOS>

```

Example of a generated Contrata.xml file

See Also

Chapter 11, "(ESP) Managing Spanish Reporting," [Previewing Generated XML](#), page 578

Confirming Contrata XML File Data

Access the Confirm Contrata XML File ESP page (Workforce Administration, Workforce Reports, Confirm Contrata XML File ESP, Confirm Contrata XML File ESP).

Confirm Contrata XML File ESP

XML File ID: CONTRATAContract of May

Temp Type: C01Contrata - ContractsStatus: XML File Created

File Path: \\GSMAAS01\DFS\USERSQR\

File Name: CONTRATA

Employee Data

Confirm AllUnconfirm All

DetailsCustomizeFindView AllFirst1 of 1Last

Empl ID	Effective Date	Contract Number	Node Status
0050	2009-05-20	0001	Required Data

Confirm Contrata XML File ESP page

XML File ID

Upon entering the component, search for the XML file ID for which you want to confirm of unconfirm the sending of the XML file for persons with data in the file. You define XML file IDs when you create XML files for generation.

Status

Shows the status of the communication for the XML file. Possible values are:

- *XML File No Generated*: The XML file has not yet been generated.
- *XML File Created*: The XML file has been generated. The system updates the field to this value when you generate the XML file on the Generation File page or when you click the Unconfirm All button.
- *XML File Sent and Confirmed*: The XML file has been sent and confirmed as sent. The system updates the field to this value when you click the Confirm All button.

This is the same field that appears on the Generation File page. Upon saving your changes, the system reflects the new value on that page as well.

Note. To maintain data integrity between this component and the XML generation component, the system does not retrieve XML files with a communication status of XML File No Generated.

Node Status

The system automatically displays the status of data for each employee being reported. Possible values are:

- *Data OK*: The employee's data has been successfully included in the XML file but the XML file has not yet been sent and confirmed.
- *XML Sent Confirmed*: The employee's data has been successfully included in the XML file and there is confirmation that the XML file has been sent.

For employees in the XML file whose data is already complete and validated, you can confirm or unconfirm the sending of the data. To confirm the sending of the XML file, select the *XML Sent Confirmed* value. To unconfirm the sending of the XML file, select the *Data OK* value. You must then save your changes.

This is the same field that appears on the Generation File page. Upon saving your changes, the system updates the values on that page as well.

Confirm All

Click this button to confirm the sending of the XML file for all employees in the file whose node status indicates that their data is validated and contains all required data.

When you click this button, the system updates the Node Status value from *Data OK* to *XML Sent Confirmed* for all of these employees. The system also updates the Status field value to *XML File Sent and Confirmed*.

After clicking this button, you must then save your changes.

Unconfirm All

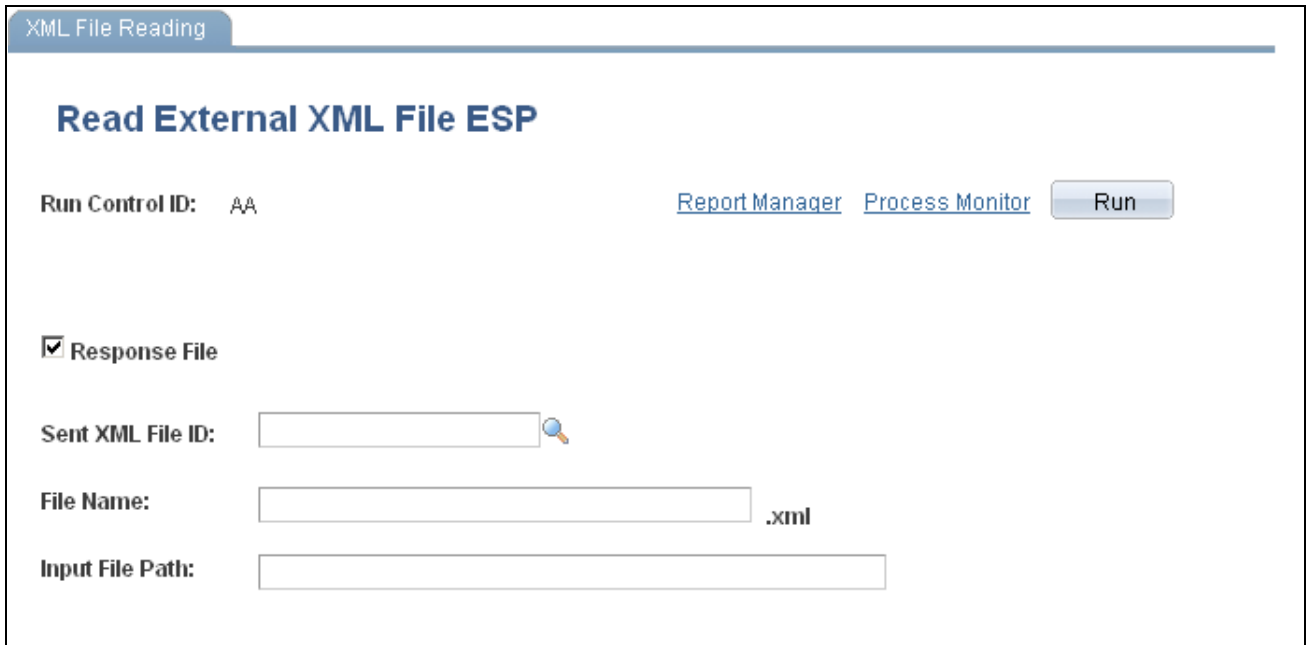
Click this button to unconfirm the sending of the XML file for all employees in the file whose node status indicates that their data is validated and contains all required data.

When you click this button, the system updates the Node Status value from *XML Sent Confirmed* to *Data OK* for all of these employees. The system also updates the Status field value to *XML File Created*.

After clicking this button, you must then save your changes.

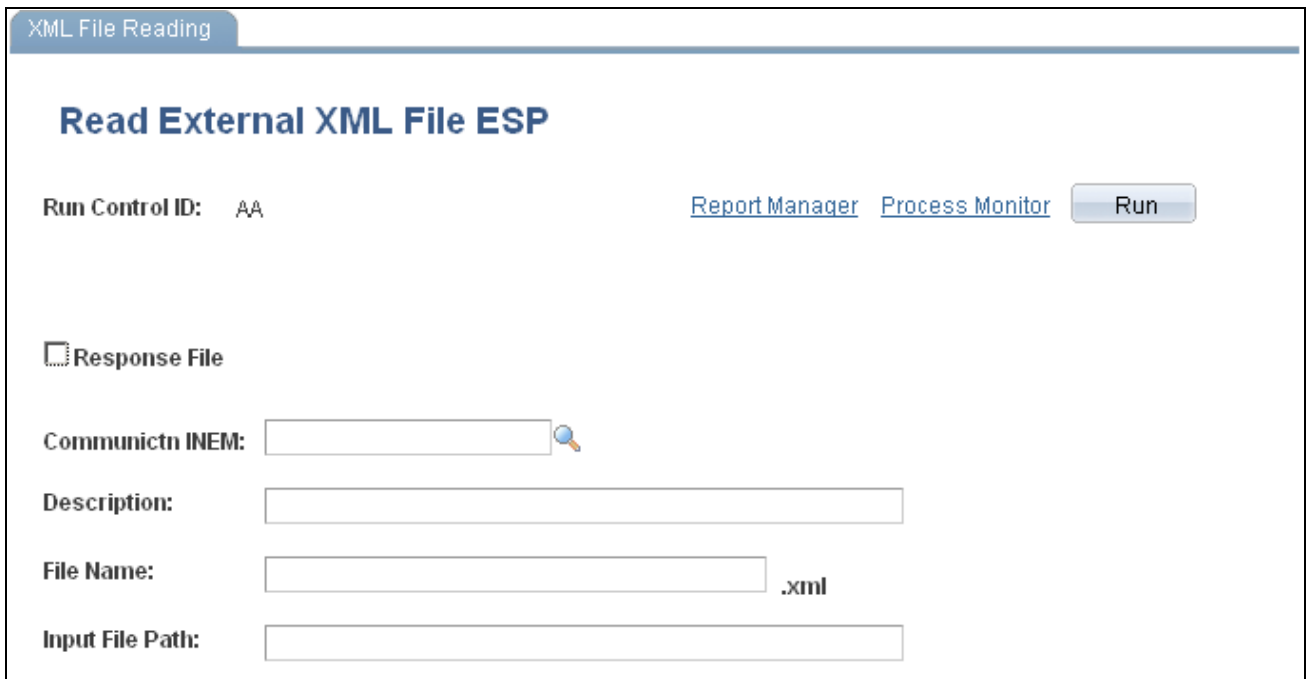
Managing Response Files

Access the Read External XML File ESP page (Workforce Administration, Workforce Reports, Read External XML File ESP).



The screenshot shows the 'Read External XML File ESP' page. At the top, there is a tab labeled 'XML File Reading'. Below the title, there is a 'Run Control ID' field with the value 'AA'. To the right of this field are two links: 'Report Manager' and 'Process Monitor', followed by a 'Run' button. Below these links, there is a checkbox labeled 'Response File' which is checked. Underneath the checkbox, there are four input fields: 'Sent XML File ID:' with a magnifying glass icon, 'File Name:' followed by a text box and '.xml', and 'Input File Path:' followed by a text box.

Read External XML File ESP page, with Response File selected



The screenshot shows the 'Read External XML File ESP' page. At the top, there is a tab labeled 'XML File Reading'. Below the title, there is a 'Run Control ID' field with the value 'AA'. To the right of this field are two links: 'Report Manager' and 'Process Monitor', followed by a 'Run' button. Below these links, there is a checkbox labeled 'Response File' which is deselected. Underneath the checkbox, there are four input fields: 'Communicatn INEM:' with a magnifying glass icon, 'Description:' followed by a text box, 'File Name:' followed by a text box and '.xml', and 'Input File Path:' followed by a text box.

Read External XML File ESP page, with Response File deselected

Fields appear on this page based on whether the Response File check box is selected or deselected.

With Response File Selected

Sent XML File ID	Enter the ID of the XML file that you sent, whose I.N.E.M. response file you want to upload.
File Name	Enter the name of the I.N.E.M. response file that you want to retrieve. Note that the .XML extension is already provided. Do not enter the extension in the field.
File Path	Enter the path to the destination where you want the system to place the uploaded I.N.E.M. response file.

Deleting Contrata XML Files

Access the Delete a Contrata XML File ESP page (Workforce Administration, Workforce Reports, Delete a Contrata XML File ESP, Delete a Contrata XML File ESP).

XML File Deleting

Delete a Contrata XML File ESP

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

Additional Data			Customize Find View All First 1 of 1 Last		
	Template Type	XML File ID	Description		
1	Contrata - Contracts	CONTRATA	Contract of May	+	-

Delete a Contrata XML File ESP page

Specify the template type and XML file ID of the Contrata XML file to delete.

Managing Delta Communications

This section provides an overview Delta (Sistema Delt@) communication management, lists the steps to manage industrial accident information, lists prerequisites, and discusses how to:

- Define the XML file.
- Populate the XML file for Delta reporting.

- Load Delta XML file data.
- Edit Delta XML file data.
- Generate the Delta XML file.
- Preview XML files.
- Confirm Delta XML file data.
- Delete Delta XML files.

Understanding Delta Communication Management

Every company must report to the Work Minister, external insurance companies, and other management entities the details of industrial accidents that occur to employees. Regulations require that companies report these industrial accidents through Delta reports within a given timeframe.

There are three types of Delta accident reports:

- Industrial accident report where the company must send a report that lists all employees with absences due to an industrial accident (PAT).
- Industrial accident report where the company must send a report that lists employees involved in an industrial accident resulting in no absence (RATSB).
- Report that lists employees who have finished the industrial accident absence because of medical discharge or death (RAF).

Human Resources for Spain provides Delta communication functionality that enables you to efficiently communicate to management entities the information about industrial accidents. This functionality helps speed the distribution of information, reduce costs, and simplify communications while guaranteeing the confidentiality of the content of documents.

The basic flow of industrial accident data is as follows:

1. The accident takes place and the person informs the company with or without a sick note.
2. The company records all incident and injury details about the industrial accident in the system.
3. The company generates the appropriate XML file and sends it to the management entities.
4. If errors exist the management entities return their copies to the company.
5. The company corrects the errors and resends copies to the management entities.

Using Human Resources for Spain, you record all data necessary for the Delta accident reports through components in the Human Resources Health and Safety business process. The Health and Safety business process enables you to create and track incidents related to health and safety for employees and non-employees. It also enables you to associate multiple individuals with a single incident. Specifically, use the Incident Details component and the Injury Details component to enter the necessary data for XML file generation. Through the Incident Details component you can enter or update industrial accident data. Through the Injury Details component you can enter the necessary data about people involved in an industrial accident.

Once you have entered all of the data necessary for Delta reporting, you can use the Create Delta XML File Id ESP component and the Create Delt@ RATS Report ESP component to create the Delta report in XML file format for accident reporting to the management entities. Within these two components you can search for employees and incident types matching your filter criteria, select the employees for whom you want to send data to the insurance company, and generate the XML files. Human Resources for Spain provides a unique XML file template for each of the Delta accident reports. The template provides the file structure in XML format.

Use the Confirm/Unconfirm component to track whether you have sent the XML file to the management entity or cancelled the sending of the file. You can track this information by the sending ID that the XML generation process creates for each XML file that you generate.

If you make changes to the report data or the management entities find errors in the report and return the XML file, you can use these same components to correct the errors and resend the XML file.

The Delta communication functionality is integrated with other PeopleSoft applications for integral management of data. In addition, both the Delta communication functionality and the Contrata functionality share components related to data setup, XML file setup, and XML file generation. The Contrata documentation provides further details about these topics.

Delivered XML Codes for Delta Reporting

The Spanish social security administration (I.N.E.M.) delivers tables with a simple structure of code equals value, with each of these tables containing numerous values. Human Resources for Spain delivers the social security tables as XML code tables for Delta reporting, providing many of the table values as sample data. During implementation, you must review the setup data to ensure that it complies with your company's requirements.

The following table describes the data tables within the XML Code Tables component that relate to the Delta communication functionality:

<i>XML Code Table</i>	<i>Description</i>	<i>Used By</i>
DIG	Body Part	Delta
CNT	Contact Types	Delta
INJ	Injury Description	Delta
DEV	Irregular Activity	Delta
TOL	Material Agent	Delta
CNO	Official Occupation Codes CNO-2	Delta
TSK	Physical Activity	Delta
PLC	Place Type	Delta
WRK	Work Type	Delta
ONE_TWO	Yes/No Table (1/2)	Contrata and Delta

<i>XML Code Table</i>	<i>Description</i>	<i>Used By</i>
YESNO	Yes/No Table (S/N)	Contrata and Delta

Delivered XML Nodes for Delta Reporting

Human Resources for Spain delivers XML file structures for Delta communication management functionality. You can also define your own XML file structures through this component by creating additional nodes and relating them to each other.

Delivered XML Templates for Delta Reporting

Human Resources for Spain delivers three different types of communications for Delta reporting. Use the XML Template Table component to define templates for the types of communication that you use for XML file generation. You can define as many XML templates as necessary to meet your company needs. Human Resources for Spain delivers as system data the following XML templates:

<i>XML Template</i>	<i>Description</i>
DELT@ PAT	Used for communication of industrial accident with sick note.
DELT@ RATSB	Used for communication of industrial accident without sick note.
DELT@ RAF	Used for communication of discharge or death.

See Also

Chapter 11, "(ESP) Managing Spanish Reporting," Managing Contrata Communications, page 567

Steps to Manage Industrial Accident Information

This section describes the steps necessary to enter industrial accident data and generate the related XML files for reporting.

To manage industrial accident information:

1. Complete the prerequisite setup for the Delta communication functionality.
2. Set the Delta data Preventive option for a company on the Company Setup page.
3. Enter the insurance company code on the Establishment Address page.

4. Use the Incident Details component to complete these steps:
 - a. Enter the incident number of the accident, incident date, and incident time, and select whether the incident is a recurrence on the Incident Details - Incident page.
 - b. Enter a long description of the incident in the Description text box on the Incident Details - Description page.
 - c. On the Incident Details - Location page enter the location, address, and establishment information where the accident occurred, and, if applicable, select the Car Incident check box to indicate that the incident is a car accident.
 - d. Enter any other data related to the incident on the remaining pages of the component.
5. For an PAT incident, use the Injury Details - Injury component to:
 - a. Access the Injury Details - Injury page and specify for each accident the employee or non-employee involved, the date reported, and the time reported.
 - b. Select the PAT value in the Incident Type Esp field.
 - c. Specify the absence begin date, working hours, and whether the incident is a relapse occurrence.
 - d. Click the Accident with sick note link to access the Detailed PAT Data page, where you must specify PAT data details about the employee, employer, and place of incident.
 - e. Enter an end date on the Injury Details - Injury page so that the PAT becomes a RAF only if the PAT results in a medical discharge or death.
 - f. Click the Medical Discharge or Death link to access the Detailed RAF Data page, where you must define the reason for discharge, the injury grade, and the diagnosis code.
 - g. Move to the Injury Details - Details page and click the Accident with sick note link to access the Detailed Pat Data page, where you can specify further details of the PAT incident.
 - h. Move to the Injury Details - Diagnosis page and click the Accident with sick note link to access the Detailed PAT Data page, where you can specify medical assistance and economic data for the PAT incident.
 - i. Enter any other data related to the injury in the remaining pages of the component.
6. For an RATSB incident, use the Injury Details - Injury component to:
 - a. Access the Injury Details - Injury page and specify for each accident the employee or non-employee involved, the date reported, and the time reported.
 - b. Select the RATSB value in the Incident Type Esp field.
 - c. Move to the Injury Details - Details page and click the Accident without sick note link to access the Detailed RATSB Data page, where you can specify further details of the RATSB incident.
 - d. Enter any other data related to the injury in the remaining pages of the component.

7. Use the Create Delta XML File Id ESP component to:
 - a. Select the template to use for the XML file.
 - b. Specify report parameters and search for persons to include in the report.
 - c. Select from the search results the persons to include in the report.
 - d. Load data for the selected persons into the XML file.
 - e. View a person's data details for the XML file and enter additional information.
 - f. Validate the data for the XML file.
 - g. Preview the XML file.
 - h. Generate the XML file.
8. Send the XML file to the management entity using the Confirm Delta XML File ESP page, or unconfirm the sending of an XML file for persons based on XML file ID.
9. If you make changes or corrections to an XML file that requires you to resend the Delta communication report:
 - a. Go to the Confirm Delta XML File ESP page and change the employee node status value from *XML Sent Confirmed* to *Data OK*.
 - b. Use the Create Delta XML File Id ESP component to regenerate the modified XML file.

Note. For the system to include a person in XML file reports that the Delta service generates, the person must work for a company where you have specified the Delta data option on the Company Setup page.

See Also

Chapter 3, "Setting Up Country-Specific Tables," Entering Social Security Company Information, page 140

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up Organization Foundation Tables," Defining Establishments

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Monitor Health and Safety, "Creating and Tracking Incidents," Entering Health and Safety Incident Details

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Monitor Health and Safety, "Creating and Tracking Incidents," Entering Injury Details

Prerequisites

Before you can use the Delta communications functionality first you must define Spanish workforce data related to Delta accident report XML files in the appropriate setup pages. This Spanish workforce data includes XML templates, codes, and nodes.

See Also

Chapter 11, "(ESP) Managing Spanish Reporting," Setting Up XML Files, page 553

Pages Used to Manage Delta Communications

Page Name	Definition Name	Navigation	Usage
Company Setup	SOCS_SETUP_ESP	Set up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Social Security Company Setup, Company Setup	Enter specific company information, including data needed for social security purposes.
Establishment Address	ESTAB_TBL1_GBL	Set Up HRMS, Foundation Tables, Organization, Establishment, Establishment Address	Create an information profile for each of your business establishments: Identify the establishment, indicate its regulatory region, and enter the address.
Incident Details - Incident	HS_INCIDENT	Workforce Monitoring, Health and Safety, Obtain Incident Information, Incident Details, Incident	Add a new incident or update an existing incident. Be sure to enter the incident number of the accident, incident date, and incident time, and select whether the incident is a recurrence.
Incident Details - Description	HS_INC_DESCRIPTION	Workforce Monitoring, Health and Safety, Obtain Incident Information, Incident Details, Description	Describe the health and safety incident and record related data. Be sure to enter a long description of the incident.
Incident Details - Location	HS_INC_LOCATION	Workforce Monitoring, Health and Safety, Obtain Incident Information, Incident Details, Location	Identify the location where the incident occurred and specify whether the incident was a car accident.
Injury Details - Injury	HS_INJ_NOTIFY	Workforce Monitoring, Health and Safety, Obtain Incident Information, Injury Details, Injury	Enter information about employees and non-employees who have work-related injuries or illnesses.
Detailed PAT Data	HS_PAT1_ESP_SEC	Click the Accident with sick note link on the Injury Details - Injury page.	Enter details about the employee, employer, and place of accident for the PAT incident.

Page Name	Definition Name	Navigation	Usage
Detailed RAF Data	HS_RAF1_ESP_SEC	Click the Medical Discharge or Death link on the Injury Details - Injury page.	Enter the reason for discharge, the injury grade, and the diagnosis code for the RAF incident.
Injury Details - Details	HS_INJ_DETAIL	Workforce Monitoring, Health and Safety, Obtain Incident Information, Injury Details, Details	Provide details of the injury or illness that is suffered by each person who is involved in the incident.
Detailed PAT Data	HS_PAT2_ESP_SEC	Click the Accident with sick note link on the Injury Details - Details page.	Enter detailed information about the accident that caused the injury for PAT reporting.
Detailed RATSB Data	HS_RATSB_ESP_SEC	Click the Accident without sick note link on the Injury Details - Details page.	Enter detailed data for RATSB reporting.
Injury Details - Diagnoses	HS_INJ_DIAGNOSIS	Workforce Monitoring, Health and Safety, Obtain Incident Information, Injury Details, Diagnoses	Record details about the physician, hospital or clinic, and the medical diagnoses that are involved with the injured and ill employees.
Detailed PAT Data	HS_PAT3_ESP_SEC	Click the Accident with sick note link on the Injury Details - Diagnoses page.	Specify medical assistance and economic data for PAT incidents.
Create Delta XML File Id ESP - Definition	DLT_DEFN_XML1_ESP	Workforce Monitoring, Health and Safety, Reports, Create Delta XML File Id ESP, Definition	Set up the XML file definition for the Delta communication for PAT, RAF, or RATSB reporting.
Create Delta XML File Id ESP - Population	DLT_CREATE_XML_ESP	Workforce Monitoring, Health and Safety, Reports, Create Delta XML File Id ESP, Population	Search for and select the employees for whom you need to communicate PAT or RAF (industrial accidents with absence) or RATSB (industrial accidents without absence), to include them in the XML file that you must send to the insurance companies.
Load Delta Data ESP	XML_RC_ESP	Workforce Administration, Workforce Reports, Load Delta Data ESP, Load Delta Data ESP	Load Delta industrial accidents data into the XML file to send to the insurance companies.
Edit Delta Data ESP	XML_EDIT_DATA_ESP	Workforce Administration, Workforce Reports, Edit Delta Data ESP, Edit Delta Data ESP	Edit data loaded into the Delta XML file to send to the insurance companies.

Page Name	Definition Name	Navigation	Usage
Print Delta XML File ESP	XML_RC_ESP	Workforce Administration, Workforce Reports, Print Delta XML File ESP, Print Delta XML File ESP	Specify the template type and XML file ID, and run the process to generate the XML file to send to the insurance companies.
Confirm Delta XML File ESP	XML_CONFIRM_ESP	Workforce Administration, Workforce Reports, Confirm Delta XML File ESP, Confirm Delta XML File ESP	Confirm the employee IDs to including in the XML file to send to the insurance companies.
Delete a Delta XML File ESP	XML_RC_ESP	Workforce Administration, Workforce Reports, Delete a Delta XML File ESP, Delete a Delta XML File ESP	Delete a Delta XML file.

Defining the XML File

Access the Create Delta XML File Id ESP - Definition page (Workforce Monitoring, Health and Safety, Reports, Create Delta XML Id ESP, Definition).

Definition	Population
XML File ID:	RATSB200905
*Description:	RATSB 2009 May
XML Set:	Delt@ XML Set
*Template Type:	DELT@ RATSB

Create Delta XML File Id ESP - Definition page

XML File ID

When generating a new XML file, enter an identifier for the XML file generation upon entering the component. You use this identifier to confirm or unconfirm the sending of an XML file on the Confirm Delta XML File ESP page.

Description

Enter a description of the XML file that you are generating.

Template Type

Select the XML template that you want the XML file generation process to use when generating the XML file. The valid values that you can select depend on the component through which you are generating the XML file. You define XML templates on the XML Template Table page.

Valid options for Delta reporting are: DELT@ PAT, DELT@RAF, and DELT@RATSB.

Generating the XML File for Delta Reporting

Access the Create Delta XML File Id ESP - Population page (Workforce Monitoring, Health and Safety, Reports, Create Delta XML File Id ESP, Population).

Definition
Population

XML File ID: RATSB200905 RATSB 2009 May Status: XML File Created
XML Set: Delt@ XML Set
XML Template: DELT@ RATSB

Filter Data

Month: Year:
Company: Business Institute - Spain
Social Security Number: GBI - Madrid

Employee Data

Employee Selection
Customize | Find | View All | First 1 of 1 Last

	Company	Employee Id	Name	Incident Date	Node Status	Description
☐	KE1	KEG003	Mariana Perez Trabado	2009-03-20	Data OK	Eventful Person

Create Delta XML File Id ESP - Population page

Status	Shows the status of the communication for the XML file. Possible values are: • <i>XML File No Generated:</i> The XML file has not yet been generated. • <i>XML File Created:</i> The XML file has been generated. The system updates the field to this value when you generate the XML file or when you click the Confirm All button on the Confirm Delta XML File ESP page. • <i>XML File Sent and Confirmed:</i> The XML file has been sent and confirmed as sent. The system updates the field to this value when you click the Unconfirm All button on the Confirm Delta XML File ESP page. This is the same field that appears on the Confirm Delta XML File ESP page. Upon saving your changes, the system reflects the new value on that page as well.

Filter Data (for PAT or RAF)

Use this group box to search for persons who have been involved in an accident who need PAT/RAF Delta reports sent to management entities. Use the search criteria to narrow your search results.

From Date and To Date	Enter a date range to search for persons within that time frame who require XML file generation for Delta accident reporting.
Filter By	Use the filter by option to narrow your search results to a specific company, employee, or social security number. If you select one of these filter options, the system displays a grid for you to enter the additional search criteria.
Company and Description	If filtering by <i>Company</i> , then select a specific company to search for persons within that company who require XML file generation for Delta accident reporting. The system displays the description of the company that you select.
Employee Id and Description	If filtering by <i>Employee</i> , then select a specific employee to search for his or her accidents that require XML file generation for Delta accident reporting. The system displays the name of the employee that you select.
Company, Description, and Social Security Number	If filtering by <i>CCC</i> , then select a specific company and social security number to use to filter your search results. The system displays the name of the company that you select.
Search	Click this button to search for persons who require XML file generation for Delta accident reporting based on your filter criteria.

Filter Data (for RATSB)

Use this group box to search for persons who have been involved in an accident who need RATSB Delta reports sent to management entities. Use the search criteria to narrow your search results.

Month	Select the month for which you want to search for persons who require XML file generation for Delta accident reporting.

Year	Select the year in which you want to search for persons who require XML file generation for Delta accident reporting.
Company	Select the company in which you want to search for persons who require XML file generation for Delta accident reporting.
Social Security Number	Select the social security number of the person who requires XML file generation for Delta accident reporting.
Search	Click this button to search for persons who require XML file generation for Delta accident reporting based on your filter criteria.

Employee Data

Use this group box to view the results of your search and select the persons to include in the XML file for Delta reporting.

Select All	Click this button to select all rows in your search results. Otherwise, select the check box for each person that you want to include in the XML file.
Deselect All	Click this button to deselect the selection check box for all persons in the search results grid.
Employee IDandName	The system displays the ID and name of the persons that meet your search criteria. For PAT/RAF incidents, select the check box for the persons that you want to include in the XML file.
Incident Date	The system display the date of each incident, as defined on the Incident Details page.
Node Status	The system automatically displays the status of data for each employee being reported. Possible values are: • <i>Data OK:</i> The employee's data has been successfully included in the XML file but the XML file has not yet been sent and confirmed. • <i>XML Sent Confirmed:</i> The employee's data has been successfully included in the XML file and there is confirmation that the XML file has been sent. You must use the Confirm Delta XML File ESP page to update the XML file status to this value. • <i>Required Data:</i> The employee's data has been included in the XML file but there is still data required for the employee before the XML file can be sent. • <i>Not Validated:</i> The employee's data has been included in the XL file but not yet validated. This is the same field that appears on the Confirm Delta XML File ESP page. Upon saving your changes, the system reflects the new value on that page as well.

Validate

Click this button to have the system validate the existence of all of the required data for each person included in the XML file. The system displays the status of the validation in the Node Status field for each of the selected persons.

You must enter all required data and have a Node Status value of *Data OK* for all of the selected employees before you can generate the XML file. When you validate the required data, the Preview XML button becomes available. Once you have a node status of successful for all of the selected employees and save the page, the XML Generation button become available.

Note. You must save the page before generating an XML file.

Preview XML

Click this button to access the XML Preview page, where you can preview the XML file for the Delta service or Contrata service before generating the XML file. This button becomes available only after you load data into the XML file.

XML Generation

Click this button to generate the XML file for the selected persons. The system executes the XML file generation batch process, which creates the XML file based on the selected template ID. The batch process saves the XML file to the location that you specify in the run parameters. The batch process also updates the Status value and the XML File Created value for the XML file ID.

Provided that you have not confirmed the sending of the XML file on the Confirm Delta XML File ESP page, you can change or add data and rerun the process as many times as necessary. The Status field shows whether the sending of the XML file is confirmed.

Loading Delta XML File Data

Access the Load Delta Data ESP page (Workforce Administration, Workforce Reports, Load Delta Data ESP, Load Delta Data ESP).

Load Delta Data ESP

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

Additional Data		Customize Find View All [grid icon] First 1 of 1 Last	
Template Type	XML File ID	Description	
1 DELT@ RATS@	RATSB200905	RATSB 2009 May	+ -

Load Delta Data ESP

Specify the template type and XML file ID into which you want to load the data that is specified on the Create Delta XML Id ESP - Population pages for the template type and file ID.

Editing Delta XML File Data

Access the Edit Delta Data ESP page (Workforce Administration, Workforce Reports, Edit Delta Data ESP, Edit Delta Data ESP).

Edit Delta Data ESP

XML File ID: RATS200905 RATS2009 May **Status:** XML File Created

XML Set: D01 Delt@ XML Set

Temp Type: D02 DELT@ RATS2009

Additional Data					
Company	Employee Id	Name	Node Status	Description	Details
KE1	KEG003	Mariana Perez Trabado	Data OK	Eventful Person	Details

Edit Delta Data ESP page

View a list of the data that was loaded into the specified XML file. Click the Details link to view the details that will be reported to I.N.E.M. for that person.

Generating the Delta XML File

Access the Print Delta XML File ESP page (Workforce Administration, Workforce Reports, Print Delta XML File ESP, Print Delta XML File ESP).

Print Delta XML File ESP

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

Additional Data					
	Template Type	XML File ID	Description	File Path	File Name
1	DELT@ RATS2009	RATS200905	RATS2009 May	\\GSMAS01\DFS\USERSQF	DELTA

Print Delta XML File ESP page

Enter the path where you want the process to store the Delta XML report file, and enter the name that you want to process to give the XML file that it places at that path.

Previewing Generated XML

After you run the process from the Print Delta XML File ESP page to create the Delta.xml file, you can go to Process Scheduler and click Details, View Log/Trace to find the file and preview the XML that was generated for the selected person. Use the template ID that you selected on the Definition page of this component.

Note that to generate the XML file with the correct template, you must select the correct template and use the appropriate report component. For example, to generate an XML file for a PAT report, you must use the Create Delt@ PAT/RAF Report ESP component and select the Delt@ PAT template.

Confirming Delta XML File Data

Access the Confirm Delta XML File ESP page (Workforce Administration, Workforce Reports, Confirm Delta XML File ESP, Confirm Delta XML File ESP).

Confirm Delta XML File ESP

XML File ID: RATS200905 RATS2 2009 May

Temp Type: D02 DELT@ RATS2 Status: XML File Created

File Path: \\GSMAS01\DFS\USERSQR\

File Name: DELTA

Employee Data

Details			
Company	Empl ID	Incident Date	Node Status
KE1	KEG003	2009-03-20	Data OK

Confirm Delta XML File ESP

XML File ID

Upon entering the component, search for the XML file ID for which you want to confirm or unconfirm the sending of the XML file for persons with data in the file. You define XML file IDs when you create XML files for generation.

Status

Shows the status of the communication for the XML file. Possible values are:

- *XML File No Generated*: The XML file has not yet been generated.
- *XML File Created*: The XML file has been generated. The system updates the field to this value when you generate the XML file on the Generation File page or when you click the Unconfirm All button.
- *XML File Sent and Confirmed*: The XML file has been sent and confirmed as sent. The system updates the field to this value when you click the Confirm All button.

This is the same field that appears on the Generation File page. Upon saving your changes, the system reflects the new value on that page as well.

Note. To maintain data integrity between this component and the XML generation component, the system does not retrieve XML files with a communication status of *XML File No Generated*.

Node Status

The system automatically displays the status of data for each employee being reported.

Possible values are:

- *Data OK*: The employee's data has been successfully included in the XML file but the XML file has not yet been sent and confirmed.
- *XML Sent Confirmed*: The employee's data has been successfully included in the XML file and there is confirmation that the XML file has been sent.

For employees in the XML file whose data is already complete and validated, you can confirm or unconfirm the sending of the data. To confirm the sending of the XML file, select the *XML Sent Confirmed* value. To unconfirm the sending of the XML file, select the *Data OK* value. You must then save your changes.

This is the same field that appears on the Generation File page. Upon saving your changes, the system updates the values on that page as well.

Confirm All

Click this button to confirm the sending of the XML file for all employees in the file whose node status indicates that their data is validated and contains all required data.

When you click this button, the system updates the Node Status value from *Data OK* to *XML Sent Confirmed* for all of these employees. The system also updates the Status field value to *XML File Sent and Confirmed*.

After clicking this button, you must then save your changes.

Unconfirm All

Click this button to unconfirm the sending of the XML file for all employees in the file whose node status indicates that their data is validated and contains all required data.

When you click this button, the system updates the Node Status value from *XML Sent Confirmed* to *Data OK* for all of these employees. The system also updates the Status field value to *XML File Created*.

After clicking this button, you must then save your changes.

Deleting Delta XML Files

Access the e (Workforce Administration, Workforce Reports, Delete a Delta XML File ESP, Delete a Delta XML File ESP).

XML File Deleting

Delete a Delta XML File ESP

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

Additional Data			Customize	Find	View All	First	1 of 1	Last
	Template Type	XML File ID	Description					
1	DELT@ RATS B	RATSB200905	RATSB 2009 May					

Delete a Delta XML File ESP page

Specify the template type and XML file ID of the Delta XML file to delete.

Printing Contracts

Printing contract functionality enables generating PDF reports corresponding to the contracts between the company and the employee.

Utilizing the flexible setup delivered to generate XML files to define the data structure of the PDF reports, the system uses the same pages to define the data of these reports by defining specific nodes.

This section provides overviews of contract printing, contract printing XML setup, and contract generation, and discusses how to:

- Map contract types to XML nodes.
- Create PDF form definitions.
- Define PDF form details.
- Map PDF form fields to XML nodes.
- Generate and print contracts for employees.
- Review and edit contract data.
- Print contracts in batch.

Understanding Contract Printing

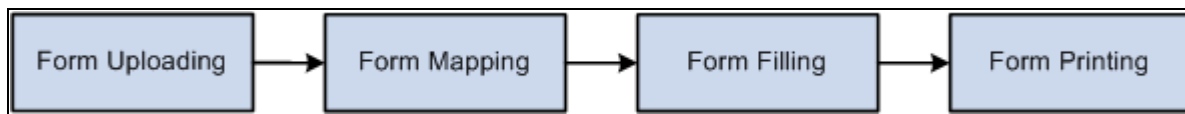
The Spanish government delivers a complete set of contract forms in PDF format that employers can download from the government website. The employer must complete the appropriate forms for new hires and submit them to the government after the newly hired employees sign the forms.

To assist employers in the completion of these contract forms, Human Resources for Spain provides Contract Printing functionality to:

1. Load the forms into the system.
2. Map data to the form fields.
3. Enter data into the fields to complete the forms.
4. Print the forms.

Employers can then have employees sign the printed forms and return them to the human resources administrator, who can then submit the completed forms to the government.

The following diagram shows the four basic tasks involved in Contract Printing functionality:



Four tasks for contract printing

System administrators must perform form uploading and form mapping tasks whenever there are new contract types that require contract-printing capability. Human Resources administrators perform the form filling and form printing tasks as necessary.

To set up the system for the printing of new contracts, system administrators must:

1. Define the XML nodes that relate to the contract form, including the node values and whether the nodes are mandatory, through the XML Node Table component.

They can also create empty nodes to enable Human Resources administrators to edit the node data online before printing.

2. Map the form-level XML nodes to contract types through the Contract Printing Mapping component.
3. Create new PDF Form definitions through the PDF Form Definition component to:
 - a. Upload PDF form files into the system.
 - b. Map each form field to Human Resources data by assigning the field-level XML nodes to PDF form fields.
 - c. Test PDF form fields.
 - d. View the PDF form filled with XML tag names in a browser to ensure accuracy and completeness.

To generate and print contracts, Human Resources administrators must:

1. Select the employees that need the printed contracts through the Contract Printing ESP component.
2. Generate the contract data for the selected population through the Contract Printing ESP component.

At runtime the XML generation process resolves the mapping of the form fields to the XML nodes, retrieving the values for the correct form fields according to the XML node setup and mapping.

3. Review the contract data, complete any missing data, validate the data, and view the form through the same Contract Printing ESP component.

The system uses the PDF Form process to read the form data and fill it into the appropriate form fields for viewing.

4. Print a single form through the Contract Printing ESP component or a batch of forms for a selected group of employees through the Print Contracts ESP component.

They can then give the printed form to the employee for signature.

The system uses the PDF Form process to read the form data and fill it into the appropriate form fields for printing.

Understanding Contract Printing XML Setup

Human Resources for Spain uses the XML generation process to retrieve the Human Resources data needed for completing the forms to print contracts, delivering all of the setup necessary to print contracts for unlimited contract types. System administrators can define additional data for the perform contract printing for other contract types.

Contract Printing XML Setup Structure

The setup for contract printing is based on:

- An XML set.

Human Resources for Spain delivers the XML set *P01* for use with all contract printing.

To maintain XML set definitions, use the XML Set Table component.

- XML nodes.

XML nodes for contract printing are always keyed by the XML set for contract printing. Human Resources for Spain delivers the XML nodes for printing unlimited contracts.

Specifically, Human Resources for Spain delivers the *PE-170* XML node for printing unlimited contracts and unlimited full-time contracts and the *PE-172* XML node for printing transformation to unlimited contracts. These nodes contain children nodes that correspond to each of the fields on the contract, and themselves are children nodes to the *P0 01* contract-printing root node.

Human Resources for Spain also delivers the children nodes for *PE-170* and *PE-172* contracts.

System administrators can maintain the delivered nodes and also define additional nodes for other contract types. To define nodes that comprise the XML file structure for contract printing of specific contract types, use the XML Node Table component.

- An XML template.

The XML template for contract printing is keyed by the XML set for contract printing. Human Resources for Spain delivers the XML template for use with all contract printing. Human Resources for Spain delivers the XML template *P01* for use with all contract printing.

To define templates for use during XML file generation, use the XML Template Table component.

- Contract print mapping.

Contract print mapping is the means of associating a contract type with XML templates and XML nodes. When you access the Contract Printing Mapping page the system automatically opens it for the delivered for the contract printing XML template. Use the page to link selected contract types to specific contract-level XML nodes. You are thus assigning a specific XML format to each contract type. You must assign a specific XML node to each contract type because each contract type could report different information. Human Resources for Spain delivers contract print mapping for unlimited contracts.

To map contract types to XML nodes for the contract-printing template, use the Contract Printing Mapping component.

Steps to Set Up New Contract Types for Contract Printing

To set up new contract types for contract printing, system administrators must:

- 1. Define one node for each piece of contract data that the system needs to retrieve from the Human Resources tables.
- 2. Create one contract-level node for each contract type, grouping the nodes for the contract data retrieval as children to this node.
- 3. Add the contract-level node as a child node to root node P0 01 because the XML generation process uses this root node for all contract types when retrieving data for contract printing.
- 4. Map each contract-level node to the appropriate contract type on the Contract Printing Mapping page.

See Also

Chapter 11, "(ESP) Managing Spanish Reporting," Setting Up XML Files, page 553

Understanding Contract Generation

Human Resources administrators can use the Contract Printing ESP component to generate, review, edit, and validate contract data.

To create contracts:

1. Access the Contract Printing page for a specific Contract Printing Run ID.
2. Enter criteria to search employees for whom you want to generate contracts.
3. Click the Search button to retrieve the applicable employees.

The system displays the search results in the Employee Data grid.

4. Select from the listed employees the ones for whom you want to generate contract data.
5. Click the Generate Data button to launch the XML Application Engine process that retrieves contract data for the selected employees.

The system displays a message informing that you have successfully launched a batch process to generate the contract data for the selected employees. Make note of the process instance.

6. To view the status of the batch process in PeopleTools Process Scheduler, click the Yes button.

The system launches a new browser window and displays the Process List page of the Process Monitor component. Verify that for your process instance the Run Status equals *Success*.

Or, to simply return to the Contract Printing Data page, click the No button.

7. Click the Edit Data button on the Contract Printing page for a specific employee to access the Contract Printing Data page, where you can review the generated contract data and enter missing data into the contract fields.
8. Click OK to return to the Contract Printing page.
9. Click the Print button on the Contract Printing page to have the PDF Form engine fill data into the PDF Form fields and print a PDF file of the contract.

The system immediately launches another window to display the contract as a PDF file.

Note. To print contracts for the entire population, use the Print Contracts ESP component.

See Also

Chapter 11, "(ESP) Managing Spanish Reporting," Running the Batch Contract Printing Process, page 616

Pages Used To Print Contracts

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Contract Printing Mapping	CTPR_MAPPING_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Contract Printing Mapping, Contract Printing Mapping	Map contract types to XML nodes for the contract-printing template.
PDF Form Definition	FM_DEF_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, PDF Form Definition, PDF Form Definition	Attach PDF versions of contracts for each language to store these forms in the system for use during contract printing. Add, delete, or view forms as necessary.

Page Name	Definition Name	Navigation	Usage
Form Details	FM_FORM_ESP	Click the Details button on the PDF Form Definition page.	Set up the interaction of the PDF version of the contract form with the database.
Node Selection	FM_FORM_ESP	Click the Select XML Node button on the PDF Form Definition page.	Map PDF form fields to a specific XML node within the specified root node.
Contract Printing ESP	CTPR_CRET_XML2_ESP	Workforce Administration, Workforce Reports, Contract Printing ESP, Contract Printing ESP	Generate contract data into XML nodes and print individual contracts.
Contract Printing Data	CTPR_XML_LVL2_ESP	Workforce Administration, Workforce Reports, Contract Printing ESP, Contract Printing Click the Edit Data link.	Review and edit, through the XML nodes, the contract data that the system retrieves for a specific contract. Complete all required XML nodes and click OK to automatically validate the contract data.
Print Contracts ESP	CTPR_RC_ESP	Workforce Administration, Workforce Reports, Print Contracts ESP, Print Contracts ESP	Print contracts in batch for employees that are grouped within a specified Contract Printing Run ID.

Mapping Contract Types to XML Nodes

Access the Contract Printing Mapping page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Contract Printing Mapping, Contract Printing Mapping).

Contract Printing Mapping

Template Type: P01 Contract Printing Template

Mapped Contracts							Customize	Find	First	1-2 of 2	Last
	Set ID	Contract Type	Description	*Node Id	Description	Set As Default					
1	ESP	001	Unlimited Contract	PE-170	PE-170	☒					
2	ESP	100	Unlimited Full Time	PE-170	PE-170	☐					

Contract Printing Mapping page

Human Resources for Spain delivers contract printing mapping for unlimited contracts.

- Template ID

You can access this page for templates that you have already defined. Define templates on the XML Template page.
- SetID

Select the setID of the contract type. The system selects *ESP* by default.
- Contract Type and Description

Select the contract type for which you want to specify the starting node. The system prompts you to select from contract types that are defined for the selected setID.

The system displays the description of the selected contract type.
- Node ID andDescription

Select the contract-printing node to which you want to map the specified contract type. By associating this node to each contract type, you are defining an XML structure that contains the data structure for the contract type. You can report each contract type with a different XML file format and structure.

The system displays the description of the selected node.

Creating PDF Form Definitions

Access the PDF Form Definition page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, PDF Form Definition, PDF Form Definition).

PDF Form Definition

Form ID: PE-170

Form Definition

*Effective Date: 01/01/1980

*Status: Active

*Description: Unlimited contract

Comment: Unlimited contract

Details

	*Language Code	Default Language	Attached File	Delete	View	Details		
1	Spanish	☒	PE-170_mod.pdf	Delete	View	Details	+	-

PDF Form Definition page

- Form ID

The ID of the PDF form definition.

Effective Date	Enter the date that the PDF form definition becomes valid and its effective status, either <i>Active</i> or <i>Inactive</i> .
Description	Enter a description of the PDF form definition.
Comment	Enter any additional comments about the PDF form definition or the contract form that it represents.
Language Code	Select the language for the PDF form that you are attaching. If you have the same contract form in multiple languages, you must specify a row for and attach a form for each language.
Default Language	Select this check box for a row to indicate that the system should use the corresponding language whenever there are contract forms missing for a specific language. You must select a default language.
Attached File	The system displays the file name of the attached contract form.
Add	Click this button to attach the PDF file of the contract form to upload the form into the system. If you have the same contract form in multiple languages, you must specify a row for and attach a form for each language.
Delete	Click this button to remove the attached form from the PDF form definition.
View	Click this button to access the view the attached PDF form file. The system launches another window to display the form.
Details	Click this button to access the Form Details page, where you can define the fields and processing details for the attached PDF form.

Defining PDF Form Details

Access the Form Details page (click the Details button on the PDF Form Definition page).

Pdf Form Details ESP

Form Details

Form ID:

PE-170

Effective Date:

01/01/1980

Language Code:

Spanish

Attached File:

PE-170_mod.pdf

Root Node:

P0 01

Contract Printing Root Node

Tag Node:

CNTRCT_PRNT

Refresh

Test Fields

&Intercenter Works Council Function:

Customize | Find | View 100 | | | First 1-4 of 106 Last

Node Mapping

Field Processing

Field Nbr.	Field Name	Field Type	Description	Select XML Node
1	cif	Text	Company CIF/NIF/NIE	Select X
2	nomrepr	Text	Company Responsible Name	Select X
3	dnirep	Text	Company Responsible NID	Select X
4	cargorep	Text	Company Responsible Role	Select X

OK

Cancel

Form Details page (Node Mapping tab)

Pdf Form Details ESP

Form Details

Form ID: PE-170

Effective Date: 01/01/1980

Language Code: Spanish

Attached File: PE-170_mod.pdf

Root Node: Contract Printing Root Node

Tag Node: CNTRCT_PRNT

&Intercenter Works Council Function: Customize | Find | View 100 | First 1-4 of 106 Last

Field Nbr.	Field Name	Root Package ID	Qualified Package/Class Path	Application Class ID
1	cif	CTPR_ESP	PE170	Clause_2
2	nomrepr			
3	dnirep			
4	cargorep			

Form Details page (Field Processing tab)

Root Node

Select the root XML node to use for mapping the PDF form fields to specific XML nodes within the root node. When printing contracts, the system uses this root node to complete the fields of the PDF according to the mapping that you define. Human Resources for Spain delivers the *P0 01* root node for contract printing.

Refresh

Click this button to refresh the list of PDF form fields that the system displays in the Field List grid. The system reads the attached PDF form and displays all of its fields in the grid.

Test Fields

Click this button to view a copy of the form in which each field on the form displays the technical Field Name value. System administrators can use this feature to locate the form field name on the PDF form.

Field List - Node Mapping Tab

Use the fields on this tab to view a list of the fields that appear on the attached PDF form and to map each of these fields to an XML node.

Field Nbr. (field number) The ID associated with the PDF form field, as determined by Adobe Acrobat specifications.

Field Name	The name of the field as it appears on the PDF form.
Field Type	The type of PDF form field: <i>Text</i> , <i>Checkbox</i> , or <i>Button</i> .
Description	The system displays a description of the node that you have mapped to the PDF form field through the Node Selection page. If you have not yet mapped the PDF form field to an XML node, this field is blank.
Select XML Node	Click this button to access the Node Selection page, where you can map a node to the PDF form field.

Field List - Field Processing Tab

Due to their complexity certain PDF form fields require formatting. Use the fields on this tab to link application classes to complex PDF form fields. The application classes perform this required formatting. The PDF Form engine executes all application classes of this type at runtime to format the data that the system retrieves from the XML nodes.

Root Package ID	Select the application class package that contains the application class for the formatting of the PDF form field.
Qualified Package/Class Path	Select the application class path that you want to use for the formatting of the PDF form field.
Application Class ID	Select the application class that you want to use for the formatting of the PDF form field. The application class must exist in the root package that you specify.

Mapping PDF Form Fields to XML Nodes

Access the Node Selection page (click the Select XML Node button on the PDF Form Definition page).

Pdf Form Details ESP

Node Selection

XML Path:

Contract Printing ESP			Customize Find View All First 1 of 1 Last
	Node Id	Tag Node	Description
☒			

Node Selection page

XML Path

The system displays the path of the currently selected XML node as it appears within the context of XML tags. When selecting an XML node for the first time, the system displays the children nodes of the root node specified on the Form Details page.

Go back to Parent Node Click this button to remove the last child-level XML node from the XML Path display box. The system repopulates the Child Nodes grid with the child nodes of the parent node.

Contract Printing

Node ID, Tag Node, and Description If applicable, the system displays the XML node ID, tag, and description for each child node of the lowest-level node that appears in the XML Path display box.

Select the XML node to child you want to map the PDF form field.

Add Node to Path

Click this button to add the selected child-level XML node to the XML Path display box. The system repopulates the Child Nodes grid with the child nodes of the selected node.

Note. The system requires the full path to the XML node because the same node can appear in multiple path locations.

Generating and Printing Contracts for Employees

Access the Contract Printing ESP page (Workforce Administration, Workforce Reports, Contract Printing ESP, Contract Printing ESP).

Contract Printing ESP

Contract Printing Run ID: 3

*Description: 3

Filter Data

From Date: 01/01/1900 To Date: 01/01/2006 Search

Filter By: None

Employee Data

Select All Deselect All

Employee Selection							
	Emplid	Name	Contract Begin Date	Effective Date	Contract Number	Contract Type	Node Status
☐	GF100ME135	Elisabette DESBROSSE	2000-01-01	2000-01-01	0001	Unlimited Contract	Data Not Loaded
☐	GF100ME137	Elisabette CAZALBOU	2000-01-01	2000-01-01	0001	Unlimited Contract	Data Not Loaded
☐	GF100ME140	Roger FRODON	2000-01-01	2000-01-01	0001	Unlimited Contract	Data Not Loaded

Contract Printing ESP page

Contract Printing Run ID Upon entering the component, select or create a Contract Printing Run ID. This ID enables you to group selected employees for whom you want to generate and print contracts.

Description Enter a description for the Contract Printing Run ID.

Filter Data

Use this group box to search for persons who have contracts that you need to generate and print. Use the search criteria to narrow your search results.

From Date and To Date Enter the date range to search for persons within that time frame who require contract generation and printing.

Filter By	Use the filter by option to narrow your search results to a specific social security number (<i>CCC</i>), <i>Company</i> , or <i>Employee</i> . If you select one of these filter options, the system displays a grid for you to enter the additional search criteria.
Company, Description, and Social Security Number	If you select to filter by <i>CCC</i> , then select a specific company and social security number to filter your search results to based on social security number. The system displays the name of the company that you select.
Company and Description	If you select to filter by <i>Company</i> , then select a specific company to search for persons within that company for whom you want to generate and print contracts. The system displays the description of the company that you select.
EmplID (employee ID) and Name	If you select to filter by <i>Employee</i> , then select a specific employee to generate and print contracts. The system displays the name of the employee that you select.

Note. You can include the same contract within multiple Contract Printing Run IDs.

Search	Click this button to search for persons who require contract generation and printing based on your filter criteria.

Employee Data

Use this group box to view the results of your search and select the persons for whom you want to generate and print contracts.

Select All	Click this button to select all rows in your search results. Otherwise, select the check box for each employee for whom you want to generate contract data.
Deselect All	Click this button to deselect the selection check box for all persons in the search results grid.
Emplid (employee ID) and Name	The system displays the ID and name of the employees that meet your search criteria. Select the check box for employees for whom you want to generate contract data.
Contract Begin Date	The system displays the employee's contract begin date as defined on the Contract Status/Content of the Update Contracts component.
Effective Date	The system displays the date when the contract type is associated with the employee. You associate contract types with employees through the Contract Type/Clauses page of the Update Contracts component.
Contract Number	The system displays the employee's contract number as defined through the Update Contracts component.
Contract Type	The system displays the type of legal contract associated with the employee. You associate contract types with employees through the Contract Type/Clauses page of the Update Contracts component.

Node Status

The system displays the status of contract data generation for each employee. Possible values are:

- *Data OK*: The system has successfully generated the employees contract data and there is no additional data required.
- *Data Not Loaded*: An error occurred during the contract data generation for this employee. The system has not loaded the data. View the details of the node status in the Details column of the grid.
- *Required Data*: The employee's data has been included in the contract generation but there is still data required for the employee.

Generate Data

Click this button to retrieve contract data for the selected employees. The system executes the Contract Printing Data Generation (CTPR_GEN_ESP) Application Engine process to retrieve contract data and to store that data in a table with a metadata XML format (XML_FILE_TBL).

Upon completion, the system displays a message informing that you have successfully launched a batch process to generate the contract data for the selected employees.

Select whether to view the run status of the process instance in the Process Monitor component.

Return to the Contract Printing ESP page to view and refresh node statuses.

Child Nodes, Details, and Edit Data

If the system successfully loads the contract data for the employee it displays an Edit Data link in the Child Nodes column. Click this link for a specific employee to access the Contract Printing Data page, where you can review, edit, and complete contract data for that employee.

If the node status is *Data Not Loaded*, the system displays a description of the problem that caused the failure to generate the contract data for the employee.

Print

Click this link for a specific employee to print the contract for that employee or to review the final contract that you can generate through the Print Contracts ESP page as part of a batch of contracts. The system immediately launches another window to display the contract as a PDF file. The PDF Form engine fills data into the PDF Form fields so that you can print the contract.

Note. To print contracts for the entire population, use the Print Contracts ESP component.

Refresh Node Status

Click this button to refresh the Node Status value for the employees listed in the Employee Data grid. When the run the Contract Printing Data Generation process, the system makes the new node statuses available for viewing on this page when the run status of the process instance equals Success.

If there are errors for a particular employees contract data generation, the Node Status value remains *Data Not Loaded*.

If the employee's contract data generation is successful but missing required data, the system updates the Node Status to *Required Data*. Click the Edit Data link to access the Contract Printing Data page and enter the required data.

If the employee's contract data is complete, the system updates the Node Status to *Data OK*.

Reviewing and Editing Contract Data

Access the Contract Printing Data page (click the Edit Data link on the Contract Printing ESP page).

Contract Printing Data ESP

Contract Printing Run ID: AA May contracts
Employee Id: 0050 Amalia García Ortiz
Effective Date: 2009-05-20
Contract Begin Date: 2009-05-20

[Remove All Rows](#)

Field List			Find	First	1-66 of 66	Last
Tag	Required	Node Value				
Employee ID	☐	0050				✓
Contract Number	☐	0001				✓
Effective Date	☐	20090520				✓
Contract Type - Full Time/Part Time	☐					▲
Company CIF/NIF/NIE	☐	B81473118				✓
Company Responsible ID	☐					▲
Company Responsible Name	☐					▲
Company Responsible NID	☐					▲
Company Responsible Role	☐					▲
Company Descr	☐	Business Institute - Spain				✓
Company Address Type	☐	CL				✓
Company Address1	☐	Hernandez de Tejada				✓
Company Address Number	☐	7				✓
Company Country	☐					▲
Company Country Code	☐	ESP				✓
Company City	☐	Madrid				✓
Company City Code	☐					▲

Contract Printing Data ESP

Remove All Rows

If you want to recalculate the field values for the selected employee's contract, click this button to delete all data rows that the system generated. The system displays a blank page.

Click OK to accept this deletion or click Cancel to reject the deletion and return to the previous page.



Nodes that display this symbol are not required. They have no data but are available for optional data entry.



Nodes that display this symbol have data that you entered manually or that the system retrieved from the database. This data is validated.



Nodes that display this symbol require a value but currently have no value entered. Enter the required data necessary to complete the contract. Depending on the node definition, you must either enter a value directly through this page or go to the source page to enter the value.

Tag

Tags are the node names as they appear in the XML file that is used to generate the contract. The system retrieves tags based on the node definition as defined on the XML Node Table page.

Required

Indicates whether the node is required for reporting.

Node Value

The system displays the value for the corresponding tag. Enter or select additional data that you want to include in the report. You must provide node values for all required tags.

OK

Click this button to save data and return to the previous page.

Cancel

Click this button to cancel any changes that you have made and return to the previous page.

See Also

My Oracle Support, PeopleSoft Enterprise Human Resources: Product Enhancements for Spain, Setting Up XML Files

Running the Batch Contract Printing Process

Access the Print Contracts ESP page (Workforce Administration, Workforce Reports, Print Contracts ESP, Print Contracts ESP).

Print Contracts ESP

Run Control ID: AA

Language:

Spanish

[Report Manager](#) [Process Monitor](#)

Run

Print Contracts ESP				Customize Find View All First 1 of 1 Last	
	*Contract Printing Run ID	Description	Validated Contracts Only		
1	AA	May contracts	☒	+	-

Print Contracts ESP page

Language	Select the language in which you want to print the contract. The system by default selects Spanish.
Contract Printing Run ID and Description	Select the Contract Printing Run ID for which you want to print contracts. Define these IDs through the Contract Printing component.
Validated Contracts Only	Select this check box to print only the contracts that you have validated through the Contract Printing component. With this option the process generates only the contracts a Node Status value of <i>Data OK</i> on the Contract Printing page.
Run	Click this button to run the Contract Printing Report (CTPR_REP_ESP) Application Engine process. The process generates contracts in PDF format that are part of the specified Contract Printing Run IDs.
Note. You can run this process for a given Contract Printing Run ID as many times as necessary.	

Generating AFI Flat Files

This section provides an overview of the AFI process and discusses how to:

- Maintain employee AFI data.
- Maintain detailed AFI data for employees.
- Create the AFI report.
- Create employee inquiries on the AFI report.
- Create company inquiries on the AFI report.
- Review employee data on AFI files.

Understanding the AFI Process

For Spanish employers, PeopleSoft Enterprise Human Resources includes an AFI process (SOCS_AFI_ESP) for reporting workforce changes to the Social Security General Treasury. The PeopleSoft process simplifies submissions by automatically creating a flat file in the format that is required by the Spanish authorities.

Every time you add, delete, or update an effective-dated row to the JOB_DATA record, the system verifies whether the action pertains to AFI reporting. If so, the system adds, deletes, or updates the corresponding effective-dated row in the AFI_DATA_ESP record via PeopleTools Integration Broker. The system uses the ESPAFIData_Sync message subscription within the WORKFORCE_SYNC message to perform the synchronization. The system stores all AFI data in the AFI_DATA_ESP record.

After an AFI-related action takes place, you can access the Employee AFI Data ESP component to view and update AFI data for that employee. You can also use this component to manually enter new rows of data for special situations not handled by job data processing, such as strikes or contract changes.

When ready you can run the AFI process through the Create AFI Report ESP component. The AFI process generates a flat file that lists changes in workforce—such as hiring, terminations, personal changes, or job data changes—for a particular period. The system ensures that employees for whom you have already generated the report are not included in subsequent file generations.

In addition to workforce changes, you can use the AFI process to send information requests to the Social Security General Treasury. Employers use these requests to obtain information about their employees' or companies' social security contributions.

When you generate an AFI report through the AFI file generation process, the system assigns an AFI file name to each row of employee AFI data that it includes in the file. The assignment of this value prevents repeat communication of the data in subsequent AFI files. The system also assigns to the communicated row of data a node status value of *Included in AFI* and a time stamp value that specifies the date and time of the processing.

You can use the Review AFI File ESP component to view all of the employee AFI data that is part of the AFI flat file being communicated to the Social Security General Treasury. Through this component you can also unlink data from the files as necessary so that the data becomes available again for processing in a subsequent AFI flat file. The system removes the AFI Flat File field value from the unlinked row to enable repeat communication of the data, although the employee data is not extracted from the file itself.

Note. To use AFI reporting functionality you must configure PeopleTools Integration Broker to support Integration Broker.

Pages Used to Generate AFI Flat Files

Page Name	Definition Name	Navigation	Usage
Employee AFI Data ESP	AFI_DATA_ESP	Workforce Administration, Job Information, Employee AFI Data ESP, Employee AFI Data ESP	View and update AFI data for employees. You can also manually enter new rows of AFI data for special situations not handled by job data processing.
AFI Data Details	AFI_DATA_ESP_SEC	Click the Details link on the Employee AFI Data ESP page.	Review and update the employee AFI data to include in the AFI report. You need only enter data for the fields that you need to report to social security.
Create AFI File ESP - Employees	AFI_RC_1_ESP	Workforce Administration, Workforce Reports, Create AFI File ESP, Employees	Search for employees for which you need to communicate AFI data to social security, and then generate the AFI flat file for selected employees.

