
PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Labor Administration

November 2010

Copyright © 1988, 2010, Oracle and/or its affiliates. All rights reserved.

Trademark Notice

Oracle is a registered trademark of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

License Restrictions Warranty/Consequential Damages Disclaimer

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

Warranty Disclaimer

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

Restricted Rights Notice

If this software or related documentation is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS

Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, duplication, disclosure, modification, and adaptation shall be subject to the restrictions and license terms set forth in the applicable Government contract, and, to the extent applicable by the terms of the Government contract, the additional rights set forth in FAR 52.227-19, Commercial Computer Software License (December 2007). Oracle USA, Inc., 500 Oracle Parkway, Redwood City, CA 94065.

Hazardous Applications Notice

This software is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications which may create a risk of personal injury. If you use this software in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy and other measures to ensure the safe use of this software. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software in dangerous applications.

Third Party Content, Products, and Services Disclaimer

This software and documentation may provide access to or information on content, products and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third party content, products and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third party content, products or services.

Contents

Preface

PeopleSoft Enterprise Human Resources: Manage Labor Administration Preface	ix
PeopleSoft Products	ix
PeopleSoft Enterprise HRMS Application Fundamentals	ix
PeopleBooks and the PeopleSoft Online Library	ix

Chapter 1

Getting Started with Manage Labor Administration	1
Understanding Manage Labor Administration	1
Manage Labor Administration Business Processes	1
Manage Labor Administration Integrations	2
Manage Labor Administration Business Process Implementation	2

Chapter 2

Navigating in Manage Labor Administration	5
Navigating in Manage Labor Administration	5
Pages Used to Navigate in Manage Labor Administration	5

Chapter 3

Setting Up Unions	9
Common Elements Used in This Chapter	9
Setting Up Bargaining Units	10
Pages Used to Set Up Bargaining Units	10
Entering Bargaining Unit Details	11
Entering Contact Information	11
(USF) Entering Contract and Partnership Dates	12
Setting Up Unions	13
Understanding Union Data Setup	14
Pages Used to Set Up Union Data	14
Entering General Union Details	14

Entering Information on Union Contract Benefit Terms	16
Entering Additional Contract Terms	18
(USF) Setting Up Unions	19
Pages Used to Set Up U.S. Federal Government Union and Contract Information	19
Setting Up General Union Details	20
Entering Country	21
Entering Union Contact and Contract Information	22
Entering Additional Contact Information	23
Entering Union Partnership and Steward Data	24
Entering Additional Agreement Information	24
Recording Allowable Earnings Codes for Union Members	25

Chapter 4

Setting Up Labor Administration Data	27
Defining Seniority Dates	27
Understanding Seniority Dates	27
Pages Used to Set Up Seniority Dates	28
Setting Up Seniority Dates	29
Setting Up Tie Breakers	30
Setting Up Layoff and Recall Control Tables	30
Understanding Recall Rights	31
Pages Used to Set Up Layoff and Recall Control Tables	31
Setting Up Recall Expiration Rules	32
Setting Up Employee Roster Statuses	34
Setting Up Labor Agreement Control Tables	35
Pages Used to Set Up Labor Agreement Control Tables	35
Defining Labor Agreements	35
Pages Used to Define Labor Agreements	36
Defining General Labor Agreement Terms	37
Assigning Job Codes to Labor Agreements	40
Assigning Seniority Rules and Tie Breakers	43
Assigning Facilities	45
Defining Labor Agreement Categories	45
Cloning Labor Agreements	48
Setting Up Labor Administration Disciplinary, Grievance, and Resolution Classifications	49
Pages Used to Set Up Labor Administration Classifications	50
Defining Disciplinary Steps	51
(USF) Defining Disciplinary Steps	52
Defining Disciplinary Types	52
(USF) Defining the First Penalty Matrix for Indicating the Offense Level Penalties	52
(USF) Defining the Recommended Disciplinary Actions for Each Offense Level and Type	53

Chapter 5

Setting Up Works Councils	55
Setting Up Works Councils	55
Understanding the Works Councils Business Process	55
Pages Used to Set Up Works Councils	56
Defining Works Councils	56
Defining Job Changes per Regulatory Region	58
(DEU) Setting Up German Works Councils Business Process	59
Pages Used to Define German Labor Administration Codes	60

Chapter 6

Managing Layoffs and Recalls	61
Common Elements Used in this Chapter	61
Defining Groups of Workers to Layoff or Recall	65
Pages Used to Define Groups	65
Defining Groups	66
Reviewing Group Members	68
Maintaining Group Security	69
Managing Layoffs	70
Pages Used to Manage Layoffs	71
Setting Up the Layoff Roster	71
Maintaining the Layoff Candidate List	73
Running the Layoff Process	74
Managing Recall Rights	77
Pages Used to Manage Recall Rights	77
Processing Recall Rights	77
Maintaining Recall Rights	78
Managing Recalls and Reinstatements	80
Understanding Reinstatements and Recalls	80
Pages Used to Manage Recalls and Reinstatements	80
Setting Up a Recall Roster	81
Maintaining a Recall Candidate List	82
Setting Up a Reinstatement Roster	84
Maintaining a Reinstatement Roster List	84
Processing Recalls and Reinstatements	85
Processing Layoffs and Recalls Using PeopleSoft Mass Update	87
Running Layoff and Recall Reports	88
Pages Used to Run Layoff and Recall Reports	89
Running the Layoff Roster Report	89