Page Name	Definition Name	Navigation	Usage
Create AFI File ESP - Employee Inquiries	AFI_RC_2_ESP	Workforce Administration, Workforce Reports, Create AFI File ESP, Employee Inquiries	Create inquiries to submit to the Social Security General Treasury about selected employees. The AFI report process includes these inquiries in the AFI flat file that it generates.
Create AFI File ESP - Company Inquiries	AFI_RC_3_ESP	Workforce Administration, Workforce Reports, Create AFI File ESP, Company Inquiries	Create inquiries to submit to the Social Security General Treasury about selected companies. The AFI report process includes these inquiries in the AFI flat file that it generates.
Review AFI Files	AFI_CONFIRM_ESP	Workforce Administration, Workforce Reports, Review AFI File ESP, Review AFI Files	View the list of employees that are part of the AFI flat file being communicated to the Social Security General Treasury and, if necessary, unlink data for employees that have been mistakenly included in the file so that their data is available for AFI flat file generation again.

Maintaining Employee AFI Data

Access the Employee AFI Data ESP page (Workforce Administration, Job Information, Employee AFI Data ESP, Employee AFI Data ESP).

Employee AFI Data ESP

Antonio Diaz Ruiz EMP ID: KEG001 Empl Record: 0

Job Information Customize | Find | View All | First 1-2 of 2 Last

General Reporting Key Fields

Eff Date	Seq	Social Security Action	Social Security Reason	Node Status	Details		
08/28/2009	0	Like-Active Comunicatio		Not Communicated	Details		
01/28/2009	0	Hire	Hire		Details		

Employee AFI Data ESP page

Job Information - General Tab

- Eff Date** (effective date)

The system displays the effective date of the job data row that contains the AFI-related action. If you are adding a row, enter the effective date of the AFI social security action.
- Seq** (sequence number)

The system displays the sequence number of the effective-dated row from the record where the social security action occurred. If you are adding a row, enter the sequence number.

Social Security Action

The system displays the social security action that caused the creation of the AFI data. The system automatically generates rows of AFI data for job data actions that relate to AFI reporting. If you are manually adding a new row, select the action. Possible values are:

- *Change in Contract*: Select to indicate a change in the employee's contract data. If you select this value, the Contract with Bonification and Additional Data group boxes become available on the AFI Data Details page for this social security action.
- *Change in Occupation*: Select to indicate a change of occupation on the Job Information page.
- *Change in Work Group*: Select to indicate a change in the social security work group value on the Labor Agreement Categories page.
- *Erase Consolidating Hiring*: Select if you have communicated a hire to social security by mistake and are requesting to social security to remove the communicated hire from their system.
- *Erase Consolidating Termination* (termination): Select if you have communicated a termination to social security by mistake and are requesting to social security to remove the communicated termination from their system.
- *Erase Like-Active Period*: Select if you have communicated a like-active period to social security by mistake and are requesting to social security to remove the communicated like-active period from their system.
- *Erase Previous Data*: Select if you have communicated data to social security by mistake and are requesting to social security to remove the previously communicated data from their system.
- *Hire*: New hire or modification of a previous hire through the job data components. If you select this value, the Contract with Bonification and Additional Data group boxes become available on the AFI Data Details page for this social security action.
- *Labor Agreement Communication*: Communicates the worker's labor agreement when it is not the company's default labor agreement.
- *Like-Active Communication*: The employee is no longer active in the company but still has social security contributions. Employees can have a like-active situation when they have a PTO balance paid at termination or when they are the victim of domestic violence. If you select this value, the Like-Active Status group box becomes available on the AFI Data Details page for this social security action.
- *Termination*: Employee termination through the job data components. If you select this value, the Termination Data group box becomes available on the AFI Data Details page for this social security action.
- *Worked Days Erasing*: Select to erase worked days for part-time workers. If you select this value, the Part Time Reporting group box becomes available on the AFI Data Details page for this social security action.

- *Worked Days Registration:* Select to add worked days for part-time workers. If you select this value, the Part Time Reporting group box becomes available on the AFI Data Details page for this social security action.

Social Security Reason	The system displays the employee status for the social security action. If you are adding a new row, select the status from the list of available choices based on the selected social security action.
Node Status	The system displays the communication status for reporting the employee's AFI data. Possible values are: • <i>Included in AFI:</i> The row of AFI data has been included in an AFI file. The system displays the AFI file name on the Reporting tab. • <i>Not Communicated:</i> The row of AFI data has not been communicated to social security.

Job Information - Reporting Tab

Via	The system displays whether you are communicating the selected row of AFI data for the employee by entering the data online through the social security website or by generating an AFI flat file that includes the data. This field corresponds directly to the Communicated By field on the Employee AFI Data ESP- Details page.
AFI File Name	The system displays the name of the AFI flat file that includes the employee AFI data for the selected row. This field is the same as the AFI File Name field on the Employee AFI Data ESP - Details page.
Time Stamp	The system displays the time and date when the row of AFI data for the employee was processed.

Maintaining Detailed AFI Data for Employees

Access the AFI Data Details page (click the Details link on the Employee AFI Data ESP page).

AFI Data Details			
Antonio Diaz Ruiz			
Reporting			
Communicate By:	AFI File		
Job Data			
Contract Type:	100	Unlimited Full Time	Scheme ID: 0111
Occupation Code:	A	Office Personnel	
SS Wrk Group:	01	Engineers	
Labor Agreement Cd:	9910605	Air Transport Industry	
Full/Part Time:	Full-Time		
Contract with Bonification			
Unemployment Condition:		☐ Active Rent	
Social Exclusion Employee:	None	☐ WomanHired 2Yrs after Maternity	
Woman Rejoin:	Rejoin After 2 Years Maternity	☐ Woman Subrepresented	
Disability Type:		☐ Re-Joined Disabled Employee	
Additional Data			
Percentage of Part Time:			
Legal Custody:	(Invalid Value)		
Special Labor Relationship:			
Inactivity Type:		Partial Strike Activity Coeff:	
Job Change Reason:		☐ First Self-Worker Employee	
Contract Begin Date:		☐ Partial Subrogation	
Substitution Reasons:		☐ Relieve Contract Flag	

AFI Data Details page

Reporting

Use this group box to specify reporting details about the AFI data.

Communicate By	Select whether you are communicating the selected row of AFI data for the employee by entering the data <i>On Line</i> through the social security web site or by generating an <i>AFI File</i> that includes the data. By default the system selects the <i>AFI File</i> value. You should also select the online value if you do not want the employee AFI data to be eligible for communication through the AFI file generation process. If you select the On Line value, the AFI File Name and Time Stamp fields become available.
AFI File Name	If you have already processed the row of AFI data for the employee in an AFI file, the system displays the name of that file. Otherwise, the field is unavailable unless you select <i>On Line</i> in the Communicate By field. Having a value in this field ensures that the AFI file generation process does not include this data in other AFI files that you generate. You can liberate this data row from the AFI flat file, and thus make the data available again for inclusion in an AFI flat file, by unlinking the data row from the AFI file name through the Review AFI Files page.
Time Stamp	For AFI data communicated by AFI file, the system displays the time and date of the AFI flat file generation. For AFI data communicated online, the system displays the system time and date, which you can modify.

Job Data

Use this group box to specify job data to include in the AFI report.

Contract Type	Enter the employee's contract type.
Occupation Code	Enter a social security risk code.
SS Wrk Group (social security work group)	The system displays the employee's social security work group.
Labor Agreement Cd (labor agreement code)	Enter a labor agreement code.
Full/Part Time	Specify whether the employee works on a <i>Full-Time</i> , <i>Part-Time</i> , or <i>On Demand</i> basis.

Contract with Bonification

Use this group box to specify contract data to include in the AFI report. This group box is available only if you select the Change in Contract or Hire value in the Social Security Action field on the Employee AFI Data ESP page.

Unemployment Condition	Select the value that you want the AFI report to contain.

Active Rent	Select to indicate that the worker has an official certificate and meets the conditions that are required to sign the specific kind of contract.
Social Exclusion Employee	Select the value that you want the AFI report to contain.
Woman Hired 2Yrs After Maternity	Select the terms under which the worker is a woman who has been hired 2 years after maternity took place.
Woman Rejoin	Select the circumstances under which the worker rejoined the company after a maternity period.
Woman Subrepresented	Select to indicate that the worker is a woman hired in a company or sector where women are underrepresented.
Disability Type	Select the type of disability for the worker.
Re-Joined Disabled Employee	Select to indicate that the worker has an official certificate and meets the conditions that are required to sign the specific kind of contract.

Additional Data

Use this group box to specify additional data to include in the AFI report. This group box is available only if you select the Change in Contract or Hire value in the Social Security Action field on the Employee AFI Data ESP page.

Percentage of Part Time	Enter the worker's part-time employment percentage. When you enter a value in this field, the Legal Custody field becomes available.
Legal Custody	Enter the worker's legal custody or schedule reduction circumstance.
Special Labor Relationship	Select a special labor relationship for the worker.
Inactivity Type	If the employee is in an inactive situation or non-working period, select the type of inactivity. Valid Values are: • <i>Inactivity Period</i> • <i>Partial Strike</i> Note. If you select this value, the Partial Strike Activity Coeff. (coefficient) field becomes available. • <i>Total Strike</i> • <i>Trienniums Public Workers</i> • <i>Work Absence</i>
Partial Strike Activity Coeff. (coefficient)	If you select an inactivity type <i>Partial Strike</i> , enter the coefficient.

First Self-Worker Employee	Select to indicate that the worker has an official certificate and meets the conditions that are required to sign the specific kind of contract.
Contract Begin Date	Select the begin date corresponding to the original contract to which this new one is subrogating.
Partial Subrogation	Select to indicate that the contract is a partial subrogation.
Substitution Reasons	Select the reason why you are making a substitution for this worker.
Substitution EmplID	Enter the ID of the substitute worker.
Relieve Contract Flag	Select this check box to indicate that the contract relieves another.

Like-Active Status

Use this group box to communicate like-active situations. This group box is available only if you select the Like-Active Communication value in the Social Security Action field on the Employee AFI Data ESP page.

Like-Active Status Type	Select the type of like-active situation to communicate about the employee. Possible values are: • <i>Domestic Violence</i>: The employee has a like-active situation because he or she is a victim of domestic violence. • <i>PTO Not Taken</i>: The employee has a like-active situation from being paid PTO balance upon termination.

Period Begin Date and Period End Date	Select the begin and end date of the like-active situation.

Termination Data

Use this group box to enter termination data. This group box is available only if you select the Termination value in the Social Security Action field on the Employee AFI Data ESP page.

Vacation Not Taken End Date	Select the end date of the period representing the vacation not taken and paid at termination.

Part Time Reporting

Use this group box to enter part-time reporting information. This group box is available only if you select the Worked Days Erasing or Worked Days Registration value in the Social Security Action field on the Employee AFI Data ESP page.

Period Begin Date and Period End Date	Enter a date range for the part-time work.

Part Time Worked Days Enter the number of part-time days worked in the specified date range.

Creating the AFI File

Access the Create AFI File ESP - Employees page (Workforce Administration, Workforce Reports, Create AFI File ESP, Employees).

Employees Employee Inquiries Company Inquiries

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

File Name: AFI_MAY1 AFI

File Path:

Authorization Key: 25689451

Date From: 05/01/2009

Date-To: 05/31/3009

Filter By: None

Search

Select All Deselect All

Actions

- ☒ Hire
- ☐ Termination
- ☐ Occupation Code
- ☐ Worked Days Report
- ☐ Others
- ☐ Work Group
- ☐ Contract
- ☐ Like-Active Status
- ☐ Erase Previous Data

☐ Check Printed Response

Employees						Customize Find View All First 1 of 1 Last
Select	Empl ID	Name	Social Security Action	Action Date	Printed Response	
1 ☒	0050	Amalia García Ortiz	Hire	05/20/2009	☐	

Create AFI File ESP - Employees page

File Name Enter the name of the file that you want the process to use for the report. The system stores the data in an AFI file.

File Path Enter the path where you want the process to store the report file.

Authorization Key Select to narrow search results to employees working for companies with this authorization key. Social Security General Treasury provides companies with authorization codes to access Winsuite.

Date From and Date-To Enter a date range to find all employees with a change in social security status between these dates.

Filter By

Select a filter to narrow search results further. When you select a filter, the Filter Data Grid becomes available to specify filter details. Available filters are:

- *CCC*: Select to run the process for a selected company and Código Cuenta de Cotización (CCC). The system displays the Filter Data Grid for you to select the company and social security number.
- *Company*: Select to run the process for selected companies. The system displays the Filter Data Grid for you to select the companies.
- *Department*: Select to run the process for selected departments. The system displays the Filter Data Grid for you to select the setID and departments.
- *Employee*: Select to run the process for selected employees. The system displays the Filter Data Grid for you to select the employee IDs.
- *None*: Select to search without a filter.

Search

Click to retrieve results based on your search criteria.

Filter Data Grid**Company**

Select the company for which to report data.

Social Security Number

Select the employer's social security number for which to report data. If you leave this field blank, the extract file contains data for all of the employer's social security numbers.

SetID

Select the department setID for which to report data.

Department

Select the department for which to report data.

EmplID (employee ID)

Select the specific employee ID for which to report data.

Actions**Hire**

Select to include employees who were hired.

Work Group

Select to include employees whose work group changed.

Termination

Select to include employees who were terminated.

Contract

Select to include employees whose contracts changed.

Like-Active Status

Select to include employees with like-active situations.

Erase Previous Data

Select this check box to request deletion of previously communicated data.

Employees

The system displays employees that meet your search criteria and have AFI data that you still need to report to social security. The system displays only employees with social security actions that you have not yet communicated to social security in an AFI report. Select the check box next to the employee AFI data row to include the information in the AFI flat file.

- Select All

Click this button to select all employees in the search results grid.
- Deselect All

Click this button to deselect the check box for all employees in the search results grid.

Creating Employee Inquiries on the AFI Report

Access the Create AFI File ESP - Employee Inquiries page (Workforce Administration, Workforce Reports, Create AFI File ESP, Employee Inquiries).

EmployeesEmployee InquiriesCompany Inquiries

Run Control ID:AA

[Report Manager](#)[Process Monitor](#)

Run

File Name:AFI_MAY1

AFI

File Path:

Clear All

Employees

CustomizeFindView All1 of 1Last

	Empl ID	Empl Record	Name	Social Security Action	Action Date	End Date	Printed Response		
1	0050		Amalia García Ortiz	Inquire Current Situati			☒	+ -	

Create AFI File ESP - Employee Inquiries page

- Clear All

Click this button to deselect all rows in the Employees grid on this page.
- EmplID andName

Select the employee for which you want to submit an inquiry to social security. The system displays the name of the employee that you select.

Social Security Action

Select the inquiry that you want to submit to the Social Security General Treasury regarding the selected employee. Possible inquiries are:

- *Inquire Current Situation:* Select to request the information that the Social Security General Treasury has about the employee.
- *Inquire IT Per Ill:* Select in request information about a temporary disability situation.
- *Inquire Previous Movements:* Select to request the information that the Social Security General Treasury has about previous movement in the CCC.
- *Inquire TA2 Copy:* Select to request a copy of a specific TA2 report. The system displays the Action Date field.

Action Date

If you select to inquire about a duplicate TA2 copy, the system prompts you to enter the action date of the original TA2.

Creating Company Inquiries on the AFI Report

Access the Create AFI File ESP - Company Inquiries page (Workforce Administration, Workforce Reports, Create AFI File ESP, Company Inquiries).

Employees Employee Inquiries **Company Inquiries**

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

File Name: AFI_MAY1 .AFI

File Path:

[Clear All](#)

Companies					Customize	Find	View All	First	1 of 1	Last
	Company	Social Security Number	Social Security Action	Action Date	End Date					
1	AG		Inquire Labor Life in CCC	08/01/2009	08/31/2009					

Create AFI File ESP - Company Inquiries page

Clear All

Click this button to deselect all rows in the Companies grid on this page.

Company

Select the company for which you want to submit an inquiry to social security.

Social Security Number

Select the employer's social security number for which to submit an inquiry. This field is required.

- Social Security Action** Select the inquiry that you want to submit to social security regarding the selected company. Possible inquiries are:
- *Inquire CCC Situation:* Select to request the information that the Social Security General Treasury has about the company.
 - *Inquire Current CCC Workers:* Select to request the information that the Social Security General Treasury has about current workers in the CCC.
 - *Inquire Labor Life in CCC:* Select to request the information that the Social Security General Treasury has about labor life in the CCC.
 - *Inquire Previous CCC Movement:* Select to request the information that the Social Security General Treasury has about previous movement in the CCC.
- Action Date** If you select to inquire about labor life in the CCC, the system prompts you to enter the start date of the period you are asking for information about.
- End Date** If you select to inquire about labor life in the CCC, the system prompts you to enter the end date of the period you are asking for information about.

Reviewing Employee Data on AFI Files

Access the Review AFI Files page (Workforce Administration, Workforce Reports, Review AFI File ESP, Review AFI Files).

Review AFI File ESP

AFI File Name: AFI_MAY1

Employee Data

Employee Selection						Customize	Find	View All	First	1 of 1	Last
Select	Empl ID	Name	Action Date	Social Security Action	Reason						
☒	0050	Amalia García Ortiz	05/20/2009	Hire	Hire						

Review AFI File ESP page

The system displays a row for each employee and social security action combination that the AFI file generation process included in the AFI flat file. If an employee has more than one action in the file, each action appears as a distinct row.

To unlink the employee's AFI data from the selected AFI flat file, deselect the corresponding check box for that row of data. By default the system select all rows of data. Upon saving the page, the system deselects the AFI File Name field for the deselected row, thus making this row of employee AFI data available for inclusion a future AFI file generation. You might do this, for instance, if you have included employee AFI data in the communication by mistake and need to resend the data for the employee.

Warning! When you click the Save button the system permanently frees the deselected rows from association with the selected AFI flat file. You will not be able to reverse this action. Note, also, that the data for the deselected rows are still part of the actual AFI flat file. To remove that data from the file, you must regenerate the AFI file with refined filter criteria that excludes this data.

AFI File Name	The system displays the name of the AFI flat file that includes the employee AFI data. When accessing this page, you can use this field to search for the AFI file for which you want to view employee data.
Time Stamp	For AFI data communicated by AFI file, the system displays the time and date of the AFI flat file generation. For AFI data communicated online, the system displays the system time and date. When accessing this page, you can use this field to search for the AFI file for which you want to view employee data.

Employee Data

Use this group box to select the employees whose AFI data you want to include in the AFI flat file, or to deselect the employee's association with the generated AFI flat file so that you can process that employee's information again.

Link All	Click this button to select the check box for all rows of employee data.
Unlink All	Click this button to deselect the check box for all rows of employee data.

Chapter 12

(JPN) Tracking Additional Appointments (Kenmu)

This chapter provides an overview of additional appointments (*kenmu*) and discusses how to:

- Set up codes for tracking additional appointments.
- Set up security for tracking additional appointments.
- Set up to handle additional appointment terminations.
- Record and view employee additional appointments data.

Understanding Additional Appointments

You track additional appointments as additional jobs (employment record numbers) in the Job record. You can track multiple additional appointment rows for each main appointment row of the Job record using the Additional Appointment JPN page. The Cost Rate JPN page enables you to track cost rate distribution among a main appointment and its additional appointments.

The system automatically increments employment record numbers, including additional appointments. The total number of additional appointments appears with main appointment data on the employee's Job Summary JPN page.

When additional appointments exist in conjunction with intercompany transfers, for example when you serve as a hosting company, you can store information about additional appointments that your transferee may have in the home company, as well as any additional appointment information within your company as host.

On the Employee Assignment List report, you can view employees by department, including an employee's additional appointments.

When you terminate a main appointment, the system automatically terminates all additional appointments associated with it.

See Also

[Chapter 15, "Updating Person and Job Information," \(JPN\) Understanding Reporting Appointments for Job Data Changes, page 763](#)

Internal and External Companies

Some of the pages used for tracking additional appointments distinguish between internal and external company appointments. Here are the definitions of internal and external companies:

Internal Companies	Companies that are internal to your organization's database. Data for these companies is already set up on the Company table and Department table.
External Companies	Companies that are external to your organization's database. You must set up data for these companies on the Intercompany Transfer Company/Department table.

Setting Up Codes for Tracking Additional Appointments

To set up the codes for tracking additional appointments, use the IC Trans External Company/Dept (INTCPX_CPY_JPN), IC Trans External Superv Lvl (INTCPX_SPV_JPN), Additional Appointment Setup for Existing Business Units (RC_AA_JOBCODE_JPN), and Additional Appointment Setup (AA_SETUP_JPN) components.

This section provides overviews of dummy codes and setup steps for additional appointments, lists prerequisites, and discusses how to:

- Set up a dummy business unit, company, department, and location.
- Designate Job record codes for additional appointments.

Understanding Dummy Codes

Setup for additional appointment tracking requires the use of dummy codes.

Dummy Job Code

The PeopleSoft system provides a dummy job code for use with all additional appointments. The dummy job code is needed because additional appointment data is held on the Job record, which requires a job code. Because job codes are not tracked as part of additional appointment data, the dummy code is required to save the Job record with additional appointment information. The dummy job code is only used in background processing for saving, and is never visible on any page except the Additional Appointment Setup and Job Code Table pages.

The delivered dummy job code is *AADUMY*. The system automatically creates this job code for each new business unit that you define. If you have already created business units, the system provides an application engine process that creates the dummy job code for each existing business unit. You only have to run the application engine one time. Subsequently, the system automatically creates the dummy job code when you define a new business unit.

See [Chapter 12, "\(JPN\) Tracking Additional Appointments \(Kenmu\)," Pages Used to Set Up Codes for Managing Additional Appointments, page 637.](#)

Dummy Business Unit, Company, Department, and Location Codes

When the additional appointment is in an external company, the business unit, company, department, and location codes setup for the external company are on the IC Transfer setup tables only, which are not values used in the Job record. Therefore, you must define one dummy code for each of these required fields so that you can save Job record information for additional appointments to external companies. Set up and use the same codes for all additional appointments to external companies. The PeopleSoft system does not deliver these dummy codes.

The dummy codes are only used in background processing for saving and are never visible on any page except the Additional Appointment Setup page.

Warning! The department code can impact security, so it is important to create a new department code for which no one has security access. Anyone who can access the dummy department through security will be granted access to all main appointments that have an external assignment.

See Also

Chapter 12, "(JPN) Tracking Additional Appointments (Kenmu)," Setting Up a Dummy Business Unit, Company, Department, and Location, page 637

Chapter 12, "(JPN) Tracking Additional Appointments (Kenmu)," Designating Job Record Codes for Additional Appointments, page 638

Understanding Setup Steps for Additional Appointments

The setup steps for additional appointment tracking vary slightly depending upon whether you:

- Initially implement PeopleSoft Enterprise Human Resources with additional appointment tracking before you set up business units.
- Add additional appointment tracking after you have already set up business units, such as during an upgrade.

Both situations require that you create dummy codes and assign them on the Additional Appointment Setup page. The details of how to do this are presented in subsequent sections.

Business Units Are Not Defined

Here are the steps for setting up additional appointment tracking when you have not yet defined business units:

1. Select Additional Appointment Enabled in the Japanese Parameters section of the Installation Table - Country Specific page.
2. Set up your organization's business units on the Business Unit page.

The system automatically creates the dummy job code *AADUMY* for each business unit that you define.

3. Create a dummy business unit, company, department, and location for use with additional appointments to external companies.

4. Assign the dummy codes on the Additional Appointment Setup page.
5. (Optional) Set up additional appointment security.

Business Units Are Defined

If you are setting up additional appointment tracking when you have already defined business units, such as when upgrading, the steps are the same as listed in the previous section with the exception of step 2:

1. Select Additional Appointment Enabled in the Japanese Parameters section of the Installation Table - Country Specific page.
2. Run the AA_JOBCODE_JPN Application Engine process to create the dummy job code *AADUMMY* for each business unit in your system.

You only have to run the application engine process one time. Subsequently, the system automatically creates the dummy job code for each business unit that you define.

3. Create a dummy business unit, company, department, and location for use with additional appointments in external companies.
4. Enter the dummy codes on the Additional Appointment Setup page.
5. (Optional) Set up additional appointment security.

See Also

Chapter 12, "(JPN) Tracking Additional Appointments (Kenmu)," Setting Up Security for Tracking Additional Appointments, page 639

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Installing PeopleSoft HRMS"

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up Organization Foundation Tables," Defining Business Units

Prerequisites

If you plan to track additional appointments in external companies, you must set up the following information for the external companies:

- Company and department IDs for external company appointments on the IC Trans External Company/Dept page.

See Chapter 3, "Setting Up Country-Specific Tables," (JPN) Setting Up Intercompany Transfer Company Data, page 126.

- Supervisor levels for external company appointments on the IC Trans External Superv Lvl page.

These codes provide the prompt values on the Edit Additional Appointment Information page and are visible on pages that display employee additional appointment data.

Pages Used to Set Up Codes for Managing Additional Appointments

Page Name	Definition Name	Navigation	Usage
IC Trans External Company/Dept	INTCPX_CPY_JPN	Set Up HRMS, Product Related, Workforce Administration, Workforce Data JPN, IC Trans External Company/Dept, IC Trans External Company/Dept	Set up company and department codes for intercompany transfers to and additional appointments in external companies.
IC Trans External Superv Lvl	INTCPX_SPV_JPN	Set Up HRMS, Product Related, Workforce Administration, Workforce Data JPN, IC Trans External Superv Lvl, IC Trans External Superv Lvl	Set up supervisor level codes for intercompany transfers to and additional appointments in external companies.
AA Setup for Existing BUs JPN (Additional Appointment Setup for Existing Business Units JPN)	RC_AA_JOBCODE_JPN	Set Up HRMS, Install, Product and Country Specific, AA Setup for Existing BUs JPN, AA Setup for Existing BUs JPN	Run the AA_JOBCODE_JPN Application Engine process to create the dummy AADUMMY job code for each existing business unit. Run this process only if business units already exist at the time of implementing additional appointment tracking. You only run this process one time.
Additional Appointment Setup	AA_SETUP_JPN	Set Up HRMS, Product Related, Workforce Administration, Workforce Data JPN, Additional Appointment Setup, Additional Appointment Setup	Enter the dummy business unit, company, department, location, and job codes to populate required entry fields on the Job record for additional appointments.

Setting Up a Dummy Business Unit, Company, Department, and Location

Set up one dummy code to be used with all additional appointments for each of the following:

- Business unit

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up Organization Foundation Tables," Defining Business Units.

- Company

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up Organization Foundation Tables," Entering Company Information.

- Department

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up Organization Foundation Tables," Maintaining Departments.

- Location

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up Organization Foundation Tables," Establishing Locations.

Additional Setup Instructions

The following are important points to keep in mind when setting up these dummy codes for use with additional appointments to external companies:

- We recommend that they not be real business unit, company, department, and location codes because of the possible effect on security and reporting.
- You may use a real, existing setID to define the dummy codes.
- The dummy department must be excluded from the department tree.

Otherwise, anyone who has access to the dummy department has access to *all* main appointments of employees who have an additional appointment in an external company.

Designating Job Record Codes for Additional Appointments

Access the Additional Appointment Setup page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data JPN, Additional Appointment Setup, Additional Appointment Setup).

Additional Appointment Setup		
*Business Unit:	JPN01 	Japan Business Unit
*Company:	KJ1 	Business Institute - Japan
*Department:	10000 	Human Resources
*Location Code:	KJ02 	Osaka
*Job Code:	AADUMY 	Additional Appointment

Additional Appointment Setup page

The prompt values for the Business Unit, Company, Department, and Location Code fields are the valid codes set up in the respective setup tables for your PeopleSoft database. In each field, select the single dummy code that you defined for use with additional appointments.

Job Code *AADUMY* is the default value.

The system uses the values on this page to populate the Job record so that it can be saved.

Setting Up Security for Tracking Additional Appointments

To set up the security for tracking additional appointments, use the Security Install Settings (SCRTY_INSTALL), Security Type Table (SCRTY_TYPE2_TBL), and Addl Appt SQR Security JPN (ADDAPPT_SEC_JPN) components.

This section provides an overview of security for additional appointments and discusses how to:

- Set up the security basis for additional appointments.
- Select reports that use additional appointment security.

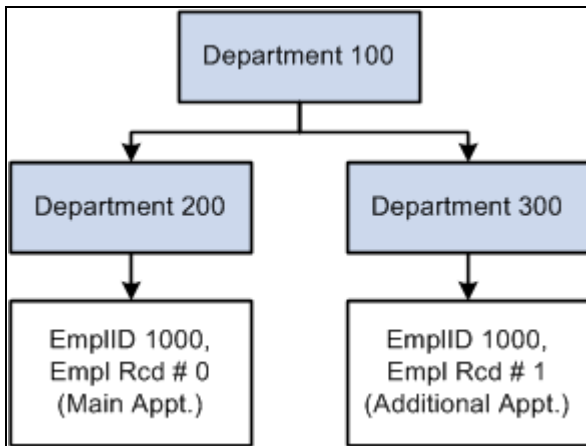
Understanding Security for Additional Appointments

The PeopleSoft system provides two security options for accessing additional appointment data: departmental security and security for additional appointments. If you choose to use the default option, departmental security, additional appointments do not provide any additional security access. The user must have access to the department in which the main appointment resides to access an employee's data. If you set up security for additional appointments, then additional appointments do provide additional security access. A user can view the main appointment if the main appointment or any of its additional appointments resides in a department to which the user has access.

Example of Security Access

To illustrate how the security options work, consider a department security tree where department 100 is hierarchically above departments 200 and 300. Employee 1000 is in both department: ERN #0, the main appointment, is in department 200, and ERN #1, the additional appointment, is in department 300.

The following diagram illustrates this department structure:



Sample department security tree

Here is how security works for the two security options:

- If you choose to use the default, departmental security:
 - If the user has access to department 200, then the user has access to the data for employee ID 1000.
 - Even if the user has access to department 300, the user does not have any access to the data for employee ID 1000.
- If you choose to set up security for additional appointments:
 - If the user has access to department 200, then the user has access to the data for employee ID 1000.
 - If the user has access to department 300 only, then the user can access the data for employee ID 1000 because the employee has an additional appointment in department 300.

Note. Security access is dependent on the system date being earlier than the effective date of the release of the additional appointment. Security access to the data row ceases with the effective date of the additional appointment release.

Pages Used to Set Up Security for Additional Appointments

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Security Installation Settings	SCRTY_INSTALL	Set Up HRMS, Security, Core Row Level Security, Security Installation Settings, Security Installation Settings	Choose the HRMS security settings for your installation.
Security Type Table	SCRTY_TYPE2_TBL	Set Up HRMS, Security, Core Row Level Security, Security Access Type, Security Type Table	Use to enable existing security access types or create new ones.
Addl Appt SQR Security JPN	AA_SECURITY_JPN	Set Up HRMS, Security, Core Row Level Security, Addl Appt SQR Security JPN, Addl Appt SQR Security JPN	Select the reports that use additional appointment security.

Setting Up Additional Appointment Security

To set up security for additional appointments:

1. Select *JPN Appointment* on the Security Install Settings page.
2. Select *JPN Additional Appointment* on the Security Type Table page for the PPLJOB security set.
3. Refresh the security join tables using the Refresh SJT_CLASS_ALL component (SCRTY_OPR_RC).

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Administering HRMS Security"

Selecting Reports that Use Additional Appointment Security

Access the Addl Appt SQR Security JPN page (Set Up HRMS, Security, Core Row Level Security, .Addl Appt SQR Security JPN, Addl Appt SQR Security JPN).

Addl Appt SQR Security JPN			
Component Detail		Customize Find	
		First 1 of 1 Last	
	*Component Name	Additional Appt Security	
1	RC_IDO_FUT_ASN_JPN	☒	

Addl Appt SQR Security JPN page

The following table lists the only reports that can be enabled for additional appointment security and the component name to select on the report page:

Report ID	Report Name	Component Name
PER062JP	Grade Advance Candidate List	RUNCTL_PER062_JPN
PER063JP	Appointment Notification JPN	RUNCTL_NTF_JPN
PER064JP	Appointment List JPN	RUNCTL_NTF2_JPN
PER065JP	Completion of IC Transfer JPN	RUNCTL_PER065_JPN
PER066JP	Employee Assignment List JPN	EMP_ASN_LST_JPN
PER072JP	Future Employee Assignment List	RC_IDO_FUT_ASN_JPN
PER074JP	Ido Candidate Listing	RC_IDO_EE_LIST_JPN

For other reports, the only way to access information on the main appointment is to have access to the department on which the main appointment resides. The department of the additional appointment does not provide any additional access for any reports other than the five reports listed here, even when additional appointment security is activated.

The purpose of activating additional appointment security for these reports is to display the main appointments when there is security access to the additional appointment. Activating additional appointment security does not display additional appointments on PER062JP, PER063JP, PER064JP, and PER065JP. PER066JP, PER072JP, and PER074JP display additional appointments.

When additional appointment security is activated for these five reports, the system evaluates only current job information. The system ignores future-dated job rows, such as future-dated hires or terminations. Regardless of the security option selected, the system uses only the current row to determine security access.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Administering HRMS Security"

Setting Up to Handle Additional Appointment Terminations

When you terminate a main appointment, the system employs a message subscription that uses a component interface to automatically terminate all additional appointments that are associated with the main appointment.

The message subscription is delivered inactive; you must activate it if you use additional appointment functionality. Following are the details you need to activate the subscription:

Message subscription	Termination_Add_Appt
Message name	WORKFORCE_SYNC
Channel	PERSON_DATA
Tables written to	JOB Termination rows are inserted for all active additional appointments associated with the terminated main appointment.

See Also

PeopleSoft Enterprise HRMS PeopleBook: Integration Interfaces

Recording and Viewing Employee Additional Appointments Data

This section discusses how to:

- Add, change, or release additional appointments.
- Record additional appointment details.

- Distribute cost.

Note. To access additional appointment data, you must first access the associated main appointment in the search page.

Pages Used to Record and View Employee Additional Appointments Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Additional Appointment JPN	AA_MGMT_JPN	Workforce Administration, Job Information, Additional Appointment JPN, Additional Appointment JPN	Add, change, or release additional appointments.
Edit Additional Appointment Information	AA_MGMT_JPN_SEC	Click the Add or Edit button on the Additional Appointment JPN page.	Record details of additional appointments.
Cost Rate JPN	AA_MGMT2_JPN	Workforce Administration, Job Information, Cost Rate JPN, Cost Rate JPN	Distribute the cost of a main appointment among its additional appointments.
Job Summary JPN	JOB_SUMMARY_JPN	Workforce Administration, Job Information, Review Job Information, Job Summary JPN, Job Summary JPN	View an employee's job history, including additional appointment total. Access details of additional appointments.
Additional Appointment Data	ADD_APPT_SUMM_SEC	Click the View link for an additional appointment on the Job Summary JPN, Work Location page.	View details of additional appointments.

Adding, Changing, or Releasing Additional Appointments

Access the Additional Appointment JPN page (Workforce Administration, Job Information, Additional Appointment JPN, Additional Appointment JPN).

Additional Appointment JPN

Bunji Asano
EMP
ID: KJ1001
Empl Record: 0

Main Appointment

Company:	KJ1	Business Institute - Japan	Location:	KJ01	Tokyo
Business Unit:	JPN01	Japan Business Unit	Job Code:	600105	HR Manager
Department:	10000	Human Resources	Supervisor Level:		

Additional Appointments

Customize | Find | First 1 of 1 Last

Edit	Empl Record	Effective Date	Status as of	Company	Business Unit	DeptID	Dept	Supv Lvl
Edit	1	07/09/2009	Active	BI Japan	Japan BU	10000	Human Reso	

[Add](#)

Additional Appointment JPN page

Additional Appointments

This section of the page displays information about existing additional appointments.

Empl Record (employment record)

The system assigns this number when you add an additional appointment. The system increments the employment record numbers whether an additional appointment or a concurrent job is added. (Concurrent jobs may be added to the system for the purpose of tracking intercompany transfers in a multicompany implementation or for adding a global assignment record.)

Effective Date

The effective date of the latest data row for the employment record number. This date might be later than the system date if additional appointment information was entered with an effective date in the future.

Status as of

The status of the appointment as of the date in the Effective Date field for this employment record number. Values are *Active* and *Inactive*.

Edit

Click this button to access the Edit Additional Appointment Information page, where you can change or release the selected additional appointment.

Add

Click this button to add an additional appointment. The system displays the Edit Additional Appointment Information page, where you record the details of the new appointment.

Recording Additional Appointment Details

Access the Edit Additional Appointment Information page (click the Add or Edit button on the Additional Appointment JPN page).

Additional Appointment JPN

Edit Additional Appointment Information

Bunji Asano

ID: KJ1001

Empl Record: 0

Additional Appointment

Find | View All | First 1 of 1 Last

Empl Record: 1

*Effective Date: 07/09/2009

Expected End Date:

*Action Reason: Asn Kenmu

Start Date:

End Date:

Internal Company Appointment

Company: KJ1 BI Japan

Business Unit: JPN01 Japan BU

Department: 10000 Human Reso

Location: KJ01 Tokyo

Supervisor Level:

External Company Appointment

Company:

Department:

Supervisor Level:

Edit Additional Appointment Information page

Additional Appointment

Empl Record
(employment record)

The system assigns this number when you add an additional appointment. The system increments the employment record numbers whether an additional appointment or a concurrent job is added. (Concurrent jobs may be added to the system for the purpose of tracking intercompany transfers in a multicompany implementation or for adding a global assignment record.)

Action Reason

Three action reason codes are valid for additional appointments:

Asn Kenmu (assign *kenmu*): If you click the Add button on the Additional Appointment JPN page to access this page, the system enters *Asn Kenmu* and you cannot change it. If you click the Edit button to access the page, you cannot save the page if you select *Asn Kenmu*.

Data Chg (data change): Select this value if you are changing (but not releasing) an additional appointment.

Rel Kenmu (release *kenmu*): Select this value if you are releasing the *kenmu* assignment.

Note. The codes that you enter on this page are translated into action and reason codes on the Job record as follows:

Asn Kenmu: The Job record action is *ADL* (additional job) and the reason is *AKM* (assign *kenmu*).

Data Chg: The Job record action is *DTA* (data change) and no action reason is associated with it.

Rel Kenmu: The Job record action is *TER* (termination) and the reason is *RKM* (release *kenmu*).

These Job record rows are not visible to users.

Start Date

Enter the date on which this additional appointment starts.

Expected End Date

Enter the date on which the additional appointment is expected to end.

End Date

Enter the date on which the additional appointment actually ends.

Note. The system displays a warning if the End Date value is later than the Effective Date value of the additional appointment release. Security access to the data row ceases with the effective date of the additional appointment release.

Note. You can enter information in either the Internal Company Appointment group box or the External Company Appointment group box. You cannot use both group boxes at the same time.

Internal Company Appointment

Use this group box if the additional appointment is with a company that is included in your organization's database (internal company).

See [Chapter 12, "\(JPN\) Tracking Additional Appointments \(Kenmu\)," Internal and External Companies, page 634.](#)

External Company Appointment

Use this group box if the additional appointment is with a company that is outside of your organization's database (external company). Prompt values come from the data that you set up on the IC Trans External Company/Dept page and the IC Trans External Superv Lvl page.

See Also

Chapter 12, "(JPN) Tracking Additional Appointments (Kenmu)," Prerequisites, page 636

Distributing Cost

Access the Cost Rate JPN page (Workforce Administration, Job Information, Cost Rate JPN, Cost Rate JPN).

Cost Rate JPN

Bunji Asano EMP ID: KJ1001 Empl Record: 0

Main Appointment

Company:	KJ1	Business Institute - Japan	Location:	KJ01	Tokyo
Business Unit:	JPN01	Japan Business Unit	Job Code:	600105	HR Manager
Department:	10000	Human Resources	Supervisor Level:		

Cost Rate History Find | View All First 1 of 1 Last

Effective Date: 07/09/2009

Main and Additional Appointment Cost Rates						
Empl Record	Company	DeptID	Dept	Supv Lvl	Cost Rate	
0	Main Appt				0.00	+ -
Total Cost Rate:					0.00	

Cost Rate JPN page

Effective Date Enter an effective date for when the additional appointment cost rates are being distributed or redistributed.

Main and Additional Appointment Cost Rates

Empl Record
(employment record) Choose the employment record number for each main or additional appointment that has an associated cost. The only values available in the list are the record numbers of additional appointments associated with the main appointment that you entered to access the page.

When you save the page, the system validates that the employment record is active as of the selected effective date.

Cost Rate Enter the percentage cost associated with the main appointment and each additional appointment.

Total Cost Rate

When you save the page, the system validates that the total cost rate for the main appointment and all of its additional appointments equals 100 percent.

Chapter 13

(JPN) Tracking Intercompany Transfers (Shukkou)

This chapter provides an overview of intercompany transfer tracking and discusses how to:

- Set up employee data for intercompany transfers.
- Enter and maintain home and host data for intercompany transfers.
- Work with search page security.
- Run the Intercompany Transfer report.

Understanding Intercompany Transfer Tracking

Whenever you need to track intercompany transfers (*shukkou*), whether as a home company or a host company, you enter a new job record with standard actions such as transfer, termination, and hire, but with specific action reasons that are related to intercompany transfers. You can use the Pay Group field on the Job Data - Payroll page to indicate which company is the compensation owner.

This section discusses home and host data for intercompany transfers and lists prerequisites.

Home and Host Data for Intercompany Transfers

The tables in the two sections that follow provide summarized data entry obligations and requirements for different intercompany transfer scenarios. The first table addresses only the hosting of intercompany transfers; the second table addresses both temporary and permanent intercompany transfers.

A later section provides details of data entry for a series of scenarios.

See [Chapter 13, "\(JPN\) Tracking Intercompany Transfers \(Shukkou\)," Entering and Maintaining Home and Host Data for Intercompany Transfers, page 655.](#)

This table explains the abbreviations that are used in the two subsequent tables:

<i>Code</i>	<i>Description</i>	<i>Action</i>
ICT	Intercompany Transfer	<i>Shukkou</i>

Code	Description	Action
TICT	Temporary Intercompany Transfer	<i>Zaiseki-Shukkou</i>
PICT	Permanent Intercompany Transfer	<i>Tenseki-Shukkou</i>
HICT	Hosting Intercompany Transfer	<i>Shukkou-Ukeire</i>
HTICT	Hosting Temporary Intercompany Transfer	<i>Zaisekki-Shukkou no Ukeire</i>
HPICT	Hosting Permanent Intercompany Transfer	<i>Tenseki-Shukkou no Ukeire</i>
SL	Supervisor Level	<i>Yakushoku</i>
AA	Additional Appointment	<i>Kenmu</i>
PA	Primary Appointment	<i>Shumu</i>

Hosting Temporary and Permanent Intercompany Transfers

The following table summarizes the information and security requirements for hosting temporary intercompany transfers from companies within a group that uses PeopleSoft Enterprise HRMS and from other companies that don't use PeopleSoft Enterprise HRMS:

<i>ICT Type</i>	<i>PA Location</i>	<i>Information and Security Required Within Affiliated Companies that Use PeopleSoft Enterprise HRMS</i>	<i>Information and Security Required for Affiliated Companies that Do Not Use PeopleSoft Enterprise HRMS</i>
1 HTICT	Host (Own Company)	• Host company information, using shared codes. • The owner of payroll. • ICT period, department, SL, and so on. • In general, employee information is maintained at host (own) company when PA is moved from PA's own company.	• Host company information, using Intercompany Transfer Company/Department and Intercompany Transfer Supervisor Level codes. • The owner of payroll. • ICT period.
2 HPICT	Host (Own Company)	Employee information is maintained at host (own) company only.	Host company information, using Intercompany Transfer Company/Department and Intercompany Transfer Supervisor Level codes.

Temporary and Permanent Intercompany Transfers

This table summarizes the information and security requirements for temporary intercompany transfers to companies within a group that uses PeopleSoft Enterprise HRMS and to other companies that don't use PeopleSoft Enterprise HRMS:

<i>ICT Type</i>	<i>PA Location</i>	<i>AA at Home Company?</i>	<i>Information and Security Required Within Affiliated Companies that Use PeopleSoft Enterprise HRMS</i>	<i>Information and Security Required for Affiliated Companies that Do Not Use PeopleSoft Enterprise HRMS</i>
TICT	Host	No	- Host company information, using shared codes (in case of PS – using group–company). - The owner of payroll. - TICT period, department, SL, and so on. - In general, employee information is maintained at host (own) company when PA is moved from PA's own company.	- Host company information, using Intercompany Transfer Company/Department and IC Transfer Supervisor Level codes. - The owner of payroll. - TICT period.
PICT	N/A (Completely terminated from home company)	N/A	Employee information will be maintained at host company only.	N/A

Prerequisites

Before you enter intercompany transfers for an employee, complete these steps:

- Set up a dummy pay group to use as the compensation indicator if you track intercompany transfers in which the host company (that is, not your company) is responsible for paying the employee.

Note. This setup is reversed if your company is the hosting company; that is, you set up a dummy pay group to track hosted intercompany transfers where the home company pays the employee.

- Set up company and department codes to use for tracking intercompany transfers to and from companies that are not registered in the Company table.
- Set up supervisor level and IC Trans External supervisor level codes to use for tracking intercompany transfers to and from companies that are not registered in the Company table.

Note. You can track intercompany transfers (*shukkou*) as additional appointments (*kenmu*) if you set up and use the additional appointment functionality.

See Also

[Chapter 3, "Setting Up Country-Specific Tables," \(JPN\) Setting Up Intercompany Transfer Company Data, page 126](#)

[Chapter 12, "\(JPN\) Tracking Additional Appointments \(Kenmu\)," page 633](#)

[Chapter 13, "\(JPN\) Tracking Intercompany Transfers \(Shukkou\)," Indicating the Home or Host Compensation Owner, page 654](#)

Setting Up Employee Data for Intercompany Transfers

This section discusses how to:

- Track intercompany transfers.
- Indicate the home or host compensation owner.

Note. This section discusses the basics of how to set up an intercompany transfer. See the next section for detailed examples of data entry and maintenance.

See Also

[Chapter 13, "\(JPN\) Tracking Intercompany Transfers \(Shukkou\)," Entering and Maintaining Home and Host Data for Intercompany Transfers, page 655](#)

Tracking Intercompany Transfers

Whenever you need to track intercompany transfers, whether as a home company or a host company, set up the employee data:

- Enter a new job record with standard actions such as transfer, termination, and hire, but with specific action reasons that are related to intercompany transfers.
- Complete the intercompany transfer fields in the Japan section of the Work Location page.

Selecting Actions and Reasons for Intercompany Transfers

These are the actions and reasons that you use on the Administer Workforce pages when you work with intercompany transfers:

Action	Reason
Transfer	Intercompany transfer.
	Completion of intercompany transfer.
Termination	Permanent intercompany transfer.
	Completion of (hosted) intercompany transfer.
Hire	Temporary intercompany transfer.
	Permanent intercompany transfer.

See Also

Chapter 6, "Increasing the Workforce," Entering Employee Job Location and Position Information, page 228

Indicating the Home or Host Compensation Owner

You can use the Pay Group field on the Job Data - Payroll page (Workforce Administration, Job Information, Job Data, Payroll) to identify whether the home or the host company is responsible for paying an employee on temporary intercompany transfer. If the home company is paying, put the employee in a standard pay group with other employees. If the host company is paying, put the employee in a designated dummy pay group that has no payroll processing implications for your (home) company.

Similarly, if you are the host for a temporary intercompany transfer, put the employee in a standard pay group if you are paying the employee, or into a designated dummy pay group if the home company is paying the employee.

Note. When the Payroll System field is set to *Other* on the Job Data - Payroll page, the Pay Group field is not a required field. You can use the field as described previously whether it is required or not.

See Also

Chapter 6, "Increasing the Workforce," Entering Payroll Processing Data, page 255

Entering and Maintaining Home and Host Data for Intercompany Transfers

The following three sets of scenarios detail the data input and maintenance requirements by the home or host company. Sets B and C are similar, but reflect different security conditions.

The sets of scenarios are:

- Set A: Single Company Using a Single PeopleSoft Enterprise HRMS Database.
- Set B: Multiple Companies Using a Single PeopleSoft Enterprise HRMS Database (with security restrictions).
- Set C: Multiple Companies Using a Single PeopleSoft Enterprise HRMS Database (without security restrictions).

Single Company Using a Single PeopleSoft Enterprise HRMS Database: Scenarios A1-8

This section discusses several scenarios for a single company that uses a single human resources database.

Note. Additional Employment Instance is not used for any scenarios in set A. The scenarios in set A are applicable when multiple companies use a single human resources database but the information—for the home or host company relevant to a particular intercompany transfer—is not stored in that database.

Scenario A1: TICT

Home Company Inputs

<i>Table</i>	<i>Fields</i>	<i>Input</i>
JOB	Action	Transfer.
	Reason	Temporary intercompany transfer.
	Department ID	Department ID that indicates temporary intercompany transfer.
	Pay Group	If the home company is responsible for compensation, no change occurs to the pay group. If not, enter a dummy pay group to indicate that the host (other) company is responsible for compensation. No processing is associated with dummy pay groups.

Table	Fields	Input
JOB_JR	Intercompany Transfer Flag	Host company information.
	Business Unit code	If the home company is a normal (internal) company, enter the code. If not, leave this field blank.
	Company code	If the Host company is a normal (internal) company, enter the code. If it is an external company, enter the ICT Company code.
	Department code	If the host company is a normal (internal) company, enter the department code. If it is an external company, enter the ICT Department code.
	Sup Lvl ID code	If the host company is a normal (internal) company, enter the supervisor level ID. If it is an external company, enter the ICT supervisor level ID.
	ICT Start Date	Actual start date of intercompany transfer.
	ICT End Date	Expected end date of ICT.

Host Company Inputs

Not applicable.

Scenario A2: Completion of TICT*Home Company Inputs*

Table	Fields	Input
JOB	Action	Transfer.
	Reason	Completion of ICT.
	Department ID	Employee's home company department.
	Pay Group	Employee's home company pay group.

Host Company Inputs

Not applicable.

Scenario A3: PICT*Home Company Inputs*

Table	Fields	Input
Job	Action	Termination.
	Reason	Permanent intercompany transfer.
JOB_JR	Intercompany Transfer Flag	Host company information.
	Business Unit (code)	If the home or host company is a normal (internal) company, enter the code. If not, leave this field blank.
	Company code	If the host company is a normal (internal) company, enter the code. If it is an external company, enter the ICT Company code.
	Department code	If the host company is a normal (internal) company, enter the Department code. If it is an external company, enter the ICT Department code.
	Sup Lvl ID code	If the host company is a normal (internal) company, enter the supervisor level ID. If it is an external company, enter the ICT supervisor level ID.

Host Company Inputs

Not applicable.

Scenario A4: HTICT*Home Company Inputs*

Not applicable.

Host Company Inputs

Table	Fields	Input
JOB	Action	Hire.
	Reason	Temporary intercompany transfer.

Table	Fields	Input
	Pay Group	If host (own) company is responsible for compensation, enter the pay group in which you want the employee. If not, enter a dummy pay group to indicate that the home (other) company is responsible for compensation.
	Employee Class	Hosting intercompany transfer.
JOB_JR	Intercompany Transfer Flag	Home company information.
	Business Unit (code)	If the home or host company is a normal (internal) company, enter the code. If not, leave this field blank.
	Company code	If the host company is a normal (internal) company, enter the code. If it is an external company, enter the ICT Company code.
	Department code	If the host company is a normal (internal) company, enter the Department code. If it is an external company, enter the ICT Department code.
	Sup Lvl ID code	If the host company is a normal (internal) company, enter the supervisor level ID. If it is an external company, enter the ICT supervisor level ID.
	ICT Start Date	Actual start date of intercompany transfer.
	ICT End Date	Expected end date of ICT.

Scenario A5: Completion of HTICT*Home Company Inputs*

Not applicable.

Host Company Inputs

Table	Fields	Input
JOB	Action	Termination.
	Reason	Completion of TICT.

Scenario A6: HPICT*Home Company Inputs*

Not applicable.

Host Company Inputs

Table	Fields	Input
JOB	Action	Hire.
	Reason	Permanent intercompany transfer.
	Pay Group	Pay group in which you want this employee.
	Employee Class	Hosting intercompany transfer.
JOB_JR	Intercompany Transfer Flag	Home company information.
	Business unit code	If the home or host company is a normal (internal) company, enter the code. If not, leave this field blank.
	Company code	If the host company is a normal (internal) company, enter the code. If it is an external company, enter the ICT Company code.
	Department: code	If the host company is a normal (internal) company, enter the Department code. If it is an external company, enter the ICT Department code.
	Sup Lvl ID code	If the host company is a normal (internal) company, enter the supervisor level ID. If it is an external company, enter the ICT supervisor level ID.

Multiple Companies Using a Single PeopleSoft Enterprise HRMS Database: Scenarios B1-6

This section discusses several scenarios for multiple companies that use a single human resources database.

Conditions:

- Both home and host companies use the same database and business unit, company, department ID, and supervisor level ID.

- Security settings make it impossible for either company to access the other's information.

Scenario B1: TICT

Home Company Inputs (Temporary Intercompany Transfer - TICT)

Table	Fields	Input
JOB	Action	Transfer.
	Reason	Temporary intercompany transfer.
	Department ID	Dummy ID that indicates temporary intercompany transfer.
	Pay Group	If home (own) company is responsible for compensation, no change occurs to the pay group. If not, enter a dummy pay group to indicate that the host (other) company is responsible for compensation. No processing is associated with dummy pay groups.
	Job Indicator	Because the host company enters information by using concurrent jobs functionality, it is <i>Secondary</i> .
JOB_JR	Intercompany Transfer Flag	Host company information.
	Business unit code	Business unit to which the employee will be sent.
	Company code	Host company to which the employee will be sent.
	Department ID code	Host department in which the employee will be.
	Sup Lvl ID code	Supervisor level that employee will take in host company.
	ICT Start Date	Actual start date of intercompany transfer.
	ICT End Date	Expected end date of ICT.

Host Company Inputs (Hosting Temporary Intercompany Transfer - TICT)

<i>Table</i>	<i>Fields</i>	<i>Input</i>
JOB	Employee ID	If accessing through Add Employment Instance, use the same employee ID as the home company. If accessing through the Add a Person page, assign a new ID.
	Employee Record #	Employee ID is 1 or higher.
	Action	Hire.
	Reason	Temporary intercompany transfer.
	Company	Host company.
	Department ID	Host department in which the employee will be.
	Pay Group	If host (own) company is responsible for compensation, the pay group in which you want this employee. If not, enter a dummy pay group to indicate that the home (other) company is responsible for compensation.
	Employee Class	Hosting intercompany transfer.
	Job Indicator	Primary.
JOB_JR	Intercompany Transfer Flag	Home company information.
	Business unit code	Employee's home business unit.
	Company code	Employee's home company.
	Department ID code	Employee's home department.
	ICT Start Date	Actual start date of intercompany transfer.
	ICT End Date	Expected end date of ICT.

Scenario B2: Completion of TICT

Home Company Inputs (Completion of Temporary Intercompany Transfer)

Table	Fields	Input
JOB	Action	Transfer.
	Reason	Completion of temporary intercompany transfer.
	Department ID	Home company department in which the employee will be.
	Pay Group	Pay group for home company that is responsible for compensation.
	Job Indicator	Primary.

Host Company Inputs (Completion of Hosting Temporary Intercompany Transfer)

Table	Fields	Input
JOB	Action	Termination.
	Reason	Completion of temporary intercompany transfer.
	Job Indicator	Secondary.

Scenario B3: PICT

Home Company Inputs (Permanent Intercompany Transfer - PICT)

Table	Fields	Input
JOB	Action	Termination.
	Reason	Permanent intercompany transfer.
	Job Indicator	Because the host company entered information by using concurrent jobs functionality, it is <i>Secondary</i> .
JOB_JR	Intercompany Transfer Flag	Host company information.
	Business unit code	Business unit to which the employee is transferring.

Table	Fields	Input
	Company code	Host company to which the employee is transferring.
	Department ID code	Employee's host department.
	Sup Lvl ID code	Supervisor level that employee will have in host company.

Host Company Inputs (Hosting Permanent Intercompany Transfer - PICT)

Table	Fields	Input
JOB	Employee ID	If accessing through Add Employment Instance, use the same employee ID as the home company. If accessing through the Add a Person page, assign a new ID.
	Employee Record #	If accessing through the Concurrent Jobs page, the employee ID is 1 or higher.
	Action	Hire.
	Reason	Permanent intercompany transfer.
	Pay Group	Regular host company pay group in which the employee will be.
	Employee Class	Hosting intercompany transfer.
	Job Indicator	Primary.
JOB_JR	Intercompany Transfer Flag	Home company information.
	Business Unit code	Business unit from which the employee comes.
	Company code	Home company to which the employee belongs.
	Department ID code	Home department in which the employee was.

Multiple Companies Using a Single HRMS Database: Scenarios C1-6

This section discusses several scenarios for multiple companies that use a single PeopleSoft Enterprise HRMS database.

Conditions:

- Both home and host companies use the same database and business unit, company, department ID, and supervisor level ID.
- Security settings allow all companies to access each other's information.

Scenario C1: TICT

Home Company Inputs (Temporary Intercompany Transfer - TICT)

Table	Fields	Input
JOB	Action	Transfer.
	Reason	Temporary intercompany transfer.
	Department ID	Dummy ID that indicates temporary intercompany transfer.
	Pay Group	If home (own) company is responsible for compensation, no change occurs to the pay group. If not, enter a dummy pay group to indicate that the host (other) company is responsible for compensation.
	Job Indicator	Because the host company enters information by using concurrent jobs functionality, it is <i>Secondary</i> .
JOB_JR	Intercompany Transfer Flag	Host company information.
	ICT Start Date	Actual start date of intercompany transfer.
	ICT End Date	Expected end date of ICT.

Host Company Inputs (Hosting Temporary Intercompany Transfer - TICT)

Table	Fields	Input
JOB	Employee ID	If accessing through Add Employment Instance, use the same employee ID as the home company. If accessing through the Add a Person page, assign a new ID.
	Employee Record #	If accessing through the Concurrent Jobs page, the employee ID is 1 or higher.
	Action	Hire.
	Reason	Temporary intercompany transfer.
	Company	Host company.
	Department ID	Host department in which the employee will be.
	Pay Group	If host (own) company is responsible for compensation, the pay group in which you want this employee. If not, enter a dummy pay group to indicate that the home (other) company is responsible for compensation.
	Employee Class	Hosting intercompany transfer.
	Job Indicator	Primary.
JOB_JR	Intercompany Transfer Flag	Home company information.
	ICT Start Date	Actual start date of intercompany transfer.
	ICT End Date	Expected end date of ICT.

Scenario C2: Completion of TICT

See Scenario B2: Completion of Temporary Intercompany transfer.

Scenario C3: PICT

Home Company Inputs (Permanent Intercompany Transfer - PICT)

Table	Fields	Input
JOB	Action	Termination.
	Reason	Permanent intercompany transfer.
	Job Indicator	Because the host company entered information by using concurrent jobs functionality, it is <i>Secondary</i> .
JOB_JR	Intercompany Transfer Flag	Host company information.

Host Company Inputs (Hosting Permanent Intercompany Transfer - PICT)

Table	Fields	Input
JOB	Employee ID	If accessing through Add Employment Instance, use the same employee ID as the home company. If accessing through the Add a Person page, assign a new ID.
	Employee Record #	If accessing through the Concurrent Jobs page, the employee ID is 1 or higher.
	Action	Hire.
	Reason	Permanent intercompany transfer.
	Pay Group	Regular host company pay group in which the employee will be.
	Employee Class	Hosting intercompany transfer.
	Job Indicator	Primary.
JOB_JR	Intercompany Transfer Flag	Home company information.

Working with Search Page Security

This section discusses how department security (Search Page Security on PERS_SRCH_COR and EMPLMT_SRCH_COR) works when you use the system's Multiple Jobs functionality.

Note. You can set up this security in many different ways. Your specific business requirements determine how you set up yours. This section describes one example of how you may set up your security.

This information makes the following assumptions:

- You want to manage two companies in one database: company A and company B, where company B is a subsidiary of company A.
- The entire organization of company A belongs to business unit A (BUA), and the entire organization of company B belongs to business unit B (BUB).
- You have defined two setIDs: SIDA and SIDB for companies A and B, respectively.
- Neither company's workers have meaningful employee IDs; that is, the ID does not identify the company.

For example, a person with employee ID 1002 may belong to company B, whereas workers with employee IDs 1001 and 1003 belong to company A.

- This security has two users: USR1 and USR2.

USR1 has the right to access the sales department of company A, and USR2 has the right to access the sales department of company B.

Following these assumptions, the next table represents the job rows for the person with employee ID 1001, who:

- Was originally hired by company A.
- Went on a temporary intercompany transfer to company B (scenario B1).
- Returned to company A (scenario B3).
- Went on permanent intercompany transfer to company B (scenario B6).

Key: In this table, Empl Rec# = Employment Record Number, Co. = Company, ICT = InterCompany Transfer, A/R = Action/Reason, D = Department, and J = Job Indicator.

<i>Event</i>	<i>Empl Rec#0</i>	<i>Empl Rec#1</i>
1. Hired by company A	A/R – Hired Co. – A D – Sales J – Primary	NA
2. Temporary ICT to company B	A/R – Transfer/ICT Co. – A D – Human Resources J – Secondary	A/R – Hire/Temporary ICT Co. – B D – Sales J – Primary

Event	Empl Rec#0	Empl Rec#1
3. Returned to company A	A/R – Transfer/Completion of Temporary ICT Co. – A D – Sales J – Primary	A/R – Termination/Completion of Temporary ICT Co. – B D – Sales J – Secondary
4. Permanent ICT to company B 4a. Terminated from company A 4b. Hired (or rehired) by company B	A/R – Termination / Permanent ICT Co. – A A/R – Hired or rehired / Permanent ICT Co. – B D – Sales J – Primary	NA

This example shows how departmental security (search page security) works for users who have security right access to a department. Users can do one of the following:

- Access all employees whose current jobs belong to that department when PERS_SRCH_GBL is used as the search table.
- Access the particular record numbers for employees whose current job is in the department when EMPLMT_SRCH_GBL is used as the search table.