Running the Bumping Report 90
 Running the Seniority Report 91

Chapter 7

Managing Wage Progression 93
 Understanding Wage Progression 93
 Wage Progression Business Process 93
 Setting Up Wage Progression Run IDs 95
 Understanding Wage Progression Run IDs 95
 Page Used to Set Up Wage Progression Run IDs 95
 Setting Up Wage Progression IDs 95
 Extracting Information from PeopleSoft Enterprise Payroll for North America 97
 Understanding the Extract Payroll Data Process 97
 Pages Used to Extract Time Information 98
 Maintaining Worker Wage Progression Information 98
 Understanding the Update Wage Progression Process 98
 Pages Used to Maintain Worker Wage Progression Information 102
 Updating Wage Progression Details Systematically 104
 Reviewing and Manually Adjusting Wage Progression Details 105
 Reviewing Time Details 112
 Viewing and Acknowledging Exception Conditions 112
 Approving and Processing Wage Advancements 113
 Understanding the Process Wage Progression Process 113
 Pages Used to Approve and Processing Wage Advancements 114
 Approving Workers for Advancement 114
 Processing Wage Progression 115

Chapter 8

Tracking Disciplinary Actions and Grievances 117
 Tracking Disciplinary Actions 117
 Pages Used to Track Disciplinary Actions 117
 Entering Disciplinary Incidents 118
 Documenting Disciplinary Action Details 119
 Recording Incident Resolutions 120
 (USF) Tracking Disciplinary Actions 120
 Pages Used to Track Disciplinary Actions 121
 (USF) Describing Disciplinary Offenses 121
 Recording Related Disciplinary Actions 123
 Entering Disciplinary Events to Support Disciplinary Actions 123
 Tracking Grievances 124

Pages Used to Track Grievances	125
Entering New Grievances	125
Tracking Steps in the Grievance Process	127
Recording Grievance Resolutions	129
(USF) Entering Union Negotiability Appeals	129
Page Used to Enter Union Negotiability Appeals	130
Tracking Union Negotiability Appeals	130

Chapter 9

Requesting Works Councils Approval	131
Understanding the Works Councils Approval Business Process	131
Prerequisites	132
Entering a Job Change Request	133
Understanding the Job Change Request Process	133
Pages Used to Enter Job Change Requests	137
Entering Job Change Request Details for Hiring	138
Entering Job Change Request Details for Termination	139
Entering Job Change Request Details for Transfer	140
Submitting a Job Change Request	141
Viewing the Job Change Request Status	149
Approving Job Change Requests	149

Index	151
--------------------	------------

PeopleSoft Enterprise Human Resources: Manage Labor Administration Preface

This preface discusses:

- PeopleSoft products.
- PeopleSoft Enterprise HRMS Application Fundamentals.

PeopleSoft Products

This PeopleBook refers to the following PeopleSoft product: PeopleSoft Enterprise Human Resources: Manage Labor Administration.

PeopleSoft Enterprise HRMS Application Fundamentals

Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

Note. One or more pages in the PeopleSoft Enterprise HRMS operate in deferred processing mode. Deferred processing is described in the preface in the *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*.

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 Manage Labor Administration

This chapter provides an overview of Manage Labor Administration and discusses Manage Labor Administration:

- Business processes.
- Integrations.
- Implementation information.

Understanding Manage Labor Administration

In many countries, some, or maybe all, of your workers are organized under collective labor agreements. This makes labor management a critical element of legally employing your workforce.

Manage Labor Administration enables you to enter and track labor-related information for each worker. You can sort workers by seniority, manage layoffs and recalls, advance workers through wage progression, track disciplinary actions, and track grievances.

Manage Labor Administration Business Processes

Manage Labor Administration enables you to enter and track labor-related information for each worker in your organization. You can layoff or recall groups of workers, manage automatic wage progression in accordance with labor agreements, track disciplinary actions your organization takes against workers, as well as grievances filed by one or several people, including workers, applicants, and unions on behalf of several union members.

Manage Labor Administration provides these business processes:

- Manage labor agreements.
- Manage union data.
- Manage layoffs and recalls.
- Manage wage progression.
- Track disciplinary actions and grievances.

- Requesting works councils approval.

See [Chapter 4, "Setting Up Labor Administration Data," Defining Labor Agreements, page 35.](#)

See [Chapter 3, "Setting Up Unions," Setting Up Unions, page 13.](#)

See [Chapter 6, "Managing Layoffs and Recalls," page 61.](#)

See [Chapter 7, "Managing Wage Progression," page 93.](#)

See [Chapter 8, "Tracking Disciplinary Actions and Grievances," page 117.](#)

See [Chapter 9, "Requesting Works Councils Approval," page 131.](#)

Manage Labor Administration Integrations

Manage Labor Administration integrates with these PeopleSoft applications:

- PeopleSoft Enterprise Human Resources: Administer Workforce.
- PeopleSoft Enterprise Human Resources: Manage Base Compensation and Budgeting.
- PeopleSoft Enterprise Payroll for North America.

Manage Labor Administration Business Process 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.

Manage Labor Administration also provides component interfaces to help you load data from your existing system into Manage Labor Administration. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

Component	Component Interface	References
Disciplinary Step Table (DISCIP_STEP_TABLE)	DISCIP_STEP_TABLE	See Chapter 4, "Setting Up Labor Administration Data," Setting Up Labor Administration Disciplinary, Grievance, and Resolution Classifications, page 49.
Grievance Step Table (GRIEV_STEP_TABLE)	GRIEV_STEP_TABLE	See Chapter 4, "Setting Up Labor Administration Data," Setting Up Labor Administration Disciplinary, Grievance, and Resolution Classifications, page 49.

In the planning phases of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides and table-loading sequences. A complete list of these resources appears in the preface in the *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, with information about where to find the most current version of each.

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

Navigating in Manage Labor Administration

This chapter discusses how to navigate in Manage Labor Administration.