This table shows which users have access to which data at each of the four events described for employee 1001:

Event	Personal Data	Empl Rec#0 Data	Empl Rec#1 Data
	PERS_SRCH_GBL	EMPLMT_SRCH_GBL	EMPLMT_SRCH_GBL
1. Hired by company A	USR1	USR1	NA
2. Temporary ICT to company B	USR1 and USR2	USR1	USR2
3. Returned to company A	USR1 and USR2	USR1	USR2

<i>Event</i>	<i>Personal Data</i>	<i>Empl Rec#0 Data</i>	<i>Empl Rec#1 Data</i>
4a. Permanent ICT to company B 4b. Hired or rehired by company B	USR1 and USR2 USR2	USR1 USR2	USR2 USR2

Running the Intercompany Transfer Report

This section lists the page used to run the JPN Completion of IC Transfer report.

Page Used to Run the Intercompany Transfer Report

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Completion of IC Transfer JPN	RUNCTL_PER065_JPN	Workforce Administration, Job Information, Reports, Completion of IC Transfer JPN, Completion of IC Transfer JPN	Run the JPN Completion of IC Transfer report (PER065JP), which lists employees on temporary intercompany transfer. The home company uses this report to confirm employees who are anticipated to return from temporary intercompany transfer.

Chapter 14

(JPN) Mass Organization Change

This chapter provides an overview of mass transfers in Japan and discusses how to:

- Change plans for restructuring an organization.
- Align employee placement plans with the new organization structure.
- Finalize organization and employee placement plans.

Understanding Mass Organization Change

Japanese companies change organizational structure periodically. Consequently, employees are transferred to new roles and departments within the revised structure. This change is referred to as mass period transfers (*teiki ido*). With rapid changes in the business environment, organizational changes and mass transfers play an integral part for businesses in Japan and take place in short cycles.

Job rotation is viewed as an integral part of employee development in Japan. Human resources (HR) departments intentionally transfer some employees to multiple departments over a period of time. This practice is aimed at developing generalists who are knowledgeable about several jobs within the company. It also provides employees more experience and a broader vision of the company. The period of service in a department is often the selection criterion for job rotation. Employees who are identified as transferable are called transfer candidate employees.

Many companies in Japan employ a split HR organizational structure made up of division HR and corporate HR. Corporate HR is an HR department located in the main company headquarters of a large company or group of companies. Division HR departments are HR departments within a business unit or division. The division HR departments report to the corporate HR department (and the general manager of the business unit, subsidiary companies, and so on).

The division HR department formulates and implements activities related to changes in organizational strategy and employee placement at the departmental level. When division HR finishes its work, it reports to corporate HR. Corporate HR then coordinates and adjusts activities and placements among departments based on company strategy.

Tamatsuki Placement

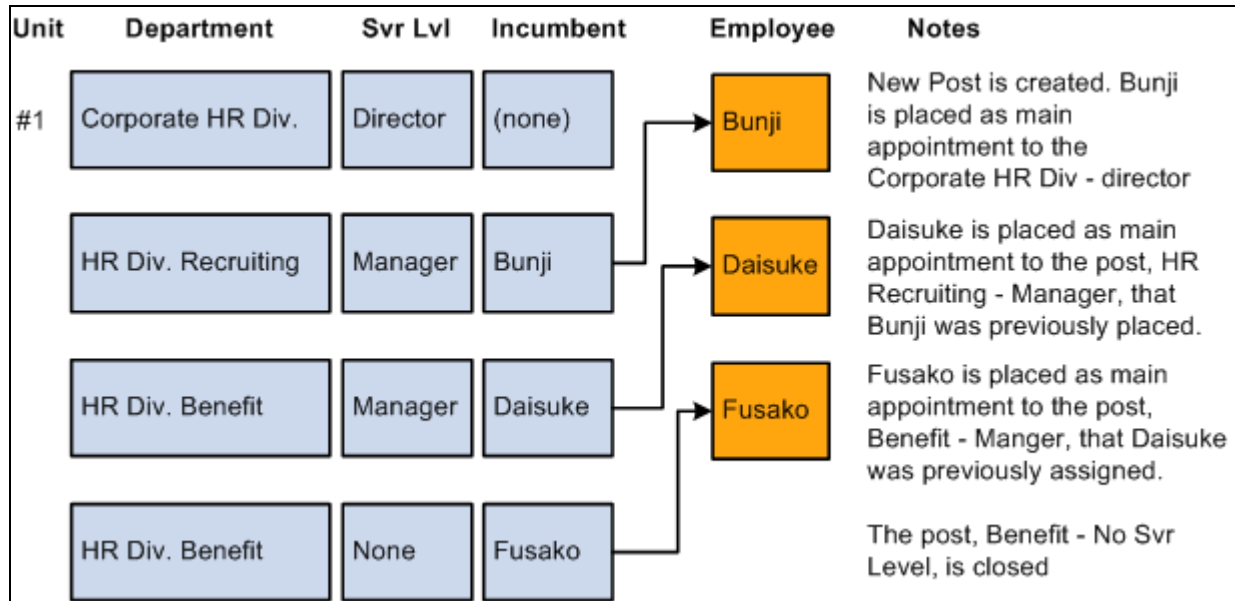
The Japanese word *tamatsuki* combines the words ball (*tama*) and hit (*tsuku*) and means *billiards* in Japanese. *Tamatsuki* placement begins when an employee is assigned to a newly created post. The existing post is vacated and is available to be filled.

Note. A post is equivalent to a supervisory level role (*yakushoku*) in a department. It is different from a position, which is maintained in the Position Management feature.

When restructuring an organization, *Tamatsuki* placement is usually conducted along the same job level. *Tamatsuki* placement can also occur when an employee has requested a transfer. Job rotation for higher level management positions are also done across the same job level, which starts a job transfer chain of events.

For example, Bunji is assigned a new post, Corporate HR Division Director, and his previous post becomes available. Other employees are then assigned to similar posts at the same level by the cascading effect of a person moving from one post to another and leaving the existing post vacant. Daisuke is assigned to Bunji's previous post, Fusako is assigned to Daisuke's previous post, and Fusako's previous post is closed.

This example of *tamatsuki* placement is pictured in the following diagram:



Example of *Tamatsuki* placement

Note. This feature does not support transfer between business units as table sets may differ from one business unit to the next.

Changing Plans for Restructuring an Organization

This section provides an overview of change plans for restructuring an organization and discusses how to:

- Create an Organization Plan.
- Specify Headcount Plan by department.
- View the Headcount Plan listing.

Understanding Change Plans for Restructuring An Organization

To plan a new organizational structure, you enter information about the new structure in the system. This information includes the department hierarchy and size by supervisor level, job code, and grade. You can store multiple structures under different names. After entering the information for a new plan, you verify the information using a visual chart.

Organizational Structure

You build the existing and planned organizational structures using PeopleSoft Tree Manager. Tree Manager provides a graphical user interface that enables you to create organizational structures visually using drag-and-drop functionality. To create a new organizational structure using Tree Manager, copy the existing tree for the current organizational structure and save it by a different name.

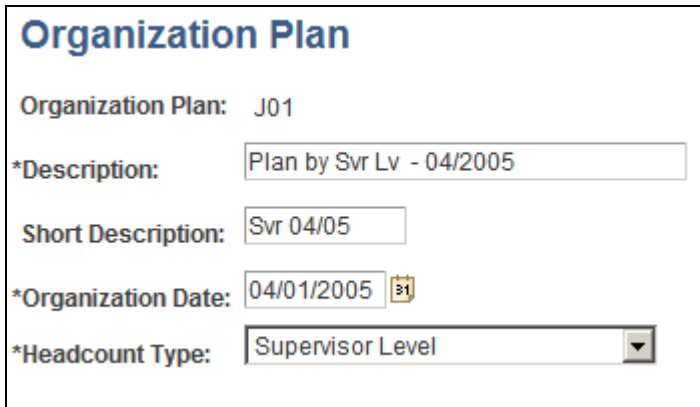
Note. When using an initial tree structure, Oracle recommends that customers create a tree based on the DEPT_SECURITY tree but with a different name. Then, after the tree is approved, rename the tree DEPT_SECURITY with a new effective date.

Pages Used to Change Plans for Restructuring an Organization

Page Name	Definition Name	Navigation	Usage
Tree Manager	PSTREEMGR	Tree Manager, Tree Manager	Base the new tree on the existing organization structure's tree and copy it or create a tree for the new organization structure. Add departments using Tree Manager functionality.
Organization Plan	IDO_ORG_PLAN_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Organization Plan, Organization Plan	Set up <i>Ido</i> organization plans.
Headcount Plan by Department	IDO_HC_DEPT_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Headcount Plan by Department, Headcount Plan by Department	Specify head count targets by department.
Headcount Plan Listing	RC_IDO_HC_RPT_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Headcount Plan Listing, Headcount Plan Listing	Use this page to run a report that compares the head count goals established for departments with the simulated result of the organization plan.

Creating an Organization Plan

Access the Organization Plan page (Workforce Administration, Collective Processes, Mass Organization Change JPN, Organization Plan).



The screenshot shows the 'Organization Plan' page with the following fields and values:

- Organization Plan:** J01
- *Description:** Plan by Svr Lv - 04/2005
- Short Description:** Svr 04/05
- *Organization Date:** 04/01/2005 (with a calendar icon)
- *Headcount Type:** Supervisor Level (with a dropdown arrow)

Organization Plan page

An Organization Plan enables you to track several different ways of reorganizing the company. After running reports modeling the different options, you can select one of the Organization Plans as the *official* plan and insert it into the Job record.

Organization Date Enter the date from which the new organization plan will be effective.

Headcount Type Select *Job Code*, *Sal Admin Plan/Grade*, or *Supervisor Level*.

Specify Headcount Plan by Department

Access the Headcount Plan by Department page (Workforce Administration, Collective Processes, Mass Organization Change JPN, Headcount Plan by Department).

Headcount Plan by Department

Organization Plan: J02

Business Unit: TBTC2

Headcount Type: Job code

Description: Plan by Job Cd - 04/2005

Description: Business Unit for Company TC2

Default by Active Departments

Headcount Plan Information						Customize Find View All First 1-25 of 32 Last	
	*Department	Description	Job Code	Description	Headcount		
1	T001	ST - HR Department	T001	ST - Manager of Human Resource	2	+	-
2	T001	ST - HR Department	T011	ST - HR Clerk	2	+	-
3	T001	ST - HR Department	T041	ST - Filing Clerk	4	+	-
4	T001	ST - HR Department	T071	ST - Accounting Mgt FIN	1	+	-
5	T001	ST - HR Department	T130	ST - Benefits Mgr	2	+	-
6	T001	ST - HR Department	T180	ST - Apprentice	2	+	-
7	T002	ST - Payroll Department	T002	ST - Manager of Payroll	1	+	-
8	T002	ST - Payroll Department	T006	Musician	4	+	-
9	T002	ST - Payroll Department	T021	ST - Payroll Clerk	7	+	-
10	T002	ST - Payroll Department	T031	ST - Computer Programmer	6	+	-
11	T002	ST - Payroll Department	T041	ST - Filing Clerk	2	+	-
12	T002	ST - Payroll Department	T043	Intern	2	+	-
13	T002	ST - Payroll Department	T081	ST - Acctg Clerk	21	+	-
14	T002	ST - Payroll Department	T110	ST Travel Co-ordinator	2	+	-
15	T003	ST - Information Systems	T00001	Assembler	2	+	-

Headcount Plan by Department page

Use this page to track goals by department. For example, if you have two people in department 100 and you want four people after the reorganization is completed, you enter the number 4 for department 100 on this page. You then perform your transfers. After your reorganization is finished (but before you insert it into the Job record), run the Headcount Plan Listing (PER071JP.SQR) report to see if your transfers have increased the headcount in the department from two to four.

Default by Active Departments

Click the Default by Active Departments button to populate the Headcount Plan Information grid with data about the active departments.

As well as using the Default by Active Departments button, you can enter the head count for each department.

Note. This page provides a lower level of detail than the Headcount by Department page. It also breaks down this information by supervisor level, job code, and grade. If you currently had a head count of two in department 100, one with a supervisor level of S10 and one with a supervisor level of S20, you could change the settings to two for S10 and two for S20, resulting in a projected total head count of four for the department.

Note. If you do not want to use headcount planning, then do not enter any data on the Headcount Plan by Department page for that organization plan.

View the Headcount Plan Listing

Access the Headcount Plan Listing page (Workforce Administration, Collective Processes, Mass Organization Change JPN, Headcount Plan Listing).

Headcount Plan Listing

Run Control ID: 1 [Report Manager](#) [Process Monitor](#) [Run](#)

Language: English

Report Request Parameter(s)

*Organization Plan: J01 Plan by Svr Lv - 04/2005

Organization Date: 04/01/2005

Headcount Type: Supervisor Level

Business Unit: JCS02 CarrotSoft Sales

Tree Name: DEPT_SECURITY

Effective Date: 01/01/1990

Tree Node: J1000 President

Headcount Plan Listing page

Enter values on this page that will be used to compare the head count goals established for departments with the simulated result of the organization plan.

Aligning Employee Placement Plans with the New Organization Structure

This section provides an overview of employee placement plans and discusses how to:

- List *Ido*.
- Transfer entries by department.
- Transfer entries by using trees.
- Select *tamatsuki* transfer candidates.
- Enter *tamatsuki* transfers.

- List *tamatsuki* placements.
- Transfer *tamatsuki* data to the job record.
- Delete and maintain transfer data.

Understanding Employee Placement Plans

Multiple ways exist to create employee placement plans. The first way is to use the Transfer Entry by Dept page. With this method, you enter the placement by department. The second method is to use the Transfer Entry with Trees page. You see the current organization structure and placement, and you enter plans.

These methods are similar in that you create an *Ido* candidate listing, use the Transfer Entry by Dept or Transfer Entry with Trees pages, and then use the Transfer Data Maintenance page, if required. You can then check, undo, and adjust placements using the Transfer Data Maintenance page.

The third method is the *Tamatsuki* Transfer method to enter placements. The *Tamatsuki* Transfer is an optional step. Using this method, you create an *Ido* candidate listing, use the Transfer Entry by Dept or Transfer Entry with Trees pages, use the *Tamatsuki* Transfer Candidate Entry, *Tamatsuki* Transfer Entry, *Tamatsuki* Placement Check List, and *Tamatsuki* to Transfer Record pages, and then you use the Transfer Data Maintenance page, if required.

Security setup does not prevent users from transferring employees. Consequently, limit access to the Mass Employee Transfer page to trusted users only. Security access is invoked whenever a user clicks the View links on the Transfer Entry by Dept and Transfer Entry by Tree pages.

Pages Used For Employee Placement Plans

Page Name	Definition Name	Navigation	Usage
Ido Candidate Listing	RC_IDO_EE_LIST_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Ido Candidate Listing, Ido Candidate Listing	Run a report that lists current information for employees. Use it to help plan future organizational changes.
Transfer Entry by Dept	IDO_MASS_TRANS_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Transfer Entry by Dept, Transfer Entry by Dept	Transfer multiple employees from one department to another.
Transfer Entry with Trees	IDO_XFR_TREE_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Transfer Entry with Trees, Transfer Entry with Trees	Transfer employees between departments using trees.

Page Name	Definition Name	Navigation	Usage
Tamatsuki Transfer Candidates	IDO_CANDIDATE_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Tamatsuki Transfer Candidates, Tamatsuki Transfer Candidates	Specify a list of <i>tamatsuki</i> candidates.
Tamatsuki Transfer Entry	IDO_TAMATSUKI_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Tamatsuki Transfer Entry, Tamatsuki Transfer Entry	Assign <i>tamatsuki</i> candidates to posts.
Tamatsuki Placement Check List	RC_IDO_TAM_CL_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Tamatsuki Placement Check List, Tamatsuki Placement Check List	Summarize the <i>tamatsuki</i> transfers that are planned.
Tamatsuki to Transfer Record	RC_IDO_TAM_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Tamatsuki to Transfer Record, Tamatsuki to Transfer Record	Copy data from the record IDO_TAMATSU_JPN to the record IDO_FUT_UPD_JPN.
Transfer Data Maintenance	IDO_MAINT_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Transfer Data Maintenance, Transfer Data Maintenance	Maintain the Future Update record.

Listing Ido Candidates

Access the Ido Candidate Listing page (Workforce Administration, Collective Processes, Mass Organization Change JPN, Ido Candidate Listing, Ido Candidate Listing).

Ido Candidate Listing

Run Control ID: 1

Language: Japanese

[Report Manager](#) [Process Monitor](#) Run

Report Request Parameter(s)

***Organization Plan:** J01 Plan by Svr Lv - 04/2005

Organization Date: 04/01/2005

Business Unit: JCS02 CarrotSoft Sales

Tree Name: ORG_PLAN1

Effective Date: 01/01/2005

Tree Node: J1000 President

Ido Candidate Listing page

Use this page to run a report to determine which employees are subject to a reorganization or *tamatsuki* placement. The report is in comma delimited file (CSV) format so that you can open the file as a spreadsheet.

Transferring Entries by Department

Access the Transfer Entry by Dept page (Workforce Administration, Collective Processes, Mass Organization Change JPN, Transfer Entry by Dept, Transfer Entry by Dept).

Transfer Entry by Dept

Organization Plan: J01

Description: Plan by Svr Lv - 04/2005

Organization Date: 04/01/2005

Selection Criteria

Effective Date: 03/31/2005

Business Unit: JPN01 Japan Business Unit

Department: 10000 Human Resources

Load

Employee Information

Details 1

Details 2

Customize

Find

View All

First

1-25 of 50

Last

	Proc	*Empl ID	Name	Empl Record	Appt Type	Title	Supv Lvl	Future Row	Tamatsuki		
1	☒	KJ1001	Bunji Asano	0	Core Appt	HR Manager				+	-
2	☒	KJL400	Eisuke Kimura	0	Core Appt	HR Spclst				+	-
3	☒	KJL401	Honzo Maita	0	Core Appt	HR Manager				+	-
4	☒	KJL402	Ayano Natsume	0	Core Appt	HR Spclst				+	-
5	☒	KJL403	Ken Onohara	0	Core Appt	HR Manager				+	-
6	☒	KJLA01	Eisuke Kimura	0	Core Appt	HR Spclst				+	-
7	☒	KJLA02	Eisuke Sato	0	Core Appt	HR Spclst				+	-

Transfer Entry by Dept page (1 of 2)

Change the Following Fields

Action: Transfer

Reason: ROR Reorg

Effective Date: 04/01/2005

Business Unit: JPN01 Japan BU

Department: 31000 Tokyo HQ

Location Code: KJ01

Supervisor Level:

Job Code:

Transfer Entry by Dept page (2 of 2)

Load

Click the Load button to list the employees for a particular business unit and department who are available for transfer to another department.

Proc (Process)	The Proc check box is selected by default. When it is selected, employees are transferred to another department or have other job-related information changed. The changes are applied when the page is saved. For example, department 100 is being closed. Half the employees in that department will be assigned to department 110, and the other half will be assigned to department 120. First, open this page and display all employees in department 100. Then enter a transfer to department 110 in the Change the Following Fields group box and deselect the Proc check box for those employees who should be transferred to department 120. After saving the page, enter a transfer for department 120, deselect the employees in department 110, reselect the employees to be transferred to department 120, and save the page again.
Action	Select the action to use for inserting a new Job row.
Reason	Select a code to specify why the value is being changed.
Effective Date	Enter a date to specify when the change becomes effective.
Business Unit, Department, Location Code, Supervisor Level, and Job Code	Enter values in these fields to specify new information for the employees selected. Note. These fields should be left blank if a user does not want to change the data for the employees. For example, if you want to move employees from department 100 to 110 but want them to keep their old job codes, you would leave the Jobcode field blank on the page. On the other hand, if you want to assign all the employees to job code J200 and change their departments, you would enter <i>J200</i> in the Jobcode field.

Transferring Entries by Using Trees

Access the Transfer Entry with Trees page (Workforce Administration, Collective Processes, Mass Organization Change JPN, Transfer Entry with Trees, Transfer Entry with Trees).

Transfer Entry with Trees

Organization Plan: J01 Description: Plan by Svr Lv - 04/2005

Organization Date: 04/01/2005

Selection Criteria to Load Source Structure

Business Unit: JCS02 Tree Name: DEPT_SECURITY

Effective Date: 01/01/1990 Tree Node: J1000

[Load](#)

Selection Criteria to Load Target Structure

Business Unit: JCS02 Tree Name: DEPT_SECURITY

Effective Date: 01/01/1990 Tree Node: J1100

[Load](#)

Source Structure

First | Previous | [Next](#) | [Last](#) | Left | Right

- J1000 - President
 - J1100 - Administration Department
 - J1110 - Accounting Section
 - J0031 0 - Muneharu Yasuda (Yasuda Muneharu)
 - J0057 0 - Nobutaka Ikeyama (Ikeyama Nobu)
 - J0202 0 - Satoru Ida (Ida Satoru)
 - J1120 - Human Resources Section
 - J0032 0 - Koichi Omura (Omura Koichi)
 - J0203 0 - Wataru Nakayama (Nakayama Wataru)
 - J0204 0 - Moe Aoki (Aoki Moe)
 - J1130 - General Affairs Section
 - J0029 0 - Tomomi Akasaka (Akasaka Tomomi)
 - J1200 - Sales Department
 - J0030 0 - Kotaro Hori (Hori Kotaro)
 - J0059 0 - Daiki Toyama (Toyama Daiki)

Target Structure

First | Previous | [Next](#) | [Last](#) | Left | Right

- J1100 - Administration Department

Employee Information

[Customize](#) | [Find](#) | [View All](#) | [Print](#) | First | 1 of 1 | Last

Details 1	Details 2	Proc	Empl ID	Name	Empl Record	Appt Type	Dept	Title
1	☒				0			

Transfer Entry with Trees page (1 of 2)

Change the Following Fields

Action: Reason:

Location: Supervisor Level:

Job Code:

Transfer Entry with Trees page (2 of 2)

Note. Before using this page, consider and decide on each employee's transfer data, including locations, supervisor levels, job codes, and actions and reasons.

Enter values for the Business Unit, Tree Name, Effective Date, and Tree Node fields in both the Selection Criteria to Load Source Structure group box and the Selection Criteria to Load Target Structure group box. Click the respective Load buttons for each section.

To transfer entries by using trees:

1. Select an employee to be transferred from the Selection Criteria to Load Source Structure tree, and click the Department folder to list all employees in the department.
2. Click the employee's name to display information on the Details 1 and Details 2 grids.
3. View information in the Details 1 and Details 2 grids, as necessary.

4. Enter values in the Action and Reason fields.

The Location, Supervisor Level, and Jobcode fields are optional.

5. Click a new department for the employee in the Selection Criteria to Load Target Structure tree.

Selecting *Tamatsuki* Transfer Candidates

Access the Tamatsuki Transfer Candidates page (Workforce Administration, Collective Processes, Mass Organization Change JPN, Tamatsuki Transfer Candidates, Tamatsuki Transfer Candidates).

Tamatsuki Transfer Candidates

Organization Plan: J01

Description: Plan by Svr Lv - 04/2005

Tamatsuki Transfer Candidates Information

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

	*Empl ID	Name	Empl Record	Appt Type	Business Unit	Dept	Supv Lvl		
1	KJ1001	Bunji Asano	0	Core Appt	JPN01	Human Reso		+	-
2	KJ1002	Daisuke Chiba	0	Core Appt	JPN01	Sales and	Manager	+	-
3	KJ1003	Fusako Endo	0	Core Appt	JPN01	Sales and		+	-

Tamatsuki Transfer Candidates page

Enter employees who are potentially candidates for transfer using the *Tamatsuki* transfer method.

Note. Use this page to begin the *Tamatsuki* process. Select employee IDs that will appear on other pages that are part of the *tamatsuki* functionality.

Note. Once employees have been assigned as a *tamatsuki* transfer candidate, they cannot be transferred using the Transfer Entry by Dept or Transfer Entry by Tree pages.

Entering *Tamatsuki* Transfers

Access the Tamatsuki Transfer Entry page (Workforce Administration, Collective Processes, Mass Organization Change JPN, Tamatsuki Transfer Entry, Tamatsuki Transfer Entry).

Tamatsuki Transfer Entry

Organization Plan: J01Description: Plan by Svr Lv - 04/2005

Tamatsuki Unit Chain

Tamatsuki Unit Chain: 1

Post List

	Assign	Business Unit	Dept ID	Dept	Supervisor Level	Supervisor Level	Incumbent Empl ID	Name	Inc Empl Record	Appt Type	Empl ID	Name
1	Assign								0			

Selected Employee ID:Employment Record Number: 0

Name:

Unassigned Candidates

CustomizeFindView AllFirst1 of 1Last

	Select	Empl ID	Name	Empl Record	Business Unit	Dept ID	Dept	Supervisor Level	Appt Type
1	Select			0					

Tamatsuki Transfer Entry page

Note. When the user needs to change the middle of the *Tamatsuki* Chain (Unit), the user should delete the whole unit and enter information from the first row.

Post List

- Assign

Use this button to assign the selected employee to the open post. When no one is selected from the unassigned candidate grid, the selected employee's post is entered on the first row.
- Business Unit

This field can only be entered for the first row. The next rows are inserted automatically based on the selected employee's post.
- Dept ID

This field can only be entered for the first row. The next rows are inserted automatically based on the selected employee's post.
- Supervisor Level

This field can only be entered for the first row. The next rows are inserted automatically based on the selected employee's post.

Ido Action

Open Post is the default value when you insert a new row. When an employee is placed in an open post, the system automatically inserts a new row so that another employee can be assigned to the open (vacated) post. Possible values are:

- *Assigned* status indicates that the post is filled.
- *Close Post* status indicates that a post is terminated.
- *Create AA* status is used to assign an employee an additional appointment.

Two circumstances can result in an additional appointment. The first is a post that was a main appointment and then changed to an additional appointment. The second is a post that is an additional appointment and remains an additional appointment.

Note. If the Additional Appointment Enabled field on the Installation - Country Specific page is not selected, additional appointment related data does not appear on this page.

Unassigned Candidates**Select**

In the Unassigned Candidates group box, click the Select button next to the row of the employee that will be assigned to a post. The Selected Employee ID field shows the currently selected employee.

Listing *Tamatsuki* Placements

Access the Tamatsuki Placement Check List page (Workforce Administration, Collective Processes, Mass Organization Change JPN, Tamatsuki Placement Check List, Tamatsuki Placement Check List).

Tamatsuki Placement Check List

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

Language: English

Report Request Parameter(s)

*Organization Plan: J01 Plan by Svr Lv - 04/2005

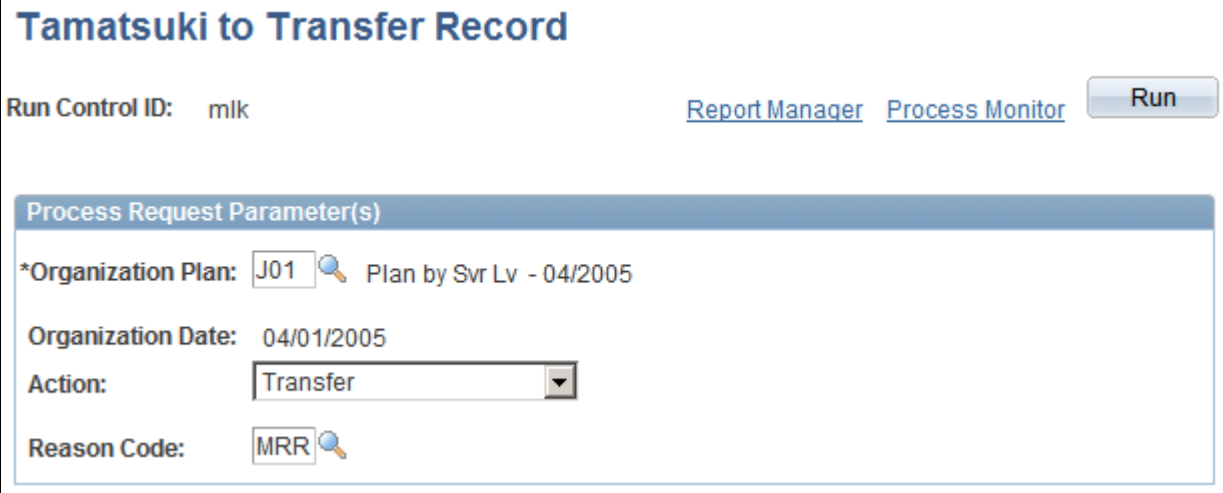
Organization Date: 04/01/2005

Tamatsuki Placement Check List page

Use this report to confirm that placements align with the organizational plan and verify that candidates have been placed in the correct posts or that the posts have been assigned the correct candidates.

Transferring *Tamatsuki* Data to the Job Record

Access the Tamatsuki to Transfer Record page (Workforce Administration, Collective Processes, Mass Organization Change JPN, Tamatsuki to Transfer Record, Tamatsuki to Transfer Record).



Tamatsuki to Transfer Record

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

Process Request Parameter(s)

*Organization Plan: J01  Plan by Svr Lv - 04/2005

Organization Date: 04/01/2005

Action:

Reason Code: MRR 

Tamatsuki to Transfer Record page

Tamatsuki data is tracked by the IDO_TAMATSU_JPN record. This process moves the data to the IDO_FUT_UPD_JPN record. The Mass Employee Transfer process takes the data from the IDO_FUT_UPD_JPN record and inserts it into the Job record.

Note. If the *Tamatsuki* to Transfer Record process is never run, the Mass Employee Transfer process will not insert the *tamatsuki* post changes into the Job record.

Deleting and Maintaining Transfer Data

Access the Transfer Data Maintenance page (Workforce Administration, Collective Processes, Mass Organization Change JPN, Transfer Data Maintenance, Transfer Data Maintenance).

Transfer Data Maintenance

Organization Plan: J01 **Description:** Plan by Svr Lv - 04/2005
Organization Date: 04/01/2005

Transfer Data Information
Customize | Find | View All | First 1-4 of 4 Last

Details 1 Details 2 Details 3 Additional Appointment

	*Empl ID	Name	Empl Record	Seq Nbr	Appt Type	Action	Reason		
1	KJ100	Bunji Asano	0	1	Core Appt	Bonus		+	-
2	KJL40	Eisuke Kimura	0	1	Core Appt	Bonus		+	-
3	KJL40	Honzo Maita	0	1	Core Appt	Bonus		+	-
4	KJL40	Ayano Natsume	0	1	Core Appt	Bonus		+	-

Transfer Data Maintenance page

Note. Use caution in modifying information on this page because few validations are made here. The primary purpose of the page is to delete unwanted transfers. It is not intended for data entry that you make on other pages in the *Tamatsuki* process. If you perform actions beyond deleting rows on this page, be careful to validate your entries.

Finalizing Organization and Employee Placement Plans

This section provides an overview of finalizing organization and employee placement plans and discusses how to:

- Create an Organization Plan checklist.
- Create a Headcount Plan listing.
- Run the Future Employee Assignment List.
- Run the Transfers After Organization Change query.
- Run the Ido Employee Listing report.
- Run the Mass Employee Transfer process.
- Clean up temporary data.

Understanding Finalizing Organization and Employee Placement Plans

In order to finalize organization and employee placement plans, a number of checks should be run to ensure that the intended structure is correct and that changes to the organization, employees, and departments are acceptable. HR administrators should also review the Ido Employee Listing and Future Employee Assignment List before the Mass Employee Transfer process.

Pages Used For Finalizing Organization and Employee Placement Plans

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Org Plan Checklist	RC_IDO_AUD1_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Org Plan Checklist, Org Plan Checklist	- Run the Employees in Inactive Department report (PER069JP) to list employees who will be in inactive departments. - Run the Open Post Checklist report (PER070JP) to list the Open Post Checklist.
Headcount Plan Listing	RC_IDO_HC_RPT_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Headcount Plan Listing, Headcount Plan Listing	Use this report to list the head count of the new organization structure.
Future Empl Assignment List	RC_IDO_FUT_ASN_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Future Empl Assignment List, Future Empl Assignment List	Use this report to simulate the way that the organization would look at an employee level if the selected organization plan is processed.
Query Viewer	QUERY_VIEWER_SRCH	Reporting Tools, Query, Query Viewer	Run the HR_TRANSAFTERORGCHG query to view a list of transferred employees that are affected after the organization change.
Ido Employee Listing	RC_IDO_AUD2_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Ido Employee Listing, Ido Employee Listing	This report summarizes the changes that will be made if the selected organization plan is processed.
Mass Employee Transfer	RC_IDO_MASS_TR_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Mass Employee Transfer, Mass Employee Transfer	Run this process to copy data from the Update Transfer Data table and insert it into the Job record.
Temporary Data Cleanup	RC_IDO_CLEAN_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Temporary Data Cleanup, Temporary Data Cleanup	Run this process to delete data associated with an organization plan.

Creating an Organization Plan Checklist

Access the Org Plan Checklist (organization plan checklist) page (Workforce Administration, Collective Processes, Mass Organization Change JPN, Org Plan Checklist, Org Plan Checklist).

Org Plan Checklist

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

Language: Japanese

Report Request Parameter(s)

*Organization Plan: J01 Plan by Svr Lv - 04/2005

Organization Date: 04/01/2005

Headcount Type: Supervisor Level

Business Unit: JPN01

Org Plan Checklist page

Use this page to run the Employees in Inactive Department (PER069JP) report and the Open Post Checklist report (PER070JP).

The purpose of the Open Post Checklist report is to list cases where the actual head count in a department (after simulating the insert into the Job record) does not match the head count goals entered in the Headcount Plan by Department page. The Open Post checklist report only lists head count when the goal and actual numbers do not match.

Creating a Headcount Plan Listing

Access the Headcount Plan Listing page (Workforce Administration, Collective Processes, Mass Organization Change JPN, Headcount Plan Listing, Headcount Plan Listing).

Headcount Plan Listing

Run Control ID: 1

[Report Manager](#)

[Process Monitor](#)

Run

Language: English

Report Request Parameter(s)

*Organization Plan: J01 Plan by Svr Lv - 04/2005

Organization Date: 04/01/2005

Headcount Type: Supervisor Level

Business Unit: JCS02 CarrotSoft Sales

Tree Name: DEPT_SECURITY

Effective Date: 01/01/1990

Tree Node: J1000 President

Headcount Plan Listing page

Use the Actual Headcount Report to list the actual headcount of an organization plan. This report is the same as the Open Post Checklist report except that it lists both matching and unmatching headcount numbers.

Running the Future Employee Assignment List

Access the Future Empl Assignment List (future employee assignment list) page (Workforce Administration, Collective Processes, Mass Organization Change JPN, Future Empl Assignment List, Future Empl Assignment List).

Future Empl Assignment List

Run Control ID: 1 [Report Manager](#) [Process Monitor](#) [Run](#)

Language: Japanese

Report Request Parameter(s)

*Organization Plan: J01 Plan by Svr Lv - 04/2005

Organization Date: 04/01/2005

Business Unit: JCS02 CarrotSoft Sales

Tree Name: DEPT_SECURITY

Effective Date: 01/01/1990

Tree Node: J1000 President

Future Empl Assignment List page

Use this report to simulate the way that the organization would look at an employee level if the organization plan is processed.

Running the Transfers After Organization Change Query

Access Query Viewer (Reporting Tools, Query, Query Viewer) and run the HR_TRANSAFTERORGCHG query.

The purpose of this query is to list employees with an effective date greater than the Organization Plan effective date. Employees listed on this report will require manual intervention after the Mass Employee Transfer process has been run.

For example, an employee has the following job data:

Date	Action	DeptID
January 1, 2003	HIR	100
February 1, 2004	PRO	200

You decide to use the Ido functionality to transfer an employee to department 300 effective on January 1, 2004, before the February 1 date that already exists in the employee's record. Effective February 1, this transfer will be canceled due to the future-dated row. In most cases, you will want to update the February 1, 2004 date to reflect the new department, which is 300. This query enables you to detect when this type of situation occurs and manually update employees records after you process the Ido job insert.

Running the Ido Employee Listing Report

Access the Ido Employee Listing page (Workforce Administration, Collective Processes, Mass Organization Change JPN, Ido Employee Listing, Ido Employee Listing).

Ido Employee Listing page

This report summarizes the changes that will be made if the organization plan is processed. The report is in CSV format so that you can open the file as a spreadsheet.

Running the Mass Employee Transfer Process

Access the Mass Employee Transfer page (Workforce Administration, Collective Processes, Mass Organization Change JPN, Mass Employee Transfer, Mass Employee Transfer).

Mass Employee Transfer page

After you decide which organization plan to use, run the batch Mass Employee Transfer process. This process updates the database with the new the organization plan. It copies data from the Update Transfer Data table and inserts it into the Job record.

If multiple job rows exist with the same effective date, the same effective date is used, however the effective sequence is incremented. For example, if you want to insert a row into the Job table effective January 1, 2004, but a January 1, 2004 row already exists (with an effective sequence of 0), the process will insert the new row with an effective sequence of 1.

Cleaning Up Temporary Data

Access the Temporary Data Cleanup page (Workforce Administration, Collective Processes, Mass Organization Change JPN, Temporary Data Cleanup, Temporary Data Cleanup).



Temporary Data Cleanup

Run Control ID: 1 [Report Manager](#) [Process Monitor](#)

Process Request Parameter(s)

*Organization Plan: J01  Plan by Svr Lv - 04/2005

Organization Date: 04/01/2005

Temporary Data Cleanup page

Run this process after the Mass Employee Transfer process completes successfully. After the employees are reorganized and their data inserted into the Job record, there is no longer a need to keep the planning information in the database. For the organization plan selected, this process deletes rows from these tables:

- IDO_FUT_UPD_JPN
- IDO_TAMATSU_JPN
- IDO_CANDIDT_JPN
- IDO_HC_DEPT_JPN

Chapter 15

Updating Person and Job Information

This chapter provides an overview of the process of updating person and job information and discusses how to:

- Change personal data.
- Change job data.
- Locate personnel records.
- Change and delete IDs.
- Delete Employment Record Numbers (ERNs).
- Update personal data.
- Run personal data reports.
- Update job data.
- Set up and track military job updates.
- Update military ranks.
- Manage military rank change requests.
- Update organizational instance and assignment relationships.
- Update salary information.
- Refresh compensation.
- Run job data reports.
- View a summary of all job records.
- Refresh tables to facilitate reporting.
- Run database audits.

See Also

[Chapter 6, "Increasing the Workforce," page 207](#)

Understanding the Process of Updating Person and Job Information

A person's history with your organization may involve many job changes, such as promotions, leaves of absence, layoffs, retirement, pay rate changes, and so on. To maintain a complete history of the person's tenure, enter these changes regularly in PeopleSoft Enterprise Human Resources.

Updating Job Information When You've Implemented PeopleSoft Enterprise Payroll for North America

When you modify job data that affects payroll, the system marks payline records for recalculation where needed. When payroll is recalculated, the payroll system uses the new information.

Updating Job Information When You've Implemented PeopleSoft Enterprise Benefits Administration

When you modify job or employment data that affects benefits, the system sets the flags that control event maintenance to indicate that a change has occurred. Then, during the next event maintenance process, the system processes the event.

Changing Personal Data

To update personal information without changing job information, use the Modify a Person component (PERSONAL_DATA), which contains the same pages that you use to add personal data records with the exception of the Organizational Relationship page:

Component	Pages in the Group	Usage
Personal Data - Workforce Administration, Personal Information, Modify a Person - Workforce Administration, Personal Information, Biographical, Modify a Person - Stock, Modify a Person - Enterprise Learning, Modify a Person	Biographical Details (PERSONAL_DATA1) Contact Information (PERSONAL_DATA2) Regional (PERSONAL_DATA3)	Update a person's personal information without changing job information.

See Also

- [Chapter 15, "Updating Person and Job Information," Updating Personal Data, page 713](#)
- [Chapter 5, "Adding a Person in PeopleSoft Human Resources," page 179](#)

Changing Job Data

Use one of the three update components on the Workforce Administration menu to update a person's job data. These components are configured to simplify updating a person's record in different business situations. The following table describes each component and its navigational path:

Component	Pages in the Component	Usage
Job Data Workforce Administration, Job Information, Job Data	Work Location (JOB_DATA1) Job Information (JOB_DATA_JOBCODE) Job Labor (JOB_LABOR) Payroll (JOB_DATA2) Salary Plan (JOB_DATA_SALPLAN) Compensation (JOB_DATA3) Employment Information (EMPLOYMENT_DTA1) Job Earnings Distribution (JOB_DATA_ERNDIST) Benefit Program Participation (JOB_DATA_BENPRG)	Work with historical effective-dated rows of the person's job data (work with past, present, and future job data).

Component	Pages in the Component	Usage
Current Job Workforce Administration, Job Information, Current Job	Work Location (JOB_DATA1) Job Information (JOB_DATA_JOBCODE) Job Labor (JOB_LABOR) Payroll (JOB_DATA2) Salary Plan (JOB_DATA_SALPLAN) Compensation (JOB_DATA3) Employment Information (EMPLOYMENT_DTA1) Job Earnings Distribution (JOB_DATA_ERNDIST) Benefit Program Participation (JOB_DATA_BENPRG)	Update only the person's <i>current</i> job record. Doing so improves processing time and system performance. You can add new current effective-dated rows to the job record, but you cannot see or add historical job records.
Pay Rate Change Workforce Administration, Job Information, Pay Rate Change	Employee Profile (PAY_RT_CHANGE1) Salary Plan (PAY_RT_CHG_SALPLAN) Compensation (PAY_RT_CHANGE2) Job Earnings Distribution (PAY_RT_CHANGE3)	Change the person's compensation without changing job data.

Updating Compensation Packages Without Using an Update Component

If you update job record data without using one of the update components, for example when initially loading data or when using your own written processes, the system does not update the calculated fields on the job record. To update the calculated fields, run the Employee Compensation process. If you update job record data by using one of the update components or a component interface built on one of the update components, you do not need to run the Employee Compensation process because the update components run all PeopleCode that is run online (including updating calculated fields). Using the update components is the best way to update the job table because the system runs all business logic.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Compensation*, "Refreshing Worker Compensation Information."

See Also

Chapter 6, "Increasing the Workforce," page 207

Locating Personnel Records

The first time that you open an update page, the system displays a search page for you to select the person on whose records you want to work. If you do not know the person's ID, use the page to search for the correct record by name, partial last name, alternate character name, department, setID, or employment status. If you prefer, use the Search By National ID page to find a person's record by using a national ID.

Changing and Deleting IDs

This section provides an overview of ID modification and discusses how to:

- Modify IDs.
- Delete IDs.
- View the ID change and delete process log.

Understanding ID Modification

IDs are the means by which you identify employees, contingent workers, and people of interest throughout PeopleSoft Enterprise Human Resources. Maintaining a precise roster of IDs is critical to the accuracy of your data.

To help you keep accurate records, you can change or delete IDs. Though you rarely need to do this, it is necessary in cases where you entered an ID in error or where you no longer need an ID.

The ID modification process changes the ID in every record where PeopleSoft Enterprise Human Resources uses it, so keep in mind that modifications might affect other functions, such as payroll and benefits processing. Deleting an ID also deletes all security profiles associated with the ID; therefore, it is recommended that you delegate this responsibility to your system administrator.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Administering HRMS Security"

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Administering the HRMS System," Restricting the Deletion of IDs

Pages Used to Change and Delete Employee IDs

Page Name	Definition Name	Navigation	Usage
ID Change	RUNCTL_ID_CHANGE	Set Up HRMS, System Administration, Database Processes, ID Change, ID Change	Modify IDs.
ID Delete	RUNCTL_ID_CHANGE	Set Up HRMS, System Administration, Database Processes, ID Delete, ID Delete	Remove IDs from the system. Note. If you've already run payroll with this ID included, you must manually delete payroll records, such as tax and deduction records.
ID Change/Delete Process Log	HR_PER502_LOG	Set Up HRMS, System Administration, Database Processes, ID Change/Delete Process Log, ID Change/Delete Process Log	Generate a log that lists which rows of data were affected when you changed or deleted an ID.

Modifying IDs

Access the ID Change page (Set Up HRMS, System Administration, Database Processes, ID Change, ID Change).

ID Change

Run Control ID: 1 [Report Manager](#) [Process Monitor](#)

Person ID(s) to be processed						Customize	Find	View All	First	1 of 1	Last
	Person ID	Name	New Person ID	Display Address	Display National ID						
1	0002	Susan Jones	B002	Display Address	Display National ID						

ID Change page

Select the current ID of the person that you want to process and enter the new ID. You can see display-only information on the person to whom the system or you assigned the original ID. Confirm that this is the correct person before you process the ID change.

Deleting IDs

Access the ID Delete page (Set Up HRMS, System Administration, Database Processes, ID Delete, ID Delete).

ID Delete

Run Control ID: 1 [Report Manager](#) [Process Monitor](#) [Run](#)

Person ID(s) to be processed				Customize	Find	View All	First	1 of 1	Last
Person ID	Name	Display Address	Display National ID						
1	KU0008	Calvin Roth	Display Address	Display National ID					

ID Delete page

Enter information and then run the Change/Delete Person ID process.

Person ID(s) to be processed

Person ID and Name Enter the ID that you want to delete. The system displays the name of the person with that ID.

Display Address Click this link to access the page on which you can review address data to further determine if this is the correct ID to delete.

Display National ID Click this link to access the Display National ID page, on which you can review the individual's national ID numbers to further determine if this is the correct ID to delete.

After running the Change/Delete Person ID process, you can review the updated records for the specific individual on the ID Change/Delete Process Log.

Viewing the ID Change and Delete Process Log

Access the ID Change/Delete Process Log page (Set Up HRMS, System Administration, Database Processes, ID Change/Delete Process Log, ID Change/Delete Process Log).

ID Change/Delete Process Log			
User ID:	PS	Date/Time Stamp:	08/21/09 2:10:00PM
Action:	Delete ID		
Person ID:	GB0801		
		Rows Deleted:	27
Updated Records			
Customize Find View All   First 1-10 of 27 Last			
Record Name	Field Name		
ADDRESSES	EMPLID		
BAS_ACTIVITY	EMPLID		
BEN_PROG_PARTIC	EMPLID		
COMPENSATION	EMPLID		
DIVERSITY	EMPLID		
ENCUMB_TRIGGER	EMPLID		
FED_TAX_DATA	EMPLID		
JOB	EMPLID		
JOB_JR	EMPLID		
NAMES	EMPLID		

ID Change/Delete Process Log page

This page lists the records and fields that the system modified when you changed or deleted the selected ID.

Deleting Employment Record Numbers (ERNs)

This section provides an overview of deleting ERNs and discusses how to:

- Define Person ID/Employee Record field names maintained in the system.
- Define exceptions for record processing.
- Define exception tables for ERN deletion.
- Process ERN deletions.
- List and review ERN Delete process results.

Understanding the Delete ERNs Component

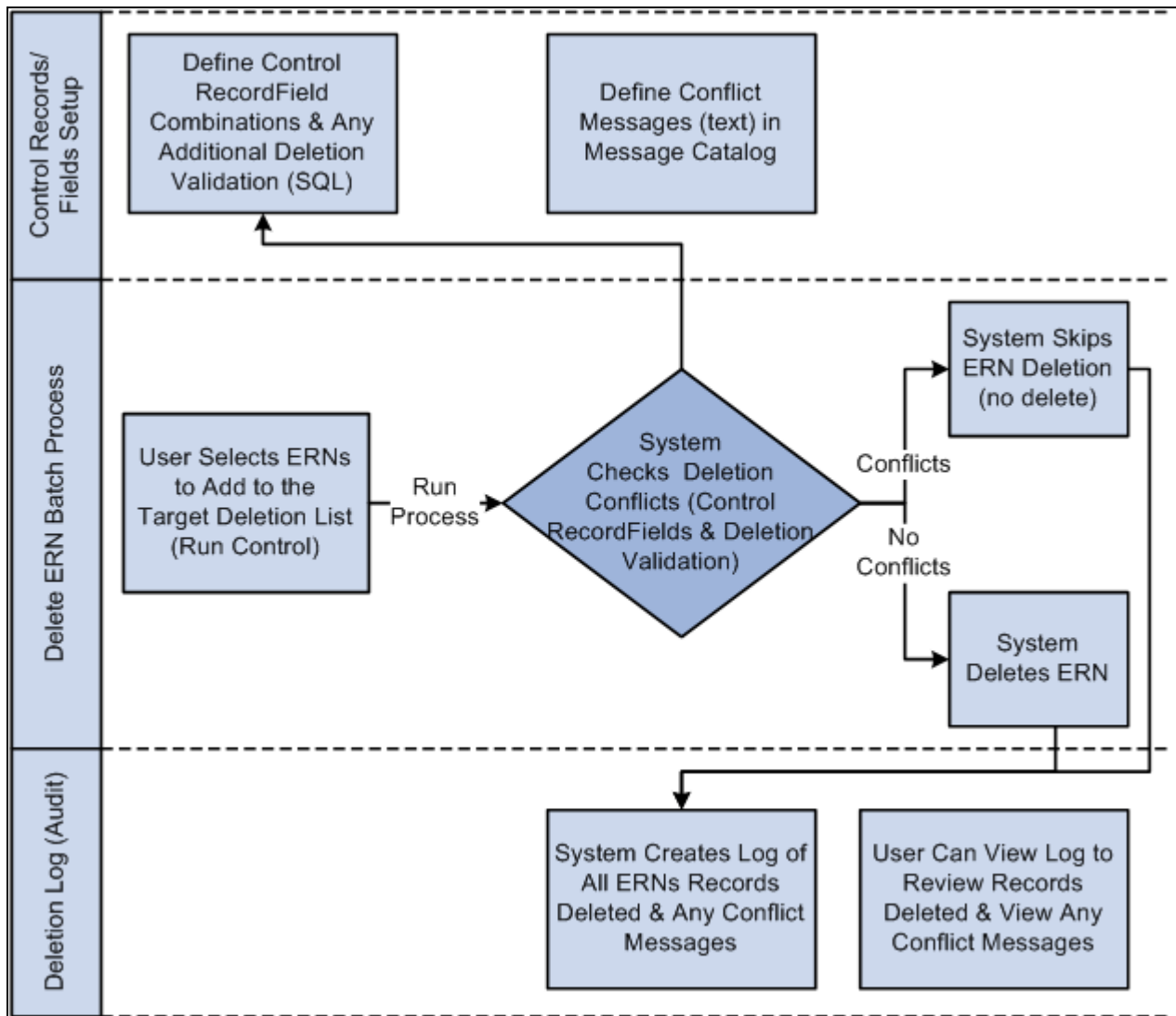
Use the Delete ERNs component when ERNs are created in error or when ERNs exist for "no show" new hires (for example, workers who never reported for their first day of work and for whom there is no need to maintain an ERN). This component verifies that no combinations of PersonID/ERN exist that will cause problems for other processes, such as payroll or benefits, that are dependent on the ERN data.

Before using this component, consider these points:

- This feature is designed to be used by HR System Administrators who have a good understanding of implications and processes related to deleting data across systems. Functional business users should not have access to this feature.
- This feature is not designed to delete ERN records for PersonID/Empl_Rcd combinations that have been used in key processes such as payroll, benefits, and time reporting. If the ERN has been used in key processes, the system will block deletion.
- PeopleSoft delivers system data conflict checks, but enables you to add additional logic and conflict checks to meet your organization's requirements for ERN deletion.

Note. Use this feature to avoid "false" same-day terminations that may cause errors in unemployment insurance eligibility and termination reports.

This flowchart illustrates the Delete ERN process. Setup tasks include defining deletion criteria, validations, and error messages. Then, during the deletion batch process, the administrator chooses ERNs to be deleted, and the system checks the ERNs against the deletion criteria, deleting only those with no conflicts. Finally, during the audit phase of the process, the system creates a log showing the deleted ERNs and the conflict messages for the ERNs that were not deleted:



Delete ERN process flowchart showing setup tasks, business process steps, and audit functions

Deleting ERNs in a Multi-Product Environment

The steps to delete ERNs affect HCM data only. No controls are delivered that check across products in a multi-product environment. Be aware of the impact of the delete process on other products and set up additional controls to avoid integrity issues.

For example, if an employee record number is created in HCM and then used in a product order, you can remove the ERN in HCM, but it still exists in the order database.

Note. PeopleSoft provides a Message Subscription (service operation PERSON_ERN_DELETE) that is used to synchronize two HCM databases. It can be configured to synchronize other products.

Pages Used to Delete ERNs

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
ERN Delete Field Names	HR_EERCDDDEL_FIELDS	Set Up HRMS, System Administration, Database Processes, ERN Delete Process, ERN Delete Field Names, ERN Delete Field Names	Define Person ID field names and Empl Rcd# field names maintained in the system.
Tables with Person ID and ERN	HR_EERCDDDEL_FLDSEC	Click Display Tables on the ERN Delete Field Names page.	Displays all tables in the system that have any combination of these defined PersonID and ERN fields.
ERN Delete Control	HR_EERCDDDEL_CTL	Set Up HRMS, System Administration, Database Processes, ERN Delete Process, ERN Delete Control, ERN Delete Control	Define which Message Catalog message text to display for each Control Table/Field conflict. Define deletion restrictions to avoid deletion of ERNs with dependencies in the system.
ERN Delete Exception Tables	HR_EERCDDDEL_EXC	Set Up HRMS, System Administration, Database Processes, ERN Delete Process, ERN Delete Exception Tables, ERN Delete Exception Tables	Define exceptions for the deletion logic.
ERN Delete Process	HR_RUNCTL_EERCDDDEL	Set Up HRMS, System Administration, Database Processes, ERN Delete Process, ERN Delete Process, ERN Delete Process	Remove a Person ID or Empl_Rcd from the database.
ERN Delete Process Results	HR_EERCDDDEL_RESULT	Set Up HRMS, System Administration, Database Processes, ERN Delete Process, ERN Delete Process Results, ERN Delete Process Results	Lists ERN Delete Process results information.

Defining Person ID/Employee Record Field Names Maintained in the System

Access the ERN Delete Field Names page (Set Up HRMS, System Administration, Database Processes, ERN Delete Process, ERN Delete Field Names, ERN Delete Field Names).

ERN Delete Field Names			Display Tables		
Person ID Fields			ERN Fields		
Customize View All First 1-15 of 16			Customize View All First 1-15 of 16 Last		
*Person ID Field Name			*Empl Record Field Name		
APPLID			APPL_EMPL_RCD		
APPROVER_ID			EG_EMPL_RCD		
CASE_OFFICER_GER			EMPL_RCD		
CONTACT_ID			EMPL_RCD_PAYEE		
EMPLID			EVENT_EMPLRCD		
EMPLID_PAYEE			GVT_TRK_EMPL_RCD		
FP_EMPLID			HOME_HOST_EMPL_RCD		
GVT_LV_REC_EMPLID			IDO_EMPL_RCD		
GVT_TRK_EMPLID			JOB_EMPL_RCD		
HS_EMPLID_APPR_IND			MIN_EMPL_RCD		
INSTRUCTOR_ID			ORG_INSTANCE_ERN		
REPORTED_TO			ORIG_EMPL_RCD		
RESPONSIBLE_ID			PI_DC_EMPLRCD		
RTW_CONTACT_CAN			PRIOR_EMPL_RCD		
SDK_EMPLID			SDK_EMPL_RCD		

ERN Delete Field Names page

Person ID Field Name Use this table to specify the field names for the Person ID available in the system.

ERN Fields Use this table to specify the field names for the Empl Rcd available in the system.

Display Tables Click this link to display all tables in the system that have any combination of these defined PersonID and ERN fields. This display enables system administrators to review tables potentially impacted by the ERN Delete process.

Defining Exceptions for Record Processing

Access the ERN Delete Control page (Set Up HRMS, System Administration, Database Processes, ERN Delete Process, ERN Delete Control, ERN Delete Control).

ERN Delete Control

Control Tables and Fields

Customize | Find | View All | | First 1-5 of 11 Last

General | **Table** |

Comment	*Message Set Number	*Message Number	Message Text		
Pension Administration	1000	2000	Employment Record %1 for Person ID %2 should not be deleted (Pension Payee record).		
Pension Administration	1000	2000	Employment Record %1 for Person ID %2 should not be deleted (Pension Payee record).		
Stock	1000	2016	Employment Rcd %1 for Person ID %2 should not be deleted (ePerformance record).		
Stock	1000	2017	Employment Rcd %1 for Person ID %2 should not be deleted (ePerformance record).		
Payroll for Noth America	1000	2001	Empl Record %1 cannot be deleted because there is payroll data referencing the Employment Rcd %1.		

► Additional Controls

ERN Delete Control page: General tab

Each of the conflict checks has a configurable conflict message. You can assign conflict messages using the Message Catalog. Conflict messages are displayed on the ERN Delete Process Results page.

ERN Delete Control

Control Tables and Fields

Customize | Find | View All | | First 1-5 of 11 Last

General

Table

*Table Name	*Person ID Field Name	*Empl Record Field Name		
PA_RT_EMP_SETUP	EMPLID	EMPL_RCD		
PA_RT_EMP_SETUP	EMPLID	EMPL_RCD_PAYEE		
ST_GRANT	EMPLID	EMPL_RCD		
ST_PURCH_PARTIC	EMPLID	EMPL_RCD		
PAY_LINE	EMPLID	EMPL_RCD		

Additional Controls

ERN Delete Control page: Table tab

The system checks these table and field combinations prior to running the Delete ERN process to help ensure that no key dependent data or process will be negatively impacted by the delete. The system scans the record/field combinations defined in this table and if an ERN that is targeted for deletion is identified in one of these control table/field combinations, the system prevents the ERN from being deleted.

ERN Delete Control

Control Tables and Fields

Additional Controls Customize | Find | View All | First 1-5 of 23 Last

General SQL

*SQL Object Identifier	SQL Statement Text		
HR_ERNDEL_PAYROLL_SPCL_LOGIC_1	SELECT COUNT(*) FROM PS_PAY_LINE A WHERE EXISTS (SELECT 1 FROM PS_PAY_LINE B WHERE A.EMPLID = B.EMPLID AND A.BENEFIT_RCD_NBR = B.BENEFIT_RCD_NBR AND A.EMPL_RCD <> B.EMPL_RCD) AND A.EMPLID = :1 AND :2 >= 0	+	-
HR_ERNDEL_PAYROLL_SPCL_LOGIC_2	SELECT COUNT(*) FROM PS_CAN_CHECK_YTD WHERE EMPLID = :1 AND :2 >= 0	+	-
HR_ERNDEL_PAYROLL_SPCL_LOGIC_3	SELECT COUNT(*) FROM PS_CHECK_YTD WHERE EMPLID = :1 AND :2 >= 0	+	-
HR_ERNDEL_PAYROLL_SPCL_LOGIC_4	SELECT COUNT(*) FROM PS_PAYROLL_DATA A WHERE EXISTS (SELECT 1 FROM PS_JOB B WHERE A.EMPLID = B.EMPLID HAVING COUNT(DISTINCT B.EMPL_RCD) > 1) AND A.PRIM_PAYGROUP <> '' AND EXISTS(SELECT 1 FROM PS_JOB C WHERE C.EMPLID = A.EMPLID AND C.EMPL_RCD = :2 AND C.COMPANY = A.COMPANY AND C.PAYGROUP = A.PRIM_PAYGROUP) AND A.EMPLID=:1	+	-
HR_ERNDEL_PAYROLL_SPCL_LOGIC_5	SELECT COUNT(*) FROM PS_PAYROLL_DATA A WHERE EXISTS (SELECT 1 FROM PS_JOB B WHERE A.EMPLID = B.EMPLID HAVING COUNT(DISTINCT B.EMPL_RCD) > 1) AND 1 <= (SELECT COUNT(*) FROM PS_JOB B WHERE A.EMPLID = B.EMPLID AND B.EMPL_RCD = :2 AND B.COMPANY = A.COMPANY) AND 0 = (SELECT COUNT(*) FROM PS_JOB C WHERE A.EMPLID = C.EMPLID AND A.COMPANY = C.COMPANY AND C.EMPL_RCD <> :2) AND A.EMPLID = :1	+	-

ERN Delete Control page: Additional Controls - SQL tab

Use the SQL tab in the Additional Controls section of the page to enter more complex product specific conflict checking that cannot be represented through the simple entry of control records and fields. Add additional SQL logic that the system needs to check prior to deleting ERNs.

Note. You cannot delete ERN delete controls that are delivered as system data.

Defining Exception Tables for ERN Deletion

Access the ERN Delete Exception Tables page (Set Up HRMS, System Administration, Database Processes, ERN Delete Process, ERN Delete Exception Tables, ERN Delete Exception Tables).

ERN Delete Exception Tables					
Exception Tables					
General		Customize Find View 100 First 1-15 of 113 Last			
*Exception Type	*Record (Table) Name	Person ID Field Name	Empl Record Field Name	Parent Record Name	
Include	ADDL_PAY_DATA	EMPLID	EMPL_RCD		+ -
Include	ADDL_PAY_DATA	EMPLID	EMPL_RCD		+ -
Include Child Table	ADDL_PAY_EFFDT			ADDL_PAY_DATA	+ -
Include Child Table	ADDL_PAY_ERNCN			ADDL_PAY_DATA	+ -
Include	BAL_ADJ_ARR	EMPLID	BENEFIT_RCD_NBR		+ -
Include	BAL_ADJ_CN_DED	EMPLID	BENEFIT_RCD_NBR		+ -
Include	BAL_ADJ_DED	EMPLID	BENEFIT_RCD_NBR		+ -
Include	BAS_ACTIVITY	EMPLID	EMPL_RCD		+ -
Include	BAS_ELIG_DBG	EMPLID	BENEFIT_RCD_NBR		+ -
Include	BAS_ELIG_DBGFLD	EMPLID	BENEFIT_RCD_NBR		+ -
Include	BAS_ELIG_DBGVAL	EMPLID	EMPL_RCD		+ -
Include	BAS_ELIG_OVRD	EMPLID	BENEFIT_RCD_NBR		+ -
Exclude	BAS_ENR_EMPL				+ -
Include	BAS_ENR_PARTIC	EMPLID	BENEFIT_RCD_NBR		+ -
Exclude	BAS_ENR_RUNCTL				+ -

ERN Delete Exception Tables page: General tab

Exception Type

Select one of three options in this field:

- *Include* includes the table in the deletion process. Select this option when the table does not follow the standard rule, but specific requirements.
- *Exclude* excludes the table from the deletion process.
- *Include Child Table* includes a table that does not contains an ERN but is attached as a child to a table that must be deleted.