Navigating in Manage Labor Administration

Manage Labor Administration provides a custom navigation page that contains groupings of folders that support a specific business process, task, or user role. This section describes a page intended for union workforce management.

Note. In addition to the Manage Labor Administration custom navigation pages, PeopleSoft provides menu navigation, standard navigation pages, and PeopleSoft Navigator.

See Also

Enterprise PeopleTools PeopleBook: Using PeopleSoft Applications

Pages Used to Navigate in Manage Labor Administration

This table lists the custom navigation pages that are used to navigate in Manage Labor Administration.

Page Name	Navigation	Usage
Seniority	Workforce Administration, Labor Administration, Union Workforce Mgmt Centre, Seniority	Access the: <ul style="list-style-type: none">• Job Data component• Seniority Dates component• Seniority Report component• Tie Breakers component

Page Name	Navigation	Usage
Labor Agreement	Workforce Administration, Labor Administration, Union Workforce Mgmt Centre, Labor Agreement	Access the: <ul style="list-style-type: none"> • Labor Agreement component • Employment Categorization component • Labor Job Classes component • Labor Facilities component • Bargaining Unit component • Unions component
Wage Progression	Workforce Administration, Labor Administration, Union Workforce Mgmt Centre, Wage Progression	Access the: <ul style="list-style-type: none"> • Review Wage Progression component. • Update Wage Progression component. • Approve Employees to Advance component. • Wage Progression Exception Rpt component. • Process Wage Progression component. • Extract Payroll Data component. • Review Time Details component. • Wage Progression Run ID component. • Define Wage Plans component. • Define Wage Grades component.
Layoffs and Recalls	Workforce Administration, Labor Administration, Union Workforce Mgmt Centre, Layoffs and Recalls	Access the: <ul style="list-style-type: none"> • Layoff Roster component. • Recall Roster component. • Reinstatement Roster component. • Recall Rights component. • Process Recall Rights component.

Page Name	Navigation	Usage
Reports	Click Reports on the Layoffs and Recalls page.	Access the <ul style="list-style-type: none">• Layoff Roster Report• Bumping Report• Seniority Report• Candidate List Report• Recall Roster Report
Set Up	Click Set Up on the Layoffs and Recalls page.	Access the: <ul style="list-style-type: none">• Labor Group Definition component.• Layoff Exemption Reasons component.• Recall Reason component.• Recall Expiration Rules component.• Employee Roster Status component.

Chapter 3

Setting Up Unions

This section discusses how to:

- Set up bargaining units.
- Set up unions.
- (USF) Set up unions.

Common Elements Used in This Chapter

Union Contact Number	The union contact number (the primary contact is number 1).
Contact Name	The union or bargaining unit's contact name.
Union Steward	Enter the name of the person who serves as the liaison between your company and the union.
Life Insurance	Indicate the amount of life insurance the union or bargaining unit offers for its members.
Vacation Plan	Enter the vacation plan that this union offers to its members.
Sick Leave Plan	Enter the sick leave plan that this union offers to its members.
Callback Minimum Hours	Enter the callback minimum hours per day for which bargaining unit members get paid if they are called in to a job.
Partnership Council	Select if this union is a member of a partnership council.
Partnership Council Date	If this union is or will be a member of a partnership council, enter the date this event took or will take place.
Partnership Agreement	Select if this union has entered into a partnership agreement.
Partnership Agreement Date	If this union is or will enter into a partnership agreement, enter the date this event took place or will take place.
Days To Complete	Use for establishing follow-up dates and other suspense items.

Setting Up Bargaining Units

To set up bargaining units use the Bargaining Unit component (BARG_UNIT_TBL) or Bargaining Unit Table USF (GVT_BARG_UNIT_TBL).

This section discusses how to enter bargaining unit details.

Note. Bargaining units have a one to one relationship with labor agreements. You cannot use the same bargaining unit for multiple labor agreements.

Pages Used to Set Up Bargaining Units

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
General Bargaining Unit Data	GVT_BARG_UNIT1	<ul style="list-style-type: none"> Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Unions, Bargaining Unit, General Bargaining Unit Data Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Unions, Bargaining Unit Table USF, General Bargaining Unit Data 	Enter bargaining unit details.
Contact Information	GVT_BARG_UNIT2	<ul style="list-style-type: none"> Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Unions, Bargaining Unit, Contact Information Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Unions/Unions, Bargaining Unit Table USF, Contact Information 	Enter union contact information.

Page Name	Definition Name	Navigation	Usage
Contract/Partnership Data	GVT_BARG_UNIT3	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Unions, Bargaining Unit Table USF, Contract/Partnership Data	Define contract and partnership information for a bargaining unit.

Entering Bargaining Unit Details

Access the General Bargaining Unit Data page (Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Unions, Bargaining Unit, General Bargaining Unit Data).

The screenshot displays the 'General Bargaining Unit Data' page with the 'Contact Information' tab selected. The page shows details for bargaining unit 0055, including an effective date of 01/01/1980, a status of 'Active', and a date union recognized of 01/01/1980. The description is 'Natl Assoc of Govt Employees' and the short description is 'NAGE'. The address section shows the country as USA (United States) and the address as 16222 West Alexandria Street, Suite 17, Mechanicsburg, OH, Wyandotte. There is an 'Edit Address' button next to the address. At the bottom, the phone number is 513/227-0922 and the fax number is 513/225-5564.

General Bargaining Unit Data page

Date Union Recognized Enter the date the union was recognized by your organization.

Entering Contact Information

Access the Contact Information page (Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Unions, Bargaining Unit, Contact Information).

General Bargaining Unit Data		Contact Information	
Bargaining Unit:	0055		
Effective Date	Find View All First 1 of 1 Last		
Effective Date:	01/01/1980	Natl Assoc of Govt Employees	Active + -
Contact Information		Find View All First 1-2 of 2 Last	
*Union Contact Number:	<input type="text" value="0000000001"/>	Primary Phone:	<input type="text" value="513/227-0922"/> + -
*Contact Name:	<input type="text" value="Mr. James Cooper"/>		
*Union Title:	<input type="text" value="Secretary/Treasurer"/>		
Fax Number:	<input type="text" value="513/227-0020"/>	Alternate Phone:	<input type="text" value="513/225-3529"/>
*Union Contact Number:	<input type="text" value="0000000002"/>	Primary Phone:	<input type="text" value="513/227-0922"/> + -
*Contact Name:	<input type="text" value="Ms. Rolanda Barnes"/>		
*Union Title:	<input type="text" value="Vice President"/>		
Fax Number:	<input type="text" value="513/227-0020"/>	Alternate Phone:	<input type="text" value="513/227-3520"/>

Contact Information page

Enter the contact information for this bargaining unit.

(USF) Entering Contract and Partnership Dates

Access the Contract/Partnership Data page (Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Unions, Bargaining Unit Table USF, Contract/Partnership Data).

Contract/Partnership Data page

Contracts

Contract Begin Date and **Contract End Date** Enter the begin and end date for this contract.

Partnership Council and **Partnership Council Date** Select if there is a partnership council and enter the date of the partnership council.

Partnership Agreement and **Partnership Agreement Date** Select if there is a partnership agreement and enter the date of the partnership agreement.

Setting Up Unions

To set up union data use the Unions component (UNION_TABLE).

This section provides an overview and discusses how to:

- Enter general union details.
- Enter information on union contract benefit terms.
- Enter additional contract terms.

Understanding Union Data Setup

If you're administering a workforce, you or others in your company might need information on union workers for collective bargaining agreement negotiations, grievance tracking, or salary step increases. Unions are alternative to labor agreements and do not have as much system processing behind them.

See Also

[Chapter 4, "Setting Up Labor Administration Data," Defining Labor Agreements, page 35](#)

Pages Used to Set Up Union Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Union Location	UNION_TABLE1	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Unions, Unions, Union Location	Enter general details for a union.
Contract Data	UNION_TABLE2	Set Up HRMS, Product Related, Workforce Administration, Labor Administration , Unions, Unions, Contract Data	Enter information on union contract benefit terms.
Union Earnings Distribution	UNION_TABLE3	Set Up HRMS, Product Related, Workforce Administration, Labor Administration , Unions, Unions, Union Earnings Distribution	Enter additional contract terms, such as callback hours and allowable earnings codes.

Entering General Union Details

Access the Union Location page (Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Unions, Unions, Union Location).

Union Location		Contract Data		Union Earnings Distribution	
Union Code:		432			
<div style="border: 1px solid #ccc; padding: 2px;"> Find View All First 1 of 1 Last </div>					
*Effective Date:	<input type="text" value="01/01/1980"/>	*Status:	<input type="text" value="Active"/>		
Short Description:	<input type="text" value="AFGE"/>				
*Description:	<input type="text" value="American Fed of Govt Employees"/>				
	<input checked="" type="checkbox"/> Certified		<input checked="" type="checkbox"/> Local		
	<input type="checkbox"/> Closed Shop	Bargaining Unit:	<input type="text" value="0055"/>		
Country:	<input type="text" value="USA"/> United States				
Address:	200 Constitution Ave N.W. RoomN4522 MailDrop XDG-722 Washington, DC 20012		<input type="button" value="Edit Address"/>		
Phone:	<input type="text" value="202/219-4532"/>				

Union Location page (1 of 2)

<div style="border: 1px solid #ccc; padding: 2px; background-color: #f0f0f0;"> India </div>					
	<input type="checkbox"/> Recognized <input type="checkbox"/> Majority Union <input type="checkbox"/> Registered Union				
Registration Number:	<input type="text"/>	Registration Date:	<input type="text"/>		
Affiliation:	<input type="text"/>				
Email ID:	<input type="text"/>				
Fax Number:	<input type="text"/>				
<div style="border: 1px solid #ccc; padding: 2px; background-color: #f0f0f0;"> Brazil </div>					
Union Type/Category:	<input type="text"/>	Union Code:	<input type="text"/>		
Month - Collective Agreement:	<input type="text"/>	Union CNPJ:	<input type="text"/>		
Day - Collective Agreement:	<input type="text" value="01"/>				

Union Location page (2 of 2)

Certified

Select if the union is certified. Certification means that a labor administration board in the country in question formally recognizes the union as the bargaining unit's exclusive representative. Certification typically occurs after the union wins a vote to form a union. A labor administration board's involvement in certifying the union ensures that all the appropriate laws and regulations have been followed in forming the union.

Closed Shop

Select if the union is a closed shop. This usually means that individuals can't work for a company within the represented worker class unless they agree to pay the equivalent dues to the union.

Local	Select if the union is represented by a local bargaining unit. The system makes the Bargaining Unit field available for entry.
Bargaining Unit	Select the bargaining unit associated with this union. This field is only available when you select the Local check box.
(IND) India	
Recognized	Select if the union is a Recognized Union.
Majority Union	Select if the majority of workers are members of the union.
Registered Union	Select if the union is a trade union registered with the government. If this is selected, then you have to enter data in the Registration Number and Registration Date fields.
(BRA) Brazil	
Union Type/Category	Enter a category, such as Trade or Chemical Sector. This information is used to group unions for reporting purposes.
Union Code	Enter the code that identifies the union in Brazil.
Month - Collective Agreement	Enter the base month of the union category. This month is when you review employees and adjust salaries.
Union CNPJ	Enter the union's CNPJ (<i>Cadastro Nacional de Pessoa Jurídica</i>) ID code.