Record (Table) Name

The name of the table to be included or excluded.

Person ID Field Name

The name of the EmplID field to be used for deletion.

Empl Record Field Name

The name of the EMPL_RCD field to be used for deletion.

Parent Record Name

The parent table of child table to be included in the deletion.

Access the SQL tab on the ERN Delete Exception Tables page.

ERN Delete Exception Tables

Exception Tables

Customize | Find | View 100 | First 1-15 of 113 Last

GeneralSQLREF

*Exception Type	*Record (Table) Name	SQL Delete Condition	SQL Record Number	Additional Where Condition		
Include	ADDL_PAY_DATA			HR_ERNDEL_PAYROLL_SPCL_WHERE	+	-
Include	ADDL_PAY_DATA	HR_ERNDEL_BEN_SPCL_COND	HR_ERNDEL_BEN_SPCL_BRN	HR_ERNDEL_BEN_SPCL_WHERE	+	-
Include Child Table	ADDL_PAY_EFFDT				+	-
Include Child Table	ADDL_PAY_ERNCD				+	-
Include	BAL_ADJ_ARR	HR_ERNDEL_BEN_SPCL_COND	HR_ERNDEL_BEN_SPCL_BRN		+	-
Include	BAL_ADJ_CN_DED	HR_ERNDEL_BEN_SPCL_COND	HR_ERNDEL_BEN_SPCL_BRN		+	-
Include	BAL_ADJ_DED	HR_ERNDEL_BEN_SPCL_COND	HR_ERNDEL_BEN_SPCL_BRN		+	-
Include	BAS_ACTIVITY				+	-
Include	BAS_ELIG_DBG	HR_ERNDEL_BEN_SPCL_COND	HR_ERNDEL_BEN_SPCL_BRN		+	-
Include	BAS_ELIG_DBGFLD	HR_ERNDEL_BEN_SPCL_COND	HR_ERNDEL_BEN_SPCL_BRN		+	-
Include	BAS_ELIG_DBGVAL	HR_ERNDEL_BEN_SPCL_COND			+	-
Include	BAS_ELIG_OVRD	HR_ERNDEL_BEN_SPCL_COND	HR_ERNDEL_BEN_SPCL_BRN		+	-
Exclude	BAS_ENR_EMPL				+	-
Include	BAS_ENR_PARTIC	HR_ERNDEL_BEN_SPCL_COND	HR_ERNDEL_BEN_SPCL_BRN		+	-
Exclude	BAS_ENR_RUNCTL				+	-

ERN Delete Exception Tables page: SQL tab

SQL Delete Condition Define a condition for deletion based on EMPLID and EMPL_RCD. If the request defined in the setup returns a number greater than 0, the record will be skipped during the deletion process.

SQL Record Number Define a request that returns the number to be used as the ERN based on EMPLID and EMPL_RCD.

Additional Where Condition Request that defines an additional where clause added during the deletion process.

Processing ERN Deletions

Access the ERN Delete Process page (Set Up HRMS, System Administration, Database Processes, ERN Delete Process, ERN Delete Process, ERN Delete Process).

ERN Delete Process

Run Control ID: 1 [Report Manager](#) [Process Monitor](#)

Person Record Numbers to be processed							Customize Find View All		First	1-3 of 3	Last
*Person ID	Name	Empl Record	Organizational Relationship	Company	Department	Job Code					
KU0016	Joanna Strunsky	0	EMP	GBI	13112	220000	+	-			
KJL502	Yamaquchi Sachi	0	EMP	KJ1	22000	310015	+	-			
KF0008	Lucien Florentin	0	EMP	KF1	11000	600110	+	-			

ERN Delete Process page

- Person ID** Use this lookup to select the person for whom you want to delete an ERN.
- Name** Displays the name of person selected. Click the link to display biographical data that enables you to confirm that this is the correct person.
- Empl Record** Use this lookup to select the employment record number to delete. You can delete any employment record, including future-dated records.
- Organizational Relationship** Click the links to view the Personal Organizational Summary page. This page enables you to confirm that you have selected the appropriate ERN.
- Company** The company that is related to the ERN.
- Department** The department that is related to the ERN.
- Job Code** The job code that is related to the ERN.

Listing and Reviewing ERN Deletion Results

Access the ERN Delete Process Results page (Set Up HRMS, System Administration, Database Processes, ERN Delete Process, ERN Delete Process Results, ERN Delete Process Results).

This page displays results for a single ERN. The page appearance changes depending whether the ERN was successfully deleted.

ERN Delete Process Results

Process Instance:777

User ID:PS

Run Control ID:PS

Run Date:08/21/2009

Person ID:GB0923

Empl Record:1

Name:Carol Kearns

Run Status:Success

Deleted Tables

Customize | Find | View All |   First 1-12 of 12 Last

Record (Table) Name	Person ID Field Name	Empl Record Field Name	Total Row Count
BAS_ACTIVITY	EMPLID	EMPL_RCD	1
COMPENSATION	EMPLID	EMPL_RCD	1
ENCUMB_TRIGGER	EMPLID	EMPL_RCD	1
JOB	EMPLID	EMPL_RCD	1
JOB_JR	EMPLID	EMPL_RCD	1
PER_ORG_ASGN	EMPLID	EMPL_RCD	1
PER_ORG_ASG_JPN	EMPLID	EMPL_RCD	1
PER_ORG_INST	EMPLID	ORG_INSTANCE_ERN	1
PRIMARY_JOBS	EMPLID	EMPL_RCD	1
SJT_PERSON	EMPLID	EMPL_RCD	2
TAX_DISTRIB	EMPLID	EMPL_RCD	1
TAX_DIST_EFFDT	EMPLID	EMPL_RCD	1

ERN Delete Process Results page - Run Status - Success

When the deletion is successful, you can review a list of tables where data was deleted.

ERN Delete Process Results

Process Instance: 486 **User ID:** SAMPLE
Run Control ID: KLN **Run Date:** 09/05/2006
Person ID: KU0010 **Empl Record:** 1
Name: Antonio Santos
Run Status: Error

Deletion Conflicts		Customize Find View All   First 1-5 of 5 Last
Message Text	Description	
Empl Record 1 cannot be deleted because there is payroll data referencing the Employment Rcd 1.	If payroll data exists for the Employment Record Number, you cannot delete the Employment Record. If you need to delete the Employment Record, relay the displayed message to your supervisor for further analysis.	
Empl Record 1 can't be deleted because Time Reporter KU0010 has reported time for Employment Rcd 1.	Since time has been reported to this Employment Record, it cannot be deleted.	
Employment Record 1 can't be deleted because Time Reporter KU0010 has Payable time for Empl Record 1.	Since payable time has been generated for this Employment Record, it cannot be deleted.	
Employment Record 1 cannot be deleted because payroll balances exist for the Person ID 1.	If payroll balances exists for the Person ID selected, you cannot delete the Employment Record. If you need to delete the Employment Record, relay the displayed message to your supervisor for further analysis.	
Empl Record 1 cannot be deleted because there is YTD paycheck data referencing the Person ID KU0010.	If YTD paycheck data exists for the Person ID selected, you cannot delete the Employment Record. If you need to delete the Employment Record, relay the displayed message to your supervisor for further analysis.	

ERN Delete Process Results - Run Status - Error

When the deletion is not successful, the page displays message text describing why the ERN deletion was not processed.

Updating Personal Data

Use the Modify a Person component to update a person's name, address, phone numbers, marital status, education, and other personal information.

This section provides an overview of types of personal data, using workflow to update person addresses, and discusses how to:

- Update effective-dated personal information.
- Update emergency contact information.

- Modify addresses.

See Also

Chapter 5, "Adding a Person in PeopleSoft Human Resources," page 179

Understanding Types of Personal Data

The Personal Data pages include two different types of personal data:

- Effective-dated data.

Name, address, biographical (such as education, marital status, and language), checklist, and some regional fields are effective-dated. Enter current, historical, or future information in these fields. When new information takes effect, the system stores the old data so that you can track the changes that occur over time.

Effective-dated biographical data is stored in the Personal Data History record (PERS_DATA_EFFDT). Name information is stored in the NAMES record with its own effective date. Address information is stored in the ADDRESSES record with its own effective date.

- Noneffective-dated data.

Some personal data fields aren't linked to an effective date. In these fields, new entries overwrite and delete the previous entries. This situation means that you can store only current information. The system stores noneffective-dated data in the Personal Data record (PERSON).

Note. PeopleSoft Enterprise Human Resources also includes a workflow process for updating employee addresses.

Using Workflow to Update Person Addresses

Keeping a person's personal information current can be time-consuming. With workflow, users who do not ordinarily have access to the PeopleSoft Enterprise Human Resources system can update their address data by using an email program to send the information to your PeopleSoft Enterprise Human Resources system.

Pages Used to Update Personal Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Biographical Details	PERSONAL_DATA1	• Workforce Administration, Personal Information, Modify a Person, Biographical Details • Workforce Administration, Personal Information, Biographical, Modify a Person, Biographical Details • Stock, Modify a Person, Biographical Details • Enterprise Learning, Modify a Person, Biographical Details • Pension, Payments, Create Payee, Create Payee Click the Personal Data link on the Create Payee page, and then access the Payee Name page.	Update a person's personal information.

Page Name	Definition Name	Navigation	Usage
Contact Information	PERSONAL_DATA2	• Workforce Administration, Personal Information, Modify a Person, Contact Information • Workforce Administration, Personal Information, Biographical, Modify a Person, Contact Information • Stock, Modify a Person, Contact Information • Enterprise Learning, Modify a Person, Contact Information • Pension, Payments, Create Payee, Create Payee Click the Personal Data link on the Create Payee page, and then access the Biographical Data page.	Update a person's name, address, phone, and email information.
Regional	PERSONAL_DATA3	• Workforce Administration, Personal Information, Modify a Person, Regional • Workforce Administration, Personal Information, Biographical, Modify a Person, Regional • Stock, Modify a Person, Regional • Enterprise Learning, Modify a Person, Regional	Maintain regionally-required information about a person.
Contact Address/Phone	EMERGENCY_CONTACT	Workforce Administration, Personal Information, Personal Relationships, Emergency Contact, Contact Address/Phone	Enter names, addresses, and primary phone information for people to contact in the event of a worker emergency.

Updating Effective-Dated Personal Information

To update effective-dated information on the Personal Data pages:

1. Insert a new data row in the effective-dated group boxes.

Each of these group boxes can use different effective dates. They are not related.

2. Enter the date when the new personal data that you're entering will take effect.

This date can be current or in the future.

3. Enter the new information.

4. Save the pages.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Understanding HRMS," Effective Dates

Updating Emergency Contact Information

The system updates a worker's emergency contact information automatically if you specify that the contact information is the same as the worker's contact information. When the emergency contact information is different from the worker's contact information, you must maintain the emergency contact information manually on the Contact Address/Phone page.

To activate the automatic emergency contact address update:

1. Access the Contact Address/Phone page.
2. Select the Same Address as Employee and Same Phone as Employee check boxes *before* you update the worker's address.
3. Select the type of address and type of phone number that is the same as the emergency contact.

When you update the worker's address, the system automatically updates the emergency contact address. It also updates the Update Dependent/Beneficiary pages in the Benefits menu and the Payroll Options pages in the Payroll menus.

If the emergency contact address changes and is no longer the same as the worker's, deselect the Same Address as Employee and the Same Phone as Employee check boxes. The system makes the address fields on the Contact Address/Phone page available, and you can enter a different address. After you deselect the check box, the system no longer updates the emergency contact address automatically.

Even if the emergency contact address is the same as the worker's, you can enter a different phone number.

4. Use the Other Phone Numbers page to record emergency contact phone numbers for the emergency contact in addition to the primary number that is recorded on the Contact Address/Phone page.

See Also

Chapter 8, "Entering Additional Data in Human Resources Records," Tracking Emergency Contacts, page 451

Modifying Addresses

To enter a new address for a worker:

1. Access the Contact Information page (Workforce Administration, Personal Information, Biographical, Modify a Person, Contact Information).
2. Insert a new data row in the Current Addresses region.
3. Enter a new effective date for the new address information and click the Add Address link.
4. Enter the worker's new address information.

Updating Emergency Contact Address Information

The system also updates the Dependent/Beneficiary pages in the Benefits menu and the Payroll Data pages in the Maintain Payroll Data (USF) menu when the Same Address as Employee and Same Phone as Employee check boxes are selected.

Running Personal Data Reports

This section lists the pages used to run personal data reports.

Pages Used to Run Personal Data Reports

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Birthdays Report	RUNCTL_PER002	Workforce Administration, Personal Information, Biographical, Birthdays Report, Birthdays Report	Run the Employee Birthdays report (PER002). This report lists employees and contingent workers, their birthdays, and other identifying information. Note. Run the Refresh Employees Table process before running this report.

Page Name	Definition Name	Navigation	Usage
Employee Home Address Listing	PRCSRUNCNTL	Workforce Administration, Personal Information, Biographical, Home Address Report, Employee Home Address Listing	Run the Employee Home Address Listing report (PER020), which contains a complete listing of all employees and contingent workers, including addresses and home phone numbers.
Mailing Labels	PRCSRUNCNTL	Workforce Administration, Personal Information, Biographical, Mailing Labels Report, Mailing Labels	Run the Mailing Labels report (PER006), which produces a three-across set of mailing labels for all employees and contingent workers in your PeopleSoft Enterprise Human Resources database. Note. Run the Refresh Employees Table process before running this report.
Employee Listing SGP	RUNCTL_EMP_LIST	Workforce Administration, Job Information, Reports, Employee Listing SGP, Employee Listing SGP	Run the Employee Listing report (PER801SG). This report provides employee and contingent worker information based on the run control selections of department, employee name, or employee ID.

Updating Job Data

Use the Job Data component when you want to work with a person's historical job data. If you need to work with a person's current job only, use the Current Job component for faster system performance. You can work only with current and future job data on the Current Job pages.

Note. The Job Data and Current Job components are made up of the same pages as the Add Employment Instance, Add Contingent Worker Instance, and Add a POI (person of interest) Relationship components.

If you are using position management, you will want to update most job data on the Position Data pages.

(USF) Update job information using the U.S. Federal pages.

See [Chapter 6, "Increasing the Workforce," page 207](#).

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Positions*, "Managing Position Data."

See [Chapter 18, "\(USF\) Processing Personnel Action Requests," page 831](#).

This section provides overviews of updating effective-dated job data, security for updating job data, and personnel actions and human resources and payroll status, and discusses how to:

- Update effective-dated job data.
- Enter promotions.
- Enter departmental transfers.
- Enter pay rate changes.
- Track leaves of absence.
- Enter terminations and retirements.
- Enter deaths.
- Enter rehires.
- Assign workers to different positions.
- Pay workers on disability.

Understanding Updating Effective-Dated Job Data

You usually update job data by inserting new effective-dated data rows into an existing employee record. Effective dates enable you to keep a complete chronological history of all your data and tables—whether you changed them two years ago or want them to go into effect two months into the future. With this information, you can review historical data from a particular time to analyze position data or employee records. Or you can plan ahead and set up tables and data before they take effect.

The system also uses effective dates to compare pages and tables to ensure that the prompt tables that you see list only data that is valid as of the effective date of the current page. For example, if you create a new department code with an effective date of May 1, 2009 and enter a new data row (or update an existing row) on the Job Data pages that has an effective date *before* May 1, 2009, you won't see the new code as a valid choice when you select a department because the new code hasn't taken effect yet.

When you enter a new data row, the system copies the contents of the previous row into the new row—thus you do not have to retype any information that stays the same. (Ensure that you position the cursor on the data row that you want to copy before you insert the new row.) The only new information is the effective date, which is set by default to the system date (usually today's date).

Understanding Security for Updating Job Data

When you update a job record, keep in mind two special security issues.

Security and Effective-Dated Sequence Numbers

When you transfer people from one department to another by using a data row that contains an effective-dated sequence number, the system currently allows users with security access to the old or new department to have access to all the job data. The system is delivered this way because implementing security in system views that are specific to the function Max (effseq) on PS_JOB would slow down online response time.

For example, when you transfer an employee from department 1 to department 2 and give the employee a promotion on the same day, users with access to either department 1 or 2 have access to the employee's data because the transfer data row contains an effective-dated sequence number.

You can prevent this access by changing the security views for the PeopleSoft applications that you use. Keep in mind, however, that making the change affects system performance.

Security for Transfers Between Departments

PeopleSoft Enterprise Human Resources enables users to assign people to departments that they cannot access for updates. If you want to prevent a user from transferring a person into a department for which the person does not have access, use the PeopleSoft Enterprise Human Resources DEPT_TBL_ACCESS view, which shows only those department IDs that a user can access based on the security permission lists to which they belong.

Note. If you choose to use this view, you must create a permission list for users who have access to all departments so that they can perform transfers.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Administering HRMS Security"

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Working with System Data Regulation in HRMS"

Understanding Personnel Actions and Human Resources and Payroll Status

When you select an action to change a person's job data, the system may change the person's HR or payroll, or job status. For example, when you select *Retired*, the system changes the HR status from *Active* to *Inactive*.

HR status indicates whether the person is still active in the human resources system. The Payroll Status field (for employees) indicates the payroll status or job status of the person. A person can have an active HR record but not be currently receiving pay (employee) or holding a job (contingent worker). Conversely, a person could have an inactive job record but continue to receive pay. For example, if you select retirement with pay, the system changes the HR status to *Inactive* and changes the payroll status from *Active* to *Retired with Pay*. The two status fields enable you to accurately identify the different types of people in your organization.

The statuses are based on either the personnel action or, in a few cases, the *reason* for the action, such as death. A change in HR status or payroll status can affect PeopleSoft Enterprise Human Resources Manage Base Benefits, PeopleSoft Enterprise Benefits Administration, PeopleSoft Enterprise Payroll processing, and PeopleSoft Enterprise Pension Administration. For example, a promotion or a job reclassification might affect an employee's benefit coverage, or you might need to suspend benefit coverage during a leave of absence or a suspension.

This table explains how the system sets status:

Personnel Action	HR Status	Payroll Status	Payroll Processing for PeopleSoft Enterprise Payroll for North America and the Payroll Interface
Hire Add contingent worker Add person of interest Rehire (employees only) Return from leave Return from disability Additional job Recall from suspension or layoff Assignment	<i>Active</i>	<i>Active</i>	Yes
Leave of absence Short-term disability Long-term disability	<i>Active</i>	<i>Leave of Absence</i>	No
Paid leave of absence Short-term disability with pay Long-term disability with pay	<i>Active</i>	<i>Leave with Pay</i>	Yes
Retirement with pay (employees only)	<i>Inactive</i>	<i>Retired with Pay</i>	Yes
Terminated with benefits Terminated with pay	<i>Inactive</i>	<i>Terminated with Pay</i>	Yes
Layoff Suspension Temporary assignment	<i>Active</i>	<i>Suspended</i>	No
Retirement	<i>Inactive</i>	<i>Retired</i>	No

Personnel Action	HR Status	Payroll Status	Payroll Processing for PeopleSoft Enterprise Payroll for North America and the Payroll Interface
Assignment completion Completion (contingent workers only) Termination	<i>Inactive</i>	<i>Terminated</i>	No
Pay rate change Demotion Data change Earnings distribution change Job reclassification Position change Probation Completion of probation Promotion Transfer	The same status that's in the previous data row. If no previous data row exists, the system sets the status to <i>Active</i> .	The same status that's in the previous data row. If no previous data row exists, the system sets the status to <i>Active</i> .	Varies

Note. If your organization uses PeopleSoft Enterprise Payroll for North America, the system does not generate payroll paysheets for workers whose status is *Retired* or *Terminated*. If you need to pay workers for a partial pay period or for a time after they leave the company, select the personnel action *Retired with Pay* or *Terminated with Pay*.

See Also

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "Maintaining Payroll Data"

Pages Used to Update Job Data and Salary Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Work Location	JOB_DATA1	- Workforce Administration, Job Information, Job Data, Work Location - Workforce Administration, Job Information, Current Job, Work Location	Update position and location information for a person's job.
Job Information	JOB_DATA_JOBCODE	- Workforce Administration, Job Information, Job Data, Job Information - Workforce Administration, Job Information, Current Job, Job Information	Update information about a person's job.
Job Labor	JOB_LABOR	- Workforce Administration, Job Information, Job Data, Job Labor - Workforce Administration, Job Information, Current Job, Job Labor	Update national labor agreement data.
Payroll	JOB_DATA2	- Workforce Administration, Job Information, Job Data, Payroll - Workforce Administration, Job Information, Current Job, Payroll	Update payroll processing data.
Salary Plan	JOB_DATA_SALPLAN	- Workforce Administration, Job Information, Job Data, Salary Plan - Workforce Administration, Job Information, Current Job, Salary Plan	Update a person's salary plan information.

Page Name	Definition Name	Navigation	Usage
Compensation	JOB_DATA3	• Workforce Administration, Job Information, Job Data, Compensation • Workforce Administration, Job Information, Current Job, Compensation	Update a person's compensation information.
Employment Information	EMPLOYMENT_DTA1	Click the Employment Data link at the bottom of any page in the Job Data or Current Job component. • Workforce Administration, Job Information, Job Data • Workforce Administration, Job Information, Current Job	Update optional employment information.
Job Earnings Distribution	JOB_DATA_ERNDIST	Click the Earnings Distribution link at the bottom of any page in the Job Data or Current Job components. • Workforce Administration, Job Information, Job Data • Workforce Administration, Job Information, Current Job	Update a person's compensation information.
Benefit Program Participation	JOB_DATA_BENPRG	Click the Benefit Program Participation link at the bottom of any page in the Job Data or Current Job components. • Workforce Administration, Job Information, Job Data • Workforce Administration, Job Information, Current Job	Update a person's benefit enrollment information.

Updating Effective-Dated Job Data

Access the Work Location page (Workforce Administration, Job Information, Job Data, Work Location).

To update effective-dated job data:

1. Locate the person whose record you want to change.

Always start on the Work Location page because that's where the Effective Date field is. From there, you may have to go to other pages to enter more information about the personnel action that you're taking.

2. Insert a new data row.
3. In the Effective Date field, enter the date when the new action will take effect.
4. Select an action code for the change, such as *Transfer* or *Promotion*.
5. If applicable, enter a reason code to explain why this action is occurring.
6. Change any other data needed to complete the new action, either on this page or on other pages in the component.

For example, when you promote an employee, you most likely enter a new job code or a new position number on the Work Location page. You might also select a new salary administration plan, grade, and step, enter a new compensation rate on the Job Data - Compensation page, and enter a new business title and work phone on the Employment Information page.

7. Save the pages.

Entering Multiple Actions with the Same Effective Date

On occasion, you may need to enter more than one action that takes effect on the same day. Entering two actions with the same effective date is especially common when you are tracking compound percentage pay increases that take effect at the same time. Use effective sequence numbers to combine multiple actions and specify which one to process first.

For example, a promotion (which produces a percentage pay increase) and a merit increase may take effect on the same day.

To enter multiple personnel actions with the same effective date:

1. Access the Work Location page (Workforce Administration, Job Information, Job Data, Work Location) for the person whose data you're updating.
2. Insert a new data row for the first action.

The effective date is set by default to the system date, usually today's date, which you can override if necessary. Leave the effective sequence number set at 0.

3. Enter any other information that you need to complete the action, either here or in other pages in the same component.
4. To enter the second action, return to the Work Location page and insert another data row.
5. Enter the same effective date as the first action, but enter an effective date sequence number of 1.

6. Select the appropriate personnel action and enter any other information required to implement the action, either here or on other pages.

Entering Promotions

A promotion usually involves a change of salary grade and new job code. This table lists the pages and fields that you typically update when you enter a promotion (you may need to update additional pages and fields):

Affected Pages	Affected Fields	Comments
Work Location	Effective Date Action Code: <i>Promotion</i> Reason Code (if applicable) Position Number	All the entries on the page could change when you enter a promotion, depending on the data for the former job and the new job. If you're organizing part or all of PeopleSoft Enterprise Human Resources by position, review <i>PeopleSoft Enterprise Human Resources PeopleBook: Manage Positions</i> .
Job Information	Job Code Regular/Temporary Full/Part Standard Hours Work Period FTE Shift Shift Rate Contract Number Local country fields	All the entries on the page could change when you enter a promotion, depending on the data for the former job and the new job. If you're organizing part or all of PeopleSoft Enterprise Human Resources by position, review <i>PeopleSoft Enterprise Human Resources PeopleBook: Manage Positions</i> .
Salary Plan Compensation	Salary Administration Plan/Grade/Step Compensation Rate	Update Salary Plan/Grade/Step on the Salary Plan page. Also update compensation information on the Job Data - Compensation page.
Employment Information	Business Title Work Phone	Update these fields as needed.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Compensation, "Refreshing Worker Compensation Information," Changing a Compensation Package

Entering Departmental Transfers

Enter a transfer action when you want to assign a person to a new department without changing the person's job code. A transfer also implies that the worker's salary grade and compensation remain the same.

If you're organizing part or all of PeopleSoft Enterprise Human Resources by position, use the transfer action to move a worker from one position to another. To move the position *and* the incumbent to a new location or department, use the Position Data pages.

This table lists the pages and fields that you typically update when you enter a transfer (you may need to update additional pages and fields):

<i>Affected Pages</i>	<i>Affected Fields</i>	<i>Comments</i>
Work Location	Effective Date Action Code: <i>Transfer</i> Reason Code (if applicable) Department	The system automatically enters a new location if it finds matching location setIDs in the Department table and the Tableset Record Group Control for the business unit that you're using.
Employment Information	Business Title Work Phone	Update these fields as needed.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Positions, "Managing Position Data"

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Working with System Data Regulation in HRMS"

Entering Pay Rate Changes

This table lists the pages and fields that you typically change when you enter a pay rate change. You may need to update additional pages and fields, as well.

Note. If you do not need to modify any job-related information, you can use the Pay Rate Change component.

See [Chapter 15, "Updating Person and Job Information," Updating Salary Information, page 761](#).

<i>Affected Pages</i>	<i>Affected Fields</i>	<i>Comments</i>
Work Location	Effective Date Action Code: <i>Pay Rt Chg</i> (pay rate change) Reason Code (if applicable)	Enter <i>Pay Rate Change</i> to enter a salary change that isn't related to a change in salary grade or job code. If the pay rate change results from a salary grade or job code change, enter the change as a promotion or some other action.
Salary Plan	Salary Administration Plan/Grade/Step	Enter a new salary step if the pay rate change involves a change in step. You cannot select a new grade because if the pay rate resulted from a change in salary grade, you enter the rate change as part of a promotion or other action. If you selected the Multi-Step/Grade check box on the Installation Table page and you enter a new step on this page, click the Default Pay Components button on the Job Data - Compensation page if you want the system to supply default values for that step. Doing so is necessary unless you have distributed the worker's earnings by amount on the Job Earnings Distribution page. For job earnings distributions, manually update the distribution for the new rate.

<i>Affected Pages</i>	<i>Affected Fields</i>	<i>Comments</i>
Compensation	All fields	To enter a new pay rate, enter a new compensation rate, rate change amount, or rate change percent. When you enter any one of these three amounts, the system automatically calculates the other two. Based on the compensation rate and frequency, the system calculates and displays the hourly rate, daily rate, monthly rate, and annual rate for this worker. If you selected the Multi-currency check box on the Installation Table page and entered the compensation rate in a different currency from your base currency, the system converts the rates to the base currency and compares them with the ranges specified for this salary grade in the Salary Grade table. If the rates exceed the salary range, a warning message appears. If necessary, enter a new annual benefits base rate for calculating this employee's benefits. The system calculates the compa-Ratio (or percent through range calculation) based on the salary plan and grade and in the base currency that your organization uses, which you specify on the Installation Table page. The system also calculates the percent through range. This figure determines where a worker falls in the range by taking the salary minus the minimum divided by the spread. For example, if an employee has a salary of 26,000 USD in a range of 25-30,000 USD for the salary grade, the percent through range is 20 percent.
Compensation (continued)		Modify any other information that has changed because of the pay rate change, such as holiday schedule, pay group, employee type, standard hours, or work period on the Job Data, Payroll, or Job Information pages.

<i>Affected Pages</i>	<i>Affected Fields</i>	<i>Comments</i>
Job Earnings Distribution		Update as needed to distribute the worker's compensation hours or earnings.

Tracking Leaves of Absence

Many workers take a leave of absence at some point in their careers. Leaves can occur for any number of reasons, including sickness, vacation, maternity or paternity leave, jury duty, suspensions, or unpaid leave.

If your company tracks workers' absence history, you can acknowledge a leave of absence in the Monitoring Absences pages and Job Data pages.

This table lists the pages and fields that you typically change when you enter a leave of absence (you may need to update additional pages and fields, as well):

<i>Affected Pages</i>	<i>Affected Fields</i>	<i>Comments</i>
Work Location	Effective Date <i>Action: Leave of Absence, Leave of Absence with Pay, or Paid Leave of Absence</i> Reason Code (if applicable)	None
Employment Information	Expected Return Date	Enter the date when you expect the worker to start work again. When you save the pages, the system displays the day before the leave of absence date as the date last worked. You can change it if necessary. When the worker returns from leave, the system deselects this field.

Tracking Multiple Types of Leave for One Worker

You might encounter situations in which you need to enter multiple types of leave for the same worker. For example, an employee might take a six-week leave with disability pay, take the following two weeks with vacation pay, and then take an additional month without pay.

You can enter all these leave types at the same time by inserting a new data row in the Work Location page for each type of leave and entering the effective date when each leave type begins. Then you access the appropriate page to make any other changes pertaining to that leave, such as compensation changes.

Entering Returns from Leave

Most workers eventually come back from leaves of absence and resume their job duties. In fact, you often know at the time workers begin their leaves when they plan to return to work. Enter the return from leave information at the same time that you enter the leave of absence, or as soon as you have a confirmed return date.

This table lists the pages and fields that you typically change when you enter a return from leave (you may need to update additional pages and fields, as well):

<i>Affected Pages</i>	<i>Affected Fields</i>	<i>Comments</i>
Work Location	Effective Date <i>Action: Return from Leave</i> Reason Code (if applicable)	None
Employment Information	Expected Return Date	When you save the pages, the system deselects this field.

Entering Terminations and Retirements

When a worker retires or leaves your organization for some other reason, you enter the termination into the person's record.

This table lists the pages and fields that you typically change when you enter a termination or retirement (you may need to update additional pages and fields, as well):

<i>Affected Pages</i>	<i>Affected Fields</i>	<i>Comments</i>
Work Location	Effective Date <i>Action: Terminated, Terminated with Pay, Terminated with Benefits, Retirement, or Retirement with Pay</i> Reason Code, if applicable	The system treats the effective date that you enter as the day the termination starts and the first day the worker is no longer paid. For example, if the worker's last day of employment is June 1, set the effective date of termination or retirement as June 2 because that's when the termination begins. If you set it as June 1, the worker isn't paid for the last day of work.

<i>Affected Pages</i>	<i>Affected Fields</i>	<i>Comments</i>
Employment Information	Termination Date	The system displays the day <i>before</i> the effective date as the termination date and last date worked. If you rehire the worker, the system deselects both these fields. When a worker returns from leave, the system deselects only the Date Last Worked field.

Inactivating a Person's Job Profiles Upon Termination

The Event Manager event AssignmentTerminated is raised when an employee's status is changed to inactive on the job record. The Event Manager also raises the HJPM_EM_EVENTS:Handlers:InactivatePersonProfile event to determine if all the worker's job assignments are inactive. If all job assignments are inactive, then the person profiles in the Manage Profiles application for that employee ID are also inactivated.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles*, "Managing Profiles," Creating and Updating Person Profiles.

PeopleSoft Enterprise Human Resources PeopleBook: Events and Notifications

Entering Deaths

This table lists the pages and fields that you typically change when you enter a termination due to death:

<i>Affected Pages</i>	<i>Affected Fields</i>	<i>Comments</i>
Work Location	Effective Date Action: <i>Terminated</i> Reason Code: <i>Death</i>	The system treats the effective date that you enter as the day the termination starts and the first day that the worker is no longer paid.
Identity/Diversity	Date of Death	Record the date that the worker died.
Employment Information		The system displays the termination effective date as the termination date, and the day before the termination date as the date last worked. The system uses these dates and the effective date in payroll processing and reporting.

Entering Rehires

You may want to rehire a person who worked for your company in the past. Information on a rehired worker is probably already in PeopleSoft Enterprise Human Resources, unless the worker data was deleted or archived. Before you rehire workers, you may want to make sure that the personal, employment, and job data is current. If a rehired worker doesn't have a record in the system, do not use the update pages. Instead, add a new employment or contingent worker instance.

See [Chapter 6, "Increasing the Workforce," page 207](#).

See [Chapter 2, "Setting Up the Administer Workforce Business Process," page 5](#).

Because you probably rehire a worker whose previous job was in a department (organizational entity) for which you do not have security access, it's helpful to provide security access to all departments to at least one user performing rehires.

This table lists the pages and fields that you typically change when you enter a rehire (you may need to update additional pages and fields):

Affected Pages	Affected Fields	Comments
Work Location	Effective Date Action: <i>Rehire</i> Reason Code, if applicable Last Start Date	You can rehire only workers whose payroll or job status is <i>Terminated</i> , <i>Terminated with Pay</i> , <i>Retired</i> , or <i>Retired with Pay</i> . When you save the pages, the system automatically completes the last start date.
Employment Information	Company Seniority Date Benefits Service Date, Years, Months, and Days Seniority Pay Calc Date, Years, Months, and Days	You may want to change the company seniority date and other assignment dates. The company seniority date can serve as the basis for the worker's seniority, or you can use it for other tracking and reporting purposes. The benefits service date is the date on which the worker's service ranking is based and is used for benefit-related matters. The seniority pay calculation date is the date that the system uses to calculate seniority-based pay. When you save the pages, the system automatically recalculates the corresponding years, months, and days.

See Also

Chapter 6, "Increasing the Workforce," page 207

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Administering HRMS Security"

Assigning Workers to Different Positions

If you're organizing part or all of PeopleSoft Enterprise Human Resources by position, you often move workers from one position to another as a result of promotions, transfers, rehires, or other personnel actions. Because both position and worker data are already in the system, you connect the two by selecting a position number, entering the effective date of the assignment, and entering any exceptions to the default data.

The following table lists the pages and fields that you typically change in the Job Data component when you enter a change of position. You may need to update additional pages and fields. When you change an assignment, the system also updates the Position Data - Work Location page. It automatically calculates and displays the new head count and shows the appropriate indicator in the Open/Filled field.

<i>Affected Pages</i>	<i>Affected Fields</i>	<i>Comments</i>
Work Location	Effective Date <i>Action: Position Change, Transfer, Promotion, or Rehire</i> Reason Code, if applicable Position Number	After you enter a position number, the system automatically completes position-related fields, including job code, department, and location. The system enters the position entry date as the effective date of the position change action. You cannot change the position entry date. To change the entry date, you must change the effective date for the position change action. To override the position defaults, select the Override Position Data button, which makes the previously unavailable fields available for entry, such as the Location and Department fields on this page, or the Job Code field on the Job Information page. You can then enter exceptions in these fields. The Position Management Record check box is display-only. The system uses this check box to indicate that it has automatically inserted a data row on the Job Data pages due to changes that you made to fields on the Position Data pages. Note. If you override the defaults, you must maintain the job data manually—the system does not update position data automatically again until you deselect the Position Data Override check box. The system issues a warning message if you assign a worker to a position that has already been filled by another worker and if a new appointment exceeds the maximum head count for that position.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Positions, "Managing Position Data"

Paying Workers on Disability

Some workers on disability need to be paid at a given percentage of their regular pay. Handle this situation without changing the worker's salary by setting up a disability plan earnings code in the Earnings table, based on a percentage.

Note. This feature works only for hourly employees, not for salaried employees.

When you enter an action of *STD* (short-term disability with pay) or *LTD* (long-term disability with pay), the system changes the employee's status to *Leave With Pay*.

To send 100 percent of the employee's pay to the disability plan earnings code, access the Job Data - Job Earnings Distribution page, select the By Percent option, enter the appropriate disability earnings code, and enter a percent of *100*.

Note. When you put an employee on disability, don't forget to check additional pay records and make any necessary changes.

Setting Up and Tracking Military Job Updates

To set up and track military service job updates, use the Approval Levels (MIL_APPRVL_LVL_DFN) and Order Codes (MIL_ORD_CODE_DEFN) components.

This section discusses how to track approvals for mass or individual job updates.

Pages Used to Track Military Job Updates

Page Name	Definition Name	Navigation	Usage
Approval Levels	MIL_APPRVL_LVL_DFN	Set Up HRMS, Product Related, Workforce Administration, Workforce Data MIL, Approval Levels, Approval Levels	Define military approval levels to describe the various levels used for approving orders that affect military members' Job rows. The approval levels codes are associated with the service member's Job Data rows on the Employee Data Tracking MIL page.
Order Codes	MIL_ORD_CODE_DEFN	Set Up HRMS, Product Related, Workforce Administration, Workforce Data MIL, Order Codes, Order Codes	Enter military order codes (such as legislative orders) that would indicate a reason for a job change. The order codes are associated with the service member's Job Data rows on the Employee Data Tracking MIL page.

Page Name	Definition Name	Navigation	Usage
Employee Data Tracking MIL	MIL_EE_DATA_TRK	Workforce Administration, Job Information, Employee Data Tracking MIL, Employee Data Tracking MIL	Track approvals for mass or individual job updates. When an employee or group of employees have a new Job row created as a result of a specific event (for example, mass deployment), use this component to indicate the approvals that occurred for this Job Data change. Changes to the job rows can be done manually or through the Mass Update process.

Tracking Approvals for Mass or Individual Job Updates

Access the Employee Data Tracking MIL page (Workforce Administration, Job Information, Employee Data Tracking MIL).

Employee Data Tracking MIL

Harriet Smith EMP ID: KUHM08 Empl Record: 0

Approval Tracking Find | View All First 1 of 4 Last

Effective Date: 04/01/2009 Effective Sequence: 0

Action: Promotion Reason: Normal Career Progression

Approval Tracking Details Customize | Find | 1 of 1

*Tracking Sequence	Approval Level	Override Oper ID	Approver Oper ID	Approval Date	Order Code	Comment
1		☐	PS			

Employee Data Tracking MIL page

Tracking Sequence Enter a tracking sequence number.

Approval Level Select a level, such as an initial request or final, for approving a military order. Define approval levels in the Approval Levels table.

Override Oper ID (override operator identification) and **Approver Oper ID** (approver operator identification) The system displays the operator that entered the approval information. Select the Override Oprid check box to manually update the approving operator id.

Approval Date	Enter the date for this approval level.
Order Code	Select an order that explains the purpose of this job change. Define order codes in the Order Codes table.
Comment	Enter additional comments regarding this job update and approval.

Note. The Mass Update process will update this component by calling the service `MassUpdateMilitaryApproval`, which in turn will call the Component Interface `HCR_MIL_EE_TRK_SRV`.

Updating Military Ranks

This section provides an overview of military rank updates in Job Data and rank tracking in Manage Profiles.

Understanding Military Rank Updates in Job Data

Military rank changes are tracked in a person's Job Data record. This table lists the pages and fields that you typically update when you enter a military rank change (you may need to update additional pages and fields):

<i>Affected Pages</i>	<i>Affected Fields</i>	<i>Comments</i>
Work Location	Effective Date Action Code: <i>Data Change</i> Reason Code (if applicable) Position Number Service Component Component Category	All the entries on the page could change depending on what the rank change involves and the service member's job. An action code may vary too depending upon other job changes related to the rank change, such as promotion or department transfer. If you're organizing part or all of PeopleSoft Enterprise Human Resources by position, military rank information does not default from the position.
Job Information	Job Family Job Function Job Subfunction	Update any other fields as needed.

<i>Affected Pages</i>	<i>Affected Fields</i>	<i>Comments</i>
Salary Plan	Rank Rank Entry Data Skill Grade Worn Rank Worn Rank Type Salary Administration Plan Grade	Rank is tied to Salary Plan and Grade. This may also involve updating compensation information on the Job Data - Compensation page.
Employment Information	Engagement Date Early Promotion Date	Update other fields as needed.

Understanding Rank Tracking in Manage Profiles

PeopleSoft Human Resources Manage Profiles manages the attributes of jobs or individuals. Typically, profiles summarize the competencies, qualifications, and skills of a job or a person as well as a service member's military ranks. The profile search and compare features enable you to perform searches for profiles that match user-defined criteria and easily compare profiles.

In order to keep military rank profiles up to date with Job Data, use the Refresh Names and Profiles MIL process (MIL_NAME_BLD). The system uses the HCM Event Manager to raise an event when a change to an assignment's military rank has occurred and execute this change.

The following prerequisites must be in place prior to running the Refresh Names and Profiles MIL process:

- The Integration Broker must be active.
- In HCM Event Manager, the event *AssignmentMilitaryRankChanged* must be active.

See *PeopleSoft Enterprise HRMS PeopleBook: Events and Notifications*, "Understanding the Events and Notifications Framework"

See *PeopleSoft Enterprise Human Resources PeopleBook: Manage Profiles*.

Page Used to Synchronize Ranks in Job Data with Manage Profiles

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Refresh Names and Profiles MIL	MIL_REBUILD_NAMES	Workforce Administration, Collective Processes, Refresh Names and Profiles MIL, Refresh Names and Profiles MIL	Run this process to rebuild the names and profiles of all the military personnel and synchronize this data with the Manage Profile records.

Managing Military Rank Change Requests

This section provides an overview of military rank change processing and discusses how to:

- Create and manage military rank change requests.
- Enter the proposed military rank change details.
- Enter military rank change notification information.
- Record postal information for stakeholders you have notified manually.
- Approve or deny rank change requests.
- Generate service member rank change notices

Understanding Military Rank Change Processing

The overall process of issuing a military rank change can occur multiple times during a service member's career and for various reasons, such as natural progression, performance and training, and other assessment-related testing. After an organization has gone through the evaluation and selection process and have identified the candidates who should receive a rank change, the organization can use the PeopleSoft Military Rank Change process.

The PeopleSoft Military Rank Change process enables the tracking of the various states of military service member rank changes, notifying stakeholders that are involved in this business process, and generating official documentation. When a rank change transaction is completely processed, a new row is inserted into the service member's Job Data to reflect the new rank change. Through the Military Rank Change pages and process, you can:

- Enter (new, amended, or cancelled) rank changes details in a specified rank change component.
- Use templates, which would provide default values for the rank change request and cut down on the number of key strokes required when entering requests.
- Retrieve and view history, including amendments and cancellations, to all employee rank changes.
- Enter notification details to be triggered based on current or future promulgation dates.
- Work closely with stakeholders (any individual that needs to be notified of a service member's rank change) through email notification and recording their approvals or denials through the manager self service pages.
- Have the system update service member job data and profile records to reflect the new rank changes.
- Generate rank change documents.

When a rank change transaction is added (a new request, an amendment, or a cancellation) for a service member, an email notification is sent to stakeholders, the career manager and a list of other reviewers and approvers you identify in the Rank Change MIL component, using the Approval Framework. This notification alerts them that the rank change process has begun and any stakeholders who have been specified as approvers will be notified that their review and approval is required for the rank change process to continue. Approvers will then approve or deny the rank change transaction in the Review Rank Change Request MIL component in the manager self service pages. If the stakeholders approve the rank change, the system then routes the information to the candidate's unit commander for final approval. The unit commander is determined based on the access type on the Military Processing Definition setup page.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Working with Common Components," Configuring Direct Reports Functionality.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Self-Service Transactions," Setting Up Access to Direct Reports Data.

The Career Manager can monitor rank change approvals and denials by reviewing the status monitor on the Review Rank Change Request MIL page. When a new or amended rank change has been approved, the system will insert and record this rank change row in the Job Data component through the MIL_UDJOB_AE Application Engine. The date this happens is based on the Application Date field value defined in Rank Change MIL component for this transaction. The Career Manager should review the status monitor on the Review Rank Change Request MIL page for denials and insert a new row in the Rank Change MIL component indicating a cancellation of the rank change transaction. This process enables you to keep a record of all military rank change propositions, amendments, and cancellations without inserting numerous rows into Job Data.

If the Military Processing Definition page is set up to enable prenotification, the system will provide a prenotification message to the stakeholders as a final reminder that this rank change is going to happen within a specified period.

You can also create rank change notices utilizing XML Publisher for the service members you select.

Military Rank Change Processes

The Military Rank Change process uses these processes:

- Launch AWE for Mil Rank Change (MIL_AWE_AE)

Launches the approval process. This application engine checks for all the rank changes that needs an approval and whose Start Approvals On date in the Rank Change MIL component is less than or equal to the current date.

- Prenotifications for Mil Rank (MIL_NOTFY_AE)

Sends out the prenotification emails based on the Prenotification Date field in the Rank Change MIL component.

- Update Job Data for Mil Rank (MIL_UDJOB_AE)

Updates Job Data with the rank changes that have been approved. This application engine checks for all the approved rank changes that are not yet applied to the database and that have an Application Date value in the Rank Change MIL component of less than or equal to the current date. This updates Job Data with an effective date that matches the Application Date value.

- Military Rank Change Notices (MILRNKNOT)

Generates the rank change notices. You run these notices by navigating to Workforce Administration, Job Information, Reports, Generate Rank Change Notices. Identify the rank change notifications you wish to print and click Run to initiate the MILRNKNOT XML Publisher process, which calls the MILRNKNOT Application Engine process. Separate files are generated for each employee and the files are stored in the report folders of the respective server.

Note. Run the approval, prenotification, and job update application engines by navigating to PeopleTools, Process Scheduler, System Process Requests and selecting the process you need to run. You can also trigger these processes to run automatically through the Process Scheduler by setting up a recurrence that is linked to the processes in order run them daily without additional manual intervention.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler*, "Defining PeopleSoft Process Scheduler Support Information," Defining Recurrence Definitions

Prerequisites

In order for you to use the Military Rank Change feature, you must ensure the following items have been setup:

- Military Rank functionality is enabled and the military rank setup tables have been defined.
- User profiles and roles have been set up with email and worklist notification preferences.
- Approval Framework has been set up for notification.
- Workflow with email is enabled.
- Event Manager has been configured.
- Integration Broker is running correctly.
- XML Publisher has been set up to create official document generation.

See Also

Chapter 2, "Setting Up the Administer Workforce Business Process," Setting Up Military Rank Change Notification and Documentation, page 58

Pages Used to Track Military Rank Changes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Military Rank Change	MIL_RANK_CHNG_CNTL	Workforce Administration, Job Information, Rank Change MIL, Military Rank Change	Create and manage military rank change requests by entering the controlling factors for this military rank change transaction. You can also enter predefined templates to populate the authorizing organization, career manager, and notification details.
Rank Change MIL - Details	MIL_RANK_CHNG_DTLS	Workforce Administration, Job Information, Rank Change MIL, Details	Enter the proposed military rank change details.
Rank Change MIL - Stakeholder	MIL_STKHLDR_NOTIF	Workforce Administration, Job Information, Rank Change MIL, Stakeholder	Enter military rank change notification information. This page is specifically designed to capture when the approval process will begin and who will be involved. List reviewers and approvers for this rank change that will receive an electronic notification and when the system should trigger approval workflow. If prenotification has been enabled, enter a prenotification date on which these stakeholders should be notified of the rank change.
Rank Change MIL - Postal	MIL_RANK_POSTAL	Workforce Administration, Job Information, Rank Change MIL, Postal	Record postal information for stakeholders that you have notified manually. Enter stakeholders that you are not notifying electronically and the date and address of where you mailed the notification.
Review Rank Change Request MIL	MIL_RANK_CHNG_APPR	Manager Self Service, Job and Personal Information, Review Rank Change Request MIL, Review Rank Change Request MIL	Approve or deny rank change requests.

Page Name	Definition Name	Navigation	Usage
Generate Rank Change Notices	MIL_NOTICE_RUN_CTL	Workforce Administration, Job Information, Reports, Generate Rank Change Notices, Generate Rank Change Notices	Generate service member rank change notices using XML Publisher. A report can be generated in any status, at any point in time.

Creating and Managing Military Rank Change Requests

Access the Rank Change MIL - Military Rank Change page (Workforce Administration, Job Information, Rank Change MIL, Military Rank Change).

Military Rank Change
Details
Stakeholder
Postal

Harriet Smith
EMP
Empl ID: KUHM08
Empl Record: 0

Current Military Organization

Military Service: United States Army
Service Component: Trained in Units Department: KUMILUS01 Training
Component Category: FTS Pers Position Number: K0ML0001 Recruit-in-Training

Rank Change Control
Find | View All First 1 of 2 Last

Template ID: KPROELIG
Effective Date: 05/12/2009 Sequence: 2
*Action: Promotion Action Reason: Normal Career Progression
*Status: NEW Selected *Status Date: 05/12/2009
Application Date: 07/01/2009 Promotion Seq: 105 ☐ Applied to Job

Authorizing Organization

Business Unit: GBIBU Global Business Institute BU Department: KUMILUS04 Human Resources

Responsible Career Manager

☒ Position Number Position Number: K0ML0004 Career Manager
☐ Role Role Name:

Rank Change MIL - Military Rank Change page

This page displays the employment and current military organization information that is recorded in the Job Data component for this person.

Note. To have the system display the worn rank in front of the employee's name at the top of the military pages, you must have Military, Event Manager, and Publish/Subscribe enabled in the system and the domain status should be active. When a rank is changed on the current row, the event AssignmentMilitaryRankChanged is raised and the Event Manager triggers the handler to update the names.

See *PeopleSoft Enterprise Human Resources PeopleBook: Events and Notifications*

Rank Change Control

Template ID	Select a rank change template to populate the component with predefined fields from the Military Rank Change Template component, such as the Action, Reason, Status, Business Unit, Department, Career Manager, and role notification fields. This field is optional.
Effective Date	Enter the date the person was selected for a rank change. This field, along with the EmplID, Empl Record, Sequence, and Action fields, uniquely identify this transaction row.
Sequence	Defaults to 1 for a new effective-dated row and automatically increments by one when a new row is inserted in the scroll area for the same effective date.
Action	Select a valid action associated with the Military Rank Change process. Valid rank change actions are defined in the Rank Change Status MIL component for PeopleSoft actions. The system will use this value in the Action field when this rank change is inserted into Job Data.
Action Reason	Select a valid action reason for the service member's rank change. Values are defined in the PeopleSoft Action Reason table. The system will use this value in the Action Reason field when this rank change is inserted into Job Data. This field is an optional.
Status and Status Date	Enter a disposition status of this rank change and the date of this disposition status. Values for this field may include <i>NEW</i> , <i>AMD</i> (rank change amendment), <i>CNA</i> (administrator canceled rank change), or <i>CNC</i> (rank change commander cancellation), depending up how the disposition status was set up in the Rank Change Status MIL component.
Application Date	Enter the date this rank change should be inserted into Job Data, if known. Since this date is not always known when the rank change for the service member is first defined, you can enter this date at a later time. However, this field is required in order for the row to be processed and inserted to the service member's Job Data.
Note. In order for the system to write this rank change to Job Data, the Apply Row to Job Data check box must be selected for the action's Status value on the Rank Change Status MIL page, approvals for military rank changes must be enabled, and the rank change must be approved. See Chapter 2, "Setting Up the Administer Workforce Business Process," Set Processing Field Selection, page 64.	
Promotion Seq (promotion sequence)	Indicate the order that a promotion should be granted to the service member. This field is available only when the action is <i>Promotion</i> . This field is an optional.
Apply to Job	Indicates whether or not the rank change has been inserted into the Job Data record.

Authorizing Organization

Business Unit	Enter the business unit that is authorizing this rank change. This is required in order to enter an authorizing department.
Department	Enter the department that is authorizing this rank change. An authorizing business unit must be entered first in order to enter a department.

Responsible Career Manager

Every service member has a career manager working for their career interests. Due to the fluid nature of the military, the Career Manager is determined by either a position or a role as determined by your organization. Use this section to determine whether the Career Manager should be identified by a position or role.

Position Number	Select this option if the career manager responsible for this service member's rank change is associated with a designated position. When you select this option, the Position Number field becomes available to enter the career manager's position number.
Role and Role Name	Select this option if the career manager responsible for this service member's rank change is associated with a PeopleSoft role. When you select this option, the Role Name field becomes available to enter the career manager's role.

See Also

Chapter 2, "Setting Up the Administer Workforce Business Process," Setting Up Military Rank Change Notification and Documentation, page 58

Enterprise PeopleTools PeopleBook: Security Administration,"Setting Up Roles"

Entering the Proposed Military Rank Change Details

Access the Rank Change MIL - Details page (Workforce Administration, Job Information, Rank Change MIL, Details).

Military Rank Change		Details		Stakeholder		Postal	
<u>Harriet Smith</u>		EMP		Empl ID: KUHM08		Empl Record: 0	
Military Service:		United States Army					
Rank Change Details Find View All First 1 of 2 Last							
Disposition Status:		NEW		Status Date:		05/12/2009	
Effective Date:		05/12/2009		Action:		PRO	
Current Values				Proposed Values			
Military Rank:	CPL	as of Date	04/01/2009	*Proposed Military Rank:	SGT		
Worn Rank:	CPL			*Worn Rank:	SGT		
Worn Rank Type:	K1			Worn Rank Type:	K1		
Salary Administration Plan:	KUML			*Salary Administration Plan:	KUML		
Salary Grade:	E02			*Salary Grade:	E03		
Job Family:	K0HM04			Job Family:	K0HM04		
Job Function Code:	K09			Job Function Code:	K09		
Job Subfunction:				Job Subfunction:			

Rank Change MIL - Details page

Use this page to view the service member's current military rank information (the left side of the page) and enter the proposed rank changes (the right side of the page).

The Current Values fields display the military services member's information from Job Data as of the effective date of this rank change. The values for the current rank and salary information come from the Salary Plan page, the job fields come from the Job Information page.

The Proposed Values fields will be written to the military service member's Job Data pages upon meeting approval requirements, if applicable, and reaching the Application Date you entered on the Military Rank Change page. These field are unavailable when you enter a cancellation.

Proposed Military Rank Enter the new rank that was proposed for the service member.

Worn Rank Enter the new worn rank that is proposed for the service member.

Worn Rank Type Enter the new worn rank type, such as temporary, substantive, or acting, that is proposed for the service member.

Salary Administration Plan and Salary Grade

Enter the new salary administration plan and grade proposed for the service member. Valid salary plans and grades for military ranks are defined in the Military Service component.

See [Chapter 2, "Setting Up the Administer Workforce Business Process,"](#) [Defining Service Ranks](#), page 56.

Job Family

Enter the new job family that is proposed for the service member, if applicable.

Job Function Code and Job Subfunction

Enter a new job function and a subfunction that is proposed for the service member, if applicable. A job subfunction is a subset of a job function, such as benefits or payroll might be subset of HR. A subfunction can only be selected if you have entered a job function first.

Entering Military Rank Change Notification Information

Access the Rank Change MIL - Stakeholder page (Workforce Administration, Job Information, Rank Change MIL, Stakeholder).

The screenshot shows the 'Rank Change MIL - Stakeholder' page for Harriet Smith (EMP ID: KUHM08). The page is divided into several sections:

- Header:** Harriet Smith, EMP ID: KUHM08, Empl Record: 0.
- Military Service:** United States Army.
- Rank Change Workflow Notifications:**
 - Sequence: 2
 - Action: PRO
 - Effective Date: 05/12/2009
 - Status: NEW
 - Status Date: 05/12/2009
 - Start Approvals On: 05/22/2009
 - Prenotification Date: 06/29/2009
- Stakeholder Notification:**

Role Name	Participant Involvement		
1 Employee	Reviewer	+	-
2 HR Military Career Manager	Reviewer	+	-

Rank Change MIL - Stakeholder page

Use this page to identify stakeholders that will be notified electronically and set the date on which the system will send out the approval workflow through Approval Framework. The employee's unit commander will always be notified via workflow. As delivered, unit commander has the final approval for their service members.

Note. The unit commander is determined by the Access Type selected on the Military Processing Definition page.

Start Approvals On Enter the date that the electronic notifications will be sent out to the stakeholders in notification list for their approval or review. This date should be the current date or a future date. If an earlier date is provided, the approvals will start immediately upon save, just like the current date.

After notifications have been sent out to the stakeholders, changes to a rank change request would have to be made by adding an amendment row.

Prenotification Date Enter the date that the online stakeholder should receive a prenotification message of the service member's rank change that will be made in the system. This date is typically set in conjunction with the Approval Date field on the Military Rank Change page, notifying stakeholders for a final time that the rank change is going to occur. This provides a final opportunity to stop or modify the rank change one last time.

If you are using a template for this rank change, you can have the system automatically enter a Prenotification Date value based on the Application Date value you have entered on the Military Rank Change page.

For example, you have a template that has the Prenotification Date = Effective Date - Days field is set to 3 in the Military Rank Change Template component. You then create a rank change request using this template. You enter an Application Date value of *June 20*, and the system automatically populates the Prenotification Date field with *June 17*, three days before the rank change is applied to the service member's Job Data.

Note. The Allow Prenotification check box must be selected on the Military Processing Definition page and the Include in Prenotification check box should be selected for the action specified on the Rank Change Status MIL page for prenotification to take place.

See [Chapter 2, "Setting Up the Administer Workforce Business Process," Defining Military Rank Change Processing Rules, page 61.](#)

See [Chapter 2, "Setting Up the Administer Workforce Business Process," Specifying Allowable Actions for Rank Change Processing, page 63.](#)

See [Chapter 15, "Updating Person and Job Information," Military Rank Change Processes, page 742.](#)

Role Name Select any additional roles, other than the unit commander, that should be included in the notification process. Roles are created in the PeopleTools Roles table. The unit commander will automatically be notified and does not need to be entered in this Stakeholders Notification group box.

Participant Involvement Identify the level of involvement of the stakeholder. Values are *Approver* or *Reviewer*.

Recording Postal Information for Stakeholders You have Notified Manually

Access the Rank Change MIL - Postal page (Workforce Administration, Job Information, Rank Change MIL, Postal).

Military Rank ChangeDetailsStakeholderPostal

Harriet Smith

EMP Empl ID: KUHM08 Empl Record: 0

Military Service: United States Army

Postal Delivery Notifications

Find | View All First 1 of 2 Last

Effective Date: 05/12/2009 Sequence: 2

Status: NEW Status Date: 05/12/2009

Action: PRO

User Notification List

Customize | Find | View All First Last

Person ID	Name	Date Notified	Address Type	Address
KUHM02	Bernard Blessinger	03/30/2009	OTH2	8900 Veterans Highway,

Rank Change MIL - Postal page

Use this page to record those stakeholders that you are notifying of the rank change outside of the AWE process, as specified on the Stakeholder page.

Note. The system does not generate any automatic notifications or letters based on information entered on this page. This page is informational only and should be used to record those notifications you performed yourself.

- Person ID and Name

Enter the PeopleSoft employee ID and the system displays the name of the individual to be notified of this service member's rank change via postal delivery.
- Date Notified

Enter the date that you notify the person about the military rank change outside of the automatic electronic notification.
- Address Type and Address

Select an address type such as *Home*, *Mailing*, or *Business*. If an address is associated with this address type, the system will populate the Address field. If there is no address provided from the system, you can manually enter the address.

Approving or Denying Rank Change Requests

Access the Review Rank Change Request MIL page (Manager Self Service, Job and Personal Information, Review Rank Change Request MIL, Review Rank Change Request MIL).

Review Rank Change Request MIL

Eugene Vickers

EMP

ID: KUHM05

Empl Record: 0

Review the proposed rank change information below. Approve this change by selecting the Approve button. If you are denying this rank change, provide a denial reason and select the Deny button.

Rank Change Details

Military Service:

United States Army

Service Component:

Trained Individuals (non-unit)

Component Category:

Indiv Mobilization Augmntee

Effective Date:

08/22/2009

Action:

Promotion

Action Reason:

Normal Career Progression

Current Values

Proposed Values

Military Rank:

W-4

as of Date

03/15/2005

Proposed Military Rank:

W-5

Worn Rank:

W-4

Worn Rank:

W-5

Worn Rank Type:

Worn Rank Type:

Salary Administration Plan:

KUML

Salary Administration Plan:

KUML

Salary Grade:

W04

Salary Grade:

W05

Job Family:

Info Ops

Job Family:

Info Ops

Job Function Code:

Ops PlnTsk

Job Function Code:

Ops PlnTsk

Job Subfunction:

Job Subfunction:

Review Rank Change Request MIL page (1 of 2)

Comment

Comment:

Denial Reasons: Not Applicable

View Approval Chain

Mil Rank Change Approval Chain

Rank Change Approval Chain: Pending

Mil Rank Change Approval Chain

Pending
[Multiple Approvers](#)
 Military Rank Change Approvers

→

Not Routed
[IPSI Catherine Xanier-MGR](#)
 Mil Rank Change Unit Commander

Review Rank Change Request MIL page (2 of 2)

This page is available to approvers who have not yet approved the transaction as well as reviewers. Approval notifications are sent out via the Launch AWE for Mil Rank Change (MIL_AWE_AE) Application Engine process, which you can schedule to run daily or on an as needed basis.

See [Chapter 15, "Updating Person and Job Information," Understanding Military Rank Change Processing, page 741.](#)

Rank Change Details

This page displays the current and proposed rank change values. Approve or deny the rank change request by selecting the appropriate button. If you are denying the request, select a reason from the Denial Reasons drop down box.

The effect date comes from the Effective Date field in the Rank Change MIL component.

Note. When a rank change is denied, the Career Manager should insert a cancellation row in the Rank Change MIL component for this person to record the change of disposition. The system will also send out an updated notification and will not insert the rank change into Job Data.

View Approval Chain

You can also view the status of the rank change approval chain in the View Approval Chain section of the page. This approval process is a two step process: first the system sends out notifications to the approvers specified on the Rank Change MIL - Stakeholder page, then, if approved, the system forwards the notification to the unit commander for approval. When there is no approver for the first step of the process, then the transaction is immediately routed to the unit commander.

Generating Service Member Rank Change Notices

Access the Generate Rank Change Notices page (Workforce Administration, Job Information, Reports, Generate Rank Change Notices, Generate Rank Change Notices).