Entering Information on Union Contract Benefit Terms

Access the Contract Data page (Set Up HRMS, Product Related, Workforce Administration, Labor Administration , Unions, Unions, Contract Data).

Union Location	Contract Data	Union Earnings Distribution
Union Code: 432		
Contract Data		Find View All First 1 of 1 Last
Effective Date:	01/01/1980	Status: Active
Contact Name:	<input type="text"/>	
Union Steward:	<input type="text"/>	
Contract Terms		
Contract Begin Date:	10/10/1980	End Date: <input type="text"/>
<div style="border: 1px solid #ccc; padding: 5px;"> <p> USA</p> <p>Vacation Plan: <input type="text"/> Sick Leave Plan: <input type="text"/></p> <p>*Disability Insurance: <input type="text" value="Not Applicable"/></p> <p>*Life Insurance: <input type="text" value="Not Applicable"/></p> <p>*Tuition Reimbursement Limit: <input type="text" value="None"/></p> </div>		
<div style="border: 1px solid #ccc; padding: 5px;"> <p> Canada</p> <p>Vacation Plan: <input type="text"/> Sick Leave Plan: <input type="text"/></p> <p>*Disability Insurance: <input type="text" value="Not Applicable"/></p> <p>*Life Insurance: <input type="text" value="Not Applicable"/></p> <p>*Tuition Reimbursement Limit: <input type="text" value="None"/></p> </div>		

Contract Data page

Contract Terms

Contract Begin Date and **End Date** Enter the dates that the contract begins and ends.

(CAN) (USA)

Vacation Plan Enter the code for the type of vacation plan administered.

Sick Leave Plan Enter the code for the type of sick leave administered.

Disability Insurance Indicate whether the union provides disability insurance for its members.

Life Insurance Indicate whether the union provides life insurance.

Tuition Reimbursement Limit Indicate whether the union provides tuition reimbursement and at what limit.

Entering Additional Contract Terms

Access the Union Earnings Distribution page (Set Up HRMS, Product Related, Workforce Administration, Labor Administration , Unions, Unions, Union Earnings Distribution).

The screenshot displays the 'Union Earnings Distribution' page. At the top, there are tabs for 'Union Location', 'Contract Data', and 'Union Earnings Distribution'. The 'Union Code' is 432. The 'Contract Data' section shows 'Effective Date: 01/01/1980', 'Contract Begin Date: 10/10/1980', and 'Status: Active'. The 'Contract Terms' section includes fields for 'Callback Minimum Hours' (4.0), 'Factor' (2.0), 'Standard Hours', 'Work Day Hours', 'Band Width Time: From', and 'Core Time: From'. Below this is a 'Payroll for North America' section with a table titled 'Allowable Earnings Codes'. The table has columns for '*Company', '*Pay Group', 'Description', '*Earnings Code', and 'Description'. One row is visible with '*Company' '1 DC', '*Pay Group' 'BWH', 'Description' 'Bwly hrly', '*Earnings Code' 'REG', and 'Description' 'Regular'.

Union Earnings Distribution page

Contract Terms

Callback Minimum Hours Enter the minimum number of hours a worker would be paid for if they are called back to a job.

Factor Enter the rate at which union workers should be paid if they are called back to a job. For example, if the worker should receive the regular rate, enter *1*. If the worker should receive 1.5 times the regular rate, then enter *1.5*.

Payroll for North America

For each company and pay group combination, enter the earnings codes allowable for workers belonging to this union.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up Organization Foundation Tables," Entering Company Information

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

(USF) Setting Up Unions

To set up U.S. Federal Government union and contract information use the Unions USF component (GVT_BU_UNION).

Use the Unions USF to define codes and record data for unions to which agency workers belong. You or others in your agency might need information on union workers for collective bargaining agreement negotiations, grievance tracking, or pay step increases.

This section discusses how to:

- Set up general union details.
- Enter union contact and contract details.
- Enter union partnership and steward data.
- Enter additional agreement information.
- Specify allowable earnings codes for union members.

Pages Used to Set Up U.S. Federal Government Union and Contract Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Union Address	GVT_BU_UNION_TBL1	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Unions, Unions USF, Union Address	Enter general details and address information for a union.
Union Address Information	GVT_BU_UNION_SEC1	Click the Country link on the Union Address page.	Enter the address information for this union.
Contact and Contract Info	GVT_BU_UNION_SEC2	Click the Union Contact / Contract Info link on the Union Address page.	Enter contact and contract details for this bargaining unit. The contact information is specific to the contract.

Page Name	Definition Name	Navigation	Usage
Contact Info	GVT_BU_UNION_TBL2	Set Up HRMS, Product Related, Workforce Administration, Labor Administration , Unions, Unions USF, Contact Info	Enter contact information that is general for all contracts with this union.
Partnership Data/Steward Info	GVT_BU_UNION_TBL3	Set Up HRMS, Product Related, Workforce Administration, Labor Administration , Unions, Unions USF, Partnership Data/Steward Info	Enter partnership and steward data for this bargaining unit.
Union Agreement	GVT_BU_UNION_TBL4	Set Up HRMS, Product Related, Workforce Administration, Labor Administration , Unions, Unions USF, Union Agreement	Enter additional contract terms for this bargaining unit.
Earnings Codes	GVT_BU_UNION_TBL5	Set Up HRMS, Product Related, Workforce Administration, Labor Administration , Unions, Unions USF, Earnings Codes	Enter allowable earnings codes data for bargaining unit members.