Generate Rank Change Notices

Run Control ID: 1
[Report Manager](#)
[Process Monitor](#)

Filter Criteria

EmplID:

Action:

Military Service:

Business Unit:

Set ID:

Department:

Location Code:

Military Rank:

Worn Rank:

Disposition Status:

Date Range

Actual Rank Change Date:

From Date:

Thru Date:

Selection Date:

From Date:

Thru Date:

Select Military Rank Changes to Print

[Customize](#) | [Find](#) | | [First](#) | [1-2 of 2](#) | [Last](#)

Select	EmplID	Name	Empl Record	Rank Change Sequence	Selection Date	Disposition Status	Details
☒	KUHM08	Harriet Smith	0	1	05/12/2009	AMD	
☒	KUHM15	Yvelyn Jung	0	1	04/17/2009	NEW	

[Select All](#)
[Deselect All](#)

Generate Rank Change Notices page

Generate this report for a single individual or for several people for which you have entered a military rank change. Enter search criteria such as an employee ID, department or location information, rank details, a rank change date range, or any combination of these items. The Actual Rank Change Date fields use the Application Date from the rank change request, and the Selection Date field uses the effective date that the person was selected for the rank change.

Click Filter to initiate the search. The system will display those who meet this criteria in the Select Military Rank Changes to Print grid. Select those for whom you wish to print the report and run the process. This process initiates the Military Rank Change Notices (MILRNKNOT XML Publisher) process, which calls the MILRNKNOT Application Engine process.

Important! Separate files are generated for each employee and the files are stored in the report folders of the respective server.

See [Chapter 15, "Updating Person and Job Information," Understanding Military Rank Change Processing, page 741.](#)

Updating Organizational Instance and Assignment Relationships

This section provides an overview of organizational instance and assignment relationships and discusses how to:

- Promote an assignment to an instance.
- Move an assignment to another instance.
- Demote an instance.

Understanding Organizational Instance and Assignment Relationships

When you promote an assignment to an instance, so that it is no longer subordinate to another organizational instance, you make an additional assignment into its own instance. For example, you might want to terminate a controlling instance, but maintain the additional assignment. If the additional assignment is subordinate to the controlling instance, they share the same organizational instance number, the additional job is terminated automatically when you terminate the controlling instance. To promote an instance for a single employee online, add a new row on the Work Location page of the Job Data component. Use the Promote an Assignment page to promote assignments for multiple employees as a batch process.

Use the Demote Instance page to make a controlling instance into an additional assignment under another instance. To demote an instance, the controlling instance should not have any additional assignments.

Use the Move Assignment to another Inst page to move an additional assignment to another instance. This is useful to correct errors. For example, when you select the wrong employee record number to be the controlling instance.

These restrictions apply to modifying organizational instance and assignment relationships:

- These actions are valid only for employees and contingent workers; persons of interest are not eligible.
- These actions are not valid for Japan additional appointments and temporary assignments.
- You can only promote a host assignment to an instance if the host assignment is terminated and there are no future assignment rows with action ASG (Assignment) or ASC (Assignment Completion).
- Assignments with future rows with action ADL (Additional Job) are ineligible.
- You cannot change or delete a row after you confirm any of these actions.

The action codes that are entered on the rows for these actions are:

- OCA – Promote an Assignment to an Instance.
- OCI – Demote an Instance.
- OCM – Move an Assignment to another Instance.

Prerequisites

You must define action reasons that correspond to the delivered actions OCA, OCI, and OCM before using this component.

Pages Used to Modify Organizational Instance and Assignment Relationships

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Work Location	JOB_DATA1	Workforce Administration, Job Information, Job Data, Work Location	Enter a new row on this page to modify instance and assignment relationships.
Promote an Assignment	RUNCTL_OC_PRO_ASG	Workforce Administration, Collective Processes, Promote an Assignment, Promote an Assignment	Batch process to promote assignments for multiple employees.
Promote an Assignment - Details	HCR_OC_PRO_ASG_SEC	Click the Details link on the Promote an Assignment page.	Review the errors and warnings returned by the component interface.
Move Assignment to another Inst	HCR_OC_CHG_ASGN	Workforce Administration, Job Information, Move Assignment to another Inst, Move Assignment to another Inst	Move an additional assignment to another instance.
Demote an Instance	HCR_OC_CHG_ASGN	Workforce Administration, Job Information, Demote an Instance, Demote an Instance	Use this page to change a controlling instance to an additional assignment under another instance. You can demote an instance to an assignment only if the instance does not have any additional assignments.

Promoting an Assignment

Access the Promote an Assignment page (Workforce Administration, Collective Processes, Promote an Assignment, Promote an Assignment).

Promote an Assignment

Run Control ID: PER099 [Report Manager](#) [Process Monitor](#) [Run](#)

Report Request Parameter(s)

Data												Customize	Find	View All	First	1 of 1	Last
	Person ID	Empl Record	Org Relation	Org Instance	NewOrg Instance	New Effdt	Action	Action Reason	Status	Details	Exec?						
1	CFB0701	0	EMP	0	0	07/10/2009	Promote an Assignment to an Instance		Ready	Details	☐						

Promote an Assignment page

Org Relation The organizational relationship. Valid values are *EMP* for employee and *CWR* for contingent worker.

Org Instance The actual org instance.

New Effdt The new effective date defaults to today's date.

Status Available values are *Ready*, *Failure*, *Success*, and *Cancelled*. The default value is *Ready* for all rows.

After the process has run to completion, you can review the status. If, for any reason, the transaction has not been loaded to the records, the status of the row is set to *Failure*. Otherwise the status is *Success*. You must determine the reasons why transactions ended in *Failure* and change the status back to *Ready* or to *Cancelled* before you run the process again.

Details Click the link to open the Details page. Use this page to review the errors and warnings returned by the component interface.

Exec? The process loads only the rows with Status set to *Ready* and with the Exec? check box selected.

Click the Details link to access the Details page for Promote Instance.

Andrew Field

EMP

ID: CFB0701

Record: 0

Old Controlling Instance Infos

ORG Instance:

0

Original Start Date:

12/01/1981

☐ Override Original Start DT

Org Instance Service Date:

12/01/1981

☐ Override Org Instance Service

Assignment Job Data

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

	Effective Date	Seq	HR Status	Action	Reason	First Start Date	Last Start Date
1	12/01/1981	0	Active	Hire		12/01/1981	12/01/1981

New Instance Infos

ORG Instance:

Original Start Date:

12/01/1981

☐ Override Original Start DT

Org Instance Service Date:

12/01/1981

☐ Override Org Instance Service

Errors and Warnings

Customize | Find | | First 1 of 1 Last

Seq Nbr	Message Set Number	Message Number	Severity	Message Text

Promote an Assignment - Details page

- Old Controlling Instance Infos**

This information is for display only.
- Assignment Job Data**

The grid displays job data for the selected assignment, sorted by effective date in ascending order.

Moving an Assignment to Another Instance

Access the Move Assignment to another Inst page (Workforce Administration, Job Information, Move Assignmmt to another Inst, Move Assignment to another Inst).

Move Assignment to another Inst

Kevin Chae EMP ID: KU0106 Empl Record: 3

Old Controlling Instance Infos			
Organizational Instance:	0		
Original Start Date:	05/28/1999	☐ Override Original Start DT	
Org Instance Service Date:	05/28/1999	☐ Override Org Instance Service	

Assignment Job Data							
Customize Find First 1-2 of 2 Last							
	Effective Date	Seq	HR Status	Action	Reason	First Assignment Start	Last Assignment Start
1	05/28/1999	0	Active	Additional Job		05/28/1999	05/28/1999
2	05/25/2000	0	Inactive	Termination	Personal Reasons	05/28/1999	05/28/1999

Choose New Instance					
Customize Find First 1 of 1 Last					
Exec?	Org Relation	Org Instance	Original Start Date	Org Instance Service Date	Comments
☐	EMP	2	05/28/1999	05/28/1999	

New Job Data	
Effective Date:	07/10/2009
Effective Sequence:	0
Action:	OCM Move an Assignment to another Instance
Reason Code:	

Move Assignment to another Inst page

Assignment Job Data The grid displays job data for the selected assignment, sorted by effective date in ascending order.

Choose New Instance This grid lists all instances for this employee per organization. If you select an assignment that has a start date prior to the instance's first hire date, you cannot select that instance. You can only move an assignment to an instance if the active date of the assignment coincides with the dates of the instance.

New Job Data Enter the job effective date, job effective sequence, the action reason for the action. The action code defaults to OCM (move an assignment to another instance), and cannot be changed.

Load to Job Click this button to insert the new job data into the JOB record.

Transfer to Job This button is displayed after the Load to Job process runs successfully. Click the Transfer to Job button to review the updated JOB data. If the process does not run successfully, an Errors and Warnings grid appears that lists the errors.

Demoting an Instance

Access the Demote an Instance page (Workforce Administration, Job Information, Demote an Instance, Demote an Instance).

Demote an Instance

[Allison Smith](#) EMP ID: K0HU10 Empl Record: 1

Old Controlling Instance Infos

Organizational Instance:	1	☐ Override Original Start DT
Original Start Date:	01/01/2003	☐ Override Org Instance Service
Org Instance Service Date:	01/01/2003	

Running Instances

Customize | Find | First 1 of 1 Last

Effective Date	Seq	HR Status	Action	Reason	First Assignment Start	Last Assignment Start
1 01/01/2003	0	Active	Hire		01/01/2003	01/01/2003

Choose New Instance

Customize | Find | First 1 of 1 Last

Exec?	Org Relation	Org Instance	Original Start Date	Org Instance Service Date	Comments
☐	EMP	0	01/01/2003	01/01/2003	

New Job Data

Effective Date:	07/10/2009
Effective Sequence:	0
Action:	OCI Demote an Instance
Reason Code:	

Demote an Instance page

Old Controlling Instance Infos

This information is for display only.

Running Instances

The grid displays job data for the selected assignment, sorted by effective date in ascending order.

Choose New Instance

This grid lists all instances for this employee per organization. If you select an assignment that has a start date prior to the instance's first hire date, you cannot select that instance. You can only move an assignment to an instance if the active date of the assignment coincides with the dates of the instance.

New Job Data

Enter the job effective date, job effective sequence, the action reason for the action. The action code defaults to OCI (Demote and Instance), and cannot be changed.

Load to Job

Click this button to insert the new job data into the JOB record.

Transfer to Job

This button is displayed after the Load to Job process runs successfully. Click this button to review the updated JOB data. If the process does not run successfully, an Errors and Warnings grid appears that lists the errors.

Updating Salary Information

The Pay Rate Change component provides a quick and simple option for making salary adjustments when the adjustment is not related to any other changes such as promotions or transfers. If any other job-related information needs to be modified for the salary change, use the Job Data component.

Note. The four pages in the Pay Rate Change component—Employee Profile, Salary Plan, Compensation, and Job Earnings Distribution—match related pages in the Job Data component (the Employee Profile page contains information from both the Work Location page and the Job Information page).

See Also

[Chapter 15, "Updating Person and Job Information," Updating Job Data, page 719](#)

[Chapter 6, "Increasing the Workforce," page 207](#)

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Compensation and Budgeting, "Administering Salary Plans, Grades, and Steps"

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Compensation and Budgeting, "Reviewing Worker Performance History"

Pages Used to Update Salary Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Employee Profile	PAY_RT_CHANGE1	Workforce Administration, Job Information, Pay Rate Change, Employee Profile	Adjust the work periods and hours if it is necessary to do so for the pay rate change.
Salary Plan	PAY_RT_CHG_SALPLAN	Workforce Administration, Job Information, Pay Rate Change, Salary Plan	Adjust the salary step.
Pay Rate Change - Compensation	PAY_RT_CHANGE2	Workforce Administration, Job Information, Pay Rate Change, Compensation	Adjust rates and frequencies.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Job Earnings Distribution	PAY_RT_CHANGE3	Workforce Administration, Job Information, Pay Rate Change, Job Earnings Distribution	Adjust earnings distributions.

Refreshing Compensation

When you run the Employee Compensation Application Engine process (HR_PER501A) or click the Default Pay Components button on the Pay Rate Change - Compensation page, the same steps are executed, but you can update several records at once with the HR_PER501A process.

The Employee Compensation process:

- Inserts a new job row when you select Add new effective date, and uses the effective date that you entered in the As Of Date field.

Alternatively, it updates the job row that is effective as of the date that you select in the As Of Date field.

- Updates any future rows (rows are considered future if they come into effect after the as of date) when you select Update Future Rows.
- Replaces manual changes with the new default values.

Page Used to Refresh Compensation

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Calculate Compensation	RUNCTL_PER501	Workforce Administration, Job Information, Calculate Compensation, Calculate Compensation	Use to run the Employee Compensation process to update compensation packages.

Running Job Data Reports

This section provides an overview of reporting appointments for job data changes, lists a common element, and discusses how to:

- (JPN) Run the Appointment Notification report.
- (JPN) Run the Appointment List report.
- (JPN) Run the Employee Assignment List report.

See Also

Chapter 17, "(USF) Administering Personnel Action Requests," page 811

(JPN) Understanding Reporting Appointments for Job Data Changes

When workers are newly hired or transferred, or have other job-related changes, many Japanese companies provide individual notifications of appointment to each worker. These notifications, known as appointment notifications (*Jirei*), contain different information depending on the action and action reason entered on the worker's new job record.

Periodically, many companies also distribute a listing of all new hires or transfers or other changes of job. This list is known as the appointment list (*Tsuutatsu*).

When you run the Appointment Notification report, the report headings change according to the actions for which you are running the report—you can select actions and action reasons on the report page.

Reporting Appointments for Actions and Report Outputs

The following table illustrates what the appointment reports contain, depending on the action for which you run the report:

Heading and Actions	Hire and Rehire	Transfer	Promotion	Termination
Announcement date	3	3	3	3
Company description (of worker's company)	3	3		3
Department	3	3		3
Supervisor level	3	3		3
Employee status	3			
Salary plan			3	
Salary grade			3	

Note. For the actions *Transfer* and *Promotion*, the system automatically populates the Reason field. For a promotion, the system populates the field with *Grade Advance*. For a transfer, the system populates the field with *Employee Request* and *Internal Recruitment*. For all other actions in the table, you can select individual reasons (for the action that you selected) or have the system select all reasons (for the action that you selected).

With the Japanese appointment reporting functionality, if you are recording a worker's simultaneous change of department and supervisor level, enter the department change first. With both changes having the same effective date, the change of supervisor level has the higher sequence number and ensures that the system selects the changes for reporting on both the appointment notification and appointment list.

In addition, when you record job data changes with the Japanese appointment reporting functionality, reports are available for the following actions:

- Hire
- Rehire
- Termination
- Transfer
- Promotion

Sorting Appointment Lists Using Tree Structures and Definitions

To have the system sort appointment lists by department and supervisor level, use the standard tree building features to create a tree structure and reporting definition for supervisor levels, and a reporting definition for departments. You then need to select only the Refer to the Tree Manager check box on the report page to have the system use your DEPT_SECURITY tree and, depending on the job action and reason to which the appointment information relates, your SUPERVISOR_LEVEL tree.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Administering HRMS Security"

Common Element Used in This Section

Show Components	Select if you want your report to display compensation component information.

Pages Used to Run Job Data Reports

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Personnel Actions History	RUNCTL_PER015	Workforce Administration, Job Information, Reports, Personnel Actions History, Personnel Actions History	Run the Personnel Actions History report (PER015), which lists all workers affected by each of the job actions that you enter.
Pending Future Actions	RUNCTL_ASOFTD_COMP	Workforce Administration, Workforce Reports, Pending Future Actions, Pending Future Actions	Run the Pending Future Actions report (PER021), which lists all workers with job action notices scheduled for a future date.
Department Action Notices	PRCSRUNCNTL	Workforce Administration, Workforce Reports, Department Action Notices, Department Action Notices	Run the Department Action Notices report (PER001). This report lists action notices that are tied to a time period or expiration date. Use it as a reminder of selected personnel action notices. Note. Run the Refresh Employees Table process before running this report.
Employees on Leaves of Absence	PRCSRUNCNTL	Workforce Administration, Job Information, Reports, Employees on Leave of Absence, Employees on Leaves of Absence	Run the Employees on Leave of Absence report (PER005). This report lists all workers on leave and their expected return dates. Use this report to compare the return date that you entered in PeopleSoft Enterprise Human Resources with the worker's expected return date, or as a reminder to enter the return from leave information. Note. Run the Refresh Employees Table process before running this report.

Page Name	Definition Name	Navigation	Usage
Temporary Employees	RUNCTL_ASOFFDATE	Workforce Administration, Job Information, Reports, Temporary Employees, Temporary Employees	Run the Temporary Employees report (PER007). This report provides an alphabetical list of all workers marked as temporary, along with length of service and other details of employment.
Years of Service	RUNCTL_PER003	Workforce Administration, Job Information, Reports, Years of Service, Years of Service	Run the Years of Service report (PER003). This report lists workers who have completed the number of years of service that you specify, as of the point in time that you specify. Use this report as a reminder of workers who are eligible for vested benefits plans or service recognition awards.
Primary Job Audit	RUNCTL_PER058	Workforce Administration, Workforce Reports, Primary Job Audit, Primary Job Audit	Run the Primary Job Audit report (PER058). Use this report to check for discrepancies in the primary job designation for workers with multiple jobs. Run this report regularly to correct discrepancies in worker job records.
Employee Turnover Analysis	RUNCTL_FROMTHRU	Workforce Administration, Workforce Reports, Employee Turnover Analysis, Employee Turnover Analysis	Run the Employee Turnover Analysis report (PER010). This report lists each department ID and provides the worker counts as of the date that you specify.
Official List ESP	RUNCTL_PER054_ESP	Workforce Administration, Workforce Reports, Official List ESP, Official List ESP	Run the Spanish Official List report (PER054ES), which compiles the information that you need for Matricula book reporting. You can run the report for all matricula books, which includes historical worker data, or for the current book only, which includes only current data.

Page Name	Definition Name	Navigation	Usage
Appointment Notification JPN	RUNCTL_NTF_JPN	Workforce Administration, Job Information, Reports, Appointment Notification JPN, Appointment Notification JPN	Run the JPN Appointment Notifications report (PER063JP). Depending on the combination of action and reason that you use in the run control, this report prints individual worker notifications of hire, rehire, termination, transfer, and promotion.
Appointment List JPN	RUNCTL_NTF2_JPN	Workforce Administration, Job Information, Reports, Appointment List JPN, Appointment List JPN	Run the Appointment List JPN report (PER064JP), which generates an appointment list. This report lists all workers who have been hired, rehired or retired, transferred or promoted. The information that the report provides varies according to the combination of action and reason that you enter on the Appointment List report page.
Employee Assignment List JPN	RUNCTL_EMPLIST_JPN	Workforce Administration, Job Information, Reports, Employee Assignment List JPN, Employee Assignment List JPN	Print the JPN Employee Assignment List report (PER066JP), which lists workers by department, including additional appointment employees.

(JPN) Running the Appointment Notification Report

Access the Appointment Notification JPN page (Workforce Administration, Job Information, Reports, Appointment Notification JPN, Appointment Notification JPN).

Appointment Notification JPN

Run Control ID: PS

[Report Manager](#)

[Process Monitor](#)

Run

Language: English

Report Parameters

As Of Date:

31

Company:

AG

Department of Agriculture

Notification Statements:

Publish Date:

31

Published by:

Department of Agriculture

Representative Title:

Representative Name:

Action:

HIR

Use All Action Reasons

Select Action Reasons

Customize

Find

View All

First

1-2 of 2

Last

	*Reason Code	Description		
1	FIX	MX-Hire	+	-
2	HAF	Hired from Affiliate	+	-

Appointment Notification JPN page

Report headings vary according to the combination of action and reason. Enter free-form text and a company official's title and name to appear on the report, and select the action and reason combinations on which you want to report.

- Language

Select the language for the report.
- As of Date

This is the effective date of worker job data rows that the system searches and report on. It appears on the report as the announcement date.

Note. For termination notifications, enter the effective date of the termination row on the worker's job record. The system sets the announcement date on the printed notification as the As of Date minus 1 day, the same as the termination date on the worker's Employment Dates page.
- Company

Select your company code. The company description appears by default in the Published by field.
- Notification Statements

Enter any comments that you want to appear as an introduction to the list on the report: for example, *Hiring order is as follows*.
- Publish Date

Enter the publish date. This date, which appears on the report, is the date that your organization wants as the official publication date of the appointment notification.

Published by	Displays the description of the company that you entered, but you can override the default with a free-form description of, for example, your human resources department.
Representative Title	Displays the default from the company table. You can override the default. This is the title of the company's representative that appears on the notification.
Representative Name	Displays the default from the company table. You can override the default. This is the name of the company's representative that appears on the notification.
Action	Select an action that you want to report on. You can only select <i>Hire</i> , <i>Rehire</i> , <i>Transfer</i> , <i>Promotion</i> , or <i>Termination</i> .
Use All Action Reasons	Click this button unless you want to select individual reasons for the action that you entered in the Reason Code grid. Even if you selected individual reasons in the grid, if you click this button, the system loads all reasons. Note. You only need to select reasons (individual or all) for actions <i>Hire</i> , <i>Rehire</i> , and <i>Termination</i> . For actions <i>Transfer</i> and <i>Promotion</i> , the system automatically populates the Reason Code field. However, the process reports only job rows that have a reason code. If a job row has an action of <i>Hire</i> , <i>Rehire</i> , <i>Termination</i> , <i>Transfer</i> , or <i>Promotion</i> , but no action reason, the system does not report it.
Reason Code	Select all the reasons for the action that you entered that you want the report to include. If the Use All Action Reasons check box is deselected, you must enter at least one reason in this field. The system displays the description of each reason that you select. See the previous note that discusses the Use All Action Reasons field.

(JPN) Running the Appointment List Report

Access the Appointment List JPN page (Workforce Administration, Job Information, Reports, Appointment List JPN, Appointment List JPN).

Appointment List JPN

Run Control ID: PS

[Report Manager](#)

[Process Monitor](#)

Run

Language: English

Report Parameters

As Of Date:

Company:

FJ

Chemical Safety and Hazard Inv

Publish Date:

Published by:

☐ Refer to the Tree Manager

Action:

HIR

Use All Action Reasons

Select Action Reasons

Customize

Find

View All

First

1-2 of 2

Last

	*Reason Code	Description		
1	FIX	MX-Hire	+	-
2	FST	First Job	+	-

Appointment List JPN page

You can enter free-form text and a company official's title and name to appear on the report, and you can select the action and reason combinations that you want to report on.

- As Of Date

This is the effective date of worker job data rows on which the system will search and report.
- Company

Select your company code. Unlike for appointment notification, the company description does *not* appear by default in the Published by field.
- Publish Date

Enter a publish date. This date, which appears on the report, is the date that your organization wants as the official publication date of the appointment list.
- Published by

Enter a free-form description of the publishing department, such as your human resources department.

Refer to the Tree Manager

Select this check box if you want the system to sort the listing by using the DEPT_SECURITY tree and, depending on the action and reasons, the SUPERVISOR_LEVEL tree.

This is how the system sorts the listing when you select this check box:

- For actions *Hire* and *Rehire*, the system uses only the DEPT_SECURITY tree.
- For actions *Transfer* and *Termination*, the system uses both the DEPT_SECURITY tree and the SUPERVISOR_LEVEL tree.
- For action *Promotion*, the system sorts by salary plan, salary grade, and employee ID, whether the check box is selected or deselected.

Trees have no effect.

If the Refer to the Tree Manager option is deselected, the system sorts the list by employee ID.

Note. Workers who do not have a supervisor level appear in the list by department, with the Supervisor Level column blank. They are sorted by employee ID, after all the workers who do have a supervisor level.

Action

Select an action that you want to report on. You can only select *Hire*, *Rehire*, *Transfer*, *Promotion*, or *Termination*.

Use All Action Reasons

Click this button unless you want to select individual reasons for the action that you entered in the Reason Code grid. Even if you have selected individual reasons in the grid, if you click this button, the system loads all reasons.

Note. You need to select reasons only for actions *Hire*, *Rehire*, and *Termination*. For actions *Transfer* and *Promotion*, the system automatically populates the Reason Code field. However, the process reports only job rows that have an action reason. If a job row has an action of *Transfer* or *Promotion*, but no action reason, the system does not report it.

Reason Code

Select all the reasons for the action that you entered that you want the report to include. If you click the Use All Action Reasons button, you must enter at least one reason in this field. The system displays the description of each reason that you select. See the note above for the Use All Action Reasons field.

(JPN) Running the Employee Assignment List Report

Access the Employee Assignment List JPN page (Workforce Administration, Job Information, Reports, Employee Assignment List JPN, Employee Assignment List JPN).

Employee Assignment List JPN page

This report lists workers by department and supervisor level, including workers with additional appointments.

To run the report, at least one department tree must be created. For the purposes of department security, the DEPT_SECURITY tree usually already exists. You can either select this tree or create a new department hierarchy beneath the DEPARTMENT tree structure.

The report is sorted by department, and then by workers:

- With supervisor levels registered in the Supervisor Level tree, in tree order.
- With supervisor levels not registered in the Supervisor Level tree, in alphanumeric supervisor level order.
- Without supervisor levels, in alphanumeric employee ID order.

Note. The Supervisor Level tree that the system uses for sorting is the one used for the Appointment Notification and Appointment List reports. It must be named SUPERVISOR_LEVEL. If you have not defined a Supervisor Level tree with that name, sorting is in alphanumeric supervisor level order.

Viewing a Summary of All Job Records

This section lists the page used to view a summary of all jobs records held by a person.

Page Used to View a Summary of All Job Records

Page Name	Definition Name	Navigation	Usage
Multiple Jobs Summary	MULTIPLE_JOBS	Workforce Administration, Job Information, Review Job Information, Multiple Jobs Summary, Multiple Jobs Summary	View a summary of all jobs and changes in job status for people that have more than one employment record.

Refreshing Tables to Facilitate Reporting

This section provides overviews of the process of refreshing the Employees table and the process of refreshing the Personal Data table, lists a common element, and lists the pages used to refresh tables to facilitate reporting.

Understanding the Process of Refreshing the Employees Table

To generate standard PeopleSoft Enterprise Human Resources reports quickly, many human resources reports retrieve data from the Employees table (PS_EMPLOYEES). To make reporting in PeopleSoft Enterprise Human Resources more efficient, this table combines information from the following records into an extract file:

<i>Person Data Tables</i>	<i>Job Data Tables</i>	<i>Other Tables</i>
- PS_PERSON - PS_PERS_DATA_EFFDT - PS_PERSON_NAME - PS_ADDRESSES - PS_PERSONAL_PHONE - PS_PERS_DATA_USA (USA data only) - PS_PERS_DATA_FRA (French data only)	- PS_JOB (Besides Work Location and Job Information, it also includes Job Labor, Payroll, Salary Plan, and Compensation) - PS_JOB_USF (Federal Only) - PS_JOBCODE_TBL - PS_DEPT_TBL	These additional records consist of tables related to organizational relationships, national identity, disability, and ethnic groups for the US and Asia pac. - PS_PER_ORG_ASGN - PS_PER_ORG_INST - PS_PERS_NID - PS_CITIZENSHIP - PS_DISABILITY - PS_DIVERS_ETHNIC - PS_ETHNIC_GRP_TBL

The extract file's sole purpose is as a report source. Because it isn't updated dynamically when you add people or job records to the system or update their data (doing so would have negative online processing impact), you must refresh the Employees table before running any reports.

When you run this process, the system updates the Employees table with data that is valid before or on the as-of date that you specify. When retrieving data from setup components such as the Department component and Job Code pages, the system uses the effective date of the specific job data record that the data relates to.

The system uses the Employees table to run these reports:

- ABS001. SQR (Employee Absence Report)
- ABS003. SQR (Time Lost Due to Absence)
- ABS004UK. SQR (Bradford Report)
- BEN001.SQR (Health Plan Participants)

- BEN002.SQR (Life InsuranceParticipants)
- ESPP005.SQR (ESPP Purchase Distribution)
- PAY110CN.SQR (Statistics-Canada [Educational Institutions])
- PER001.SQR (Department Action Notices)
- PER002.SQR (Employee Birthdays)
- PER004.SQR (Emergency Contacts)
- PER005.SQR (Employees on Leave of Absence)
- PER008.SQR (Employee Review Audit)
- PER009.SQR (Union Membership)
- PER011.SQR (Competency Inventory)
- PER012.SQR (Departmental Salaries)
- PER006 - Crystal (Mailing Labels)

A useful feature of the Employees table is that you can refresh it to show a specific date, so you can report based on how things were at that time. This might be useful if an organization needed to reconstruct its organization over the last several years to research its promotion policies.

Update the Employees table using the Refresh Employees Table Application Engine process (PER099) before running any of these reports so that the report contains all changes made to your employee files.

Understanding the Process of Refreshing the Personal Data Table

PeopleSoft Enterprise Human Resources reports also retrieve data from the Personal Data table. This table combines information from these tables: PERSON, PERS_DATA_EFFDT, NAMES, ADDRESSES, PERSONAL_PHONE. Like the Employees table, the Personal Data table is a report source only. It updates through the process described below. The Personal Data table is updated with changes to current data when the changes are made online. Future dated information is not updated unless a batch process is run. You may want to update the Personal Data table before running reports. You can update the Personal Data table for future dated information that has become current at any time without affecting the online updates.

Note. Do not run the Refresh Personal Data process, it interferes with online transactions.

Common Element Used in This Section

As Of Date

Indicate the As Of Date to run the processes. The process selects the new data based on the date that you enter and populates the table. It includes only workers who are active, on leave of absence, or suspended. The process excludes any *terminated* workers.

Pages Used to Refresh Tables to Facilitate Reporting

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Refresh EMPLOYEES Table - Parameters	RUNCTL_ASOFDATA	Set Up HRMS, System Administration, Database Processes, Refresh EMPLOYEES Table, Parameters	Reflect back to a specific date or period for employee data reporting.
Refresh Personal Data	PRCSRUNCNTL	Set Up HRMS, System Administration, Database Processes, Refresh Personal Data, Refresh Personal Data	This process rebuilds the Personal Data table after deleting all rows in the table. Note. This process should only be run during an upgrade or installation.
Update Personal Data - Future	PRCSRUNCNTL	Set Up HRMS, System Administration, Database Processes, Update Personal Data - Future, Update Personal Data - Future	Run this process to update the Personal Data table for future dated information.
Ad-Hoc Process Request	PRCSRUNCNTL	Workforce Administration, Workforce Reports, Request Ad hoc Process, Ad-Hoc Process Request	Run several or all Administer Workforce reports that do not require parameters.
As-of-Date Request	RUNCTL_ASOFDATA	Workforce Administration, Workforce Reports, Create As-of-Date Request, As-of-Date Request	Run several or all Administer Workforce reports for which you specify an as of date.
Create Calendar Year Request	RUNCTL_CALENDARYR	Workforce Administration, Workforce Reports, Create Calendar Year Request, Create Calendar Year Request	Run several or all Administer Workforce reports for which you specify a calendar year.
From/Thru Dates Request	RUNCTL_FROMTHRU	Workforce Administration, Workforce Reports, Create From/Thru Dates Request, From/Thru Dates Request	Run several or all Administer Workforce reports for which you specify a from and through date range.

Running Database Audits

Database audits monitor changes, additions, or deletions made to sensitive fields such as salary amounts.

Page Used to Run Database Audits

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Database Audit	RUNCTL_FROMTHRU	Workforce Administration, Workforce Reports, Database Audit, Database Audit	Run the Database Audit report (PER029).

Chapter 16

Viewing Summary Workforce Information

This chapter discusses how to:

- View the Company Directory.
- View worker job history.
- (USF) View employee personal and job data.
- View other summary pages in PeopleSoft Enterprise Human Resources.

Viewing the Company Directory

Use the Company Directory component to view employee personal and job data within the context of your organization's hierarchical reporting structure.

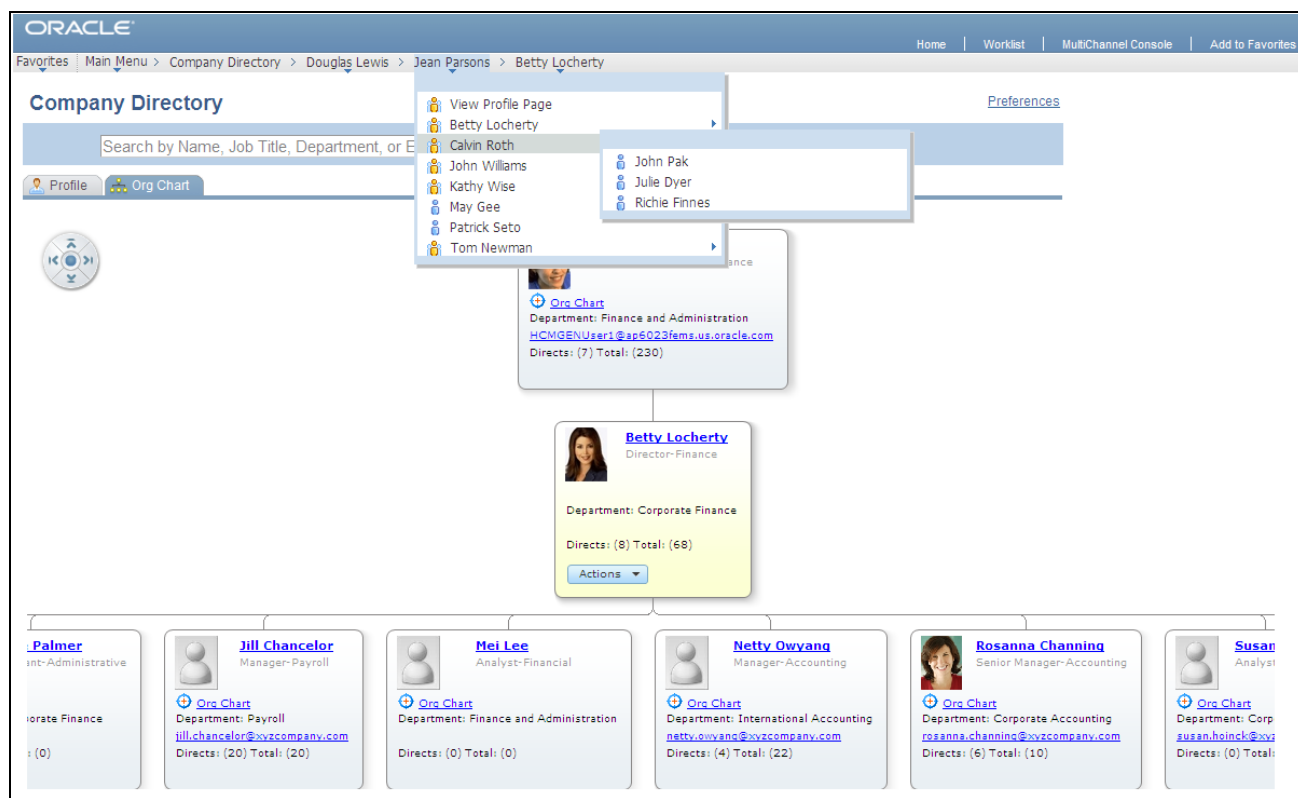
This section provides an overview of the Company Directory and discusses how to:

- Search for a person in the company directory.
- Define Company Directory personal preferences.
- View the organizational chart for a person.
- View a person's profile.
- Update a personal photo.
- Manage additional contact information.
- Manage personal links.
- Enter a personal statement or text.

Understanding the Company Directory

The Company Directory enables your employees and managers to search for people across the organization, to see a visual representation of the organization based on your defined hierarchical structure, and enable actions from the visualization. Users are able to collaborate with co-workers by selecting the communication methods available within the organization including email, telephone options, links to social networks, and a free form text field to add additional personalized information.

The organizational reporting structure appears on the Org Chart page of the Company Directory as a three-leveled treelike structure. Select any person on the chart to refocus the page content. You can also navigate to people using breadcrumbs and SmartNavigation, which display above the page in the navigational header. Breadcrumbs and SmartNavigation enhance drop-down menus by incorporating your company hierarchy into the menu structure. This enables you to navigate the organizational chart using breadcrumbs as an alternative to using the search fields.



Breadcrumbs and SmartNavigation drop-down menu navigation for the Company Directory

Note. In order to utilize the Company Directory functionality, you must be on PeopleTools 8.51.02 or greater.

Performing Personal Updates Through Self Service Transactions

When an individual views his or her content, whether from the Org Chart page or the Profile page, he or she has the ability to access HR related self service transactions through the use of the Actions drop-down list. These actions include:

- Change Name
- Update Home/Mailing Address
- Update Emergency contacts
- Update Marital Status
- Review Ethnicity Details
- View Personal HR Summary

See [Chapter 16, "Viewing Summary Workforce Information," Viewing an Organizational Chart for a Person, page 785.](#)

See [Chapter 16, "Viewing Summary Workforce Information," Viewing a Person's Profile, page 787.](#)

See *PeopleSoft Enterprise eProfile 9.1 PeopleBook*, "Using eProfile," Reviewing and Updating Personal Information.

Prerequisites

Before you begin to using the Company Directory functionality, you should perform these tasks:

1. Define the Company DirectorySetup component.

The system administrator will need to set up the rules, hierarchy, and layout for the Company Directory.

2. Build a tree.

The system administrator need to build a job tree for the Company Directory tree structure to support the organizational chart that shows the hierarchies of people according to their job information.

3. Update the Company Directory Portal folder, if necessary.

See [Chapter 2, "Setting Up the Administer Workforce Business Process," Understanding the Company Directory Setup, page 84.](#)

Pages Used to View the Company Directory

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Company Directory - Search for People	HRCD_SEARCH	Company Directory	Search for a person by name, job title, department, or email using the basic search. Use the Advanced Search link to enter multiple criteria to search for an individual. Note. This page appears first when the Search Box Only option is selected on the Company Directory Setup - General Settings or Company Directory - Preferences pages.
Company Directory - Preferences	HRCD_USER_PREF_SEC	Click the Preferences link at the top of any of the Company Directory pages.	Enter personal preferences for how the Company Directory startup page content and layout should appear.

Page Name	Definition Name	Navigation	Usage
Company Directory - Org Chart	HRCD_MAIN	- Company Directory, Org Chart - Click the My Org Chart link from the search navigation area of the Org Chart page. - Click the Org Chart link from within any node box for a person.	Displays a three-tiered organizational chart with the person's record for whom you are retrieving in the focus node in the middle level.
Company Directory - Profile	HRCD_MAIN	- Company Directory, Profile - Click the My Profile link from the search navigation area of the Profile page. - Click the name link of a person on either of the Company Directory pages.	Displays profile information for a person, such as contact information, company details, and other personal information. Users can enter additional contact information, links, and text on this page for their own profile.
Company Directory - Update Photo	HRCD_USER_PICS_SEC	Click the Update Photo link on the Profile page when you are in your own profile.	Select photo display options, such as no photo, upload your own photo, or use the HR photo that is on file, for your personal profile.
Edit Additional Contacts	HRCD_USER_CNTC_SEC	Click the Edit Additional Contact (pencil ) icon on the Profile page when you are in your own profile.	Add additional contact information to your personal profile, such as home phone number, mobile, or email addresses.
Edit My Profile Links	HRCD_USER_LINK_SEC	Click the Edit My Profile Links Contact (pencil ) icon on the Profile page when you are in your own profile.	Add web site links to your own personal profile.
Edit Personal Statement	HRCD_USER_TEXT_SEC	Click the Edit Personal. Contact (pencil ) icon on the Profile page when you are in your own profile.	Include a personal statement or comments using a rich text formatting to your own personal profile.

Searching for a Person in the Company Directory

The Company Directory feature enables you to search and retrieve people through various methods. You can use the basic search field, enter multiple search criteria through an advanced search page, use SmartNavigation that appears in the navigation header as breadcrumbs and fly-out menus, or select the links of other names on the Org Chart or Profile pages of the Company Directory component.

This section discusses:

- The Search for People: single field search page.
- The Search for People: advanced search page.
- The SmartNavigation menu structure.
- Searches for people with multiple jobs.

The Search for People: Single Field Search Page

Access the Company Directory - Search for People page (Company Directory) when the Search Box Only option is selected on the Company Directory Setup - General Settings page.



Company Directory - Search For People: single field search page

Search by Name, Job Title, Department, or Email	Enter the name, job title, department, or email for the person that you want to retrieve. Searches are not case sensitive and will perform partial name searches.
Advanced Search	Enter the name, job title, department, or email for the person that you want to retrieve. Searches are not case sensitive and will perform partial name searches.
My Org Chart	Click this link to have the system display your information as the focus on the Org Chart page. This link appears if the layout for the start page is set to show the Org Chart page first or when you are on the Org Chart page.
My Profile	Click this link to have the system display your information as the focus on the Profile page. This link appears if the layout for the start page is set to show the Profile page first or when you are on the Profile page.
Preferences	Click this link to access the Preferences page and configure personal start up page and layout preferences.

The Search for People: Advanced Search Page

Access the Company Directory - Search For People advanced search page (click the Advanced Search link in the search header of the Company Directory pages).

Company Directory

Search For People [Preferences](#)

Advanced Search

Name: begins with

Last Name: begins with

Second Last Name: begins with

Alternate Character Name: begins with

Middle Name: begins with

Email: begins with

Company: begins with

Department: begins with

Job Title: begins with

Location: begins with

Telephone: begins with

Phone Extension: begins with

Country: begins with

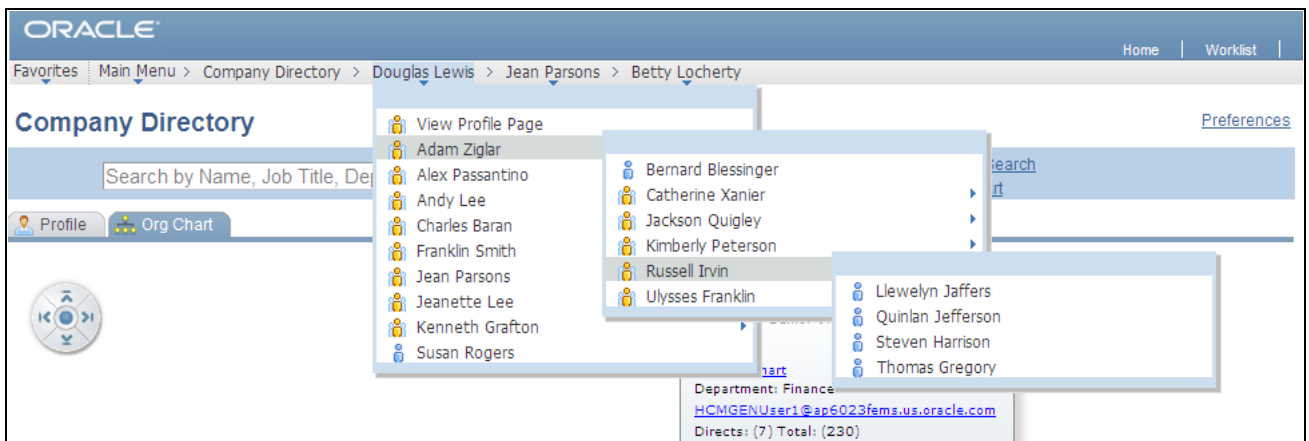
[Show Basic Search](#)

Company Directory - Search For People: advanced search page

Enter search criteria in one or more of the fields on this page and click Search.

The SmartNavigation Menu Structure

The system uses Application Based Navigation (ABN), or SmartNavigation, which enables you an alternative method of navigating directly into the main Company Directory page (bypassing the search) with a pre-selected employee. The SmartNavigation breadcrumbs also provide a quick overview of the reporting structure of the employee jobs in the directory.



Example of the SmartNavigation fly-out menu

Company Directory functionality uses trees to provide not only the visual representation of the person-based organization chart but also the SmartNavigation breadcrumbs and fly-outs on the Company Directory.

Searches for People with Multiple Jobs

When searching for a person who holds multiple jobs or assignments, and the Company Directory setup tables and tree are set up to support multiple jobs, the search will retrieve each active job held by the employee.

Search Results
 Search results for: "danny".

Search Results				
Find View All First 1-2 of 2 Last				
Name	Job Title	Department	Telephone	Email
Danny Johnson	Analyst-HRMS	Human Resources		
Danny Johnson	Assistant-Administrative	Human Resources		

Cancel

Search Results page showing an employee with multiple jobs

Click the name link for the job title you wish to view. If, after clicking the name you find you accessed the wrong job information, you can select another job title for the person from the Org Chart or Profile pages.

See Also

[Chapter 16, "Viewing Summary Workforce Information," Viewing a Person's Multiple Jobs from the Org Chart Page, page 787](#)

[Chapter 16, "Viewing Summary Workforce Information," Viewing a Person's Multiple Jobs from the Profile Page, page 789](#)

Defining Company Directory Personal Preferences

Access the Preferences page (click the Preferences link in the search header from any Company Directory page).

The screenshot shows a dialog box with two sections. The first section, 'Select Start Page Content', has three radio button options: 'Search Box Only' (selected), 'Show My Information', and 'Show Other Person's Info'. The second section, 'Select Directory Layout', has two radio button options: 'Profile First' (selected) and 'Org Chart First'. At the bottom are three buttons: 'OK', 'Cancel', and 'Refresh'.

Company Directory - Preferences page

Select Start Page Content

This section enables you to determine how the start page of the Company Directory component should display for yourself as a user. Options include:

Search Box Only	Select this option to display the search field only, where you can search by name, job title, department, or email for any active person in the system.
Show My Information	Select this option to have the system display your information as the user accessing the page. Your information will appear as the focus of the Org Chart node or on the Profile page, depending on the layout setting you have selected. The search field is also available at the top of the page when you select this option.
Show Other Person's Info	Select this option to enter a person's name in the Enter a Name field. This person's information will appear as the initial focus of the Org Chart node or Profile page, depending on the layout setting you have selected. The search field is also available at the top of the page when you select this option.
Enter a Name	Enter the name of the person who should appear as the focus when you first access the Company Directory page. For example, you may want to enter the name of a person you contact frequently, such as your HR or accounting representative. This field is available only when Show Other Person's Info is selected.

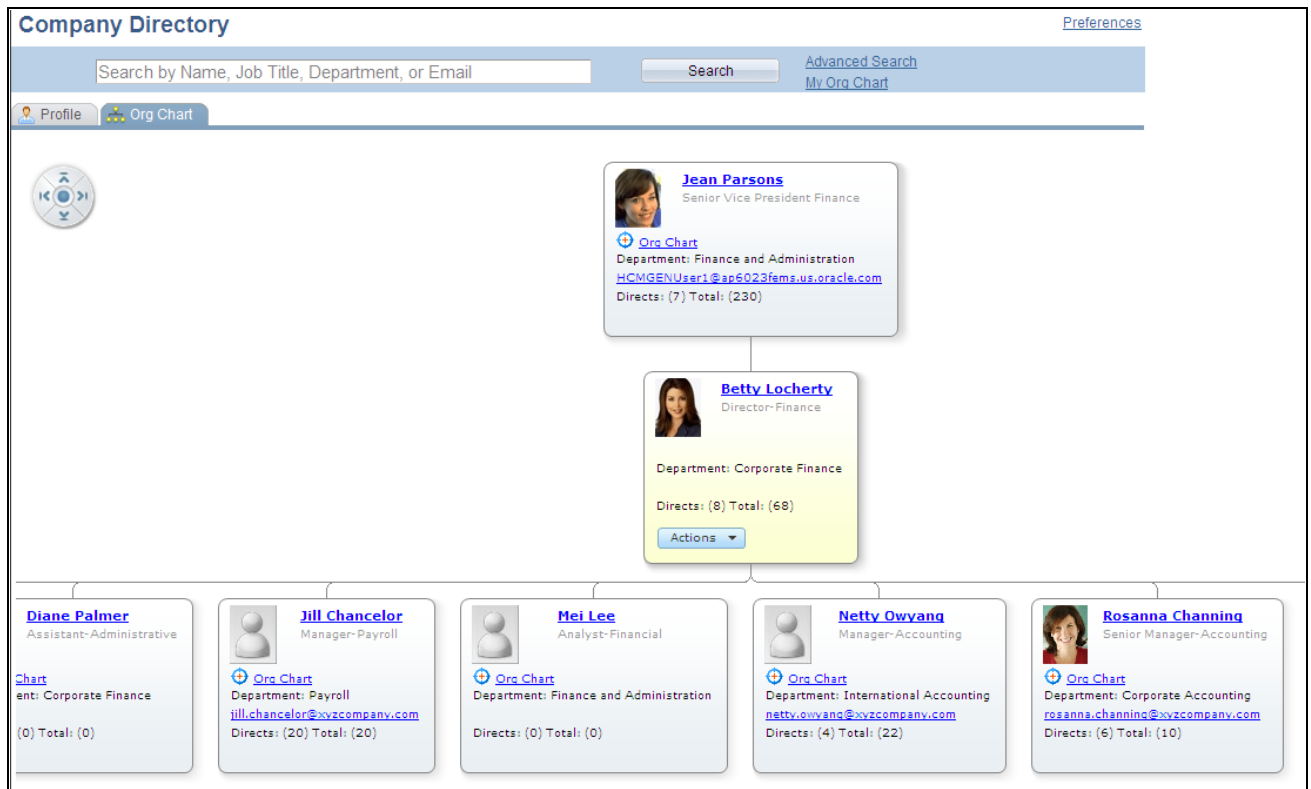
Select Directory Layout

This section enables you to select which page of the Company Directory component the system should display first to you as a user. The value you select here will determine the page order of the Company Directory component. Options are:

Profile First	Select this option to have the system display the Profile page for the focus person of the page. The Profile page displays detailed information about the person, such as contact information, company details, and personalized links and information.
Org Chart First	Select this option to have the system display the Org Chart page for the focus person of the page. The Org Chart page displays a three-leveled graphical representation of this person's reporting structure, with the focus person in the middle level.

Viewing an Organizational Chart for a Person

Access the Org Chart (Company Directory, Org Chart).



Company Directory - Org Chart page showing the user as the focus node of the tree and no siblings showing

The Org Chart page displays the organizational chart or reporting hierarchy of a focal person on the page and enables you to navigate to another person in the chart.

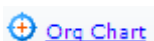
The system uses trees from Tree Manager to build the hierarchies rendered by the organization chart. The chart displays a maximum of three vertical levels at any time. If the person in the focus node does not report to another person (is in the top-most or root node position), or when the person in the focus node does not have any direct reports, the Org Chart page will display two levels only.

The focus node is displayed in a contrasting color from other nodes in the chart. You can change the focus node by clicking the Org Chart link in each node of the chart. Changing the focus node updates the contents of the Profile page to reflect the person who is in the focus node. Clicking the name link on a node will transfer you to the Profile page for that person and refocus the org chart on that node.

The fields that appear within the nodes are determined on the Company Directory Setup - Org Chart Content page.



The org chart appears with a navigator widget in the upper left-hand corner of the chart. Use the directional arrows to navigate left, right, up, or down. Click the dot in the center of the widget to center the chart on the focus node. If all of the nodes fit within the visible area of the chart, this widget does not appear.



Click the Org Chart link to move the focus of the chart to another node. This also sets the focus of profile page to the newly selected node.

Actions

Select an option from the drop-down list when you are on your own record to perform updates to your personal information.

PeopleSoft delivers the following self service transactions to work in conjunction with the Company Directory that enable employees to view, add, change, and delete personal information in the PeopleSoft database:

- Update Marital Status
- Change Name
- Update Home/Mailing Address
- Update Emergency Contacts
- Review Ethnicity Details
- View Personal HR Summary

This option is available for your personal Org Chart node only.

See *PeopleSoft Enterprise eProfile 9.1 PeopleBook*, "Using eProfile," Reviewing and Updating Personal Information.

Name link

Click the name to access profile information for the person you have selected.

Viewing a Person's Multiple Jobs from the Org Chart Page

When you are on the Org Chart page and a person holds multiple jobs, the node will display a Job Title drop-down list that enables you to select any job that this person holds. When you select a job from the drop-down list, the org chart refocuses on the newly selected job.



Focus node showing a person with multiple jobs

Information about setting up the Company Directory to support multiple jobs is documented in the set up pages of the Company Directory.

See Chapter 2, "Setting Up the Administer Workforce Business Process," Defining General Settings for the Company Directory Pages, page 88.

Viewing a Person's Profile

Access the Profile page (Company Directory, Profile).

Company Directory [Preferences](#)

Search by Name, Job Title, Department, or Email [Advanced Search](#)
[My Profile](#)

[Profile](#) [Org Chart](#)

Contact Information

 **Rosanna Channing**
 Job Title: Senior Manager-Accounting
 Address: 4500 Corporate Lane
 Pleasanton, CA 94588
 Work Phone: 925.555.1234
 Location: Corporation Headquarters
 Building: 2000
 Email: rosanna.channing@xyzcompany.com
[Update Photo](#)
 Actions:

Additional Contact Information

Mobile Phone: 555-654-2323
 Pager: 555-787-2121
 Personal Email: rchanning@homemail.com

My Profile Links

 [Oracle Web Site](#)

Company Details

Reports To: [Betty Locherty](#)
 Peers (7): [Cynthia Adams](#), [Diane Palmer](#), [Jill Chancellor](#), [Mei Lee](#), [Netty Qwang](#), [Susan Hoinck](#), [Tina Palisico](#)
 Direct Reports (6): [Christelle Stevenson](#), [Daryl Reese](#), [Edmund Donahue](#), [Mei Lee](#), [Shawn Quilligan](#), [Vicki Zinn](#)
 Manager Level: Senior Manager
 Additional Jobs (0):

Personal Statement

Real leaders are ordinary people with extraordinary determination.

Company Directory - Profile page for the user

This page displays details regarding the person in focus on the organizational chart. This page displays up to five sections, depending on how the system administrator set up this page on the Company Directory Setup - Profile Content page. These sections are:

- **Contact Information**

Depending on the Company Directory Setup - Profile Content page set up, this section can include items such as job and location information, contact information, links for e-mail addresses, and a drop-down list for a user to perform self service actions for him or herself. This section is not editable to the user.

- **Company Details**

Depending on the Company Directory Setup - Profile Content page set up, this section can include items such additional job information and co-worker and reports to links. This section is not editable to the user.

- **Additional Contact Information**

Users can enter their own person contact data, such as phone numbers and emails, on their own profile.

- **My Profile Links**

Users can enter person links, such as web engines and social web sites, on their own profile.

- **Personal Statement**

Users can enter personalized text to appear on their own profile.

Fields on this page will also vary depending upon the setup. Use the links on the page to access other people's Profile pages. Enter or edit content for the personalized sections by using the edit (pencil) icon to access the specific pages for your own profile.

Update Photo

Click this link to open the Company Directory - Update Photo page and change your photo display options.

See [Chapter 16, "Viewing Summary Workforce Information," Updating a Personal Photo, page 790.](#)

Actions and (Go To)

Select an option for the drop-down list and click the Go To icon when you are on your own profile record to perform updates to your personal information.

PeopleSoft delivers the following self service transactions to work in conjunction with the Company Directory that enable employees to view or manage personal information in the PeopleSoft database:

- *Change Name*
- *Review Ethnicity Details*
- *Update Emergency Contacts*
- *Update Home/Mailing Address*
- *Update Marital Status*
- *View Personal HR Summary*

If enabled, this option is available for your own profile only.

See *PeopleSoft Enterprise eProfile 9.1 PeopleBook*, "Using eProfile," Reviewing and Updating Personal Information.



Click this edit icon to access the corresponding edit page for the personalization sections of the Profile page

This icon is available for your Profile only.

Note. Any edits or updates made in the editable sections of this page are not written to the HR records. This data is stored in the Company Directory only

Viewing a Person's Multiple Jobs from the Profile Page

When you are viewing the Profile page and a person holds multiple jobs, the Job Title field will display a drop-down list that enables you to select another job for this person. Select another job to have the system redirect you to the Profile page for that job.

Profile

Org Chart

Contact Information



Danny Johnson

Job Title:

Analyst-HRMS

Address:

Analyst-HRMS

Work Phone:

Assistant-Administrative

Location:

Corporation Headquarters

Building:

2000

Profile page showing a person with multiple jobs

See [Chapter 2, "Setting Up the Administer Workforce Business Process," Defining General Settings for the Company Directory Pages, page 88.](#)

Updating a Personal Photo

Access the Company Directory - Update Photo page (Click the Update Photo link on the Profile page for your profile).

Company Directory - Update Photo

Select a photo to be displayed in the Company Directory:


☐ No Photo


☒ Display HR System Photo

[Upload a Photo](#)

Use the "Upload a Photo" link above to upload a new photo.

Note:

1. Photo must be of file type JPEG and not exceed 256KB.
2. For best results, scale or crop your image to 100x80 pixels (Height by Width) prior to uploading.

Company Directory - Update Photo page

This page is available when the Photo check box is enabled on the Company Directory Setup - Profile Content page. The photo option you select on this page will also appear on the Org Chart page.

No Photo	Select this option to have the Profile page display a default photo image.
Display HR System Photo	Select this option to have the Profile page display the company stored photo image of yourself.
Display My Photo	Select this option to have the Profile page display a photo image of yourself you have uploaded. If you have not uploaded an image for yourself, this option will not be available.
Upload a Photo	Click this link to upload your own photo image to appear on the Profile page. Photo must be of file type JPEG and not exceed 256KB. This option is available when the Allow User to Add Own Image check box is selected on the Company Directory Setup - Profile Content page

Managing Additional Contact Information

Access the Edit Additional Contacts page [Click the Edit Additional Contact (pencil) icon on the Profile page for your own profile].

Edit Additional Contacts

Enter contact types to be displayed on your profile.
Content entered here will not change Human Resource system records.

Additional Contact Information			
	Contact Type	Label	Value
☐	Mobile Phone	Mobile Phone	555-654-2323
☐	Personal Email	Personal Email	rchanning@homemail.com
☐	Other	Pager	555-787-2121

[Select All](#) [Deselect All](#)

Edit Additional Contacts

Add Contact

Click this button to insert another contact row to add additional contact types. Contact types are defined by the administrator on the Company Directory Setup - Profile Content page.

Select a contact type and the related label will appear. The user can enter the contact information in the Value field. When the *Other* contact type is available and selected, the user can enter his or her own field description label.

Delete Selected

Click this button to delete the contact rows you have selected.

Note. Any edits or updates made in the Additional Contact Information section are not written to the HR records. This data is stored in the Company Directory only.

Managing Personal Links

Access the Edit My Profile Links page [Click the Edit My Profile Links (pencil) icon on the Profile page for your own profile].

Edit My Profile Links

Enter hyperlinks to be displayed on your profile.
Only http:// and https:// protocols are supported.

My Profile Links		1 of 1
	Display As	Web Address
☐	Oracle Web Site	oracle.com

[Select All](#) [Deselect All](#)

Add Link Delete Selected

OK Cancel Refresh

Edit My Profile Links page

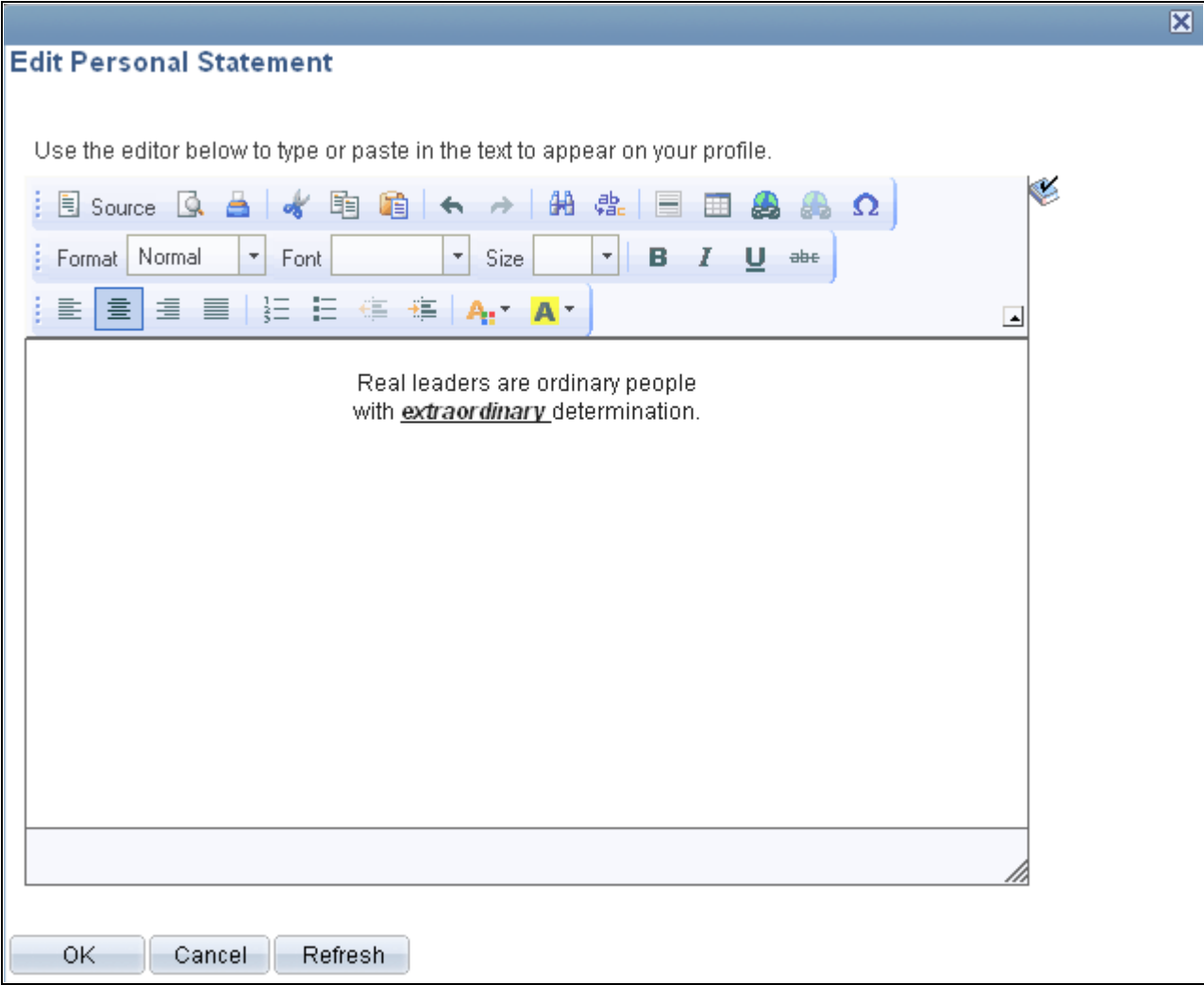
Add Link Click this button to insert another link row and enter how the name should display in your profile and the web address.

Delete Selected Click this button to delete the link rows you have selected.

Note. Any edits or updates made in the My Profile Links section are not written to the HR records. This data is stored in the Company Directory only.

Entering a Personal Statement or Text

Access the Edit Personal Statement page [Click the Edit Personal Statement (pencil) icon on the Profile page for your own profile].



Edit Personal Statement

Use the editor below to type or paste in the text to appear on your profile.

Real leaders are ordinary people with extraordinary determination.

OK Cancel Refresh

Edit My Profile Links page

The Edit Personal Statement page opens up in a modal, resizable window. Enter data and click OK to save your text that will display on the Profile page, Personal Statement section.

Note. Any edits or updates made in the Personal Statement section are not written to the HR records. This data is stored in the Company Directory only.

For more information on using the Rich Text Editor, see *PeopleTools PeopleBook: Using PeopleSoft Applications*, "Using PeopleSoft Application Pages," Working With the Rich Text Editor.

Viewing Worker Job History

Viewing worker job history provides a quick summary of important job details of current and historic work records.

This section discusses how to:

- View worker job history.

- View compensation information.

Pages Used to View Employee Job History

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Workforce Job Summary	WF_JOB_SUMMARY	Workforce Administration, Job Information, Review Job Information, Workforce Job Summary, Workforce Job Summary	View an employee's job history.
Job Summary JPN	JOB_SUMMARY_JPN	Workforce Administration, Job Information, Review Job Information, Job Summary JPN, Job Summary JPN	View a Japanese employee's job history.
Salary Components	COMP_JOB_SUMM_SEC	Click the Components link on the Compensation tab of the Workforce Job Summary page.	View compensation information.
Rate Code	WCS_RTCD_DETAILS	Click the Details link on the Controls tab of the on the Salary Components page.	Review the description, compensation rate type, and rate code class associated with the rate code.

See Also

[Chapter 5, "Adding a Person in PeopleSoft Human Resources," page 179](#)

[Chapter 18, "\(USF\) Processing Personnel Action Requests," page 831](#)

Viewing Worker Job History

Access the Workforce Job Summary page (Workforce Administration, Job Information, Review Job Information, Workforce Job Summary, Workforce Job Summary).

Workforce Job Summary

Antonio Santos

EMP

Empl ID: KU0010

Job Information

Customize | Find | | | First 1-7 of 7 Last

General | Job Information | Work Location | Salary Plan | Compensation | Military Information

Org Relation	Empl Record	Effective Date	Seq	Action	Action Reason	Key Person	Go To Job
EMP	0	11/10/2008	0	Pay Rt Chg			Job Data
EMP	1	04/24/2000	0	Addl Job			Job Data
EMP	0	07/01/1998	0	Compl Prob	Prob Comp		Job Data
EMP	0	07/01/1998	1	Pay Rt Chg			Job Data
EMP	0	04/04/1998	0	Return-LOA	Retrn Lv		Job Data
EMP	0	02/27/1998	0	Paid LOA	Short-Term		Job Data
EMP	0	09/12/1997	0	Hire			Job Data

Workforce Job Summary page

The Job Summary page displays the person's name, organizational relationship, and ID.

Common Page Information

Effective Date and Seq (sequence) Displays the effective date and effective date sequence, if any, for each personnel action. The sequence tracks actions that occur on the same day.

Org Relation (organizational relationship) Indicates the type of organizational relationship, *EMP* (employee), *CWR* (contingent worker), or *POI* (person of interest).

Empl Record (employment record) The sequential number of the employment instance for the same ID.

General

Select the General tab.

Action and Action Reason Displays the action taken and reason for the row's existence.

Job Data Click this link to display the Job Data component. The system initially displays the current row, regardless of which row's link you click. To access a specific row after you access the Job Data component, use the Go To Row button on the Work Location page.

Job Information

Select the Job Information tab.

Workforce Job Summary

Antonio Santos

EMP

Empl ID: KU0010

Job Information

Customize | Find | First 1-7 of 7 Last

General

Job Information

Work Location

Salary Plan

Compensation

Military Information

Org Relation	Empl Record	Effective Date	Seq	Job Code	Empl Type	Empl Status	Full/Part Time	Reg/Temp	Standard Hours	Work Period
EMP	0	11/10/2008	0	170005	Hourly	Active	Full-Time	Regular	40.00	Weekly
EMP	1	04/24/2000	0	310005	Salaried	Active	Full-Time	Regular	40.00	Weekly
EMP	0	07/01/1998	0	170005	Hourly	Active	Full-Time	Regular	40.00	Weekly
EMP	0	07/01/1998	1	170005	Hourly	Active	Full-Time	Regular	40.00	Weekly
EMP	0	04/04/1998	0	170005	Hourly	Active	Full-Time	Regular	40.00	Weekly
EMP	0	02/27/1998	0	170005	Hourly	Leave W/Py	Full-Time	Regular	40.00	Weekly
EMP	0	09/12/1997	0	170005	Hourly	Active	Full-Time	Regular	40.00	Weekly

Workforce Job Summary page: Job Information tab

Job Code	Displays the job code information for this worker after each personnel action.
Empl Type (employee type)	Displays the worker type after each personnel action.
Empl Status (employee status)	Displays the worker's status after each personnel action.
Full/Part Time	Indicates whether the worker is full or part time after each personnel action.
Reg/Temp	Indicates whether the worker is regular or temporary after each personnel action.
Standard Hours	Displays the standard hours per work period after each personnel action.
Work Period	Displays the work period after each personnel action.

Work Location

Select the Work Location tab.

Workforce Job Summary

Antonio Santos

EMP

Empl ID: KU0010

Job Information								
Customize Find First 1-7 of 7 Last								
General Job Information Work Location Salary Plan Compensation Military Information								
Org Relation	Empl Record	Effective Date	Seq	Position	Company	Department	Location	Reports To
EMP	0	11/10/2008	0	Admin Asst	GBI	HR	US HQ	Sylena Tyler
EMP	1	04/24/2000	0	CnsInt-Jr.	GBI	Cust Svc	OK Opr	
EMP	0	07/01/1998	0	Admin Asst	GBI	HR	US HQ	
EMP	0	07/01/1998	1	Admin Asst	GBI	HR	US HQ	
EMP	0	04/04/1998	0	Admin Asst	GBI	HR	US HQ	
EMP	0	02/27/1998	0	Admin Asst	GBI	HR	US HQ	
EMP	0	09/12/1997	0	Admin Asst	GBI	HR	US HQ	

Workforce Job Summary page: Work Location tab

Position, Agency, Department, Location, and Reports To

The workers position, company code, department, location, and supervisor after each personnel action.

Salary Plan

Select the Salary Plan tab.

Workforce Job Summary

Antonio Santos

EMP

Empl ID: KU0010

Job Information

Customize | Find | | First 1-7 of 7 Last

General

Job Information

Work Location

Salary Plan

Compensation

Military Information

Org Relation	Empl Record	Effective Date	Seq	Sal Plan	Grade	Step	Pay Group	Frequency
EMP	0	11/10/2008	0	KU01	004	0	KU1	Monthly
EMP	1	04/24/2000	0	KU01	005	0	KU3	Monthly
EMP	0	07/01/1998	0	KU01	003	0	KU1	Monthly
EMP	0	07/01/1998	1	KU01	004	0	KU1	Monthly
EMP	0	04/04/1998	0	KU01	003	0	KU1	Monthly
EMP	0	02/27/1998	0	KU01	003	0	KU1	Monthly
EMP	0	09/12/1997	0	KU01	003	0	KU1	Monthly

Workforce Job Summary page: Salary plan tab

Sal Plan (salary plan),
Grade, Step, Pay Group, and **Frequency**

Displays the worker's salary plan, grade, step, pay group, and payment frequency after each personnel action.

Compensation

Select the Compensation tab.

Workforce Job Summary

Antonio Santos

EMP

Empl ID: KU0010

Job Information										
Customize Find First 1-7 of 7 Last										
General Job Information Work Location Salary Plan Compensation Military Information										
Org Relation	Empl Record	Effective Date	Seq	Annual Rate	Monthly Rate	Daily Rate	Hourly Rate	Currency	Change Percent	Components
EMP	0	11/10/2008	0	18512.000	1542.667	71.200	8.900000	USD		Components
EMP	1	04/24/2000	0	48006.400	4000.533	184.640	23.080000	USD		Components
EMP	0	07/01/1998	0	17160.000	1430.000	66.000	8.250000	USD		Components
EMP	0	07/01/1998	1	18512.000	1542.667	71.200	8.900000	USD	7.879	Components
EMP	0	04/04/1998	0	17160.000	1430.000	66.000	8.250000	USD		Components
EMP	0	02/27/1998	0	17160.000	1430.000	66.000	8.250000	USD		Components
EMP	0	09/12/1997	0	17160.000	1430.000	66.000	8.250000	USD		Components

Workforce Job Summary page: Compensation tab

Annual Rt (annual rate),
Monthly Rt (monthly rate), **Daily Rt** (daily rate), **Hrly Rate** (hourly rate), **Currency**, and **Change Percent**

Displays the worker's compensation rate in annual, monthly, daily, or hourly terms in the given currency. When there has been a change in the compensation rate for this employee, the system displays the percentage of change from the previous row.

Components

Click the link to access the Salary Components page.

Military Information

Select the Military Information tab.

Workforce Job Summary

Antonio SantosEMP

Empl ID: KU0010

Job Information

CustomizeFindPrintGridFirst1-7 of 7Last

GeneralJob InformationWork LocationSalary PlanCompensationMilitary Information

Org Relation	Empl Record	Effective Date	Seq	Service	Component	Job Family	Job Function	Sub Function	Rank	Worn Rank	Rank Type	Skill Grade
EMP	0	11/10/2008	0									
EMP	1	04/24/2000	0									
EMP	0	07/01/1998	0									
EMP	0	07/01/1998	1									
EMP	0	04/04/1998	0									
EMP	0	02/27/1998	0									
EMP	0	09/12/1997	0									

Workforce Job Summary page: Military Information tab

Service	The specific branch of armed forces (for example, Army, Navy, Air Force, Marines, and so forth)
Component	The type of service (for example, Regular, Active Reserve, Inactive Reserve, Emergency Reserve, or Guard).
Job Family	The job classification as defined in Job Profile Management (for example, Intelligence, Ammunitions, Medical, Aviation)
Job Function	The function as defined in Job Profile Management (for example, Cryptography, Doctor, Nurse, Pilot)
Subfunction	The subfunction as defined in Job Profile Management (for example, Surgeon, Pathology, Radiology, Light-wing pilot)
Rank	Rank held permanently, as opposed to while serving in a particular post. When relieved of command, a holder of substantive rank remains at that rank.
Worn Rank	Actual or temporary rank held while serving in a particular post.
Rank Type	The rank category (for example, Substantive, Temporary, Frocked, Acting, Acting Lacking, Honorary, Provisional, Probationary).
Skill Grade	The overall evaluated grade level for the individual after the personnel action.

Viewing Compensation Information

Access the Salary Components page (click the Components link on the Compensation tab of the Workforce Job Summary page).

Salary Components

Antonio Santos
Empl ID: KU0010 Empl Record: 0

Compensation Rate: 1,542.666667  USD

Compensation Frequency: M Monthly

Pay Components

Amounts
Controls
Changes
Conversion


Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
NAHRLY	0	8.90 	USD	Hourly			

Salary Components page

Common Page Elements

Rate Code	Rate codes are IDs for pay components. The system displays compensation information associated with this rate code in the compensation grid.

Seq(sequence)	Indicates multiple occurrences of the same rate code.

Amounts

Select the *Amounts* tab.

Comp Rate (compensation rate) and Currency	Displays the compensation rate for the pay component rate codes and the currency.

Frequency	Displays the compensation frequency for the pay component's rate.

Rate Code	Rate	Points
00	0.00	
01	0.01	
02	0.02	
03	0.03	
04	0.04	
05	0.05	
06	0.06	
07	0.07	
08	0.08	
09	0.09	
10	0.10	
11	0.11	
12	0.12	
13	0.13	
14	0.14	
15	0.15	
16	0.16	
17	0.17	
18	0.18	
19	0.19	
20	0.20	
21	0.21	
22	0.22	
23	0.23	
24	0.24	
25	0.25	
26	0.26	
27	0.27	
28	0.28	
29	0.29	
30	0.30	
31	0.31	
32	0.32	
33	0.33	
34	0.34	
35	0.35	
36	0.36	
37	0.37	
38	0.38	
39	0.39	
40	0.40	
41	0.41	
42	0.42	
43	0.43	
44	0.44	
45	0.45	
46	0.46	
47	0.47	
48	0.48	
49	0.49	
50	0.50	
51	0.51	
52	0.52	
53	0.53	
54	0.54	
55	0.55	
56	0.56	
57	0.57	
58	0.58	
59	0.59	
60	0.60	
61	0.61	
62	0.62	
63	0.63	
64	0.64	
65	0.65	
66	0.66	
67	0.67	
68	0.68	
69	0.69	
70	0.70	
71	0.71	
72	0.72	
73	0.73	
74	0.74	
75	0.75	
76	0.76	
77	0.77	
78	0.78	
79	0.79	
80	0.80	
81	0.81	
82	0.82	
83	0.83	
84	0.84	
85	0.85	
86	0.86	
87	0.87	
88	0.88	
89	0.89	
90	0.90	
91	0.91	
92	0.92	
93	0.93	
94	0.94	
95	0.95	
96	0.96	
97	0.97	
98	0.98	
99	0.99	

Percent If the rate type for this rate code is percent, the system displays the percent to be applied to the job compensation rate or to a rate code group (if you are using rate code groups).

Rate Code Group	A rate code group enables you to be more specific when calculating percentage-based components as part of your worker compensation package.

Controls

Select the Controls tab.

Salary Components

Antonio Santos **Empl ID:** KU0010 **Empl Record:** 0

Compensation Rate: 1,542.666667  **USD**

Compensation Frequency: M Monthly

Pay Components

[Amounts](#) [Controls](#) [Changes](#) [Conversion](#) 

Rate Code	Seq	Source	Calculated By	Manually Updated	Default Without Override	Details
NAHRLY	0	Manual	None	☒	☐	Details

Salary Components page: Controls tab

Source

Indicates how the pay component was assigned to the Compensation grid. *Manual* indicates that the pay component was added manually; *Salary Step* indicates that the pay component defaulted from the Salary Step; *Job Code* indicates that the pay component defaulted from the job code definition, and so on.

Calculated by

Values are:

- *None*: The rate value is assigned by the Rate Code definition or manually entered.
- *Rate Matrix*: The rate value is determined by a rate code matrix.
- *Extended*: Not used.

Manually Updated

Indicates whether the pay component's value was manually entered or the pay rate contains only defaulted values.

Default Without Override

Indicates whether the default rate value of the pay component can be overridden.

Details

Click to access the Comp Rate Code page and review the description, compensation rate type, and rate code class associated with the rate code.

Changes

Select the Changes tab.

Salary Components

Antonio Santos Empl ID: KU0010 Empl Record: 0

Compensation Rate: 1,542.666667  USD

Compensation Frequency: M Monthly

Pay Components

Amounts Controls **C**hanges Conversion 

Rate Code	Seq	Change Amount	Currency Code	Frequency	Change Points	Change Percent
NAHRLY	0		USD	Hourly		

Salary Components page: Changes tab

Change Amount Displays the overall change amount in this pay component rate relative to the previous Job Data row.

Change Points Displays the overall change amount (in points) for this pay component. This field is visible only if Salary Points is selected on the Installation Table page.

Change Percent Displays the overall change amount for this pay component. This field isn't available for rate codes that have a rate code type of percent or points.

Conversion

Select the Conversion tab.

Salary Components

Antonio Santos Empl ID: KU0010 Empl Record: 0

Compensation Rate: 1,542.666667  USD

Compensation Frequency: M Monthly

Pay Components

Amounts Controls Changes **C**onversion 

Rate Code	Seq	Converted Comp Rate	Currency Code	Frequency	Apply FTE
NAHRLY	0	1,542.666667	USD	Monthly	☐

Salary Components page: Conversion tab

Converted Comp Rate (converted compensation rate)	Displays the converted compensation rate for this pay component. The system converts all base pay components to the currency and compensation frequency specified.
Apply FTE (apply full time equivalent)	Indicates that the value associated with the rate code is to be multiplied by the FTE factor for annualization and deannualization. FTE is the percent of full time the employee should normally work in the corresponding job. This field isn't applicable for rate codes of type percent.

(USF) Viewing Employee Personal and Job Data

Use the Personal Data inquiry component to view employee personal and job data.

This section discusses how to:

- View employee personal data.
- View employee job data.
- View employee benefit programs.

Pages Used to View Personal and Job Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Personal Data	GVT_PERS_INQ	Workforce Administration, Job Information, Review Job Information, Personal Data USF, Personal Data	View employee personal data.
Mailing Address	GVT_MAILADDR_SEC	Click the Mailing Address link on the Personal Data page.	View the employee's mailing address.
Veterans Info (veterans information)	GVT_VETINF_INQ_SEC	Click the Veterans Info link on the Personal Data page.	View veteran's information for this employee.
Job Data1	GVT_JOB_INQ	Workforce Administration, Job Information, Review Job Information, Personal Data USF, Job Data1	View employee job data.
Benefits/Retirement Data	GVT_BENDAT_INQ_SEC	Click the Benefits/FEHB Data link on the Job Data1 page.	View the benefit program in which the employee is enrolled for benefits in PeopleSoft Enterprise Human Resources or in PeopleSoft Enterprise Benefits Administration.

Page Name	Definition Name	Navigation	Usage
Job Data2	GVT_JOB_INQ2	Workforce Administration, Job Information, Review Job Information, Personal Data USF, Job Data2	View additional job data, including quoted pay and expected pay information.
Employment Data	GVT_EMPLOY_INQ	Workforce Administration, Job Information, Review Job Information, Personal Data USF, Employment Data	View employment data.

Viewing Employee Personal Data

Access the Personal Data page (Workforce Administration, Job Information, Review Job Information, Personal Data USF, Personal Data).

Personal Data
Job Data1
Job Data2
Employment Data

Marvin Campos
Effective Date: 08/28/2006

Name: Marvin Campos
Gender: Male

Marital Status: Married
Race:
Handicap: No Handicap

Home Address

Country: USA United States

Address: 29 Francisco Street
San Francisco, CA 94113

Birth Info

DOB: 09/12/1969

Place:

State:
Country: USA

Citizenship Status:
Date Entitled to Medicare

Draft Status:

[Mailing Address](#)
[Veterans Info](#)

Personal Data page

The Personal Data page displays information on employee hire date, birth date, home address, marital status, birth information, citizenship, draft status, Medicare entitlement, race, and handicaps. Click the Mailing Address link to view the employee's mailing address. Click the Veterans Info link to view veteran's information for this employee.

Viewing Employee Job Data

Access the Job Data1 page (Workforce Administration, Job Information, Review Job Information, Personal Data USF, Job Data1).

Personal Data	Job Data1	Job Data2	Employment Data
Marvin Campos			
			Effective Date: 08/28/2006
Position:	LEP00021	GS 0345 11 Analyst	Benefits/FEHB Data
Job Code:	LEJ005	- -	
Employee Type:	Salaried	Type of Appointment:	Career (Competitive Svc Perm)
Empl Class:		Posn Occupied:	Competitive
Reg/Temp:	Regular	Work Schedule:	Full Time
Supervisor Level:	Other	Holiday Schedule:	
Agency:	DC	Department of Communications	LEO Position: N/A
Sub-Agency:	01	Bureau of Telecommunications	Standard Hours: 40.00
Department:	LE0055		FLSA Status: Nonexempt
Location:	L00001		Regular Shift: N/A
Tax Location Code:	L00001	National Office in DC	

Personal Data - Job Data1 page

This page displays the employee's position number, job code, employee type, class, type of appointment, position occupied, work schedule, agency, subagency, department, location, tax location, LEO position, FLSA status, and other job-related information.

Click the Benefits/FEHB Data link to view information on this employee's benefits and retirement data.

Viewing Employee Benefit Programs

Access the Benefits/Retirement Data page (click the Benefits/FEHB Data link on the Job Data1 page).

Benefits/Retirement Data

Benefits Employee Status:	Active
BAS Group ID:	
Benefit Program:	LFG Federal Employees Pgm - Manual

FEHB Eligibility
 Not Eligible

FEGLI Code:	Basic Only

Annuitant Indicator:	Retirement Plan:
Not 9	FERS and FICA
Applicable	
Previous Retirement Coverage:	FERS Coverage:
Never Covered	Automatically Covered By FERS
Annuity Commencement Date:	
CSRS Annuity Offset Amount:	CSRS Frozen Service: 0000

Personal Data - Job Data1: Benefits/Retirement Data page

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Benefits, "Setting Up Base Benefits Core Tables"

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Benefits, "Enrolling Participants"

Viewing Other Summary Pages in PeopleSoft Enterprise Human Resources

Several other display-only pages summarizing employee data are available for you to review in PeopleSoft Enterprise Human Resources. Most of them derive information that you enter in other PeopleSoft Enterprise Human Resources business processes, such as Planning Compensation, Track Global Assignments, and Administering Training. However, you'll also find them useful for planning and analysis when you work in the Workforce Administration menu.

Following are some of the summary pages:

- **Employee Data Summary:** Displays information on employee current status, hire date, birth date, marital status, standard work hours, pay group, job code, and other job- and compensation-related information. Benefits, Employee/Dependant Information, Review HR/Job/Payroll Data.
- **Organizational Summary:** Displays a summary of all the organizational relationships for a person. Workforce Administration, Personal Information, Person Organizational Summary.
- **Career Assignment Summary:** Displays the actual job path the employee has followed in the organization. By tracking employee movements through salary structures and manager levels, you'll get a feel for where the employee has been in your organization so far. Workforce Development, Career Planning, Review Career Summaries, Career Assignments.
- **Compensation History:** Displays the history of all pay rate changes the employee has received, which is particularly useful when you are planning new increases. Compensation, Base Compensation, Review Salary Information, Employee Compensation History. The Compensation History page is also in Workforce Development, Career Planning, Review Career Summaries.
- **Immediate Family Summary:** Lists all dependents that are a part of the employee's immediate family. Immediate family is defined as dependents that are the employee's spouse, son, or daughter. You'll find this page helpful for determining eligibility for various types of benefits your organization offers to employees, their spouses, and children. Benefits, Employee/Dependant Information, Review Dep/Ben Summary.
- **Training Summary:** Displays student training history, which is helpful when determining whether students are receiving adequate training to perform their current jobs, to see if they've taken all course prerequisites, and for career and succession planning. Enterprise Learning, Result Tracking, Review Training Summary.
- **Injury Summary:** Provides an overview of the health and safety incidents in which this individual has been involved, including injuries and illnesses and the nature of the incidents. Workforce Monitoring, Health and Safety, Obtain Incident Information, Review Employee Injury Summary.

Chapter 17

(USF) Administering Personnel Action Requests

This chapter provides an overview of administering personnel action requests (PAR) and discusses how to:

- Track and route a personnel action request (PAR) through reviews and completion.
- Initiate and request personnel actions.
- Authorize and approve personnel actions.
- Process human resources personnel actions.
- Cancel or correct a personnel action request.
- Print Request for Personnel Action (SF-52) and Notice of Personnel Action (SF-50) reports.
- View summary pages.
- Generate a Personnel Actions History report.
- Generate a Wage and Separation report.

Understanding the Administering PAR System

The administering PAR system provides you with the power to process action requests quickly and easily. The system automatically routes a wide variety of requests directly to reviewing officials, and on to human resources, in the path your agency designates.

If anyone needs further information, the system automatically routes that inquiry back to the originator. All involved are included in the communication loop and always know that their requests are moving through a well-mapped review, authorization, and approval cycle.

Note. Keep in mind that the description and samples described throughout this book are illustrative, flexible models that you can adapt for your agency's personnel administration system. Your agency can set up the Administer Workforce system routing, security, accessing, processing, and many other features to meet your individual agency needs and requirements.

Using a streamlined menu structure, you can navigate quickly and easily through the whole process. Using PeopleSoft workflow, you indicate the level of authorization and the system routes the request through the process for you.

Significant features of the PAR system include:

- Flexible work-in-progress processing.
- Cancellation and correction functionality.
- Reviewed flag processing for retroactive personnel actions.
- Enhanced navigation with pages.
- Issuing awards and bonuses.
- Detail assignment processing.
- Support for the personnel office identifier (POI) signature requirement.

Common Elements Used in This Chapter

PAR Status

The PAR status code automatically defaults to *Requested* for new actions. Leave this as a work-in-progress request with that status until you have complete data. After you have completed all the necessary information, keep the PAR status as *Requested* to send it on to human resources officials for approval and processing.

If you aren't ready to submit the request, change the status to *Initiated*, and keep working on it until you're done. Change the status to *Requested* to submit it.

After completing the HR Request pages and reviewing the data, assign a status of *Processed by HR* to approve and finalize this request.

Once you assign the status of *Processed by HR*, the request becomes an actual event and is posted in the system to interface with PeopleSoft Enterprise Payroll, Manage Base Benefits, or other related areas.

If the request is invalid or needs further information, assign a status of *Disapproved* or *Return to Sender*.

Prerequisites

Begin every personnel action request on the Data Control page. The first time you open the page, the most recent personnel action request appears automatically. Before creating a new request, you must insert a new row for all actions or changes.

In order to save time, the system assumes you want to continue viewing and updating information on the same employee, so when you move to a new page in the component, information for that same employee appears automatically.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "(USF) Setting Up Human Resources Management Tables"

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "(USF) Setting Up the Work-in-Progress Management System"

Chapter 7, "(USF) Adding an Employment Instance," Entering Information for the Employment Instance, page 343

Understanding Workflow

Many of the tasks you perform throughout the day are part of larger tasks that involve multiple steps and several people in your organization working together. PeopleSoft workflow tools help you build the larger process into your PeopleSoft Enterprise Human Resources system, automating vital business tasks. You can tie together the individual steps so that PeopleSoft can help coordinate the activities. Because the system has the big picture and knows what you are trying to accomplish, it can automatically start the next step in the workflow, following your organization's business rules.

Using workflow capabilities for administering personnel actions, the PAR status indicates the steps in routing and provides employees, supervisors, and human resources professionals easy access, surveillance, and security in the request management process. Workflow routes requests by sending personnel actions through a cycle to initiate, request, authorize, and approve requests, and provides options along the way for more time, further information, or returning to sender. Workflow then sends requests on to human resources for final processing. The automated workflow process ensures that the action request goes through all the reviews your agency needs until it becomes an actual event.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Delivered Workflows for PeopleSoft HRMS"

Tracking and Routing a PAR Through Reviews and Completion

The Employee Request, Supervisor Request, and HR Request components are identical. The only difference is in the type of data that is accessible to each group, according to security options and allowable actions.

Note. The information you need to track and route a PAR is the same type of information you enter to hire employees. Use the same pages for both.

Your agency determines the actions and data available to employees, supervisors, and human resources officials. Actions may include creating requests, issuing approvals and authorizations, and finalizing actions. Actions also include returning an action to the originator; asking for more information; or withdrawing, canceling, or correcting an action. Decisions on these issues are implemented using the Approval Flow component (GVT_WIP_ACTIVITY).

Employees may request only their allowable actions; therefore, a user sees only certain options, such as Family/Benefits Change or Retirement. Supervisors may request, approve, and authorize those and other specific actions. When a supervisor opens the pages, their list reflects whatever your agency designates, such as promotion, demotion, detail assignment, reassignment, bonuses and awards, and others. They may also return an action to the originator for more information, or disapprove a request and render it inactive.

Human resources officials have the authority to initiate, approve, and finalize all possible actions. Therefore, human resources officials, along with hiring, tenure changes, and other actions that an employee or supervisor wouldn't usually initiate, can access *all* of the personnel actions in any phase of the cycle. For *finalized* actions that have already completed the processing cycle, human resources has the exclusive right to cancel and correct.

The PAR processes provide both flexibility and modification capacity. You can process new personnel actions that are effective-dated prior to existing personnel actions and define the codes for requests in a truly user-defined environment.

See Also

Chapter 7, "(USF) Adding an Employment Instance," Adding an Employment Instance, page 336

Adding and Updating Data

For U.S. Federal Government customers, to add, update, or change any employee data, you create a PAR. To submit and route and track a PAR automatically through the approval process, assign a PAR work-in-progress status code that indicates its position in the request cycle and determines where to send it.

Automatically Routing the PAR

By changing the request status and saving the page, reviewers acknowledge receipt and approval, and send a PAR forward through workflow. Each review level serves as verification that the information is complete and that the necessary documents are attached. The reviewers may also enter their own comments. Your agency can set up and route request cycles for each type of request from creation through various reviews, including as many or few reviews as desired, and on to final Human Resources completion.

Selecting a PAR Status

If you want to open a request, fill in partial data and then complete it later, open a request and assign a PAR status of *Initiated*. While you gather additional information, the request stays within your own domain and control. You can revisit it as often as needed until you are ready to submit it for review.

When your request data is complete and you want to proceed with the automatic routing review cycle, submit the request by assigning a PAR status of *Requested*. By doing so, you make the request official. Once the originator submits a *Requested* action, workflow retrieves it and automatically routes it to others who are involved in the processing, and the authorizing and approving officials review its merits. It may go through a review cycle that includes *1st Authorized* and *2nd Authorized* by specific supervisors and managers, *Approved/Signed* by second-level managers, and finally to the status of *Processed* (processed by HR), according to your agency's requirements.

If clarification or additional information is needed, a reviewer can choose the status of *Returned for More Information*. Returning it to the originator restarts the process. A reviewer can also disapprove a request by assigning the *Disapproved* status, which stops the process altogether. During the review cycle, the originator can also withdraw a request while it is still in a work-in-progress state.

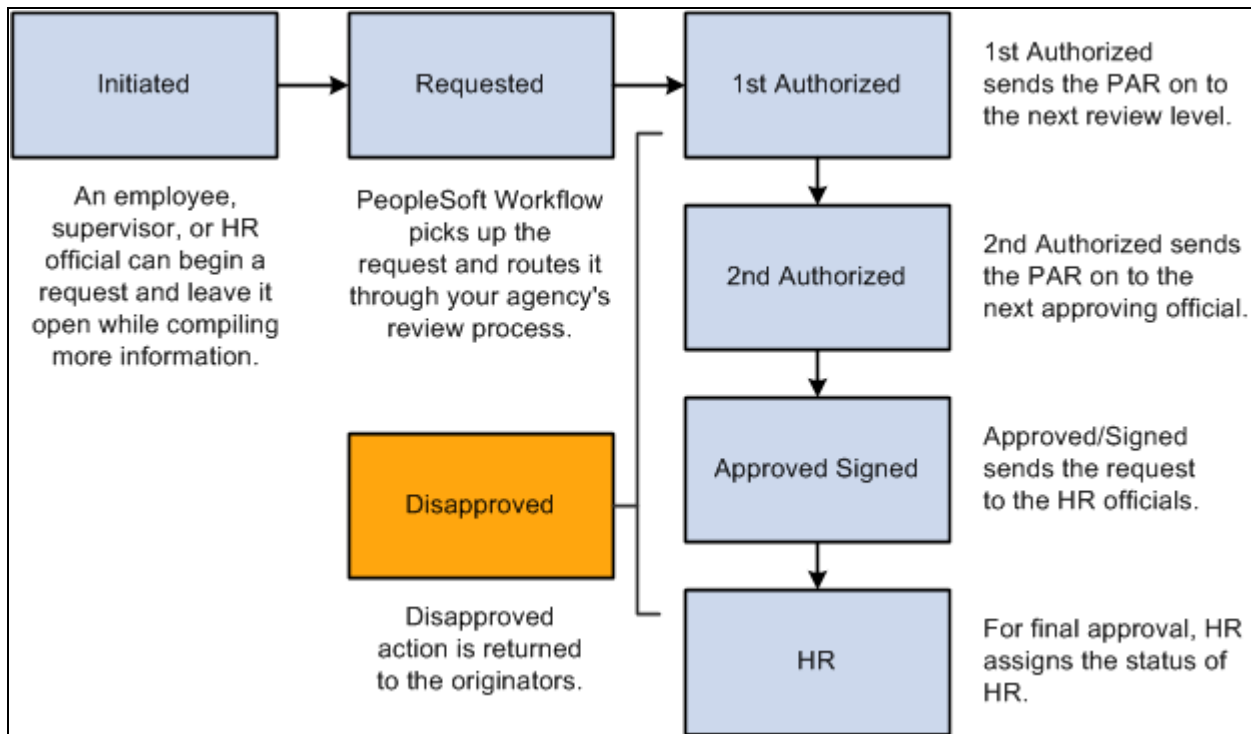
Only the originator can cancel or change and resubmit a request that is in progress. Because other supervisors, managers, and human resources officials don't have the ability to change request data, if a request needs to be *Canceled*, you must return it to the originator.

When a user chooses a work-in-progress status and assigns a PAR status code, this code indicates the request's status and position and enables workflow to route and monitor it through the approval cycle.

We provide a general example of the review cycle, though your agency can set it up differently if necessary.

An Overview of PAR

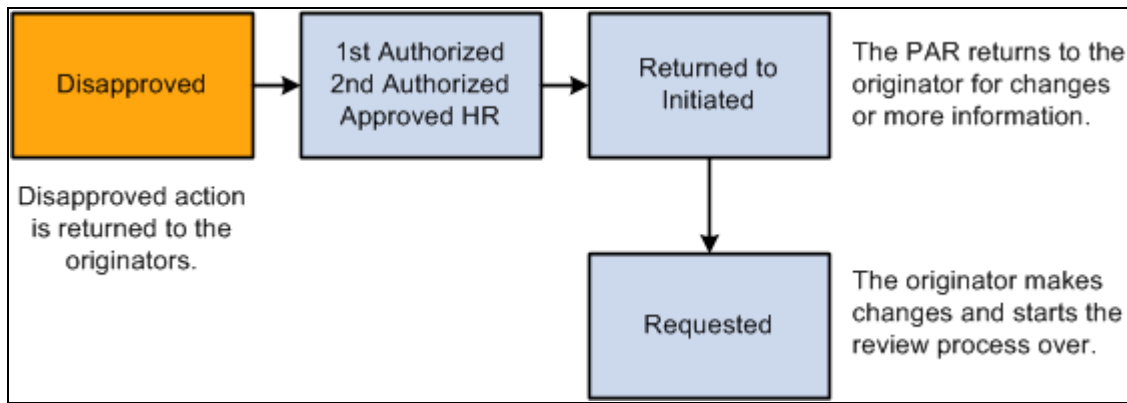
This illustration shows an overview of a sample process. In this example, an employee, supervisor, or HR official initiates the PAR and submits it for approval. The PAR then goes through multiple levels of authorization before it is either approved or denied:



An example of the process of initiating, requesting, and approving a PAR

Disapproving or Returning a Request

This illustration provides an example of a business process when a request is disapproved. In this example, the request is put back in the Initiated state so that the originator can modify it as necessary and resubmit it. The resubmitted request then goes through the standard approval cycle again:



Example of return or disapproval of a PAR before completion

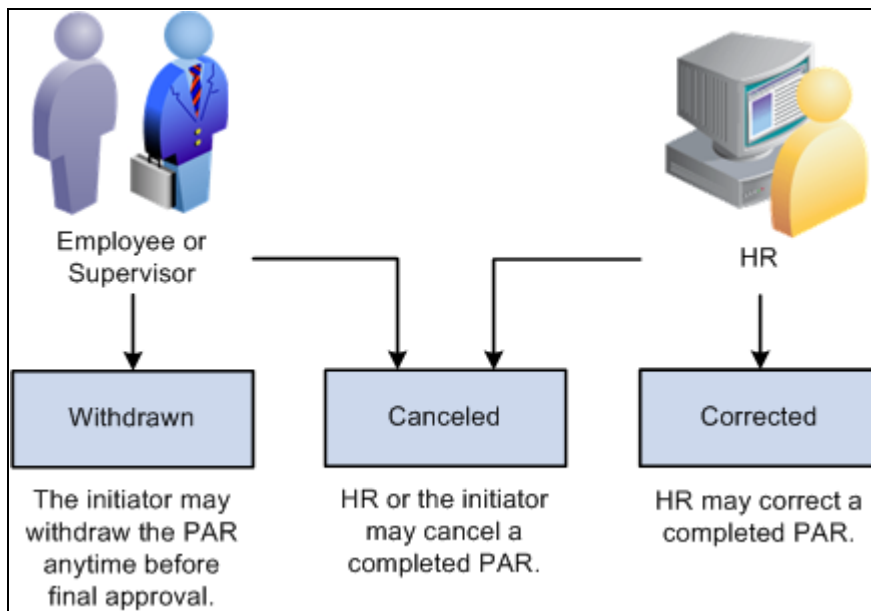
Note. Although a status of Returned/Disapproved is delivered, workflow isn't part of this feature.

Cancellation, Correction, or Withdrawal of a Request

Requests can be cancelled, withdrawn, or corrected only in specific situations:

- Any time before final approval, the initiator can withdraw the request.
- Once the request is approved, either the initiator or HR can cancel the requests, but only HR can correct the completed request.

The following diagram shows who can cancel, correct, or withdraw a request:



Example of cancellation, correction, or withdrawal of a PAR

Identifying PAR Status Codes

Following are definitions for each work-in-progress status and PAR status code that are set up in the sample data delivered with your system:

Work-In- Progress Status	PAR Status Code	Definition
Initiated	INI	Indicates an action is open, but not yet submitted as a request. For various reasons, originators may begin a request and then find they need additional time or data before completing their work on that action. By assigning a status of <i>Initiated</i>, originators can leave the request open until it is ready to submit. Supervisors may need extra time to develop supporting documentation, such as job codes, and can assign a status of <i>Initiated</i> to designate that their work is in progress.
Requested	REQ	To submit a request, assign a status of <i>Requested</i>. Most requests then go automatically to the first-level supervisor for approval. An exception is the request for family/benefits change; you may want to set the system up to send this type directly to a human resources (HR) official to be processed. Or when a request originates in the HR department, it may go directly to an HR official to be processed.
1st Authorized	1st	The first-level reviewer assigns a status of <i>1st Authorized</i> to send a request forward to the next review level.
2nd Authorized	2nd	A first-level reviewer sends a request forward to the next review level by assigning a status of <i>2nd Authorized</i> .
Approved/Signed	SIG	A second-level reviewer sends a request forward to an HR official to be processed by assigning a status of <i>Approved/Signed</i> .
Processed By Human Resources	PRO	Only human resources officials can assign the status of <i>Processed By Human Resources</i>. They first review and complete the request and may add the appropriate nature-of-action code, legal authorities, and remarks. They indicate final approval by assigning the status of PRO. The request then becomes an actual event. A status of PRO is final and can't be changed by anyone. Once a request becomes an actual event, it is then available for further consideration and processing by payroll, benefits, interface reports, and other areas.

Work-In- Progress Status	PAR Status Code	Definition
Return for More Information	RET	Anywhere in the process, a reviewer can request more information or clarification by assigning a status of <i>Returned for More Information</i> and can include a comment such as, "I need further information." The request goes back to the originator. When originators get the returned request, they add the information, reassign a status of <i>Requested</i>, and the process begins again.
Withdrawn	WTH	The original creators of the request may withdraw a request if it is sent back to them for any reason. Human resources may withdraw a request when it is proven invalid or for some reason no longer is needed. Note. A request cannot be withdrawn after it has been either processed or disapproved.
Disapproved	DIS	At any point in the process, a reviewer can disapprove a request by assigning a status of <i>Disapproved</i> and entering the reason in the Comments field. This causes the request to be sent back to the originator either for cancellation or for the originator to change and resubmit it.
Corrected	COR	Only a human resources official has the authority to perform a correction after a request has completed the approval cycle and been finalized.
Canceled	CAN	A human resources official has the authority to perform a cancellation after a request has completed the approval cycle and been finalized. The <i>Canceled</i> status removes the request from the active request system, leaving only the tracking record history. Or if the originator receives a returned request, the originator may assign a status of <i>Canceled</i>.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Delivered Workflows for PeopleSoft HRMS"

Processing of PAR Actions

The PeopleSoft Enterprise Human Resources USF functionality has separate tables for managing PAR, and these tables hold data until each action has been approved and completed by human resources. Any records held in the separate tables haven't completed the PAR process and don't exist to the rest of the system. After completion, the data is automatically updated to system tables to enable other processes, such as those in PeopleSoft Enterprise Payroll, Benefits Administration, and Time and Labor.

To support the PAR processing concept, all of these records have been effective-dated and have been tied together with common keys. Because the three records (GVT_JOB, GVT_PERS_DATA, and GVT_EMPLOYMENT) work as one, a row is inserted into all three records when a user inserts a row on the Data Control page.

Once a PAR has successfully worked its way through the approval process, is processed by human resources as completed, and has become an actual event, it is ready to be copied into the three counterpart records (JOB, PERS_DATA_EFFDT, and EMPLOYMENT). The process is accomplished instantly, and the user is unaware of the updates to the other tables.

However, if the PAR action has an effective date that is later than the system date, only JOB is updated when the action is saved. PERSONAL_DATA and EMPLOYMENT are updated only when the date of the action is equal to the system date. This is because the counterpart to GVT_JOB, which is JOB, is effective-dated. Therefore, it receives the future effective-dated action and ignores it until that date.

Initiating and Requesting Personnel Actions

Most of the various PARs are created in a similar way. A good representative example is a family/benefits change request, which is reviewed in this chapter. Other chapters of this book cover other examples of the most highly used requests, such as hiring, awards and bonuses, leave with or without pay, data changes, and termination.

The only significant differences between submitting the various requests are the action and reason codes that you assign and the data that is entered. Most of the requests involve similar steps: You begin on the Data Control page, insert a new row and indicate the desired action, and then tab to another data page in the same group to enter further information, if necessary.

For example, when you initiate a request for changing benefit choices, enter data on the Data Control page and then move to the Personal Data page. For some requests, such as a leave without pay action, however, you enter data *only* on the Data Control page.

You can always view data on other pages, and view summary pages, for decision-support purposes.

See Also

Chapter 7, "(USF) Adding an Employment Instance," Adding an Employment Instance, page 336

Chapter 18, "(USF) Processing Personnel Action Requests," page 831

Authorizing and Approving Personnel Actions

Once a request has been submitted, the PeopleSoft workflow system automatically routes the request to designated supervisors and managers for authorizations and approvals.

Supervisors and human resources officials can approve and authorize requests that cover many possible actions involving hire, return to duty, leave with or without pay, suspension, promotion, bonus, award, change in pay, and others. They can also return a request and ask for more data or disapprove it so that it is returned to the originator and its cycle ended.

If you are a designated reviewer, you see the request item in your worklist if you are using the PeopleSoft Navigator display. To authorize or approve a request, click **Work It!**, and the system automatically transfers you to the 1st Rqst Authorization, 2nd Rqst Authorization, or Approve Request component. You can also access the request from the Workforce Administration, Job Information menu.

You see the same page on which the initiator entered data, beginning with the Data Control page. However, the information you see is display only and unavailable for entry. Review the data on the Data Control page, including the PAR Remarks and Tracking Data, as well as data on any other page that is relevant to the request. To approve the request, change the PAR Status code on the Data Control page to the appropriate choice, such as *1st Authorized*, *2nd Authorized*, or *Approved/Signed*. The request is then routed to human resources officials for completion and processing.

If you need more information or want to disapprove the request, change the PAR Status code to *Return for More Information* or *Disapproved*.

The authorization process works exactly the same way regardless of what the request is, such as data change, award, bonus, or recruitment. Once the authorizing officials have completed their work and entered a new PAR status code, the request goes automatically to the next level in the process.

Processing Human Resources Personnel Actions

Once a Personnel Action request (PAR) has been through the initiation and request process and has passed the authorization and approval processes, it goes to the human resources office for final processing. A human resources official can submit human resources-specific actions and review and finalize personnel actions that have already been requested, authorized, approved, and are ready to become actual events.

The HR Processing pages are reserved specifically for the human resources officials and as a result contain overviews, controls, and additional navigational capacity. The HR Processing pages enable you to *access* personnel actions, *view* data, *finalize* actions, and *print* reports.

The HR Processing (USF) component is similar to the Supervisor Request, 1st Rqst Authorization, and 2nd Rqst Authorization components, however the HR Processing (USF) component contains additional PAR Status options.

Canceling or Correcting a Personnel Action Request

Once a request has the PAR status *Processed by HR*, it remains as a record in the system. However, it is possible to correct or cancel it by, essentially, creating a new action that references the initial request and gives it a new status. Only human resources officials may perform a correction or cancellation.

Only processed rows are available for correction or cancellation. If an employee has an unprocessed transaction, you will be unable to correct or cancel a previous transaction until all of the employee's unprocessed rows have been successfully processed.

To access a processed request that you want to correct:

1. Open a new request in the Data Control page of the Correct Personnel Action USF component.
2. Click the Insert Row button to insert a new row, and enter the correct data.

The system automatically enters a PAR Status of *COR*.

3. If you insert a row and a more current transaction exists, the Reviewed check box is displayed and is highlighted in blue. This check box serves to alert you to review the additional transaction for errors and to select the check box after you review or change it. An error message is displayed if you try to save the page without first selecting the Reviewed check box.

Note. The Reviewed check box is also displayed on the Data Control page of the HR Processing USF component.

Note. Be careful when updating data using correction mode, particularly on processed personnel actions. Federal business process specifies that if corrections are made to existing data rows, a Correction SF50 is required. In this case, do not use HR Processing USF component, but rather the Correct Personnel Action USF component.

To access a processed request that you want to cancel:

1. Open a new request in the Data Control page of the Cancel Personnel Action USF component.
2. Click the Insert Row button or click F7 to insert a new row.

The system automatically enters a PAR Status of *CAN*.

See Also

Chapter 7, "(USF) Adding an Employment Instance," Adding an Employment Instance, page 336

Printing Request for Personnel Action (SF-52) and Notice of Personnel Action (SF-50) Reports

Employees and supervisors can print an action request (SF-52) anytime. Human resources officials can also review a personnel action request report (SF-50) that summarizes various aspects of employee and job request data in printed form.

This section discusses how to:

- Print an action request (SF-52).
- Run the Personnel Action Report.

Pages Used to Print a Request for Personnel Action/Notice of Personnel Action

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Data Control	GVT_JOB0	- Workforce Administration, Job Information, Add Employment Instance USF On the Add Employment Instance USF page, enter a Person ID and click the Add button. - Workforce Administration, Job Information, Employee Request USF, Data Control - Workforce Administration, Job Information, Supervisor Request USF, Data Control - Workforce Administration, Job Information, HR Processing USF, Data Control - Workforce Administration, Job Information, Correct Personnel Action USF, Data Control - Workforce Administration, Job Information, Cancel Personnel Action USF, Data Control	Print an action request (SF-52).

Page Name	Definition Name	Navigation	Usage
Notice of Personnel Action USF - Parameters	RUNCTL_PAR	- Workforce Administration, Job Information, Reports, Notice of Personnel Action USF, Parameters - Workforce Administration, Job Information, Reports, Request Personnel Action USF, Parameters	Print the official Notification of Personnel Action form used to notify employee and payroll office of the action, record the action in the Official Personnel Folder, and provide a chronological record of actions that have occurred.
Notice of Personnel Action USF - Select Data	RUNCTL_PAR2	- Workforce Administration, Job Information, Reports, Notice of Personnel Action USF, Select Data - Workforce Administration, Job Information, Reports, Request Personnel Action USF, Select Data	After filtering the data with the parameters defined on the Parameters page, use the Select Data page to select employee data for printing PARs.

Printing an Action Request (SF-52)

Access the Data Control page (select Workforce Administration, Job Information, Add Employment Instance USF, then enter a Person ID and click the Add button).

To produce a printed Request for Personnel Action form (SF-52), click the Print SF-52 button. The system asks whether to print the SF-52 to the Web or to a file. If you choose File, you must specify the file location.

Before saving and printing this request, ensure that the employee ID is the one you want to appear on the form. An assistant processing an action on an authorized official's behalf, who wants that official's information to appear on the SF-52 and become part of the official audit trail for this action, should select the Override Opr EmplID check box and enter the employee ID and employee record number of the official for the action on the Job Tracking Info page.

If you want to print to a file, specify the name of the output file (including the drive and directory names). Once you enter these parameters, the system runs a Structured Query Report (SQR) to create the SF-52 for you. You can print an SF-50 only when the action has a status of *Processed by HR*.

Running the Personnel Action Report

Access the Notice of Personnel Action USF - Parameters page (Workforce Administration, Job Information, Reports, Notice of Personnel Action USF, Parameters).

Parameters page

PAR Type (personnel action request)

This field is available for entry only if you selected the Request for Personnel Action menu item. Select the type of PAR that you want to print.

Copies Requested

This group box is available for entry only if you selected the Notification of Personnel Action menu item. Select the copies that you want to print. Available values are Employee, OPF, Payroll, and Utility.

On-line

Select if you want to immediately print the PARs you select.

Within Batch Program

Select if you want to save your filtering criteria for later processing.

EmplID (employee ID), **SSN** (social security number), **Name**, **PAR Status**, **NOA Code** (nature of action), and **Business Unit**

Filter actions by employee ID, employee social security number, PAR status, NOA code, or business unit.

PAR Status

To filter by PAR status, select a status. The Begin Date and End Date fields become available when you select a PAR status.

Filter

When you click this button, the system selects the records that match your filter criteria and displays them on the Select Data page.

Access the Notice of Personnel Action USF - Select Data page (Workforce Administration, Job Information, Reports, Notice of Personnel Action USF, Select Data).

Parameters

Select Data

Run Control ID: 1

[Report Manager](#)[Process Monitor](#)

Run

Filtered Personnel Actions

CustomizeFindView All1 of 1FirstLast

	Select	ID	Name	SSN	Effective Date	Eff Seq	
1	☒						

Add All

Add Selected

Remove Selected

Remove All

Selected Personnel Actions to Print

CustomizeFind1 of 1FirstLast

	Select	ID	Name	SSN	Effective Date	Eff Seq	
1	☐						

Select Data page

The system displays information about the PARs that it filtered based on the parameters you specified on the Parameters page. Use the check box at the beginning of each data row to select individual PARs and add them to the list in the Selected Personnel Actions to Print group box when you click the Add Selected button. Click the Add All button to add all of the PARs to the list without selecting any check boxes. These PARs print when you run the report.

If you want to remove any of the PARs in the Selected Personnel Actions to Print group box, select the check box at the beginning of each data row and click the Remove Selected button. Click the Remove All button to remove all PARs without selecting the check box on any row.

Click this button to view the values of all of the filter criteria for this PAR.

Add All

Click this button to add all PARs that are in the Filtered Personnel Actions group box to the Selected Personnel Actions to Print group box.

Add Selected

Click this button to add the selected PARs from the Filtered Personnel Actions group box to the Selected Personnel Actions to Print group box.

Remove Selected

Click this button to remove selected PARs from the Selected Personnel Actions to Print group box.

Remove All

Click this button to remove all PARs from the Selected Personnel Actions to Print group box.

Viewing Summary Pages

To view a summary of employee data, use the dynamic inquiry pages and display-only pages that summarize data entered in other pages throughout the system, including Job Summary, Personal Data, Job Data 1 and 2, and Employment Data pages.

See Also

Chapter 16, "Viewing Summary Workforce Information," page 777

Generating a Personnel Action History Report

This section discusses how to generate the Personnel Actions History report.

The Personnel Actions History report (FGHR017) lists all employees affected by each of the job actions you enter on the Run Control page. It prints the following information:

- Employee name.
- Department.
- Effective date.
- Reason for the action.

For each employee the report lists:

- Original hire date.
- Total years of service.
- Employee type.
- Regular/temporary.
- Full/part-time.
- Job code and title.
- Salary grade.
- Compensation rate associated with the action.
- Supervisor's name.

Page Used to Run the Personnel Actions History Report

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Personnel Actions History USF	RUNCTL_FGHR017	Workforce Administration, Job Information, Reports, Personnel Actions History USF, Personnel Actions History USF	Run the Personnel Actions History report (FGHR017).

Generating a Wage and Separation Report

Periodically, Federal agencies are required to generate a Form ES-931 report (Request for Wage and Separation Information). State agencies use the information in this report to determine benefit eligibility for each claimant filing claims for Unemployment Compensation for Federal Employees (UCFE).

The generation of the ES-931 report is a two-part process.

1. Use the Setup Wage/Separation USF component to enter setup information.
2. Use the Print Wage/Separation USF component to generate the actual report.

This section discusses how to:

- Enter ES-931 employee identification information.
- Enter ES-931 annual leave information.
- Enter ES-931 severance pay information.
- Generate the ES-931 report.

Pages Used to Set Up and Run the ES-931 Wage and Separation Report

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Setup Wage/Separation USF - Identification	GVT_UCFE_PG	Workforce Administration, Job Information, Reports, Setup Wage/Separation USF, Identification	Enter ES-931 identification information for the wage and separation report. Note. The pages in the Setup Wage/Separation USF component pre-populate the fields for which data is already available and those pre-populated fields are inaccessible. Enter data for the remaining fields since data is required in all of the fields.
Setup Wage/Separation USF - Annual Leave	GVT_UCFE_PAY_PG	Workforce Administration, Job Information, Reports, Setup Wage/Separation USF, Annual Leave	Enter ES-931 annual leave information for the wage and separation report.
Setup Wage/Separation USF - Severance Pay	GVT_UCFE_SEV_PG	Workforce Administration, Job Information, Reports, Setup Wage/Separation USF, Severance Pay	Enter ES-931 severance pay information for the wage and separation report.

Page Name	Definition Name	Navigation	Usage
Print Wage/Separation USF	GVT_PRINT_ES931	Workforce Administration, Job Information, Reports, Print Wage/Separation USF, Print Wage/Separation USF	Run the Print Wage/Separation report (ES931).

Entering ES-931 Employee Identification Information

Access the Setup Wage/Separation USF - Identification page (Workforce Administration, Job Information, Reports, Setup Wage/Separation USF, Identification).

Setup Wage/Separation USF - Identification page

Request Date	Enter the date the information was transmitted.
Local Office	Enter the numerical ID of the requesting/record holding office.
Claim Date	Enter the effective date of the claim.
Print ES931	Click to access the Print Wage and Separation component.
Does this person perform "Federal Civilian Service?"	Select if the employee performs Federal Civilian Service.
If No	If the employee does not perform Federal Civilian Service, enter an explanation.
Is payroll office address based on SF-8?	Select if the payroll office is based on an SF-8.

If No, has claimant received an SF-8?

Select if the payroll office is not based on an SF-8.

Defaulted Data

The information in this group box is pre-populated from existing data, if that data exists. If you need to change a value in a field that was pre-populated, you can click the Edit Information link to make the fields accessible for edit.

Entering ES-931 Annual Leave Information

Access the Setup Wage/Separation USF - Annual Leave page (Workforce Administration, Job Information, Reports, Setup Wage/Separation USF, Annual Leave).

Identification Annual Leave Severance Pay

Annual Leave Find | View All First 1 of 1 Last

Empl ID: C10001 Name:

Request Date: 07/10/2009 Local Office: Claim Date: 07/10/2009

☐ Received Lump-Sum Payment(s) for Terminal Annual Leave

If 'Yes', and payment was received on or after the begin date of the base period or if currently entitled to such a payment, then record the data below.

Leave Payment Amount

Payment Amount: Date of Payment:

Terminal Annual Leave Amount Period of Terminal Leave

Days: Begin Time: Begin Date: End Time: End Date:

Hours: 31 31 31

Setup Wage/Separation USF - Annual Leave page

If the employee received a lump-sum payment for terminal annual leave, select *Received a lump-sum payment(s) for terminal annual leave?*. If selected, and the payment was received on or after the beginning date of the base period, or if the employee is currently entitled to such a payment, enter the related data in the Leave Payment Amount group box.

Entering ES-931 Severance Pay Information

Access the Setup Wage/Separation USF - Severance Pay page (Workforce Administration, Job Information, Reports, Setup Wage/Separation USF, Severance Pay).

Identification		Annual Leave		Severance Pay	
Severance Pay Find View All First 1 of 1 Last					
Empl ID:	C10001	Name:	Richard Stankowski		
Request Date:	07/10/2009	Local Office:		Claim Date:	07/10/2009
☐ Received or is Entitled to Receive Severance Pay by Any Federal Law or Agency-Employee Agreement If 'Yes', then complete the following information.					
Severance Pay Information					
Begin Date:			End Date:		
Number of Weeks:			Weekly Amount:		
Total Entitlement (\$):					

Setup Wage/Separation USF - Severance Pay page

If the employee has received or is entitled to receive severance pay, select *Received or is entitled to receive severance pay by any Federal law or agency-employee agreement*. If selected, enter the related data in the Severance Pay Information group box.

Generating the ES-931 Report

Access the Print Wage/Separation USF page (Workforce Administration, Job Information, Reports, Print Wage/Separation USF, Print Wage/Separation USF).

Once you have completed the necessary setup, run the Print Wage and Separation report (ES931). This prints an ES-931 Request for Wage and Separation Information report.

Chapter 18

(USF) Processing Personnel Action Requests

This chapter provides an overview of personnel action requests (PARs) and discusses how to perform common personnel actions.

Note. PeopleSoft delivers a database providing a sample setup of PAR data. All discussions, overviews, and examples in this book are based on the sample setup. Your agency may choose a similar setup or vary the processes to reflect its own system and operational procedures.

Understanding PARs

This section discusses:

- PARs.
- Sample setup of pages used by employees and supervisors.
- Personnel actions and employee status.
- The importance of effective dates.
- Multiple actions with the same effective date.

Personnel Action Requests

An employee's history with an agency usually involves many job changes, such as promotions, leaves of absence, layoffs, retirement, pay rate changes, awards, and so on. To maintain both current records and a complete history of employee job data, your employees, supervisors, and human resources officials will regularly submit PARs for these changes in PeopleSoft Enterprise Human Resources. (Before requesting personnel actions, verify that you've selected the Multiple Jobs Allowed check box on the Installation Table - Product Specific page.)

Note. The information you need to maintain your employees' career histories is the same type of information you enter to hire employees. Use the same pages for both.

Requests for updates that you want to make to employee job data begin in the Workforce Administration, Job Information menu. Depending on whether you are an employee requesting a change for yourself, a supervisor requesting a change on behalf of someone in your department, or a human resources official, you must choose Employee Request USF, Supervisor Request USF, or HR Request USF, where the system prompts you for an employee ID. Go to the Data Control page to begin the request for a new action, and then go to other pages to enter additional information for the personnel action that you're requesting.

The differences between employee, supervisor, and human resources requests are the types of requests available and the workflow routing of the requests after being submitted. Human resources officials may request any of the actions.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Installing PeopleSoft HRMS," Setting Up Implementation Defaults

[Chapter 7, "\(USF\) Adding an Employment Instance," page 333](#)

Sample Setup of Pages Used by Employees and Supervisors

The following table lists a sample setup of the pages employees and supervisors can use to enter requests and where those requests can be routed.

Request Type	Page	Submitted By	Routed To
Accounting information	Compensation	Supervisors	Authorization
Agency transfer	Job	Supervisors	Authorization
Agency/subagency	Job	Supervisors	Authorization
Appointment/expiration data	Employment 1	Supervisors	Authorization
Awards	Data Control	Supervisors	Authorization
Benefits/retirement	Job	Supervisors	Authorization
Department reassignment	Job	Supervisors	Authorization
Departmental hierarchy (view only)	Job	Supervisors	Authorization
Draft status	Personal Data	Employees/Supervisors	HR department

<i>Request Type</i>	<i>Page</i>	<i>Submitted By</i>	<i>Routed To</i>
Earnings	Compensation	Supervisors	Authorization
Employee type	Position	Supervisors	Authorization
Expected pay (view only)	Compensation	Supervisors	Authorization
FLSA status	Position	Supervisors	Authorization
Holiday schedule	Position	Supervisors	Authorization
Job code #	Job	Supervisors	Authorization
LEO position	Position	Supervisors	Authorization
Locality/LEO adjustment	Compensation	Supervisors	Authorization
Location	Job	Supervisors	Authorization
Marital status	Personal Data	Employees/supervisors	HR department
Medicare entitlement date	Personal Data	Employees/supervisors	Authorization
Military status	Personal Data	Employees/supervisors	Authorization
Name/address/birth/phone	Personal Data	Employees/supervisors	Authorization
Nonpay data	Employment 2	Supervisors	Authorization
Other pay information	Compensation	Supervisors	Authorization
PAR remarks	Data Control	Supervisors	Authorization
Pay group/frequency	Position	Supervisors	Authorization
Pay plan/table/grade/step	Compensation	Supervisors	Authorization

<i>Request Type</i>	<i>Page</i>	<i>Submitted By</i>	<i>Routed To</i>
Permanent/RIF/tenure	Employment 2	Supervisors	Authorization
POI	Position	Supervisors	Authorization
Position #	Job	Supervisors	Authorization
Probation dates	Employment 2	Supervisors	Authorization
Quoted pay data	Compensation	Supervisors	Authorization
Reports to position	Job	Supervisors	Authorization
Retained grade	Employment 2	Supervisors	Authorization
Review date	Employment 1	Supervisors	Authorization
Service computation dates	Employment 1	Supervisors	Authorization
Service conversion dates	Employment 1	Supervisors	Authorization
SF-50/SF-52	Data Control	Supervisors	Prints reports
SF-113G ceiling	Position	Supervisors	Authorization
Shift details	Position	Supervisors	Authorization
Tax location	Job	Supervisors	Authorization
Tracking (job) data	Data Control	Supervisors	Authorization
Union information	Employment 2	Supervisors	Authorization
Veteran's Info	Personal Data	Employees/supervisors	Authorization
Within-grade-increase data	Employment 1	Supervisors	Authorization

Request Type	Page	Submitted By	Routed To
Work schedule	Position	Supervisors	Authorization

Personnel Actions and Employee Status

When you request a personnel action to make changes to employee job data, the employee status often changes. For example, when you select *Retirement*, the employee status changes from *Active* to *Retired*. Similarly, if you terminate an employee due to death, the employee status changes from *Active* to *Deceased*. The employee status is based on either the personnel action, or in a few cases, the reason for the action, such as death. The system sets employee status as follows.