Setting Up General Union Details

Access the Union Address page (Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Unions, Unions USF, Union Address).

Union Address	Contact Info	Partnership Data/Steward Info	Union Agreement	Earnings Codes
Bargaining Unit:	0055	Natl Assoc of Govt Employees		
Union Code:	432	American Fed of Govt Employees		
Union Information Find View All First 1 of 1 Last				
*Effective Date:	<input type="text" value="01/01/1980"/>	*Status:	<input type="text" value="Active"/>	<input type="button" value="+"/> <input type="button" value="-"/>
Union Scope:	<input type="text" value="National"/>			
Union Affiliate:	<input type="text" value="AFGE"/>			
LMR Hours:	<input type="text" value="0"/>	Fax Number:	<input type="text"/>	
*Description:	<input type="text" value="American Fed of Govt Employees"/>			
Short Description:	<input type="text" value="AFGE"/>			
Country Union Contact / Contract Info				

Union Address page

Assign union codes to workers on the Job Data - Job Labor page.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Increasing the Workforce," Entering National Labor Agreement Data.

Union Scope	Enter the union scope (local, national, worldwide).
Union Affiliate	Enter the union affiliate type.
LMR Hours (labor management relations hours)	Enter the labor management relations training hours required for union members or other personnel, if you want to track this information.
Country	To enter the union's address information, click this link. The system displays the Union Address Information page.
Union Contact / Contract Info	To enter the bargaining unit's contact and contract information, click this link. The Contact and Contract Info page appears.

Entering Country

Access the Union Address Information page (click the Country link on the Union Address page).

Union Address Information

Union Address Information

Country: United States

Address: 200 Constitution Ave N.W.
RoomN4522
MailDrop XDG-722
Washington, DC 20012 Edit Address

Phone:

Union Address Information page

Select the appropriate country and enter the address information. If the address is already entered, click the Edit Address link to display the Edit Address Information page.

Entering Union Contact and Contract Information

Access the Contact and Contract Info page (click the Union Contact / Contract Info link on the Union Address page).

Contact and Contract Info

Contact Information

Contact Name:

Union Steward:

Contract Information

Contract Begin Date: <input type="text" value="10/10/1980"/>	Contract End Date: <input type="text"/>
*Life Insurance: <input type="text" value="N/A"/> ▼	Retirement Pickup Percent: <input type="text" value="5.00"/>
*Disability Insurance: <input type="text" value="N/A"/> ▼	SDI Administration Percent: <input type="text"/>
*Tuition Limit: <input type="text" value="None"/> ▼	Callback Minimum Hours: <input type="text" value="4.0"/>
Vacation Plan: <input type="text"/>	Callback Factor: <input type="text" value="2.0"/>
Sick Leave Plan: <input type="text"/>	<input type="checkbox"/> FICA Pickup

Contact and Contract Info page

Contact Information

Enter contact information that is specific for the contract.

Contract Information

- Disability Insurance** Specify the amount the disability insurance offered bargaining unit members.
- Retirement Pickup Percent** Enter the retirement pickup percent for bargaining unit members' retirement plan under the contract.
- Tuition Limit** Indicate the maximum amount of tuition provided each bargaining unit member, if any.
- SDI Administration Percent** (state disability insurance administration percent) Enter the percent amount paid to the state disability insurance.
- Callback Factor** Enter the rate at which bargaining unit members should be paid if they are called to a job. For example, if the worker should be paid at the regular rate, enter *1* as the factor. Or if the employee should be paid time and a half, enter *1.5*.

Entering Additional Contact Information

Access the Contact Info page (Set Up HRMS, Product Related, Workforce Administration, Labor Administration , Unions, Unions USF, Contact Info).

The screenshot shows a web application interface with the following elements:

- Navigation tabs: Union Address, Contact Info (selected), Partnership Data/Steward Info, Union Agreement, Earnings Codes.
- Bargaining Unit: 0055 Natl Assoc of Govt Employees
- Union Code: 432 American Fed of Govt Employees
- Effective Date: 01/01/1980 Status: Active
- Contact Information section:
 - *Union Contact Number: 0000890543
 - *Status: Active
 - *Contact Name: Joseph Spazk
 - *Union Title: President
 - Primary Phone: 202/872-4800
 - Alternate Phone: 202/872-4801
 - Fax Number: (empty field)

Contact Info page

Add contact information that is general for the union bargaining unit.

Entering Union Partnership and Steward Data

Access the Partnership Data/Steward Info page (Set Up HRMS, Product Related, Workforce Administration, Labor Administration , Unions, Unions USF, Partnership Data/Steward Info).

Partnership Data/Steward Info page

Partner

Union Type Indicate whether this bargaining unit is part of a private, public, or federal government union.

Date Union Recognized Enter the date the union was recognized by your agency.

Entering Additional Agreement Information

Access the Union Agreement page (Set Up HRMS, Product Related, Workforce Administration, Labor Administration , Unions, Unions USF, Union Agreement).

Union Agreement page

Type highlights of the union agreement in the space provided for bargaining unit/union agreement text. Enter more text than is visible in the group box, if needed. Use the inner scroll bar to navigate to text off of the screen.

Recording Allowable Earnings Codes for Union Members

Access the Earnings Codes page (Set Up HRMS, Product Related, Workforce Administration, Labor Administration , Unions, Unions USF, Earnings Codes).

Earnings Codes page

Note. The information on this page is for information only.

Company Designate the company name.

- Pay Group, Earn Prog** (pay group, earnings program) Select the pay group. When you move out of this field, the system displays the associated earnings program.
- Earnings Code** Select each earnings code that is valid for this union within each pay group.