When you select the personnel action	The system sets the employee status to
Hire. Applicant hire. Rehire. Concurrent appointment. Detail assignment. End of detail. Terminate detail assignment. Return from LWOP. Return from disability (LWP). Recall from suspension/furlough. Intl assignment.	<i>Active</i>
Leave with pay. Short-term disability. Long-term disability.	<i>Leave of Absence</i>
Paid leave of absence. Short-term disability with pay. Long-term disability with pay.	<i>Leave with Pay</i>
Retirement with pay.	<i>Retired with Pay</i>
Terminated with benefits. Terminated with pay.	<i>Terminated with Pay</i>

<i>When you select the personnel action</i>	<i>The system sets the employee status to</i>
Furlough. Suspension.	<i>Suspended</i>
Retirement.	<i>Retired</i>
Intl assignment completion. Termination.	<i>Terminated</i>
Termination (reason of death).	<i>Deceased</i>
Pay rate change. Change to lower grade. Data change. Earnings distribution change. Job reclassification. Position change. Probation. Completion of probation. Promotion Extension of NTE date. Award-monetary. Award-nonmonetary. Bonus. Reassignment/conversion. Family benefits change.	The system sets the employee status to the same status that's in the previous data row. If no previous data row exists, the system sets the status to <i>Active</i> .

When an employee status is set to *Active*, *Leave with Pay*, *Retired with Pay*, or *Terminated with Pay*, the system triggers payroll processing in PeopleSoft Enterprise Payroll and PeopleSoft Enterprise Payroll Interface.

If your agency uses PeopleSoft Enterprise Payroll for North America, payroll paysheets aren't generated for employees whose status is *Retired* or *Terminated*. You may need to pay employees for a partial pay period or for a time after they leave the agency, however, so use either the personnel action *Retired with Pay* or *Terminated with Pay* to ensure that this occurs.

A change in employee status can affect PeopleSoft Enterprise Human Resources Manage Base Benefits, PeopleSoft Enterprise Benefit Administration, and PeopleSoft Enterprise Payroll processing. Specifically for benefits, you may need to suspend coverage during a leave of absence or a suspension. In addition, a promotion or a job reclassification might affect an employee's benefit coverage.

Changes in an employee's status can also impact pension administration.

Importance of Effective Dates

You usually update employee job data in PeopleSoft Enterprise Human Resources for U.S. Federal Government by adding effective-dated data rows to the employee records. When you insert a new row on the Data Control page, the system copies the contents of the previous row into the new row so that you don't have to retype the information that stays the same. (So before you insert a new row, ensure that you're on the data row that you want to copy.) The only new information you see is the effective date, which defaults to the system date, usually today's date, which you can change.

If you want to work on the Employment Data 1 or 2 pages, for example, first insert a new data row on the Data Control page, and then access the appropriate Employment page to enter changes.

Effective dates enable you to maintain a complete chronological history of all your data and tables, whether you changed them two years ago or want them to go into effect in two months. With all this information at your fingertips, you can roll back your system to a particular time to analyze position data or employee records. Or you can roll forward and set up tables and data before they take effect.

The system also uses effective dates to compare pages and tables to ensure that the prompt tables list only the data that is valid as of the effective date of the page where you are working. For example, let's say you create a new department code with an effective date of May 1, 1997. If, on the Job Data pages, you enter a new data row for an employee or update an existing row that has an effective date *before* May 1, 1997, then when you select a department, you won't see the new code as a valid choice because it isn't in effect yet.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "(USF) Setting Up Human Resources Management Tables"

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "(USF) Setting Up the Work-in-Progress Management System"

Multiple Actions with the Same Effective Date

On occasion, you may need to enter more than one personnel action that takes effect on the same day. Entering two actions with the same effective date is particularly common when you need to track annual pay adjustments and career promotions that take effect on the same day. Use effective sequence numbers to combine multiple actions and specify which one to process first. On the Data Control page, enter an actual effective date and assign the action, and the system automatically assigns a transaction number/sequence for each personnel action: The first on that date as 1/1 and the second as 2/1.

For example, an employee received a pay rate change and a promotion on the same day. As a result of this pay rate change, that employee's salary was raised by about 2.5 percent. A promotion from a GS-07 position to a GS-09 position produced an additional 7.9 percent increase in salary.

Note. The sequence number for a request is always 1 unless you are canceling or correcting a request that has already been completed and processed. In this case, the system would assign a sequence number of 2 for that action.

To enter multiple personnel actions with the same effective date:

1. Open the Data Control page for the employee whose data you're requesting to update.

2. For the first personnel action, insert a new data row.
3. Enter a new actual effective date.

Because it is the first action processed for this actual effective date, the Transaction Nbr / Seq field is 1/1.

4. Enter any other information required to implement the action, either here or in other pages in the component.
5. Change the PAR Status on the Data Control page to *Requested* so that you can continue on to enter the next action.
6. To enter the second action, such as *Promotion*, insert another data row.
7. Enter the same actual effective date as the first action.

The system enters a Transaction Nbr / Seq of 2/1.

8. Continue the same steps required for the first action, entering a new action each time.

Note. If two name changes are submitted for the same person on the same day and a Personnelist logs on and navigates to Worklists, two entries are displayed (one for each name change request), but both link to the most recent request on the PAR pages. If the Personnelist approves and processes the second one but leaves the first one in REQ status, a warning message is displayed that indicates that the Reviewed check box should be selected before processing the request. This warning message alerts the Personnelist to review the possible impact of processing one request before others that are scheduled to take effect on the same day or in the future.

Employee Data Security Considerations

When you reassign employees from one department to another using a data row containing an effective-date sequence number, the system currently allows users with security access to the old or new department to have access to all the employee data. PeopleSoft delivers the system this way because implementing security in system views specific to the function Max (effseq) on PS_JOB would adversely affect online response time.

For example, when you reassign an employee from department one to department two and give the employee a promotion on the same day, because an effective-date sequence number is in the reassignment data row, users with access to either department one or two have access to the employee data.

If you want to modify the system to prevent this, change the security views for the PeopleSoft applications you use. Bear in mind, however, that making the change affects system performance.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Administering HRMS Security"

Performing Common Personnel Actions

This section discusses how to:

- Grant performance awards.
- Enter promotional information.
- Request departmental reassignments.
- Request a leave of absence.
- Enter terminations and retirement requests.
- Request a supplemental or correction individual retirement record.
- Request terminations due to death.
- Request to rehire an employee.

Pages Used to Perform Common Personnel Actions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Supervisor Request USF-Data Control	GVT_JOB0	Workforce Administration, Job Information, Supervisor Request USF, Data Control	Enter information for the employee for whom you want to enter a personnel action.
Supervisor Request USF-Award Data	GVT_AWD_DATA	Click the Award Data link on the Supervisor Request - Data Control page. This link is available only when the Action field is <i>AWD</i> (award - monetary) or <i>BON</i> (bonus), and the Reason Code field is populated.	Assign an award to a federal employee and enter award, informational, and payroll details.

Granting Performance Awards

Recognizing and rewarding employee performance is a critical component of attracting and keeping top talent. PeopleSoft Enterprise Human Resources handles the complexity of this human resource area by making it easy to establish, record, track, and grant employee awards and bonuses.

Begin the process to grant an award by submitting a request to issue a bonus or award. The data is automatically sent through the approval process, tracked, approved, recorded, and issued to the employee.

To issue an award:

1. Set up the Award Actions page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Award Actions, Award Actions) to define monetary and nonmonetary award types.
2. Request an award or bonus for your employee on the Supervisor Request - Data Control page (Workforce Administration, Job Information, Supervisor Request USF, Data Control).

Submit your request the same as you would for other personnel actions.

- Define the award setup using the Award Data page (click the Award Data link on the Supervisor Request - Data Control page).

Access the Award Data page (select Workforce Administration, Job Information, HR Processing USF, Data Control, enter *BON* in the Action field and select a value in the Reason field, then click the Award Data link.)

Award Data

Action: BON Bonus
Reason Code: RELEASE
Award Classification: Bonus

Award Data

Award Percent:	0.00	Award Code:	
Amount:		Hours:	
Pay Period Amount:		Process Until:	ⓘ

Informational Data

Award Group:		Use By Date:	ⓘ
Suggestion Number:		Tangible Benefit:	
Obligation Expiration:	ⓘ	Intangible Benefit:	
From Date:	ⓘ	To Date:	ⓘ

Payroll Data

Combination Code:	FCB-4476EXTSAL-USA		Edit ChartFields
GL Pay Type:		☐	Pay in Separate Paycheck?
Amount Paid:	0.00	☐	Gross-Up
Earnings Code:	FG-Bonus	Seq:	
Sub-Agency Charged:	ⓘ		
Check Mail Address:	Check Mail Address ⓘ	☒	Generate Payment

Comment: ⓘ

Award Data page

Award Data

Award Percent Percent of pay to be paid as an award.

Award Code NFC award code defaults from the Award Action definition.

Amount	Award amount granted.
Hours	Hours granted as an award.
Pay Period Amount and Process Until	Award amount paid each pay period until a specified date.

Informational Data

From Date	Award begin date (NFC only).
To Date	Award end date (NFC only).

Payroll Data

Combination Code, GL Pay Type, Amount Paid, Earnings Code, Pay In Separate Paycheck, and Gross Up	The information in these fields defaults from the Award Action definition.
Sub Agency Charged	The accounting station charged for cash award if not the employee's accounting station (NFC Only).
Check Mail Address Indicator	Specify where NFC should mail an award check. For example, the award may not get mailed to the employee's address, but instead to an office for a ceremony (NFC Only).
Generate Payment	Select to generate the award payment (NFC Only).

Note. When you save this page, payroll data is written to the Additional Pay table for Payroll for North America customers only.

Entering Promotional Information

When an employee changes pay grades or moves to a new job, salary changes are typically part of that personnel action.

To enter promotional information:

1. Insert a new data row on the Supervisor Request - Data Control page (Workforce Administration, Job Information, Supervisor Request USF, Data Control), and complete all fields.

2. When you are ready to submit the request, ensure that the PAR Status is *REQ*.

The workflow system then picks up this information and routes it through the process. After that, you can still change, withdraw, or deny the information up until the point that the action has been finalized and has a status of *Processed*. To correct or cancel the request after it has been completed and has a status of *HR Processed*, go to the Cancellation or Correction pages.

The information you change on the Supervisor Request - Data Control page and other pages varies according to the data for the former job and the new job. You usually select a new job code or a new position number by moving to the Supervisor Request - Job Data page. But all of the other entries on this page could also conceivably change in the event of a promotion.

Again, the information you change on the Supervisor Request - Job Data page may vary, but you usually select a new pay plan, table, grade, or step and enter (or generate) a new base pay.

3. Once you've completed all the changes caused by the promotion, if necessary, access other pages to enter relevant information.

For example, access the Personal Data page to enter new business phone numbers. Or access the Position Data page to change the pay group or employee type, or to enter other relevant position details.

4. Change the position as necessary on the Supervisor Request - Job page (Workforce Administration, Job Information, Supervisor Request USF, Job Data).
5. Select a pay rate determinant on the Supervisor Request - Compensation Data page (Workforce Administration, Job Information, Supervisor Request USF, Compensation Data).
6. Set the options in the Within-Grade Increase Data group box on the Supervisor Request - Employment Data 1 page (Workforce Administration, Job Information, Supervisor Request USF, Employment Data 1) as follows:

Actions	Impact
Promotion (nature of action 702) WIGI (NOA 893) GM WIGI (NOA 891)	Sets the WIGI status to <i>waiting</i> . Sets the WIGI due date to the pay begin date, which is the first pay begin date after the employee has satisfied his or her next increase waiting period. Sets the LEI date and last increase date to the effective date of the action.
Quality step increase (QSI) (NOA 892)	Sets the WIGI status to <i>waiting</i> . Sets the WIGI due date to the pay begin date, which is the first pay begin date after the employee has satisfied his or her next increase waiting period. The WIGI due date is based on the last equivalent increase date, not the effective date of the action. Sets the last increase date to the effective date of the action. (Has no effect on the LEI Date.)

Actions	Impact
Change to lower grade (NOA 713)	Issues a warning message "Warning -- Change to Lower Grade Personnel Action may have an impact on WGI Due Date -- Adjust accordingly." Always review current or future-dated records and make manual adjustments that may be required for any change to lower grade action.
Temporary promotion (NOA 703)	Sets the WIGI status to <i>NA</i> . Sets the WIGI due date to <i>Blank</i> .

Requesting Departmental Reassignments

The description given here is for reassigning employees among departments. Agency-to-agency transfers are processed as hires and terminations.

To enter a reassignment request when a person is assigned to a new department without changing job codes:

1. Access the Supervisor Request USF - Data Control page (Workforce Administration, Job Information, Supervisor Request USF, Data Control) to enter reassignment requests.

Reassignments usually imply that there is no change in pay grade or compensation.

2. If this action is to occur on the same day as another action, insert that action's values in the Transaction Nbr and Sequencefields.
3. Enter the action of *Reassignment/Conversion*.
4. Enter the reason code, such as *Employee Request* or *Manager Request*.
5. Complete all other necessary changes, such as NOA Code and Authority (1) and (2).
6. Access the Supervisor Request USF - Job Data page (Workforce Administration, Job Information, Supervisor Request USF, Job Data) to enter additional changes for the employee being reassigned.

Change the position number, job code, agency, and any other details that will change with the employee reassignment. When you select a new department for the employee, the system automatically enters a new location and tax location if you've associated a location with the department in the Department table.

7. Access other pages in the Supervisor Request USF component to enter any other employment or job information applicable to the reassignment.

For example, you may need to go to the Supervisor Request USF - Personal Data page to enter a new phone number. On the Personal Data page, click the Personal Phone Numbers button, and on the Personal Phone Numbers page, enter a new business phone number. On Employment 2, change the supervisor ID to the manager of the new department. Access other pages, such as the Position Data page to change the pay group, employee type, or other relevant position details.

Security Considerations

PeopleSoft Enterprise Human Resources enables users to assign employees into departments that they can't access for updates. If you want to prevent users from reassigning an employee into a department for which they don't have access, PeopleSoft Enterprise Human Resources contains a view (DEPT_TBL_ACCESS) that displays only those department IDs that users can access based on their user security profiles.

If you choose to use this view, you must create a class of users who have access to all departments so that they can perform reassignments.

See Also

Chapter 6, "Increasing the Workforce," page 207

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Administering HRMS Security"

Requesting Leave of Absence

At some point in their careers, many employees take leaves of absence. For example, when an employee has a baby, the new parent may request a maternity or paternity leave.

To enter a leave of absence:

1. Access the Supervisor Request USF - Data Control page (Workforce Administration, Job Information, Supervisor Request USF, Data Control) to submit a request for the employee who is temporarily leaving the agency.
2. Access the Non Pay Data page (Workforce Administration, Job Information, Supervisor Request USF, Employment Data 2, and click the Non Pay Data link) to enter leave of absence data for an employee.

In the Last Date Worked field, enter the last date the employee worked. When you process the PAR to return the employee to pay status, you must update the other fields (SCD Hours, Probation Hours, and Career Tenure Hours), as appropriate.

3. When an employee returned from leave, return to the Supervisor Request USF - Data Control page to change that employee's status to *active*.
 - a. In the Action field, select *RFL* (return from leave without pay).
 - b. In the Reason Code field, select *RFL* (return from leave).
 - c. In the PAR Status field, select *Requested* or leave it as *Initiated* in case the return date changes for any reason.
 - d. Access any other pages to make needed changes.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

Entering Terminations and Retirement Requests

When employees leave the agency permanently, you render their records and their statuses inactive by registering them as *Terminated* or *Retired*. The processes for entering terminations and retirements are almost identical; the primary difference is the action you select on the Data Control page.

To enter termination and retirement requests:

1. Request a termination for an employee who has left the agency using the Supervisor Request USF - Data Control page Workforce Administration, Job Information, Supervisor Request USF, Data Control).

The Actual Effective Date field defaults to the system date, usually today's date, which you can change.

Normally, the system uses the effective date to represent the *beginning* of an action; however, when an employee terminates or retires, the system treats the effective date you enter as the close of business of the day of the termination.

For example, if an employee's last day of employment is September 1, the effective date is September 1 because the termination is effective at the close of business that day.

2. In the Action field, select one of the following: *Termination*, *Terminated with Pay*, *Terminated with Benefits*, or *Retirement*, and then select a reason code for the departure, if applicable.

Depending on the action you selected, the system changes the employee status from *Active* to *Terminated*, *Terminated with Benefits or Pay*, or *Retired*.

3. If the employee is suitable for rehire, save this page.

When you request a termination or retirement, the system generates an individual retirement record (IRR) control record for this employee.

Note. The IRR process is used by agencies using PeopleSoft Enterprise Payroll. Payroll detail earnings and deductions for the fiscal history are used in the IRR process.

See Also

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "(USF) Generating IRR and ROST Reports," Understanding the IRR Process

Requesting a Supplemental or Correction Individual Retirement Record

After you process an employee's IRR, you may find that you need to supplement or make corrections to that IRR. This requires that you create another PAR using the Workforce Administration, Job Information, Supplement to IRR or Correct IRR Supplement menu.

When you create the new PAR, the system creates an IRR control record with an IRR type of *C* (correction) or *S* (supplemental).

See Also

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "(USF) Generating IRR and ROST Reports," Generating Supplemental or Correction IRRs

Requesting Terminations Due to Death

To request termination due to death:

1. Open the Supervisor Request USF - Data Control page (Workforce Administration, Job Information, Supervisor Request USF, Data Control) for the deceased employee.
2. In the Action field, indicate that the employee is *Terminated*.
3. In the Reason Code field, select *Death* as the reason for termination.

The system automatically changes the Employee Status field from *Active* to *Deceased*.

Requesting to Rehire an Employee

When you request to hire an employee who worked for your agency in the past, enter a *Rehire* action. Information on a rehired employee is already in PeopleSoft Enterprise Human Resources unless the employee data was deleted or archived. If employee records aren't in the system, follow the new hire process described in "Hiring Your Workforce."

You can rehire only employees whose employee status is *Terminated*, *Terminated with Pay*, *Terminated with Benefits*, *Retired*, or *Retired with Pay*. If you rehire an employee whose records already exist in the system, you may want to ensure that the personal, employment, and job data for that person is current.

If you want to rehire an employee whose previous job was in a department (organizational entity) for which you don't have security access, give at least one user performing rehires security access to all departments.

To request to rehire an employee into the system:

1. Open the Supervisor Request USF - Data Control page (Workforce Administration, Job Information, Supervisor Request USF, Data Control) for the employee and request a rehire.
2. Access the other employee data pages to enter additional information.

Chapter 19

(USF) Processing Automatic Actions for Probation, Tenure, and WGIs

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

- Perform automatic actions.
- Administer probation termination automatic actions.
- Administer tenure conversion automatic actions.
- Administer within-grade increases (WGIs).

Understanding Automatic Action Processing

This section lists prerequisites and provides an overview of processing automatic actions.

Prerequisites

For the Automatic Actions process to work as described, you must first activate workflow and set up supervisors in the workflow process. Consult your system administrator for information.

Before you can administer automatic actions for your employees, you must have already entered them into the system using one of the components in Workforce Administration.

You should designate one or more employees, perhaps from your human resources or payroll office, to administer the Automatic Actions processes. As delivered, the system sends supervisor notifications to the employee's supervisor's worklist based on WGI, tenure, and probation information already in your system. This information, most of which you entered during the hire process, initiates the automatic action processes. Run the Automatic Action processes regularly, as determined by your organization's needs. If necessary, manually change employee records to process special cases.

Before implementing Automatic Actions, decide how often your agency should run each process. For example, within-grade increases generally take effect on the first day of a pay period, so you might choose to process step increases only once per pay period. On the other hand, if supervisors review notices every Thursday morning, you should run 60-day notification processes weekly. Some agencies run the notification processes nightly to accommodate multiple supervisors and to allow for maximum time to verify upcoming employee record changes.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Delivered Workflows for PeopleSoft HRMS"

Chapter 7, "(USF) Adding an Employment Instance," Adding an Employment Instance, page 336

Processing Automatic Actions

Your agency's human resources personnel have many tasks to oversee: recruiting new employees, making hiring decisions, administering reviews, and tracking changes in employees' personal data, among others. Unfortunately, much of their time can be spent processing routine, tedious data. PeopleSoft Enterprise HRMS USF functionality automates some of these routine tasks, leaving your professionals free to spend time on other projects that require their professional insight and skills.

The PeopleSoft Enterprise Human Resources Administer Workforce business process offers an Automatic Actions process to administer these routine tasks:

- Probation termination.
- Tenure conversion.
- WGs.

If you activate workflow, PeopleSoft Enterprise Human Resources alerts you of upcoming waiting period terminations or step increases and then automatically updates employee records without user intervention. After you assign supervisors to review automatic action notices, you won't forget these important dates.

The procedure is identical for all three automatic actions:

1. Run a process to identify employees with upcoming probation terminations, tenure conversions, or within-grade increases in the next 60 days.

The system creates online notifications of upcoming changes and sends them to the worklist of designated supervisors.

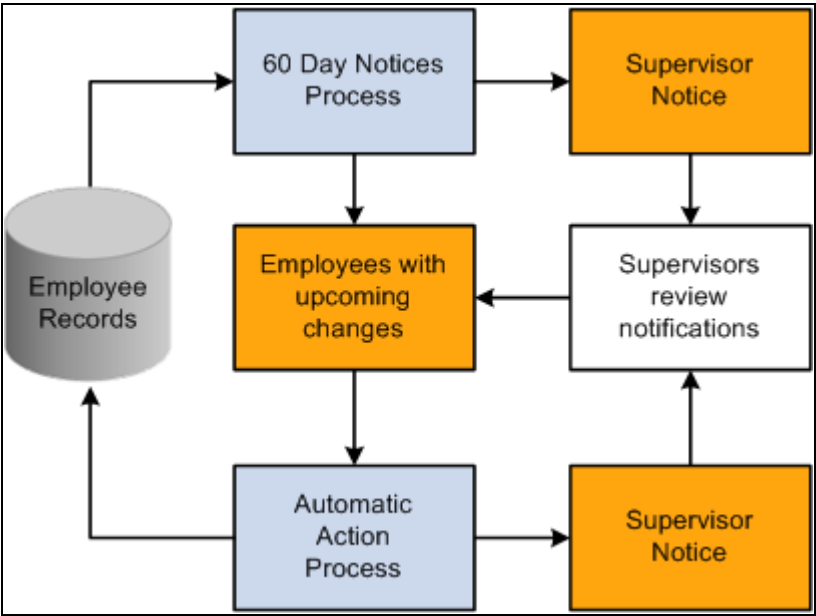
2. Review online notifications and make any necessary changes to employee records.

Unless you change status or date fields in the employee's records to stop the update from occurring, the respective process updates the employee's records.

3. Run a process on the specified date to change employee records.

This process also creates notices and sends them to supervisor worklists.

The following diagram illustrates automatic action processing, including the creation of advance supervisor notification, the automated updates to employee data, and the supervisor notifications that the updates have been completed:



Processing automatic actions and generating supervisor notifications for the automatic actions

Performing Automatic Actions

To set up Automatic Action messages, use the Automatic Action Msgs (GVT_AUTOACTNMSG_TB) component.

This section provides an overview of the menus and pages used for each Automatic Action process and discusses how to:

- Process automatic actions.
- Run the Load Within Grade Increases process.

Understanding the Menus and Pages Used for Each Automatic Action Process

The following table provides an overview of the menus and pages used for each automatic action process. However, this table does not include manual setup and verification. Run all of these processes from the Workforce Administration, Collective Processes menu.

Step	Function	Navigation	Option to select in PeopleSoft Process Scheduler	Process Type and Name
1	Identify employees, create notices, and send notices to supervisor worklists.	Process Automated Actions USF	60 Day Probation Term Notices	Application Engine FGHR003A
			Or 60 Day Tenure Notices	Application Engine FGHR004A
			Or 60 Day WGI Notices	Application Engine FGHR002A
2	Update employee records and send notices to supervisor worklists.	Process Automated Actions USF	Process Probation Terminations	Application Engine FGHR003B
			Or Process Tenure Conversions	Application Engine FGHR004B
		Or Process WGI Auto Action USF	Load Within Grade Increases	Application Engine FGHR002B

Pages Used to Perform Automatic Actions

Page Name	Definition Name	Navigation	Usage
Automatic Action Msgs	GVT_AUTOACTMSG_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Automatic Action Msgs, Automatic Action Msgs	Define Automatic Action messages.
Process Automated Actions USF	RUNCTL_AUTO_ACTNS	Workforce Administration, Collective Processes, Process Automated Actions USF, Process Automated Actions USF	Specify automatic action run control parameters for the probation termination and tenure conversion processes.

Page Name	Definition Name	Navigation	Usage
Process WGI Auto Action USF	RUN_FGHR002B	Workforce Administration, Collective Processes, Process WGI Auto Action USF, Process WGI Auto Action USF	Specify automatic action run control parameters for processing WGIs.
Probat Term-Supv Notif USF	GVT_PROB_END_NOTE	Workforce Administration, Collective Processes, Probat Term-Supv Notif USF, Probat Term-Supv Notif USF	View impending probationary period termination notifications online.
Tenure Conversion Notice USF	GVT_TEN_END_NOTICE	Workforce Administration, Collective Processes, Tenure Conversion Notice USF, Tenure Conversion Notice USF	View 60-day tenure notifications online.
Within Grade Incr Notice USF	GVT_WGI_NOTICE	Workforce Administration, Collective Processes, Within Grade Incr Notice USF, Within Grade Incr Notice USF	View impending WGI notifications online.

Processing Automatic Actions

Access the Process Automated Actions USF page (Workforce Administration, Collective Processes, Process Automated Actions USF, Process Automated Actions USF).

Process Automated Actions USF

User ID: PS
[Report List](#)
[Process Monitor](#)
[Process Request](#)

Run Control ID: 1

Automatic Action Control Parm

Company: DC Department of Communications

As Of Date: 01/01/1980

Process Automated Actions USF page

Company Enter the company for which you would like to identify employees and create notifications.

As Of Date The as of date is set by default to the system date. The process identifies all rows with a probation date within 60 days in the future from this date.

Process Request

Click to run this request. PeopleSoft Process Scheduler runs the Automatic Actions process at user-defined intervals.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

Running the Load Within Grade Increases Process

Access the Process WGI Auto Action USF page (Workforce Administration, Collective Processes, Process WGI Auto Action USF, Process WGI Auto Action USF).

Process WGI Auto Action USF

User ID: PS

[Report List](#)

[Process Monitor](#)

Process Request

Run Control ID: 1

WGI Automatic Action Control P

Company:

DC

Department of Communications

As Of Pay Period End Date:

05/20/2000

Process WGI Auto Action USF

Company

Enter the company for which you would like to process WGIs.

As Of Pay Period End Date

This field is set by default to the system date, but you must change it to a valid pay period end date for the pay calendar you have created. The system processes within-grade increases for employees with a WGI due date before this date, usually the begin date for the same pay period. However, the system also processes WGIs due before this pay period-retroactive WGIs.

Administering Probation Termination Automatic Actions

When you first hire an employee, your agency usually imposes a probation period; most new regular federal employees have one-year probation periods. Supervisory or managerial employees and Senior Executive Service (SES) employees often have different probation periods, which you track separately.

The probation termination automatic action, like other automatic actions, identifies employees who will reach their probation termination date within 60 days. After you have activated workflow, the system sends messages to employee supervisors who are designated to process automatic actions. After the supervisors approve the probation termination, run the process to perform the actual changes to employee records, blanking out employee probation dates, indicating that they have met the probation period. Finally, you can send notices of completed probation periods to the designated supervisors' worklists.

This section discusses how to run the probation termination automatic action.

Running the Probation Termination Automatic Action

To run the probation termination automatic action:

1. Verify all of the data required for automatic probation termination processing.
 - a. Verify the employee's probation waiting period (Probation Date) and the position to which the employee reports (Reports To Position) on the Employment 2 page, accessed from the HR Request menu.

If the employee has multiple data rows, verify only the current row.
 - b. Verify accumulated non-pay hours that affect the employee's probation termination date on the Non Pay Data page.
2. Run the 60 Day Probation Term Notices process from the Process Automated Actions USF page.

During this process, the system performs the following functions:

- Identifies employees who have a probation termination within the next 60 days, and then creates supervisor notifications. After the notices are created, the supervisor has until the probation termination date to request an extension of the probation period. The system processes the probation termination if the supervisor doesn't respond in time.
- Adds a row to the automatic action control table (GVT_AUTO_ACTN), which records the employee ID, employee record number, automatic action type, and automatic action date.

The system differentiates among the three probation termination types: standard, supervisor, and SES. This table also indicates whether the notification was sent to the specified worklist, whether the action was processed, and whether notification of the processed action was sent to the specified worklist.

3. Run the Process Probation Terminations process from the Process Automated Actions USF page.

The automatic action process updates the records of all employees previously identified in the 60 Day Probation Term Notices process unless the supervisor has extended their probation periods. The probation termination automatic action performs the following functions on the probation termination date:

- Edits the applicable row in the automatic action control table (GVT_AUTO_ACTN) to indicate that the probation termination was processed.

This row was created during the 60-Day Probation Term Notices process.
- deselects the probation date on the employee's current Employment 2 page.
- Creates a supervisor notice indicating that the probation termination was processed.

4. View notices of upcoming probation terminations on the 60 Day Prob Term page.

Supervisors and human resources officials can view 60-day notifications online. After viewing these online messages of impending probationary period termination, they should verify that the employee will fulfill all of your agency's requirements by the specified date. To extend the probation period, the supervisor should request a personnel action to change the probation date on the employee's Employment 2 page. If the employee's probation date isn't changed, the probation termination will occur on the date indicated.

See Also

Chapter 7, "(USF) Adding an Employment Instance," Assigning Employees to Positions, page 381

Chapter 7, "(USF) Adding an Employment Instance," Adding an Employment Instance, page 336

Administering Tenure Conversion Automatic Actions

Most of your conditional and career-conditional new hires are subject to tenure conversion waiting periods. If you specify this period when you first hire the employee, the tenure conversion automatic action alerts you of upcoming tenure conversion dates and changes employee records to reflect the tenure conversion.

The tenure conversion automatic action, like other automatic actions, identifies employees who will reach their tenure conversion dates within 60 days. After you activate workflow, the system sends messages to the supervisors you have designated to process automatic actions. After the supervisors approve the tenure conversion, run the process to perform the actual changes to employee records—clearing tenure conversion dates and changing tenure types. Finally, you can send notices of tenure conversions to the designated supervisors' worklists.

This section discusses:

- Running the tenure conversion automatic action.
- Changes made to employee records during tenure conversion.

Running the Tenure Conversion Automatic Action

To run the tenure conversion automatic action:

1. Verify all of the data required for automatic tenure conversion processing.
 - a. Verify the employee's service conversion dates, tenure status, and the position to which the employee reports (Reports To Position) on the Employment 2 page, accessed from the HR Request menu.
 - b. Verify accumulated non-pay hours that may affect tenure conversion waiting periods on the Non Pay Data page.

2. Run the 60 Day Tenure Notices process from the Process Automated Actions USF page.

During this process, the system:

- Identifies employees who will reach their tenure conversion date within 60 days, and then creates supervisor notifications.

After the notices are created, the supervisor has until the tenure conversion date to request an extension of the waiting period. The system processes the tenure conversion if the supervisor doesn't respond.

- Adds a row to the automatic action control table (GVT_AUTO_ACTN).

This table records the Employee ID, Employee Record Number, automatic action type, and automatic action date. The system differentiates between the two types of tenure conversions, career and career-conditional. This row also indicates whether the notification was sent to the specified worklist, whether the action was processed, and whether notification of the processed action was sent to the specified worklist.

3. Run the Process Tenure Conversions process from the Process Automated Actions USF page.

In this process, the system updates records of employees previously identified in the 60 Day Tenure Notices process, unless the supervisor extended the tenure conversion date. The tenure conversion automatic action performs the following functions on the tenure conversion date:

- Edits the applicable row in the automatic action control table (GVT_AUTO_ACTN) to indicate that the tenure conversion was processed.

This row was created during the 60-Day Tenure Notices process.

- Inserts an employee data row with updated or deleted tenure conversion dates and changed tenure type.
- Creates a supervisor notice indicating that the tenure conversion was processed.

4. View notices of upcoming tenure conversions on the 60 Day Ten Conv page (60 day tenure conversion page).

Supervisors and Human Resources officials can view 60-day notifications online. After viewing online messages of impending tenure conversion, they should verify that the employee will fulfill all of your agency's requirements by the specified date. To extend the tenure conversion period, the supervisor should request a personnel action to change the date on the employee's Employment 1 page, as described previously. If they don't change the employee's tenure conversion date, the tenure conversion will occur on the date indicated.

See Also

[Chapter 7, "\(USF\) Adding an Employment Instance," Assigning Employees to Positions, page 381](#)

[Chapter 7, "\(USF\) Adding an Employment Instance," Adding an Employment Instance, page 336](#)

Understanding Changes Made to Employee Records During Tenure Conversion

To understand the changes made to employee records during the Tenure Conversion process, let's look at an example of an employee's data rows.

<i>Effective Date</i>	<i>NOA</i>	<i>Conv Begin Date</i>	<i>Career Conv Date</i>	<i>Career-Cond Conv Date</i>	<i>Tenure</i>
January 1, 1999 = old Career Conv Date	880 = Change in Tenure Status				Permanent
January 1, 1996 = old Career- Cond Conv Date	880 = Change in Tenure Status	January 1, 1996 = current effective date	January 1, 1999 = Conv Begin Date + 3 years		Conditional
January 1, 1994	101 = Career Conditional Appointment	January 1, 1994		January 1, 1996	None

As the table demonstrates, the system inserts a row with an effective date equivalent to the career conversion date or career-conditional conversion date and a nature of action code *880*.

For career-conditional conversions, the system performs the following actions on the new row:

- Blanks out the career-conditional conversion date.
- Changes the conversion begin date to the effective date of the current row.
- Inserts a career conversion date three years in the future.

You can change this date.

- Changes the tenure type from *None* to *Conditional*.

For career conversions, the system performs these actions on the new row:

- Blanks out the career conversion date.
- Blanks out the conversion begin date.
- Changes the tenure type from *Conditional* to *Permanent*.

Administering WGIs

Keeping track of WGIs for all of your agency's employees can be a time-consuming, labor-intensive process. Using workflow, which you activate and set up, PeopleSoft Enterprise Human Resources automates the entire process, from identifying upcoming step increases to updating employee records after the increase has occurred. All employees who meet minimum performance standards will receive the proper step increase and concurrent pay raise at the end of the step waiting period.

This section provides an overview of 60 day WGI notices and of the load within grade increases process and discusses:

- Running the WGI automatic action.
- Entering data that affects WGI automatic actions.

Understanding the 60 Day WGI Notices

The system identifies and differentiates among employees who have a WGI Status of *Waiting* or *Approved* and a WGI Due Date up to 60 days in the future, but do not meet all automatic WGI criteria. Employees are classified into four different WGI automatic action types.

<i>Automatic Action Type</i>	<i>Explanation</i>
Within Grade Increase	These employees receive an automatic WGI within 60 days.
Manual WGI	You need to process these employees' WGIs manually. For example, employees with intermittent or seasonal work schedules require manual WGI processing.
Retroactive WGI	These employees have a WGI status of <i>Waiting</i> , but were due a WGI in a previous pay period.
WGI W/O Min. Performance	These employees have an overall review rating below <i>Satisfactory</i> or do not have a review within the last fifteen months.

Different supervisor notifications are sent for each of these types. However, the system processes WGIs automatically for only the first and third types listed previously, Within Grade Increase and Retroactive WGI.

Understanding the Load Within Grade Increases Process

To understand the within-grade increase automatic action, consider what happens to an employee with this current row:

Effective Date	NOA	Step	WGI Due Date	WGI Status	Last Increase Date	LEI Date
January 1, 2001	Any	1	May 18, 2001	Waiting		

In March, the notification process identified this employee's upcoming WGI, after which you sent a notification to the supervisor. The supervisor approved the increase and didn't need to change any data.

On May 18, 2001, the WGI due date, the system processes this employee's within-grade increase. It changes the WGI Status in the old row and inserts a new row as follows:

Effective Date	NOA	Step	WGI Due Date	WGI Status	Last Increase Date	LEI Date
May 18, 2001 = old WGI due date	893 = WGI	2	Pay period begin date after Step 2 waiting period	Waiting	May 18, 2001 =old WGI due date	May 18, 2001 =old WGI due date
January 1, 2001	Any	1	May 18, 2001	Created		

As you can see, the system performs six actions during the within-grade increase process:

- Changes the WGI Status to *Created* in the row that was current when the WGI process occurred.

If the employee has multiple rows with the same WGI due date, the system changes the status of all the rows to *Created*. Only the system enters a status of *Created*.

- Inserts a new row with nature of action code 893 and effective date equal to the old WGI due date.
- Increments the step by one in the new row, and updates step-dependent pay information.
- Calculates the WGI due date for the new row.

This date corresponds to the beginning of the pay period following the waiting period for the new step.

- Sets the WGI status on the new row to *Waiting*.
- Sets both the last increase date and LEI date on the new row to the old WGI due date.

WGI increases take effect only at the beginning of a pay period. If the WGI due date is the beginning of a pay period, the pay increase occurs on that date—the employee receives the increased pay for the entire period. However, if the WGI due date falls between the beginning and ending dates of a pay period, the pay increase takes effect at the beginning of the following pay period.

In addition to changing employee records, the system edits the applicable row in the Automatic Action Control table (GVT_AUTO_ACTN) to indicate that the WGI was processed. It also creates a notice indicating that the WGI was processed.

Running the WGI Automatic Action

To process automatic within-grade increases:

1. Verify all of the data required for automatic WGI processing.

To enable the system to run WGI automatic actions, you must first set up required position and employee data. You may have already entered the necessary information when hiring the employee. Now, verify information throughout your PeopleSoft Enterprise Human Resources system, at both the table level and the employee level. If the employee has multiple data rows, you only need to verify the current row. All of the following conditions must be met for the system to process an automatic within-grade increase:

- a. Selected the Pay Plan is Eligible for Auto Within Grade Increase check box on the Pay Plan Table page.
- b. Defined pay calendars for the current year plus the next three years on the Pay Calendar Table page.
- c. Ensured each step has a next step increment value in the Weeks column on the Salary Step Table page.
- d. Set the overall review rating to *Satisfactory* or better within last 15 months on the Employee Appraisal 1 page.
- e. Selected a work schedule of *Full Time*, *Baylor Plan*, or *Part Time* on the Position Data page.
- f. Set WGI status to *Waiting* or *Approved* on the Employment 1 page.
- g. Ensured that the Reports To Position field contains a valid entry on the Employment 2 page.
- h. Verified that the step isn't the highest in grade on the Compensation Data page.

Note. If you are using the Manage Positions business process, the Report To Position field on the Employment 2 page is unavailable for data entry. To edit the field, select the Position Override check box on the Position Data page and change the position this employee reports to. You can also identify the reports to position on the Position Data – Description page. To do this, select Organizational Development, Position Management, Maintain Positions/Budgets, Update Position Info.

2. Run the 60 Day WGI Notices process from the Process Automated Actions USF page.

This process identifies employees with a WGI due date within the next 60 days and a WGI status of *Waiting* or *Approved*. The system:

- Adds a row to the automatic action control table (GVT_AUTO_ACTN).

This table records the employee ID, employee record number, automatic action type, and automatic action date. This table also indicates whether the notification was sent to the specified worklist, whether the action was processed, and whether notification of the processed action was sent to the specified worklist.

- Identifies employees who will receive a within-grade increase within 60 days and creates supervisor notifications.

After the notices are created, the supervisor has until the WGI due date to deny or postpone the increase. If the supervisor doesn't respond, the system processes the step increase. To prevent the automatic within-grade increase from occurring, the supervisor must change the WGI status to *Denied*, *Postponed*, or *N/A* on the current row and insert a new row with the new WGI due date and WGI status of *Waiting* or *Approved*. The system also creates notices for employees who have a condition preventing automatic WGI processing.

- Changes the WGI status on the employees' current Employment 1 pages to *Approved*, if the employees meet all of the WGI criteria.
- Sends upcoming WGI notices to supervisor worklists.

3. Run the Load Within Grade Increases process from the Process WGI Auto Action USF page.

In this process, the system updates records of employees previously identified in the 60-Day WGI Notices process, unless you have denied or postponed their increases.

4. View notices of upcoming WGIs on the Within Grade Incr Notice USF page.

After viewing these online messages of impending WGI due dates, verify that the employee will fulfill all of your agency's requirements by the specified date. To prevent the WGI from occurring, you must change the employee's WGI status to *Denied*, *Postponed*, or *N/A* on the current Employment 1 page. Also, insert a new row with an updated WGI due date and WGI status of *Waiting*. You can also view notices for employees who do not receive automatic WGIs or for whom you must manually process a WGI.

See Also

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "(USF) Setting Up Additional U.S. Federal Payroll Functionality," Establishing Pay Plans

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up Pay Calendars," Creating Pay Calendars and FLSA Calendars

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Compensation and Budgeting, "Setting Up Base Compensation and Budgeting," Setting Up Salary Plans, Grades, and Steps

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Employee Reviews, "Managing Employee Reviews"

Chapter 7, "(USF) Adding an Employment Instance," page 333

Entering Data That Affects WGI Automatic Actions

Because the automatic WGI process obtains information from many pages, be aware of entering information that might affect some of the data the system uses.

- Creating a PAR for a Change to a Lower Grade.

When you create a PAR with nature of action code 713, the system updates the WGI due date to reflect the change. However, the change may affect the WGI due date and status in many ways. You need to verify that the information entered is correct for your specific circumstances. To remind you, the system displays a warning message.

- Changing the WGI due date.

When you change the WGI due date, the system checks that the date you entered is the beginning of a pay period. If it isn't, it issues a warning message.

- Based on the WGI due date you entered, the system suggests the beginning of the pay period in which your date falls and the beginning of the next pay period.

You can enter one of these or keep your original date. If you decide to keep the date you've entered, the WGI process still identifies this employee as eligible for a step increase. However, if you enter a WGI due date in the middle of a pay period, the pay increase takes effect only at the beginning of the following pay period.

- Adding historical rows.

When you insert a row with an effective date earlier than an automatic WGI that has already occurred, the system assigns a WGI status of *Waiting*. You probably do not want the system to process this row in an automatic WGI and should change the WGI status to *N/A*. Depending on the nature of action, you might need to check other information, for example step, on this and subsequent pages.

- Inserting a row with an effective date equivalent to the current WGI due date.

The system processes the WGI after all other actions with the same effective date. It increments the sequence number of the WGI row it adds.

- If a user creates a manual WGI (NOA = 893) PAR row, any preceding rows that have a WGI status of *Waiting* or *Approved* are updated to a status of *Manual* to indicate that a manual WGI has been inserted.

Chapter 20

(USF) Managing Leave

This chapter provides an overview of leave administration and discusses how to:

- Administer automatic leave enrollment.
- Set up leave transfer programs.
- Administer leave donations.
- Administer leave recipients.
- View leave transfer data.
- Report on leave transfer programs.

Understanding Leave Administration

This section lists prerequisites and discusses:

- Automatic leave enrollment administration.
- Leave transfer management.

Prerequisites

Set up Earnings codes and Earnings Accrual Classes.

See Also

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "Defining Earnings Codes and Earnings Programs"

Automatic Leave Enrollment Administration

Use automatic leave enrollment functionality to enroll an employee automatically in an earnings accrual class with personnel action request (PAR) activity or approval to participate in a leave program. The system automatically populates the employee's leave enrollment record with default enrollment values based on the leave class rules you set up. You can manually override the defaults.

Here are the steps in administering automatic leave enrollment:

1. Set up the Leave Class Rules template (one-time set up).
2. Set up Leave Class Rule criteria (one-time set up).
3. Process PAR activity or approval to participate in a leave program.
4. Run the Auto Leave Enrollment process.
5. Review the results of the Auto Leave Enrollment process.
6. Adjust enrollments as necessary.

Leave Transfer Management

Each Federal Government agency may establish and administer procedures to permit the voluntary transfer of annual leave between Federal Government employees in a time of crisis. A crisis can be a personal medical emergency or a situation deemed as an emergency of the agency.

There are three types of programs in which employees may donate or receive annual leave hours. These programs have similar but slightly different eligibility or usage rules. Employees may participate in more than one program.

Voluntary Leave Transfer Program (VLTP)	Employees donate and receive annual leave hours directly from each other.
Emergency Leave Transfer Program (ELTP)	Employees donate and receive hours through an agency-managed emergency bank that has been created to deal with a specific emergency.
Leave Bank	Employees donate and receive hours through an agency-managed leave bank.

Administering Automatic Leave Enrollment

To set up leave class rules, use the Leave Class Rules Criteria USF (GVT_LVCLSRUL_TMPLT) and Leave Class Rules USF (GVT_LV_CLS_RULES) components.

This section discusses how to:

- Set up the leave class rules template.
- Set up leave class rules criteria.
- Process automatic leave enrollment.
- Review automatic leave enrollment.
- Manually enter or adjust leave enrollment.

Pages Used to Administer Automatic Leave Enrollment

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Leave Class Rules Criteria USF	GVT_LVCLSRUL_TMPLT	Set Up HRMS, Product Related, Workforce Administration, Absence, Leave Class Rules Criteria USF, Leave Class Rules Criteria USF	Rank five rules criteria for the purpose of breaking ties if an employee qualifies under more than one leave class rule.
Leave Class Rules USF	GVT_LV_CLS_RULES	Set Up HRMS, Product Related, Workforce Administration, Absence, Leave Class Rules USF, Leave Class Rules USF	Define your organization's rules for enrolling or terminating an employee from an earnings (leave) accrual class.
Automatic Leave Enrollment	RUNCTL_FGASOFDT	Workforce Administration, Leave Administration USF, Manage Leave Information, Request Auto Leave Enrollment, Automatic Leave Enrollment	Run the process that automatically enrolls employees in earnings accrual classes based on the PAR or leave program activity and the leave class rules.
Track Auto Leave Enrollment	GVT_LVCLS_TRGR	Workforce Administration, Leave Administration USF, Manage Leave Information, Track Auto Leave Enrollment, Track Auto Leave Enrollment	Review the results of the Leave Class Auto Enrollment process.
Employee Accruals Enrollment	GVT_ACCR_PLAN	Workforce Administration, Leave Administration USF, Manage Leave Information, Employee Accruals Enrollment, Employee Accruals Enrollment	Adjust employee enrollment in earnings accrual classes if there is a reason to override the automatic enrollment. If your organization does not use the automatic leave enrollment process, use this page to enroll employees in accrual classes.

Setting Up the Leave Class Rules Template

Access the Leave Class Rules Criteria USF page (Set Up HRMS, Product Related, Workforce Administration, Absence, Leave Class Rules Criteria USF, Leave Class Rules Criteria USF).

Leave Class Rules Criteria USF

Ranking Instructions

Please select the criteria fields that will determine leave class enrollment defaults. For each criteria field, assign a rank in the order of relevance of that criteria. For example, if work schedule is the most important criteria then give it a ranking of 1.

The ranking will serve as a tiebreaker for the Leave Class Auto Enrollment Process

Data				
Customize Find View All First 1-5 of 5 Last				
	*Leave Rule Criteria Field	*Rank		
1	ACTION	1	+	-
2	GVT_PAY_PLAN	2	+	-
3	ACTION_REASON	3	+	-
4	GVT_WORK_SCHED	4	+	-
5	GVT_NOA_CODE	5	+	-

Leave Class Rules Criteria USF page

Set up the Leave Class Rules template only once.

Leave Rule Criteria Field

Select the PAR criteria and rank them on this page. These criteria correspond to the PAR Criteria fields on the GVT Leave Class Rules page, where you select values for each criterion. The criteria that you select and rank are:

ACTION: action

ACTION_REASON: action/reason.

GVT_NOA_CODE: nature of action code.

GVT_PAY_PLAN: pay plan.

GVT_TYPE_OF_APPT: type of appointment.

GVT_WORK_SCHED: work schedule.

Rank

Rank each criterion in order from 1 to 5, with 1 being the highest rank. The single rule where the employee transaction meets the highest-ranking criteria is the rule the system uses as a tiebreaker if an employee qualifies under more than one rule.

Example of Tie Breaking

The following example illustrates how the system uses ranking to resolve situations where the employee qualifies under two different Leave Class Criteria rules.

<i>Rule 1 Definitions</i>	<i>Rule 2 Definitions</i>
PAR Criteria: Action: HIR Work Schedule: Full-time Pay Plan: GS	PAR Criteria: Action: HIR Work Schedule: Full-time NOA code: 170
Default Enrollments: Annual Leave Sick Leave	Default Enrollments: Annual Leave Sick Leave Home Leave

The employee meets all criteria for both rules. The Action and Work Schedule criteria are the same in both rules.

- If pay plan is ranked higher than NOA code on the Leave Class Rules template, the system uses the first rule to enroll the employee in leave classes.
- If NOA code is ranked higher than pay plan on the Leave Class Rules template, the system uses the second rule to enroll the employee in leave classes.

Setting Up Leave Class Rule Criteria

Access the Leave Class Rules USF page (Set Up HRMS, Product Related, Workforce Administration, Absence, Leave Class Rules USF, Leave Class Rules USF).

Leave Class Rules USF

Leave Class Rule ID: FT2PT

Leave Class Rule Criteria Type: Non-Hire PAR actions

Rule Criteria and Default Enrollment

Find | View All | First 1 of 1 Last

Effective Date: 01/01/1980

Status: Active

*Description: From FT to PT Schedule

Short Description: FT to PT

PAR Criteria

Default Enrollments

Find | First 1-6 of 6 Last

*Earnings Accrual Class	Elect:	Terminate:	
ANN240	☐	☒	+ -
ANN360	☐	☒	+ -
ANN720	☐	☒	+ -
ANNLPT	☒	☐	+ -
SICKFT	☐	☒	+ -
SICKPT	☒	☐	+ -

Leave Class Rules USF page

Note. You do not need to set up a Leave Class Rule for terminating employees. The PeopleSoft Enterprise Payroll for North America Final Check Process requires that the employee stay enrolled to determine how much pay they are eligible for upon their separation. Once an employee has *Terminated* status, normal payroll calculations in PeopleSoft Enterprise Payroll for North America no longer process that employee.

- Leave Class Rule ID

Identify each leave class rule you create.
- Leave Class Rule Criteria Type

Assign a type to each new rule when you first enter the page. This value determines which additional fields are available on the page. Values are:

Hire/Rehire: for rules associated with hire or rehire actions.

Leave Program Status: for rules associated with leave bank and transfer processing.

Non-Hire PAR actions: for rules associated with PAR actions that are not hire or rehire.

The value you select in the Leave Class Rule Criteria Type field affects which group boxes appear on the page.

Leave Class Rule Criteria Type	Group Boxes
<i>Hire/Rehire or Non-Hire PAR actions</i>	PAR Criteria Default Enrollments
<i>Leave Program Status</i>	Leave Program Default Enrollments

PAR Criteria

Only the criteria you selected and ranked on the Leave Class template appear in this group box. Select a value for a criterion if you want to process leave enrollment based on a designated value for that criterion under this rule. The system processes enrollments based on the value of this field in the employee's PAR transaction.

Default Enrollments

Earnings Accrual Class Select the earnings accrual classes that apply to this rule.

Elect Select to enroll employees in the earnings accrual class by this rule's criteria.

Terminate Select to terminate employees from the earnings accrual class by this rule's criteria.

Leave Program

Leave Program Type If an employee has been approved as a recipient of one of the leave transfer programs, you can define which accruals to enroll or terminate. Select the type of leave transfer program *Bank*, *Emergency*, or *Voluntary*.

See Also

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "(USF) Setting Up Additional U.S. Federal Payroll Functionality," Defining Earnings Accrual Classes

[Chapter 20, "\(USF\) Managing Leave," Administering Leave Donations, page 879](#)

Processing Auto Leave Enrollment

After you set up the Leave Class Rules template and the Leave Class Rule Criteria, you process any hire, PAR transaction, or leave program approval as you normally would through the Workforce Administration, Job Information menu.

When you are ready to enroll employees in earnings accrual classes, access the Automatic Leave Enrollment page (Workforce Administration, Leave Administration USF, Manage Leave Information, Request Auto Leave Enrollment, Automatic Leave Enrollment). *As Of Date* is the run parameter. The Leave Class Auto Enrollment process (FGHR036) compares the PAR transactions and leave program approval against the leave class rule criteria and enrolls employees in the appropriate earnings accrual classes. You can set this process to run automatically or on demand.

Reviewing Auto Leave Enrollment

Access the Track Auto Leave Enrollment page (Workforce Administration, Leave Administration USF, Manage Leave Information, Track Auto Leave Enrollment, Track Auto Leave Enrollment).

Track Auto Leave Enrollment

View by Status:

Pending

Purge Completed

Data								
	Empl ID	Empl Record	Name	Effective Date	Leave Class Enrollment Trigger	Description	Leave Class Rule ID	Leave Class Rule Criteria Type
1	0041		Marvin Campos	08/28/2006	Pending			H
2	FB0100		Larry Smith	01/01/2001	Pending			H
3	FB0200		John Miller	01/01/2001	Pending			H
4	FB0300		Debra Schmelzer	01/01/2001	Pending			H
5	FB0400		Margaret Ballard	01/01/2001	Pending			H

Track Auto Leave Enrollment page

Note. Not all page elements are visible on this page. Depending on the page arrangement, you see additional elements by scrolling either vertically or horizontally.

Use this page to view the outcome of each transaction that was processed by the Leave Class Auto Enrollment process.

View by Status

Select a value to sort the data by status (Leave Class Enrollment Trigger). Values are: *Completed*, *Error*, or *Pending*.

The system records employees on this table with the status of *Pending* as soon as a PAR action is completed or the employee is approved into a leave program.

The status changes to *Completed* when the auto enrollment process is complete.

Purge Completed

Click to delete all data rows with the status (Leave Class Enrollment Trigger) of *Completed*.

Manually Entering or Adjusting Leave Enrollment

Access the Employee Accruals Enrollment page (Workforce Administration, Leave Administration USF, Manage Leave Information, Employee Accruals Enrollment, Employee Accruals Enrollment).

The screenshot shows the 'Employee Accruals Enrollment' page for employee Rebekah Jones (EMP ID: K0G001, Empl Record: 0). The page is divided into several sections:

- Accrual Plan:** Includes a search bar with 'ALFT' and a magnifying glass icon. It shows 'Annual Leave -- Full Time' with expand/collapse buttons (+/-). Navigation links: Find | View All | First | 1 of 1 | Last.
- Accrual Election:** Shows 'Leave Type: Annual' with expand/collapse buttons (+/-). It includes '*Effective Date: 07/10/2009' with a calendar icon. Navigation links: Find | View All | First | 1 of 1 | Last.
- Coverage Election:** Contains radio buttons for 'Elect' (selected), 'Waive', and 'Terminate'. It includes '*Date: 07/10/2009' with a calendar icon.
- Alternate Work Schedule:** A dropdown menu currently set to 'None'.
- Grandfathered Carryover:** An empty text input field.

Employee Accruals Enrollment page

Accrual Plan

Earnings Accrual Class Select an earnings accruals class. The classes you created on the Earnings Accruals Class table are displayed.

Accrual Election

Leave Type The leave type defaults from the accrual calculation box on the Earnings Accruals – Class Page.

Election Select the enrollment status.
 Select *Elect* to enroll the employee in a class.
 Select *Waive* to waive a leave just like a regular benefit.
 Select *Terminate* to end the employee's enrollment in a class.

Elect Date Enter the date on which the accrual election change occurs.

Effective Date	Select a date to specify when this accrual election becomes effective and the employee will be in the new earnings accrual class.
Alternate Work Schedule	The purpose of the alternate work schedule is for those employees on the Credit Leave Accrual. When the employee's work schedule changes, the system creates an additional pay record for them to pay out their current balance.
Grandfathered Carryover	Enter the grandfathered carryover here, if applicable. A grandfathered carryover is when an employee has a balance greater than the new earnings accrual-ceiling amount. For example, an employee who carried an annual leave balance of 360 hours in a previous class can transfer to a new class that has a ceiling of 240 hours. The difference of 120 hours between the new ceiling amount and the current balance of 360 is called the <i>Grandfathered Carryover</i> .

See Also

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "(USF) Setting Up Additional U.S. Federal Payroll Functionality," Defining Earnings Accrual Classes

Setting Up Leave Transfer Programs

To set up leave transfer programs, use the Leave Denial Codes USF (GVT_DENIAL_CD_TBL), Leave Program Type Table (GVT_LV_XFR_TYP_TBL), Leave Bank Details (GVT_LV_BANKMEM_SEC), and Emergency Leave Transfer Details (GVT_LV_DON_TGT_SEC) components.

To set up leave transfer programs, you must define the programs and the earnings codes and accrual classes used for processing.

This section discusses how to:

- Set up denial codes and denial notification letter text.
- Set up leave transfer programs.
- Set up earnings codes for leave transfer.
- Set up earnings accrual classes for leave transfer.
- Set up leave class rules for leave transfer.

Pages Used to Set Up Leave Transfers

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Leave Denial Codes USF	GVT_DENIAL_CD_TBL	Set Up HRMS, Product Related, Workforce Administration, Absence, Leave Denial Codes USF, Leave Denial Codes USF	Set up denial reasons and specify the text to be printed in denial notifications.
Leave Program Type Table	GVT_LV_XFR_TYP_TBL	Set Up HRMS, Product Related, Workforce Administration, Absence, Leave Program Type Table, Leave Program Type Table	Set up leave transfer programs, specify the program type, and indicate limits on donations and balances.
Leave Bank Details	GVT_LV_BANKMEM_SEC	Click the Leave Bank Details button on the Leave Program Type Table page	Enter Leave Bank board members.
Emergency Leave Transfer Details	GVT_LV_DON_TGT_SEC	Click the Emergency Leave Transfer Dtl (emergency leave transfer details) button on the Leave Program Type Table page	Enter the number of donation hours targeted.
Leave Class Rules USF	GVT_LV_CLS_RULES	Set Up HRMS, Product Related, Workforce Administration, Absence, Leave Class Rules USF, Leave Class Rules USF	Define your organization's rules for enrolling or terminating an employee from an earnings (leave) accrual class.

See Also

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "(USF) Setting Up Additional U.S. Federal Payroll Functionality," Defining Earnings Accrual Classes

Chapter 20, "(USF) Managing Leave," Setting Up Leave Class Rule Criteria, page 867

Setting Up Denial Codes and Denial Notification Letter Text

Access the Leave Denial Codes USF page (Set Up HRMS, Product Related, Workforce Administration, Absence, Leave Denial Codes USF, Leave Denial Codes USF).

Leave Denial Codes USF

Denial Reason Code: L01

Denial Codes

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

*Effective Date:

01/01/1980

*Status:

Active

*Description:

Family

*Short Description:

Family

Denial Letter Text:

Leave Denial Codes USF page

Denial Letter Text

Enter details of the reason for denial that you want to be printed on the Leave Denial Notifications report (FGPY031).

Setting Up Leave Transfer Programs

Access the Leave Program Type Table page (Set Up HRMS, Product Related, Workforce Administration, Absence, Leave Program Type Table, Leave Program Type Table).

Leave Program Type Table

Leave Program Type: **BNK**

Leave Program Type Information
Find | View All First 1 of 1 Last

*Effective Date: 01/01/1990

*Status: Active

*Description: Leave Bank

Short Description: Leave Bank

Leave Program

☒ Bank
☐ Emergency
☐ Voluntary

Donation Limits

*Minimum Hours: 1

*Maximum Hours: 20

Balance Limits

Minimum Hours: 1

Maximum Hours: 500

Leave Bank Details

Leave Program Type Table page

Leave Program Type Information

Leave Program Type	Define your leave program codes.
Leave Program	Select the type of leave transfer program (Bank, Emergency, Voluntary) to associate with this Leave Program Type code.
Donation Limits and Balance Limits	Enter the Minimum Hours and Maximum Hours allowable for donations and balances.
Leave Bank Details	Click to access the Leave Bank Details page and enter the Leave Bank board members and indicate those who are labor representatives. If you select <i>Bank</i> in the Leave Program group box, the system adds the Leave Bank Details button to the page when you save.
Emergency Leave Transfer Dtl (emergency leave transfer details)	Click to access the Emergency Leave Transfer Details page and record the number of donation target hours. If the Leave Program Type is <i>Emergency</i> , the system adds the Emergency Leave Transfer Details button to the page when you save.

Setting Up Earnings Codes for Leave Transfer

Set up three unique earnings codes for three distinct purposes:

- For donors to donate leave to transfer programs.

- For recipients to receive (accrue) leave from transfer programs.
- For recipients to use leave accrued from transfer programs.

Leave Earning Type

PeopleSoft provides five Leave Earning Type codes as translate values. Associate these types with earnings codes that you set up for processing leave transfers. The type code you select defines the function of the earnings code within the leave bank and transfer program. The following table summarizes the processing that is triggered by these codes.

Leave Earn Type	Leave Bank and Transfer Process	Earning Accrual Process
Donate to Bank	Updates the donor's Additional Pay page with the hours contributed to a Leave Bank Program. Use the Leave Bank Application/Donate page to enter requests. Updates Leave Bank Ledger inquiry page with hours contributed.	Donor's Annual: • Increase Hours Taken YTD • Reduce Balance YTD
Donate to Emergency	Updates the donor's Additional Pay page with the hours contributed to an Emergency Leave Transfer Program (ELTP). Use the Leave Bank Application/Donate page to enter requests. Updates the Leave Bank Ledger with hours contributed.	Donor's Annual: • Increase Hours Taken YTD • Reduce Balance YTD
Donate to Recipient	Updates the donor's Additional Pay page with the hours contributed in the Voluntary Leave Transfer Program (VLTP). Use the Donor Contribution page to enter requests. Updates the Track Leave Donation page.	Donor's Annual: • Increase Hours Taken YTD • Reduce Balance YTD
Received from Bank	Updates the recipient's Additional Pay page with the hours received from the Bank or ELTP. Use the Create Leave Recipient App page to enter requests. Updates Leave Bank Ledgers with hours withdrawn.	Leave Program Recipient: Increase Balance YTD

Leave Earn Type	Leave Bank and Transfer Process	Earning Accrual Process
Received from Donor	Updates the recipient's Additional Pay page with the hours received through the VLTP. Use the Create Leave Recipient App page to enter requests.	Leave Program Recipient: Increase Balance YTD

Setting Up Earnings Codes for Donors and Recipient Accruals

Use the Earnings Table component to set up earnings codes for donors and recipient accruals. You must use the specified values for the following fields:

- **General page:** In the Payment Type field, select *Hours Only*. Leave transfer earnings codes process hours only; there are no earnings or deductions associated.