Chapter 4

Setting Up Labor Administration Data

This chapter lists common elements and discusses how to:

- Define seniority dates.
- Set up layoff and recall control tables.
- Set up labor agreement control tables.
- Define labor agreements.
- Set up Labor Administration disciplinary, grievance, and resolution classifications.

Defining Seniority Dates

To define seniority dates, use the Seniority Dates component (HR_SNR_DATE_TBL) and the Tie Breakers component (HR_TIEBREAK_TBL).

This section provides an overview of seniority dates and discusses how to:

- Set up seniority dates.
- Define tie breakers.

Understanding Seniority Dates

PeopleSoft calculates and displays a number of seniority dates on the Job Data - Employment Data page (EMPLOYMENT_DTA1). These fields are used throughout PeopleSoft Enterprise HRMS for various features (such as Benefits), but, since seniority rules can vary from labor agreement to labor agreement, they are not used for labor administration processing.

Instead, use the Seniority Dates page (HR_SNR_DATE_TBL) to define the seniority dates required to comply the labor agreements in effect at your organization. Associate the seniority dates with labor agreements on the Labor Agreements component (HR_LABOR_AGRMNT). The system displays the seniority dates associated with a person's labor agreement on the Job Data - Job Labor page (JOB_LABOR).

Examples of seniority dates you may want to create are:

- Seniority date for providing workers with employment rights.
- Seniority date providing workers with the ability to exercise preferences such as bidding on shifts and overtime.

You can create seniority date types using existing system dates so that the system will insert the values from the existing fields into the seniority date you create. You can also create seniority dates to update and maintain manually. Maintain the dates for workers on the Job Data - Job Labor page.

Use seniority dates as sort criteria for the:

- Seniority List report
- Candidate List report
- Reinstatement roster
- Layoff roster
- Recall roster

Tie Breakers

In the event that two workers are tied for seniority, you will need to apply a tie breaker that is in accordance with the workers' labor agreement. Define tie breaker types that are based on information in the system, such as birth date or national identification number, on the Tie Breakers page (HR_TIEBREAK_TBL) and associate them with labor agreements on the Labor Agreement component. Use tie breakers as sort criteria for the:

- Seniority List report
- Candidate List report
- Reinstatement roster
- Layoff roster
- Recall roster

Note. For lottery-style tie breakers, where the unions decide the seniority order, you can manually change people's ranking on the roster by changing their rank number accordingly.

Pages Used to Set Up Seniority Dates

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Seniority Dates	HR_SNR_DATE_TBL	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Layoffs and Recalls, Seniority Dates, Seniority Dates	Set up seniority dates to track a worker's seniority for labor administration purposes. You can base the seniority dates on existing system values or create new dates. Attach the dates you create here to labor agreements.

Page Name	Definition Name	Navigation	Usage
Tie Breakers	HR_TIEBREAK_TBL	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Layoffs and Recalls, Tie Breakers, Tie Breakers	Set up different types of ways to break ties between two workers who otherwise have equal seniority.

Setting Up Seniority Dates

Access the Seniority Dates page (Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Layoffs and Recalls, Seniority Dates, Seniority Dates).

Seniority Dates page

Label Enter the label to appear next to this date field on the Job Data - Job Labor page.

Default From Existing Field Select if this field's value defaults from an existing PeopleSoft system field. When you select this check box, the system makes the Record and Field fields available for entry.

Date From Existing Field

Record and Field Select the record and field you want to use.

For example, to create a seniority date called Dept Entry that uses the Department Entry Date value from the Work Location page as a seniority date, select the JOB record and the DEPT_ENTRY_DT field. The system will display the Dept Entry seniority date on the Job Labor Workers page and automatically populate it with the date from the Department Entry Date field on the Work Location.

The system only makes those records and fields displayed on the Seniority Date Fields page available on this page.

Allow Edits Select to make the field available for entry on the Job Labor page, enabling you to override the default value.

Setting Up Tie Breakers

Access the Tie Breakers page (Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Layoffs and Recalls, Tie Breakers, Tie Breakers).

Tie Breakers

Tie Breaker ID: HXDOB

Tie Breakers Find | View All First 1 of 1 Last

*Effective Date: 01/01/2009 *Status: Active

*Description: Date of Birth Short Description: Date of Bi

Date From Existing Field

Record (Table) Name	Field Name
PERSON	BIRTHDATE

Tie Breakers page

Date From Existing Field

Record (Table) Name and Field Name Select the record and field value you want to use as a tie breaker. Only select records are available.

Setting Up Layoff and Recall Control Tables

To set up layoff and recall control tables, use the Layoff Exemption Reasons component (HR_LAY_EXEM_TBL), Recall Expiration Rules component (HR_RCL_EXP_TBL), Employee Roster Status component (HR_LBR_EEST_TBL) and Recall Reason component (HR_RCL_RSN_TBL).

This section discusses how to set up:

- Layoff exemption reasons.
- Recall expiration rules.
- Employee roster statuses.
- Recall reasons.

See Also

[Chapter 6, "Managing Layoffs and Recalls," page 61](#)

Understanding Recall Rights

Workers that have been bumped to a lower level job or workers that were laid off can have rights for vacant positions. Labor agreements specify how long after being bumped or laid off a worker can have rights to reemployment and what circumstances might terminate their recall rights.

For example, workers under labor agreement ABC and who have been with the company for four or more years have first rights on any new vacancies in the organization for twelve months following a layoff while workers who have been with the company for less than four years have recall rights that expire after six months. Recall rights for workers may be terminated in the event that they refuse an offer of reemployment from the company.