- **Taxes page:** There are no taxes taken. In the Earning Allocation group box, select *Maintain Earnings Balances*.
- **Federal Additional Earnings page:** In the Leave Bank and Transfer Type group box, select the appropriate Leave Earnings Type.
- **Calculation Page:** The Multiplication Factor must be 0.0000 to ensure no earnings.

Setting Up an Earnings Code for Recipients to Use Transferred Leave

Use the Earnings Table component to set up earnings codes for recipients to use transferred leave. You must use the specified values for the following fields:

- **General page:** In the Payment Type field, select *Hours Only*.
- **Taxes page:** The earnings are fully taxable. In the Earning Allocation group box, select Add to Gross, Maintain Earnings Balances, and Hours Only.
- **Calculation Page:** The Multiplication Factor must be 1.0000 to ensure the earning is paid at the regular hourly rate.

See Also

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "Defining Earnings Codes and Earnings Programs"

Setting Up Earnings Accrual Classes for Leave Transfer

Set up earning accrual classes for the following purposes:

- Leave program recipient.

Once an employee is approved as a recipient in either a Bank, ELTP, or VLTP, they must be enrolled into an Earning Accrual Class to track hours received and used during their program participation.

- **Deferred Annual/Sick Leave.**

When an employee is participating in either an Agency Bank or VLTP, they must terminate their enrollment from regular annual and sick leave plans and enroll into the deferred annual and sick earning accrual classes. The deferred programs will track service hours and entitlement to a defined maximum accrual. For example, full time employees may accrue to the maximum of 40 hours.

Employees participating in an ELTP are not subject to the accrual limit and do not need to be enrolled into the deferred programs.

- **Annual Leave.**

All donated hours are taken from the employee's annual leave accrual class. Update each of your annual accrual classes with the three donor earning codes defined with Donate to Bank, Donate to Emergency, and Donate to Recipient leave earning types.

Setting Up Earnings Accrual Classes for Leave Program Recipients

Use the Earnings Accruals component to set up earnings accrual classes for leave program recipients. You must use the specified values for the following fields:

- **Class page:** In the Leave Type field, select *Leave Program*.
- **Balance page:** The values you enter depend upon the purpose of the earnings code you're adding to the class.

For earnings codes used to accrue recipient leave transfer, select *Add to Hours Earned*.

For earnings codes used when recipients use transferred leave, select *Add to Service Hours* and *Add to Hours Taken*.

Setting Up Earnings Accrual Classes for Deferred Annual/Sick

Use the Earnings Accruals component to create a deferred earning accrual class for every annual and sick accrual class that has a different accrual maximum during an employee participation in the leave bank or transfer programs.

Deferred accrual classes need to mirror the accrual classes that they are replacing; the only difference in the two classes is the leave type and accrual ceiling.

For example, the Deferred Annual Accrual Class mirrors the Annual Accrual Class by having the same accrual calculation, carryover, expiration/termination, accrual rates, and balance earning codes. The only difference in the two classes is the Leave Type and Accrual Ceiling. In this example, enter the following information:

- **Class page:** In the Leave Type field, select *Deferred Annual*.
- **Ceiling/Carryover page:** Set up the accrual ceiling as desired for the deferred accrual class.

Setting Up Annual Accrual Classes for Leave Transfer Processing

All donated hours to bank and transfer programs are withdrawn from the employee's Annual Leave Accrual Class. You must update all your Annual Accrual Class Balance tables with the three earning codes you set up with the leave earnings types of Donate to Bank, Donate to Emergency, and Donate to Recipient.

See Also

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "(USF) Setting Up Additional U.S. Federal Payroll Functionality," Defining Earnings Accrual Classes

Setting Up Leave Class Rules for Leave Transfer

Access the Leave Class Rules USF page (Set Up HRMS, Product Related, Workforce Administration, Absence, Leave Class Rules USF, Leave Class Rules USF).

You can define leave class rules to enroll an approved recipient automatically into the accrual class that you create to track leave program activity. Use this page to define the automatic enrollment rule for each leave program type you set up.

- Select *Leave Program Status* as the Leave Class Rules Criteria Type.
- Select the appropriate Leave Program Type.

See Also

Chapter 20, "(USF) Managing Leave," Setting Up Leave Class Rule Criteria, page 867

Administering Leave Donations

Employees may donate hours to an agency Leave Bank, ELTP, or VTLP. The contribution process is the same for the Bank and ELTP programs, where hours are donated to a common pool. However, the contribution process is different for the VLTP, where the hours are donated directly to an employee.

This section discusses how to:

- Enter employee requests to contribute leave to a Leave Bank or ELTP.
- Enter employee donations to the VLTP.
- Enter employee requests to donate to another agency's leave transfer program.
- Run the Leave Bank and Transfer process.

Pages Used to Administer Leave Donations

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Leave Bank Application/Donate	GVT_LV_BANK_APP	Workforce Administration, Leave Administration USF, Reports, Leave Bank Application/Donate, Leave Bank Application/Donate	Enter employee requests to contribute leave to a Leave Bank or ELTP.

Page Name	Definition Name	Navigation	Usage
Donor Contribution	GVT_LV_DON_CONTRIB	Workforce Administration, Leave Administration USF, Manage Leave Information, Voluntary Donations, Donor Contribution	Enter employee donations to the VLTP.
External Leave Donations	GVT_LV_DON_EXT	Workforce Administration, Leave Administration USF, Manage Leave Information, External Leave Donations, External Leave Donations	Enter employee requests to donate to another agency's leave transfer program.
Process Leave Bank/Transfers	RUNCTL_FGPY022	Workforce Administration, Leave Administration USF, Manage Leave Information, Process Leave Bank/Transfers	Run the Leave Bank and Transfer process to process donations and update accruals, additional pay, and leave ledgers.

Entering Employee Requests To Contribute Leave To A Leave Bank Or Emergency Leave Transfer Program

Access the Leave Bank Application/Donate page (Workforce Administration, Leave Administration USF, Reports, Leave Bank Application/Donate, Leave Bank Application/Donate).

Leave Bank Application/Donate

[Rebekah Jones](#)
ID: K0G001
Empl Record:

*Leave Program Type:

BNK

Leave Bank

Data

Find | View All | First 1 of 1 Last

*Effective Date:

07/10/2009

*Member Status:

Applied

Leave Bank Contribution Detail

*Contribution Hours:

8

Annual Leave Balance:

Service Date:

06/15/1996

Leave Bank Application/Donate page

Leave Program Type	Select the leave program type to which the employee is donating. Valid values are the Leave Program Types you set up for Bank and Emergency leave programs.
Effective Date	The request date of the application.
Member Status	Select or view the member status of the leave request. Values are: <i>Applied:</i> The Leave Bank Board has not processed the request and no annual leave contributions have been taken from the employee's current Earnings Accrual Class balance. <i>Approved:</i> The leave review board has approved the donor's leave request. The system processes only <i>Approved</i> requests. <i>Contribute:</i> The system processes the hours during the next payroll cycle and updates the hours on the employee's additional pay to reduce the balance by the donation hours on the application. Only the system can update the applicant's request to <i>Contribute</i>; it issues an error message if you select this value. <i>Cancelled:</i> Indicates any other reason that the request is terminated. <i>Denied:</i> The Leave Bank Board has evaluated the request and denied the donor's leave request.
Denial Reason 1 and Denial Reason 2	These fields appear if you select Denied as the Member Status. You must provide the applicant with at least one reason for denial.
Contribution Hours	Specify the number of hours the donor is contributing to the leave bank or ELTP.
Annual Leave Balance	Displays the number of hours of annual leave the employee has as of this request date (Effective Date).
Service Date	The basis for determining the length of service, on which the required contribution minimum is based.

Entering Employee Donations to Voluntary Leave Transfer Program

Access the Donor Contribution page (Workforce Administration, Leave Administration USF, Manage Leave Information, Voluntary Donations, Donor Contribution).

Note. Not all page elements are visible on this page. Depending on the page arrangement, you see additional elements by scrolling either vertically or horizontally.

Recipient information is displayed at the top of the page.

Effective Date	The date of the donation.

Donor Details

In this group box, enter the donor information. The system enters the pay period in which the donation was processed. Donations are not processed until the recipient's application is approved.

The Return to, Returned Processed, and Pay Period Return Date assist you in recording your manual leave donation return process. If an employee has donated leave, and it is not needed, it may be returned to the donor.

Return to Acknowledges the donor's choice for the disposition of where the leave should be returned in the case that any unused leave is returned. Valid values are *Donor* or *Bank*. This field is informational only and used to track the return of excess leave donation hours.

Returned Processed When a leave recipient has excess leave when their emergency is over, select this check box when the leave amount to be returned is restored to the Donor. This field is informational only and used to track the return of excess leave donation hours.

Pay Period Return Date Enter the date the leave is restored to the donor. The field is informational only and used to track the return of excess leave donation hours.

Entering Employee Requests To Donate To Another Agency's Leave Transfer Program

Access the External Leave Donations page (Workforce Administration, Leave Administration USF, Manage Leave Information, External Leave Donations, External Leave Donations).

External Leave Donations

Rebekah Jones EMP ID: K0G001 Empl Record: 0

External Leave Donations									
	*Effective Date	Leave Program Type	Name	National ID	Agency	Sub-Agency	*Donation Hours	Pay Period End Date	
1	07/10/2009	EMB			AG	11	8		

External Leave Donations page

Note. Not all page elements are visible on this page. Depending on the page arrangement, you see additional elements by scrolling either vertically or horizontally.

Record the details of donations made by an employee in your agency to another agency's leave transfer program. The system updates the donor's accrual balances when you run the Leave Bank / Transfer process.

Running the Leave Bank and Transfer Process

Access the Process Leave Bank / Transfer page (Workforce Administration, Leave Administration USF, Manage Leave Information, Request Leave Bank/Transfers, Process Leave Bank / Transfer).

Run the Leave Bank and Transfer process (FGPY022) after employees have donated hours. The process loads the Additional Pay page and applies the donation amount to the Leave Bank Ledgers. The process can be run multiple times and should be run prior to your payroll cycle.

The system processes all employee leave bank applications with Member Status *Approved* and an effective date equal to or before the As of Date you enter on the run control page.

See Also

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "Maintaining Payroll Data," Entering Additional Pay Earnings Information

[Chapter 20, "\(USF\) Managing Leave," Running the Leave Bank and Transfer Process for Approved Recipients, page 886](#)

Administering Leave Recipients

Employees may receive hours from a Bank, ELTP or VTLP. The process to receive hours from all leave program types is the same.

This section discusses how to:

1. Enter employee requests to receive hours from any of the leave program types.
2. Enroll recipients in the leave program accrual class.
3. Run the Leave Bank and Transfer process for approved recipients.
4. View and adjust the data entered by the Leave Bank and Transfer process.
5. View recipient accrual balances.

Page Used to Administer Leave Recipients

Page Name	Definition Name	Navigation	Usage
Create Leave Recipient App	GVT_LV_RECIP_INFO	Workforce Administration, Leave Administration USF, Manage Leave Information, Create Leave Recipient App, Create Leave Recipient App	Enter employee requests to receive hours from any of the leave program types.

See Also

- Chapter 20, "(USF) Managing Leave," Manually Entering or Adjusting Leave Enrollment, page 871
- Chapter 20, "(USF) Managing Leave," Pages Used to Administer Leave Donations, page 879

Enter Employee Requests to Receive Hours From Any of the Leave Program Types

Access the Create Leave Recipient App page (Workforce Administration, Leave Administration USF, Manage Leave Information, Create Leave Recipient App, Create Leave Recipient App).

Create Leave Recipient App

Edward Jackson

ID: K0G017

Empl Record:

Leave Program Type: BNK Leave Bank

Program: Bank

Data

Find | View All | First 1 of 1 Last

*Effective Date: 05/31/2009

*Leave Reason: Family

*App Status: Approved

Position Detail

Application Status

Hours

*Duration Hours: 40.00

☐ Is This a Recurrence

*Start Date for Gen Standing PO: 06/04/2009

*End Date: 06/11/2009

Emergency Description:

Create Leave Recipient App page

- Effective Date** Enter the date that leave program participation was requested.
- Leave Reason** Select the reason for the emergency leave requested. Values are *Employee*, *Family*, and *Agency*.

App Status (application status)	Select the status from the following values: <i>Pending:</i> The leave review board has not processed the request. <i>Approved:</i> The leave review board has approved the request. <i>Denied:</i> The leave review board has denied the request. <i>Separated:</i> The employee separated from Federal service before the originally requested end date. <i>Cancelled:</i> Any other reason that the request is not active.
Position Detail	Click to view the position number, pay plan, grade, and step of the potential leave recipient as of the request date. Standard hours and tour of duty are used to validate the minimum number of absence hours.
Application Status	Click to identify the approver and the status Date. If the Leave Recipient Application has a status of Denied, then you may enter up to two. You must enter at least one denial reason. These codes are used later when generating Leave Recipient Denial letters.
Hours	
Duration Hours	Enter the number of hours requested (to the quarter-hour).
Is This a Recurrence	Select if the reason is a recurrence.
Start Date for Gen Standing PO and End Date	Enter the days on which the recipient requests the leave to begin and end.
Emergency Description	Detail the reasons for needing transferred leave, including a brief description of the nature and severity of the emergency.

Enrolling Recipients in the Leave Program Accrual Class

While receiving hours from a leave program, the recipient must be enrolled in the leave program accrual class to record hours donated and used.

If the program is either a Bank or VLTP, terminate enrollment from their regular and sick earnings accrual classes using the Employee Accruals Enrollment page. Then enroll the recipient into the deferred accrual classes to track accruals during the program participation and enforce the maximum entitlement.

If there is an auto enrollment leave class rule set up for the leave programs, then once the approved request is saved, the application opens the employee's Employee Accruals Enrollment page and inserts the earning accrual defined in the class rule. While in the page, you may terminate the annual and sick and enroll the employee in the deferred annual and sick accrual classes.

See Also

Chapter 20, "(USF) Managing Leave," Manually Entering or Adjusting Leave Enrollment, page 871

Running the Leave Bank and Transfer Process for Approved Recipients

Access the Process Leave Bank/Transfer page.

The Leave Bank & Transfer process (FGPY022) processes *Approved* recipients.

If the employee is participating in a Bank or ELTP, the process:

- Updates the recipient's Additional Pay page with the earnings code defined on the Earnings Code Table with *Received from Bank* as the Leave Earning Type.
- Updates the Leave Bank Ledger with hours withdrawn.
- If the employee is participating in a VLTP, the process updates the recipient's Additional Pay page with earnings code defined on the Earnings Code Table with *Received from Donor* as the Leave Earning Type.

Viewing the Data Entered by the Leave Bank and Transfer Process

See Chapter 20, "(USF) Managing Leave," Viewing Leave Donations to Leave Bank and Emergency Leave Transfer Programs, page 887.

Viewing Recipient Accrual Balances

See Chapter 20, "(USF) Managing Leave," Viewing Donor and Recipient Accrual Summaries, page 889.

Viewing Leave Transfer Data

After you run the Leave Bank / Transfer process, you can view leave transfer data.

This section discusses how to:

- View leave donations to leave bank and emergency leave transfer programs.
- View leave donations to voluntary leave transfer programs.
- View donor and recipient accrual summaries.
- View donor contributions or hours received by recipients.
- View a summary of participation in a leave transfer program.

Pages Used to View Leave Transfer Data

Page Name	Definition Name	Navigation	Usage
Review Leave Bank Ledger	GVT_LV_BANK_LDGR	Workforce Administration, Leave Administration USF, Manage Leave Information, Review Leave Bank Ledger, Review Leave Bank Ledger	View and adjust leave donations to leave bank and emergency leave transfer programs.
Track Leave Donation	GVT_LV_DON_TRACK	Workforce Administration, Leave Administration USF, Manage Leave Information, Track Leave Donation, Track Leave Donation	View leave donations to voluntary leave transfer programs.
Review Leave Program Summary	GVT_LV_PRGM_SUMM	Workforce Administration, Leave Administration USF, Manage Leave Information, Review Leave Program Summary, Review Leave Program Summary	View a summary of participation in a leave transfer program.

See Also

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "Maintaining Payroll Data," Entering Additional Pay Earnings Information

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "Reviewing, Adjusting, and Deleting Employee Balances," (USF) Reviewing and Adjusting Leave Accrual Balances

Viewing Leave Donations to Leave Bank and Emergency Leave Transfer Programs

Access the Review Leave Bank Ledger page (Workforce Administration, Leave Administration USF, Manage Leave Information, Review Leave Bank Ledger, Review Leave Bank Ledger).

Review Leave Bank Ledger

Leave Bank ID: BNK

Leave Bank

Available (Hrs):

Leave Bank Ledger

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

	Effective Date	Empl ID	Name	Member Status	Contribution/Withdrawal	Hours		
1							+	-

Data

Find | View All | First 1 of 1 Last

Effective Date:

07/10/2009

Description:

Contribution/Withdrawal:

Contribute

Hours:

Review Leave Bank Ledger page

The Leave Bank Ledger tracks the activity within the Bank and ELTP leave programs. The Leave Bank and Transfer process updates the ledgers with the transactions it has processed.

Available (Hrs)

Displays the total number of hours available in the bank or ELTP. The system updates this value when you adjust the Contribution/Withdrawal and Hours fields.

Leave Bank Ledger

Effective Date

Displays the As Of Date on the Leave Bank / Transfer process run control page.

EmplID and Name

List of all the employees who have participated in the bank.

Member Status

Displays the member status for the transfer.

Contribution/Withdrawal

Indicates whether each transaction is a contribution or a withdrawal.

Hours

Displays the number of hours contributed or withdrawn in each transaction.

Agency Ledger Adjustments

To adjust the hours, enter the effective date, the reason for the adjustment, and the hours to add or subtract. The system updates the Available Hours balance at the top of the page.

Viewing Leave Donations to Voluntary Leave Transfer Programs

Access the Track Leave Donation page (Workforce Administration, Leave Administration USF, Manage Leave Information, Track Leave Donation, Track Leave Donation).

Track Leave Donation

Rebekah Jones

EMP

ID: K0G001

Empl Record:

Leave Recipient LedgerTracking

	Donation Effective Date	Leave Program Type	Recipient Emplid	National ID	Name	Agency	Sub-Agency	Donation Hours	Return to	Leave Program Type
1										

Track Leave Donation page

Note. Not all page elements are visible on this page. Depending on the page arrangement, you see additional elements by scrolling either vertically or horizontally.

The Track Leave Donation page tracks the activity within the VLTP program. The Leave Bank & Transfer process updates this page with the transactions it has processed.

The page lists the donor's contributions by effective date and recipient.

Viewing Donor and Recipient Accrual Summaries

View donor and recipient accrual balances on the Accrual Summary page after payroll is processed and leave accruals are run.

- Donors: The fields Hours Taken Year-to-Date and Hours Balance Year-to-Date are updated with the hours contributed.
- Recipients: Leave program earning accrual is updated with the hours received. When the recipient uses hours, the Hours Taken Year-to-Date and Service Hours YTD are updated.
- Recipients who terminate regular and sick accrual classes and enroll in deferred accrual classes: The deferred accrual class is updated with the pay period's Service Hours YTD, Hours Earned Year-to-Date, and Hours Balance Year-to-Date.

See Also

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "Reviewing, Adjusting, and Deleting Employee Balances," (USF) Reviewing and Adjusting Leave Accrual Balances

Viewing Donor Contributions or Hours Received by Recipients

The Leave Bank and Transfer process inserts a row in the Additional Pay page for hours donated or received. The new row contains donor contribution or hours received information in the following fields.

Earnings Code	The earnings code associated with the appropriate Leave Earn Type.
Effective Date	The As Of Date on the Leave Bank / Transfer page.
Earnings End Date	The end date of the pay period in which the effective date falls.
Hours	The hours donated or received.

Viewing a Summary of Participation in a Leave Transfer Program

Access the Review Leave Program Summary page (Workforce Administration, Leave Administration USF, Manage Leave Information, Review Leave Program Summary, Review Leave Program Summary).

Review Leave Program Summary

Leave Program Type: BNK Leave Bank

Process Summary

From Date: 10/25/2009 31

Thru Date: 11/22/2009 31

Calculate Leave Summary

Participants

Approved Participants:

Total Hours

Total Contribution (Hrs):

Used (Hrs):

=====

Available (Hrs):

Review Leave Program Summary page

From Date and Thru Date	Define the time period for which you want to see a summary.
Calculate Leave Summary	Click after entering the date range. The system displays summary information.
Participants	The system displays the number of approved participants and denied participants.

Total Hours

The system displays the total number of hours contributed, the total number of hours used, and the number of hours available for use (derived from the contribution hours and used hours).

Reporting on Leave Transfer Programs

PeopleSoft provides the following leave transfer reports:

- FGPY028 – Leave Acceptance Notifications.
- FGPY029 – Leave Bank Participants (required by OPM).
- FGPY030 – Leave Transfer Participants (required by OPM).
- FGPY031 – Leave Denial Notifications.

See Also

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "PeopleSoft Enterprise Payroll for North America Reports"

Chapter 21

(USF) National Finance Center Processing

This chapter provides an overview of National Finance Center (NFC) processing and discusses how to:

- Set up NFC document types supported by PeopleSoft Enterprise.
- Set up NFC SING (Suspense Inquiry and Correction System) Import process parameters.
- Run the NFC SING Import process.
- Administer SINGs.
- Work with SING assignments.

Understanding NFC Processing

The NFC processes payroll for the majority of U.S. civilian federal government employees. This population consists of approximately 600,000 individuals. Consequently, the NFC and its federal customers generate a high volume of human resources transactions each day. The NFC SING Import process enables you to upload the daily SING transaction file from NFC. Positions, job codes and personnel actions are identified and marked as SINGed (for example, failed). The last operator (OPRID) who updated the SING row is notified to correct transactions in the PeopleSoft Human Resources system.

Additionally, the NFC SING Import process:

- Automates the assignment of errors to human resources personnel in your agency.
- Enables human resource personnel to view and change transaction status.

Common Elements Used in this Chapter

National Finance Center (NFC)	Part of the U.S. Department of Agriculture that provides payroll services to more than 600,000 federal employees.
Personnel Action Processing System (PACT)	NFC's online system for entering personnel actions into the payroll and personnel databases.
Personnel Management System (PMSO)	NFC's online system used for creating, editing, inactivating, reactivating or deleting individual (position) and master (jobcode) data. Position data must be entered into PMSO before personnel data can be entered into PACT.

**Personnel Edit
Subsystem (PINE)**

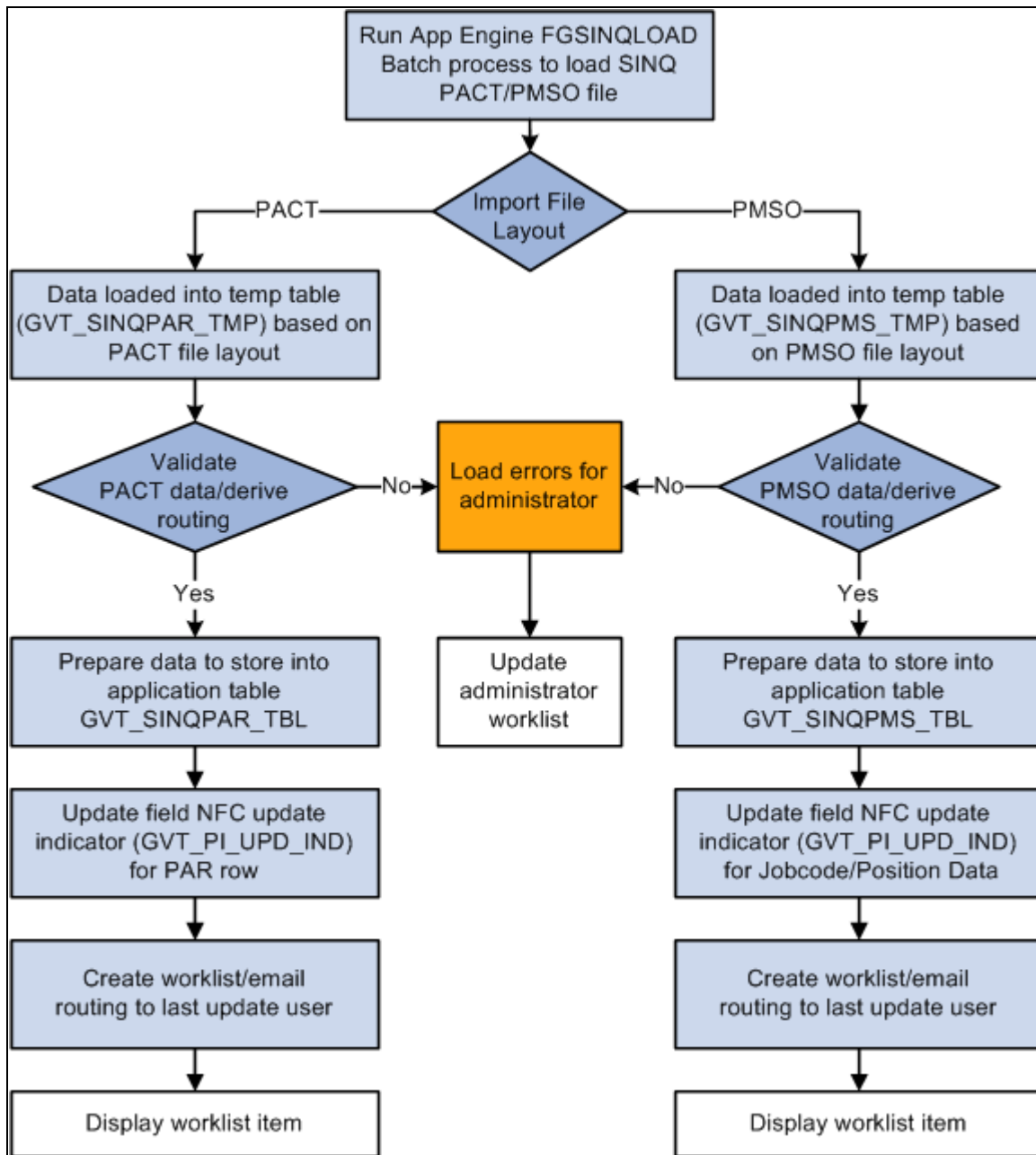
NFC's system that combines PACT and PMSO data and processes edits against the submitted personnel and position transactions. PACT and PMSO transactions must pass PINE edits before they are processed through NFC's Personnel Processing System (PEPL) to update the Payroll/Personnel System database (PPS). PINE processes Monday through Friday of each week, and the first Saturday of the pay period.

**Suspense Inquiry and
Correction System
(SINQ).**

Position (PMSO) and personnel (PACT) transactions that do not pass PINE edits are placed in the this system.

Understanding the Process Flow for the SINQ Import Process

This diagram shows the process flow for the SINQ Import process. The process is similar for PACT and PMSO except that different tables are used. For both PACT and PMSO, the batch process loads data into a temporary table, validates the data, prepares to move the data into an application table, updates the NFC update indicator field, and notifies the last update user:



The SINQ import process populates application tables, updates the NFC update indicator, and generates notifications

This table describes the NFC PACT import file layout supported by the SINQ import process. A sample import file, fgnfcpinetinq.dat, is delivered under your product data directory.

Field Name	Start Position	Length	Field Type	Description
ERR_SSN_NO	1	9	Char	Employee SSN (no dashes)
ERR_SUBAGENCY	10	2	Char	NFC agency (sub) code (that is, 70, 71)

Field Name	Start Position	Length	Field Type	Description
ERR_POI	12	4	Char	Agency Personnel Office Identifier
ERR_COMPANY	16	2	Char	Company Cd
ERR_DOC_TYPE	18	3	Char	NFC doc type (action)
ERR_PAY_PERIOD	21	2	Char	Pay period that action was processed in.
ERR_AUTH_DATE	23	6	Num	Date action was authorized
GVT_STATUS_TYPE	29	3	Char	NFC nature of action code (denotes correction or cancellation of action) CAN = 001, COR = 002
GVT_NOA_CODE	32	3	Char	NFC nature of action code (type of action)
ERR_EFFDT	35	6	Num	Date action was effective (month)
ERR_BATCH_NO	41	4	Char	NFC batch processing identifier
ERR_OPER_CODE	45	7	Char	HR specialist (id) submitting the action
ERR_CODE	52	3	Char	NFC error code
ERR_MSG	55	50	Char	NFC error message

This table describes the NFC PMSO import file layout supported by the SING import process. A sample import file, fgncfpmsoing.dat, is delivered under your product data directory.

Field Name	Start Posn	Length	Field Type	Description
SUSP_OPER_CD	1	7	Char	HR specialist (id) submitting the action
SUSP_MAST_INDV	8	4	Char	"MSTR" if job code action / "INDV" if position action

Field Name	Start Posn	Length	Field Type	Description
SUSP_FUNCTION_CD	12	10	Char	Type of action performed (for example, CHANGE, ADD, and so forth)
SUSP_COMPANY	22	2	Char	Company Cd
SUSP_SUBAGCY	24	2	Char	NFC agency (sub) code (for example, 70, 71, and so forth)
SUSP_POI	26	4	Char	Agency Personnel Office Identifier Example: POI 1536 for Smithsonian
SUSP_JOBCODE	30	6	Num	Jobcode
SUSP_GRADE	36	2	Num	Pay grade level of position/job code
SUSP_POSITION_NBR	38	8	Num	Position Number
SUSP_INCUM-SSN	46	9	Char	SSN of current or last employee holding position
SUSP_OBLIG-SSN	55	9	Char	SSN of new hire employee filling position
SUSP_PAY_PERIOD	64	2	Num	Pay period that action was processed in
SUSP_PASS_NUM	66	2	Num	NFC processing sequence within pay period (1, 2, 3, and so forth)
SUSP_ERR_CD	68	3	Num	NFC error code
SUSP_ERR_MSG	71	50	Char	NFC error message
SUSP_ELEM_NAME_NUM	121	3	Char	NFC element number (record field location) where error detected
SUSP_ELEM_NAME	124	30	Char	NFC element name (record field location) where error detected

Field Name	Start Posn	Length	Field Type	Description
SUSP_DATA_FIELD	154	8	Char	NFC element content (field value) where error detected

Supported Document Types

PeopleSoft delivers and supports four document types that correspond to the types of data imported during the SINQ Import process. The delivered document types are listed in this table:

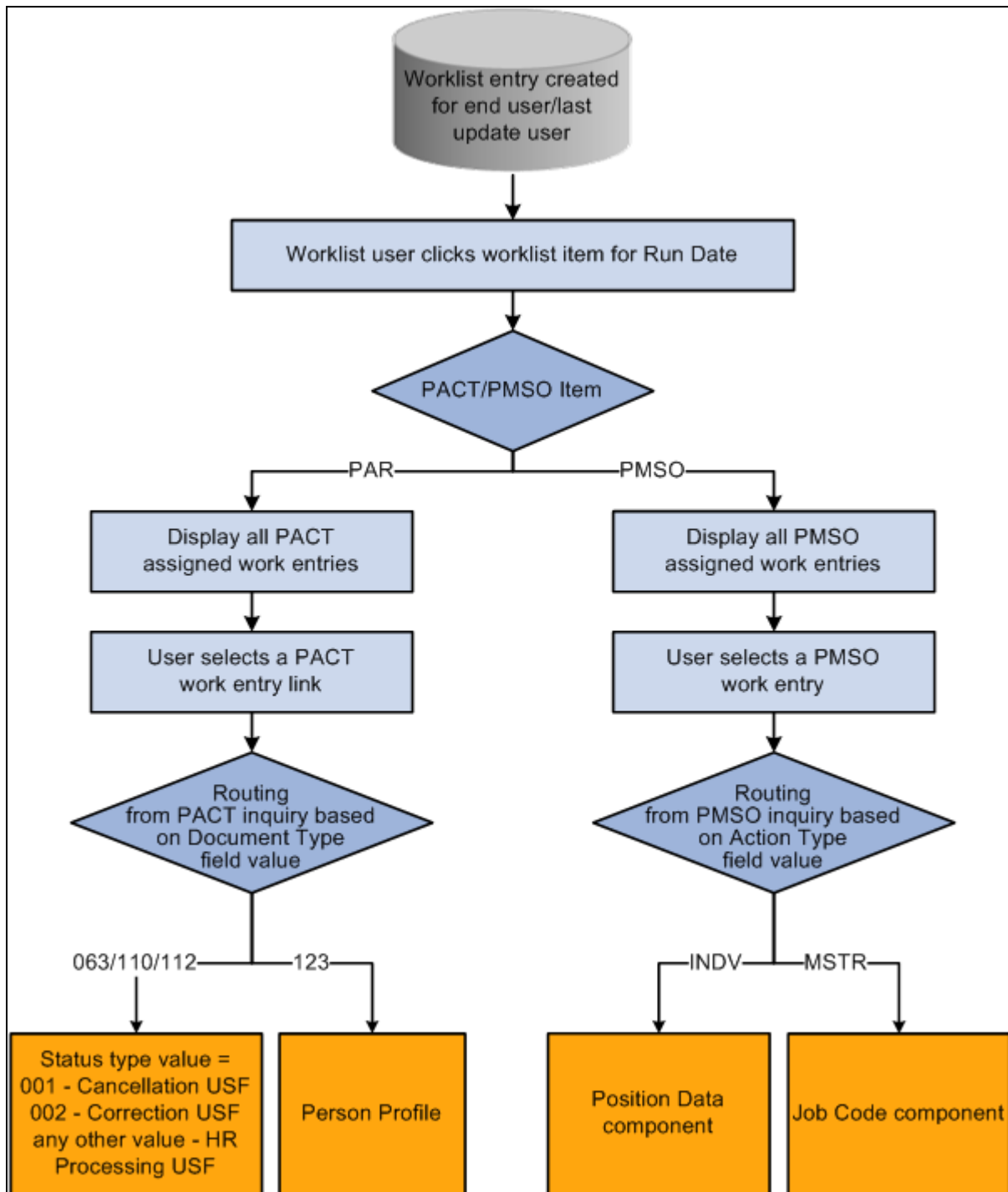
NFC Document Type	Description
063	Personnel Action
110	Award
112	Cash Award
123	Education

System administrators can filter any of these NFC document types when they run the SINQ Import process.

Understanding the Process Flow for SINQ Transactions

The SINQ Import process generates a worklist entry and an email message. The recipient uses the worklist entry to access a list of all PACT or PMSO assigned work entries. Clicking a work entry routes the user to the component where the work is to be performed.

The following diagram illustrates the process of using the worklist notification to access first the list of work entries and subsequently the components where the work is to be performed:



Using the SINQ transaction worklist to access components where work is to be performed

When a user selects an assigned work entry for a PACT SINQ row, the page that is displayed depends on the NFC document type and the status type values. If the NFC document type is 063 (Personnel action), 110 (Award action) or 112 (Education), the pages that are displayed are:

- If the Status type value equals 001, the Cancel Personnel Action USF (EE_CANCELLATION) component is displayed.

- If the Status type value equals 002, the Correct Personnel Action USF (EE_CORRECTION) component is displayed.
- If the Status type value equals blank or any other value, HR Processing USF (EE_HR_PROC) component is displayed.

See [Chapter 17, "\(USF\) Administering Personnel Action Requests,"](#) page 811.

If the NFC document type is 123, the Person Profile component is displayed.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles*, "Managing Profiles," Creating and Updating Person Profiles.

When a user select an assigned work entry for a PMSO SING row:

- If Action type field value is INDV, the Position Data component is displayed.
- If Action type field value is MSTR, the Job Code component is displayed.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Positions*, "Setting Up Positions," Position Information and *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up Jobs."

Setting Up NFC Document Types

To set up NFC document types, use the NFC Import Document Types (GVT_NFC_DOC_TYPE) component.

This section discusses how to set up NFC document types.

Page Used to Set Up NFC Document Types

Page Name	Definition Name	Navigation	Usage
NFC Import Document Types	GVT_NFC_DOC_TYPE	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, NFC Import Document Types, NFC Import Document Types	Setup component for NFC document types.

Setting Up NFC Document Types

Access the NFC Import Document Types page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, NFC Import Document Types, NFC Import Document Types).

NFC Import Document Types

Document Type: 063

NFC Document Details

Find | View All First 1 of 1 Last

Effective Date: 01/01/1900  Effective Status: Active   

Short Description: Personnel Action

Description: Personnel Action

NFC Import Document Types page

The four NFC document types that are supported by the SING import process are delivered by PeopleSoft. They are described in this table:

<i>NFC Document Type</i>	<i>Description</i>
063	Personnel Action
110	Award
112	Cash Award
123	Education

Setting Up NFC SING Import Process Parameters

To define NFC SING import process parameters, use the NFC Import Process Parameters (GVT_NFC_DOC_LIST) component.

This section discusses how to set up process parameter lists that are used by the NFC SING Import process run control page:

- Define SING Import Document lists.
- Define System User IDs that need special processing.

Pages Used to Set Up NFC SING Import Process Parameters

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
NFC Import Document List	GVT_NFC_DOC_LIST	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, NFC Import Process Parameters, NFC Import Document List	Set up NFC document types that will be processed by the PACT SING import. This field corresponds to ERR_DOC_TYPE (position 18) on the PACT import file. See Chapter 21, "(USF) National Finance Center Processing," Understanding the Process Flow for the SING Import Process, page 894.
NFC System UserId List	GVT_NFC_OPR_LIST	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, NFC Import Process Parameters, NFC System UserId List	Enter UserIDs that the system will ignore during the SING Import process. The system uses <i>like</i> logic to make the comparison. This field corresponds to ERR_OPER_CODE (position 45) on the PACT import file. See Chapter 21, "(USF) National Finance Center Processing," Understanding the Process Flow for the SING Import Process, page 894.

Defining NFC SING Import Documents to Process from the PACT Import File

Access the NFC Import Document List page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, NFC Import Process Parameters, NFC Import Document List).

NFC Import Document List
NFC System UserId List

Import Parameters List:
LNFCPR

Import Document List

Listed Document types will be processed by import.

Document Types

Customize | Find | View All | | First | 1-4 of 4 | Last

NFC Document Type	Description		
063	Personnel Action		
110	Award		
112	Cash Award		
123	Education		

NFC Import Document List page

Use this page to create lists containing different NFC PACT transactions to import during the SING Import process.

Note. You can easily add and delete rows from an Import Document List for a single SING Import process run using the View Import Parameters List link on the Run SING Import Process page.

Defining System User IDs on the PACT File that Need Special Processing by the Import Process

Access the NFC System UserId List page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, NFC Import Process Parameters, NFC System UserId List).

NFC Import Document List

NFC System UserId List

Import Parameters List:LNFCPR

System Generated User IDs

All Opr IDs LIKE listed values will be unprocessed by import process.

User Id List

CustomizeFindView All1-7 of 7FirstLast

User ID	Description		
BEAR10	NFC system user	+	-
BEAR90	NFC system user	+	-
EEXWEB	Employee Express	+	-
GWEBESS	Employee Express	+	-
NF000		+	-
NFC	Exclude all NFC users returned	+	-
PINE58	NFC system user	+	-

NFC System UserId List page

Enter User IDs that are from other systems that the SING Import process should ignore. The system performs the comparison based on *like* comparison logic.

Running the NFC SING Import Process

This section discusses how to run the NFC SING Import process.

Page Used to Run the NFC SING Import Process

Page Name	Definition Name	Navigation	Usage
Run SING Import Process	RUNCNTL_GVTSING	Workforce Administration, Collective Processes, NFC Import Process USF, Run SING Import Process, Run SING Import Process	Run Control component for NFC SING Import process

Running the NFC SING Import Process

Access the Run SING Import Process page (Workforce Administration, Collective Processes, NFC Import Process USF, Run SING Import Process, Run SING Import Process).

Run SING Import Process

Run Control ID: 01 [Report Manager](#) [Process Monitor](#) [Run](#)

Process Request Parameters

NFC File Process Date: 07/10/2009

Notification Parameters

Administrator Role: Federal NFC SING Administrator

User Notification Role Name: Federal NFC SING User

SING PACT Load

☒ Personnel Action SING

Import Parameters List: LNFPCR [View Import Parameters List](#)

File Path and Name:

SING PMSO Load

☒ Position/Jobcode SING

File Path and Name:

Run SING Import Process page

This page enables you to load only SING PACT transactions or only SING PMSO transactions, or both by selecting the corresponding check boxes in the SING PACT Load or the SING PMSO Load group boxes.

NFC File Process Date The date that is associated with all transactions that are imported during the SING Import process. System administrators can run the process only *once each day*.

Administrator Role Enter the role that is assigned to administrators for whom Worklist items and email notification will be generated for this day's SING Import process transactions. This role enables you to view all imported transactions and reassign individual transactions to specific users.

User Notification Role Name Enter the role that is assigned to users who will work on transactions that they last updated or saved, or transactions that the administrator assigns to them.

Personnel Action SING Select this check box to import PACT SING transactions.

- Import Parameters List** Select the Import Parameters List that contains the NFC document types to process.
- View Import Parameters List** Click this link to open the NFC Import Document List page for the selected Import Parameters List. Modify the document types listed and click OK to return to the Run SING Import Process page.
- File Path and Name** Enter a share drive file location that is recognized by the process server.
- Position/Jobcode SING** Select this check box to import PMSO SING transactions.

Administering SINGs

This section discusses how to:

- Administer PACT SINGs.
- Administer PMSO SINGs.

Pages Used to Administer SINGs

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Administer PACT SINGs - Assigned SINGs	GVT_SINGPACT_ADMIN	Workforce Administration, Collective Processes, NFC Import Process USF, Administer PACT SINGs, Assigned SINGs	Work with assigned PACT SINGs.
Administer PACT SINGs - Import Errors	GVT_SINGPACT_ERR	Workforce Administration, Collective Processes, NFC Import Process USF, Administer PACT SINGs, Import Errors	Review details about PACT transactions that were not imported.
Unprocessed Transactions	GVT_SINGPACT_UNPRO	Workforce Administration, Collective Processes, NFC Import Process USF, Administer PACT SINGs, Unprocessed Transactions	Review details and the reason why NFC transactions were not processed by the SING Import process.
Administer PMSO SINGs – Assigned SINGs	GVT_SINGPMSO_ADMIN	Workforce Administration, Collective Processes, NFC Import Process USF, Administer PMSO SINGs, Assigned SINGs	Work with assigned PMSO SINGs.

Page Name	Definition Name	Navigation	Usage
Administer PMSO SINQs - Import Errors	GVT_SINQPMO_ERR	Workforce Administration, Collective Processes, NFC Import Process USF, Administer PMSO SINQs, Import Errors	Review details of PMSO error transactions.

Administering PACT SINQs

Access the Administer PACT SINQs - Assigned SINQs page (Workforce Administration, Collective Processes, NFC Import Process USF, Administer PACT SINQs, Assigned SINQs).

Assigned SINQs | Import Errors | Unprocessed Transactions

Run Date: 08/28/2009

Assignment Summary

Total Count: 4 *Filter by: All

Refresh

Purge Worked Entries

Employee Detail Customize | Find | View All | First 1-4 of 4 Last

Worked	Override Operator Id	Operator Id	SSN	Empl ID	Effective Date	Name
☐	☐	HFG_LE0019	210-31-1958	LE0016	01/01/2006	Barbara Young
☐	☐	HFG_LE0019	210-31-1958	LE0016	06/06/2005	Barbara Young
☐	☐	HFG_LE0019	456-82-5649	LE0017	07/15/2006	Felicia Rodriguez
☐	☐	HFG_LE0019	456-82-5649	LE0017	01/02/2006	Felicia Rodriguez

Administer PACT SINQs - Assigned SINQs page

- Filter by** Select the criterion by which to filter the transactions listed in the Assignment Summary grid. All options use *like* comparison logic, except *Effective Date* (date format) and *Pay Period* (numeric format).
- Refresh** Click this button after selecting a filter and a comparison value to refresh the list of transactions.
- Purge Worked Entries** Click this button to remove from the grid updated transactions that have the check box selected in the Worked column.
- Override Operator Id** Select this check box to override the current assignment. After you select it, the Operator ID field becomes available for reassignment.
- Name** Click the link in this column to access the HR Processing component, Data Control page for that employee.

Reviewing Import Errors

Access the Administer PACT SINQs - Import Errors page.

Assigned SINQs
Import Errors
Unprocessed Transactions

Run Date: 08/28/2009

Errors Summary

Total Count: 4

Purge Import Errors

Import File Errors
Customize | Find | View All |

First 1-4 of 4 Last

Row Nbr	SSN	Effective Date	NOA Code	Pay Period Nbr	POI	Error Code	Import Error Message
5	641-45-6821	09/03/2004		12	1598	021	Invalid PAR effective date for employee on SINQ file.
6	526-49-8561	03/07/2004		12	1598	021	Last Operator ID not assigned to selected SINQ User Role.
7	564-95-6243	08/15/2004		12	1598	021	Invalid PAR effective date for employee on SINQ file.
9	456-09-9098	12/21/2005		9	1597	110	Invalid SSN on SINQ Import File.

Administer PACT SINQs - Import Errors page

Purge Import Errors Click this button to purge PACT error transactions from the import process.

Reviewing Unprocessed Transactions

Access the Unprocessed Transactions page.

Assigned SINQs

Import Errors

Unprocessed Transactions

Run Date: 08/28/2009

Transactions Summary

Total Count: 2

Purge Unprocessed Trxs

Import Unprocessed SINQs

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

Row Nbr	Document Type	SSN	Effective Date	NOA Code	POI	Pay Period Nbr	Error Code	Error Message
8	067	564-95-6243	08/15/2004		1598	12	021	Document type not supported by NFC SINQ Import Process.
10	095	456-09-9098	12/21/2005		1597	9	110	Document type not supported by NFC SINQ Import Process.

Unprocessed Transactions page

Purge Unprocessed Trxs Click this button to purge PACT unprocessed transactions from the import (purge unprocessed process. transactions)

See [Chapter 21, "\(USF\) National Finance Center Processing," Understanding the Process Flow for SINQ Transactions, page 898.](#)

Administering PMSO SINQs

Access the Administer PMSO SINQs - Assigned SINQs page (Workforce Administration, Collective Processes, NFC Import Process USF, Administer PMSO SINQs, Assigned SINQs).

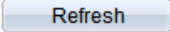
Assigned SINQs **Import Errors**

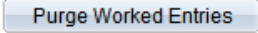
Run Date: 08/28/2009

Assignment Summary

Total Count: 3

*Filter by: All 

 Refresh

 Purge Worked Entries

PMSO SINQ Detail Customize | Find | View All |  First 1-3 of 3 Last

Summary **Details** 

Worked	Override Operator Id	Operator Id	Action Type	Effective Date	Job Code	Position Number
☐	☐	HFG_LE0019	INDV	01/01/1980	101046	LEP00104
☐	☐	HFG_LE0019	INDV	01/01/1980	101046	LEP00104
☐	☐	HFG_LE0019	MSTR	01/20/2006	LEJ011	00008151

Administer PMSO SINQs - Assigned SINQs page

For rows with an Action Type *INDV* and a link in the Position Number column, click the link to open the *JOB_CODE_TBL* component pages for that row.

For rows with an Action Type *MSTR* and a link in the Job Code column, click the link to open the *POSITION_DATA* component pages for that row.

- Filter by** Select the criterion by which to filter the transactions listed in the Assignment Summary grid. All options use *like* comparison logic, except *Pay Period* (numeric format).
- Refresh** Click this button after selecting a filter and a comparison value to refresh the list of transactions.
- Purge Worked Entries** Click this button to remove from the grid updated transactions that have the check box selected in the Worked column.
- Override Operator Id** Select this check box to override the current assignment. After you select it, the Operator ID field becomes available for reassignment.
- Job Code** Click the link in this column to access the Job Code Table component for that job code.
- Position Number** Click the link in this column to access the Position Data component for that position number.

Reviewing Import Errors

Access the Administer PMSO SINQs - Import Errors page.

Assigned SINQs

Import Errors

Run Date:08/28/2009

Errors Summary

Total Count:5

Purge Import Errors

Import File Errors

Customize | Find | View All | First 1-5 of 5 Last

Row Nbr	Action Type	Job Code	Position Number	Function Code	Grade	POI	NFC Operator Cd	Error Code	Import Error Message
1	INDV	100687	LEP00051	CHANGE	12	1599	106445Z	083	Last Operator ID not assigned to selected SINQ User Role.
4	INDV	040028	00008695	CHANGE	11	1599	106445Z	083	Invalid Position Number on SINQ Import file.
6	MSTR	LEJ007	00008151	CHANGE	10	1599	106445Z	083	Last Operator ID not assigned to selected SINQ User Role.
7	MSTR	FJC033	00008151	CHANGE	10	1599	106445Z	083	Last Operator ID not assigned to selected SINQ User Role.
8	MSTR	FAC034	00008151	CHANGE	10	1599	106445Z	083	Invalid Job Code on SINQ Import file.

Administer PMSO SINQs - Import Errors page

Purge Import Errors Click this button to purge PMSO error transactions from the import process.

See Chapter 21, "(USF) National Finance Center Processing," Understanding the Process Flow for SINQ Transactions, page 898.

Chapter 22

Implementing the Oracle Workforce Administration for PeopleSoft Human Resources Partial Process Integration Pack

This chapter provides an overview of the Oracle Workforce Administration Integration Pack for PeopleSoft Human Resources Application Integration Architecture (AIA), and discusses how to:

- Activate integrations.
- Publish the data.
- Launch the integration service.
- Populate the domain value maps.

Understanding the Workforce Administration for PeopleSoft Human Resources Integration

Oracle provides a partial Process Integration Pack (PIP) that publishes reference data information through the Application Integration Architecture (AIA) layer and sends PeopleSoft HR person, worker, and talent profile entries through AIA to a staging table in PeopleSoft. From there, your organization can build your own integrations to desired target systems.

As part of the Workforce Administration for PeopleSoft HR partial integration pack, PeopleSoft delivers the following:

- New services for synchronization and validation of reference data for use from PeopleSoft HR to the target system.
- Domain Value Maps (DVMs) within PeopleSoft Enterprise Components to define and transform common values for control data between PeopleSoft and the target system

These services are provided to publish data for load and synchronization for the process integration between PeopleSoft HR and the target system:

- Full synchronization for initial loading of person, worker, and talent profile data
- Incremental synchronization and update of person, worker, and talent profile data

Note. Changes that are delivered for the Oracle Workforce Administration Integration Pack for PeopleSoft Human Resources Application Integration Architecture (AIA) are posted on My Oracle Support website (<http://metalink.oracle.com>).

Prerequisites

To activate services and publish data for the integration between Workforce Administration for PeopleSoft HR and the target system:

- Confirm that all DVMs, both PeopleSoft and Application Integration Architecture (AIA) DVMs, are populated
- Read and become familiar with information in *Oracle Workforce Administration Integration Pack for PeopleSoft Human Resources 3.1 Implementation Guide*.

See Also

Enterprise PeopleTools PeopleBook, Integration Broker, "Using the Service Operations Monitor."

Enterprise PeopleTools PeopleBook: Integration Broker, "Managing Integration Gateways."

Activating Integrations

To activate the Workforce Administration for PeopleSoft HR process integration, you must complete specific setup tasks and activate the gateways and service operations that are specific to the Workforce Administration for PeopleSoft HR process integration.

The tables in this section list the setup tasks to accomplish and the gateways and service operations to activate.

Setup Tasks

This table lists tasks for activating integrations in your database. You should perform these setup tasks on both the publishing and subscribing databases, unless stated otherwise.

Setup Task	Navigation
Set up and configure Integration Broker Gateway. Multiple steps are required to set up the gateway. Refer to <i>Enterprise PeopleTools PeopleBook: Integration Broker, "Managing Integration Gateways"</i> for details.	PeopleTools, Integration Broker, Configuration, Gateways
Activate node definitions.	PeopleTools, Integration Broker, Integration Setup, Nodes

Setup Task	Navigation
Activate service operations. - Review Service Operation Security - Select active for Handler Status and Routings	PeopleTools, Integration Broker, Integration Setup, Service Operations
Provide web service.	PeopleTools, Integration Broker, Web Services, Provide Web Service

Sync Messages

This table lists the gateways and service operations to activate for sync messages:

Service Operation/ Description	Queue	Operation Type	Application Engine Transform Program Names
Person Documentation ABM	PERSON_DATA	Sync	PER_VISA_XF
Person Basic ABM	PERSON_DATA	Sync	PERSON_BASE_XF
Person Diversity ABM	PERSON_DATA	Sync	PER_DIV_XF
Dependent Beneficiary ABM	BENEFIT_DATA	Sync	DEPBEN_SY_XF
Worker ABM	PERSON_DATA	Sync	WORKER_SY_XF
Talent Profile Instance Qualifier ABM	JPM_DATA	Sync	JPM_TP_IQ_XF
Talent Profile Content Type ABM	JPM_DATA	Sync	JPM_CT_XF
Talent Profile Content Item ABM	JPM_DATA	Sync	JPM_TP_CI_XF
Talent Profile Type ABM	JPM_DATA	Sync	JPM_TP_T_XF
Talent Profile ABM	JPM_DATA	Sync	JPM_JP_XF

Full Sync Messages

This table lists the gateways and service operations to activate for full sync messages:

Service Operation/ Description	Queue	Operation Type	Application Engine Transform Program Names
Person Documentation ABM	PERSON_DATA	Full Sync	PER_VISA_XF
Person Basic ABM	PERSON_DATA	Full Sync	PERSON_BASE_XF
Person Diversity ABM	PERSON_DATA	Full Sync	PER_DIV_XF
Dependent Beneficiary ABM	BENEFIT_DATA	Full Sync	DEPBEN_SY_XF
Worker ABM	JPM_DATA	Full Sync	WORKER_SY_XF
Talent Profile Instance Qualifier ABM	JPM_DATA	Full Sync	JPM_TP_IQ__XF
Talent Profile Content Type ABM	JPM_DATA	Full Sync	JPM_CT_XF
Talent Profile Content Item ABM	JPM_DATA	Full Sync	JPM_TP_CI_XF
Talent Profile Type ABM	JPM_DATA	Full Sync	JPM_TP_T_XF
Talent Profile ABM	JPM_DATA	Full Sync	JPM_JP_XF

Steps to Activate Integration Broker Gateways

To activate Integration Broker gateways, complete the following steps:

1. Ping the local gateway (PeopleTools, Integration Broker, Configuration, Gateways) to ensure it is running, the connectors are loaded, and that the status is *Active*.
2. Click the Gateway Setup Properties link on the Gateways page, and ensure that the default local node, usually the database name, has an entry on the PeopleSoft Node Configuration page.
3. Ensure that the default local node, usually the database name, is appended to the Target Location URL at the service configuration (PeopleTools, Integration Broker, Configuration, Service Configuration).
4. Verify that the Domain and its IB dispatchers are running (PeopleTools, Integration Broker, Service Operations Monitor, Administration, Domain Status).
5. Activate node definitions (PeopleTools, Integration Broker, Integration Setup, Nodes).

See *Enterprise PeopleTools PeopleBook: Integration Broker, "Managing Integration Gateways."*

Steps to Activate Service Operations

To activate service operations, complete the following steps:

1. Access the service operations that are listed for this integration (PeopleTools, Integration Broker, Integration Setup, Service Operations).
2. Review service operation security by clicking the Service Operation Security link and select *Active* for General, Handler Status and Routings.

Steps to Activate Delivered Outbound Routings

To activate delivered outbound routings (activate routings that include external alias and transform properties), complete these steps:

1. Access the Routings page (PeopleTools, Integration Broker, Integration Setup, Service Operations, Routings).
2. From the Routings tab, select the Selected check box for the outbound routing whose Receiver Node is *PSFT_XOUTBND*, and click the Activate Selected Routings button.
3. Click the routing name to access the Routing Definitions page. Confirm that the Sender Node on this page is the default local node name and the Receiver Node is the AIA node *PSFT_XOUTBND*.
4. Click the Connector Properties page and replace the *<id:port>* within the PRIMARYURL by the FMW server host name and port number.
5. After the PSFT resolutions are applied, recycle both the PSFT App Server and the PSFT Process Scheduler (Stop/Clear Cache/Start). Recycling these ensures that all of the new IB objects in the resolutions will work correctly.

See *Enterprise PeopleTools PeopleBook, Integration Broker, "Using the Service Operations Monitor."*

See *Enterprise PeopleTools PeopleBook, Integration Broker, "Providing Services."*

Publishing Data

After you initiate the integration, you must publish the data and launch the integration services. This section discusses how to:

- Publish initial setup (fullsync) data.
- Publish incremental setup (sync) data.

Publishing Initial Setup (FullSync) Data

Full sync set up is typically a one-time setup activity using service operations with the *_FULLSYNC* suffix.

Use the Full Table Publish utility to publish the entire setup table. The subscribing database erases its setup table and synchronizes itself by supplying and populating data from the service operation.

Make sure that you have activated the full publish rules before you run this process.

Publishing Incremental Setup (Sync) Data

Incremental sync changes use service operations with a `_SYNC` suffix, which are associated with setup pages. When you make changes to corresponding setup data, such as names and addresses, a service operation is published automatically when you save the page.

Launching the Integration Services

Making updates to the pages listed in this section or running their associated processes, triggers services for the integration with Workforce Administration for PeopleSoft HR.

Pages that Launch the Integration Services

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Full Data Publish	EO_FULLDATAPUB	Enterprise Components, Integration Definitions, Initiate Processes, Full Data Publish	Run this process for initial (full) all-date publishing and synchronization of reference data between PeopleSoft and Financials Accounting Hub.
Effective Date Pub	EO_EFFDATAPUB	Enterprise Components, Integration Definitions, Initiate Processes, Effective Date Publish	Run this process for incremental effective-date publishing and synchronization of reference data between PeopleSoft and Financials Accounting Hub.
Application Engine Request	AE_REQUEST	PeopleTools, Application Engine, Request AE	Run the GL_FSAH_APFS Application Engine program to publish the initial open period statuses to Financials Accounting Hub at implementation.

Populating the Domain Value Maps

This section provides an overview of domain value maps (DMVs) and discusses how to populate the DVMs.:

Understanding the DVMs

A DVM is a standard feature of Oracle's Service Oriented Architecture (SOA) Suite. DVMs are XML files that contain the mapping between related information in the participating applications. The Application Integration Architecture (AIA) DVMs are maintained in the AIA layer and are used to transform the messages from one system to the expected format of the other system. PeopleSoft maintains DVMs in addition to the DVMs that are stored within AIA. The AIA DVMs and their corresponding PeopleSoft DVMs should be maintained in both systems.

The PeopleSoft ABCS does not reference the AIA domain value maps (DVMs) at runtime.

The transformation within PeopleSoft Integration Broker populates the EBM with AIA Common values using the PeopleSoft Application Integration Framework for DVMs domain value map (DVM) framework, and passes the common values in the Sync<data type>ListEBM.

PeopleSoft DVM values are provided in the AIA DVM to help the end user understand the context for populating DVM data for each participating system requiring DVM translation in their ABCS. The values in the AIA DVM for PeopleSoft are not used by the integration. The ABCS of each participating system requiring DVM translation can use the AIA DVM data to translate to values specific to that system.

Update the PeopleSoft DVMs prior to running any initial loads or initiating any incremental setup or transactional flows.

The PeopleSoft DVMs must be populated, maintained, and synchronized with their corresponding AIA DVM.

It is important to remember that any AIA DVM with a corresponding PeopleSoft DVM must be maintained in both PeopleSoft and in AIA. The AIA DVMs map the data in the third-party target system column to the COMMON column, and the PeopleSoft DVMs map the COMMON column to the PSFT_01 column. The PeopleSoft values within the AIA DVMs are provided as reference only for those DVMs with a corresponding PeopleSoft DVM.

Pages Used to Create and Maintain the DVMs

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Populate Domain Value Maps	EOTF_POPULATE_DVMS	Enterprise Components, Integration Definitions, Transformation Framework, Populate Domain Value Maps	Populate the DVMs for the Workforce Administration for PeopleSoft HR integration. Make sure that all values are included and that the common values assigned agree to those that are in the corresponding AIA DVM.
Define Value Maps	EOTF_DEFINE_MAPS	Enterprise Components, Integration Definitions, Transformation Framework, Define Value Maps	Define any new DVMs, if needed.

See Also

Enterprise Components: Application Integration Framework Documentation Update, Defining and Populating Value Maps.

Populating the DVMs

Access the Populate Domain Value Maps page (Enterprise Components, Integration Definitions, Transformation Framework, Populate Domain Value Maps):

Populate Domain Value Maps

Map Name: CountryCodeDVM

Description: Country Codes

Assign Data to Value Maps

Customize | Find | View 100 | First 1-25 of 238 Last

	COUNTRY	COMMON		
1	USA	USA	+	-
2	CAN	Canada	+	-
3	ABW	Aruba	+	-
4	AFG	Afghanistan	+	-
5	AGO	Angola	+	-
6	AIA	Anguilla	+	-
7	ALB	Albania	+	-
8	AND	Andorra	+	-
9	ANT	Netherlands Antilles	+	-
10	ARE	United Arab Emirates	+	-

Populate Domain Value Maps

Access all of the PeopleSoft DVMS that are used in the Workforce Administration for PeopleSoft HR integration. Populate or verify that all values are included and that the COMMON values are the same as those in the corresponding AIA DVMS.

To access and update the corresponding AIA DVMS, log into Oracle Enterprise Manager - ESB Control and click the Maps icon.

See For a list of the PeopleSoft DVMS and their AIA DVM counterparts that are delivered for use with each Workforce Administration for PeopleSoft HR integration scenario: *Oracle Workforce Administration Integration Pack for PeopleSoft Human Resources 3.1 Implementation Guide, "Integration Scenarios"*

See *Oracle Workforce Administration Integration Pack for PeopleSoft Human Resources 3.1 Implementation Guide, "Populating the PeopleSoft Domain Value Map (DVMs)"*.

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