Pages Used to Set Up Layoff and Recall Control Tables

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Layoff Exemption Reasons	HR_LAY_EXEM_TBL	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Layoffs and Recalls, Layoff Exemption Reasons, Layoff Exemption Reasons	Create reasons a worker could be exempt from layoff. Attach these reasons to workers on the Job Labor page. The system does not include workers who are exempt from layoffs in the group population when you generate a layoff.
Recall Expiration Rules	HR_RCL_EXP_TBL	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Layoffs and Recalls, Recall Expiration Rules, Recall Expiration Rules	Set up rules to govern the expiration of recall rights. Attach recall expiration rules to a labor agreement.
Employee Roster Status	HR_LBR_EEST_TBL	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Layoffs and Recalls, Employee Roster Status, Employee Roster Status	Define the statuses you need to manage your roster during a layoff or recall. Assign people roster statuses on the Layoff, Recall or Reinstatement Roster List pages.

Page Name	Definition Name	Navigation	Usage
Recall Reason	HR_RCL_RSN_TBL	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Layoffs and Recalls, Recall Reason, Recall Reason	Define reasons for allocating workers with recall rights.

Setting Up Recall Expiration Rules

Access the Recall Expiration Rules page (Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Layoffs and Recalls, Recall Expiration Rules, Recall Expiration Rules).

Recall Expiration Rules

Recall Expiration Rule ID: HXUEXP1

Recall Expiration Rule Find | View All First 1 of 1 Last

*Effective Date: 01/01/2009 *Status: Active

*Description: Job Code Entry Seniority date

Select By: Seniority

Rule Details Find | View All First 1 of 1 Last

Seq Nbr: 1

	If Seniority Date ID HXUJENTRY	Operand >	1	Period Years
	Then Recall Period	=	6	Recall Period Months

Recall Expiration Rules page

Note. The system determines that a recall right has expired when the defined expiry date is less than current system date.

Recall Expiration Rule

Select By

Select one of the following options:

- *Seniority*

Select if the recall expiration date is calculated using seniority as determined by a seniority date.

Note. If a recall expiration rule is based on a seniority date and this date is blank for a person, then the system will not create automatic recall rights for the worker. You will have to enter rights manually on the Recall Rights page (HR_RCL_RIGHTS).

- *Layoff Date*

Select if the recall expiration date is calculated from the layoff date.

- *No Recall*

Select if there is no recall.

Note. You must set up at least one recall expiration rule with no recall because the Recall Expiration Rule field on the Seniority Rules page (HR_LABOR_AGRDEFN3) is a required field. If a labor agreement has no predetermined rules around recall rights processing then attach a No Recall type rule to the labor agreement. When a layoff is processed for workers in covered by a labor agreement with a No Recall rule, the system will not create automatic recall rights those candidates being laid off. The Recall/ Reinstatement process will also not process recall rights for candidates covered by a labor agreement with a No Recall recall expiration rule.

Rule Details for Seniority Based Recall Expiration Rules

Enter multiple Rule Details rows to create different recall expiry periods for different seniority categories.

Seq Nbr	Enter the sequence in which the system should process this rule detail.
Seniority Date ID	Select the ID of the seniority date you want the rule to use to calculate seniority for the purpose of recall for this rule detail line.
Operand	Select the operation symbol.
Period	Enter a number in the preceding field and then select the period of time it refers to. For example, enter <i>1</i> in the preceding field and <i>Years</i> in this field to indicate that the period of seniority is one year.
Recall Period	Enter a number in the preceding field and then select the period of time it refers to. For example, enter <i>6</i> in the preceding field and <i>Months</i> in this field to indicate that recall rights expire after six months for workers with this seniority range.

Rule Details for Layoff Date Based Recall Expiration Rules

Period Enter a number in the preceding field and then select the period of time it refers to. For example, enter *6* in the preceding field and *Months* in this field to indicate that recall rights expire six months after layoff.

Setting Up Employee Roster Statuses

Access the Employee Roster Status page (Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Layoffs and Recalls, Employee Roster Status, Employee Roster Status).

The screenshot shows the 'Employee Roster Status' page. At the top, it says 'Employee Roster Status: K00RECC'. Below that is a header for 'Employee Roster Status History' with navigation links: 'Find | View All | First | 1 of 1 | Last'. The form contains the following fields and options:

- *Effective Date: 01/01/1980
- Status: Active
- *Event Type: Recall
- *Description: Recall/Reinstatement Comple
- Process Event?
- Event Complete?

Employee Roster Status page

Event Type Select whether the status is for a *Layoff* or *Recall* event. *Recall* events also apply to Reinstatements.

Process Event? Select so that when you process the layoff, recall, or reinstatement processes the system will process people with this status and insert a new job data record for the event.

For example, create a status called *Layoff Accepted* and select the Process Event? check box for the status. When you assign *Layoff Accepted* to a person on a layoff roster and then process the layoff, the system will insert a new job data record for the person processing their layoff.

Event Complete? Select if this status indicates the completion of the event on the roster. You should only select this check box for two Employee Roster Statuses: one for an event type of *Layoff* and one for an event type of *Recall*.

When workers are successfully processed using the Layoff (HR_LAY_EXEC) or Recall or Reinstatement processes (HR_REIN_EXEC), the system reads the relevant Event Complete? value from this page and sets all processed workers to this status to prevent them from being reprocessed.

Setting Up Labor Agreement Control Tables

To set up labor agreement control tables use the Labor Job Classes component (HR_LBR_JOB_CLS_TBL) and Labor Facilities component (HR_LBR_FAC_TBL).

Before you can set up labor agreements you need to define labor job classes and labor facilities. This section discusses how to set up:

- Labor job classes.
- Labor facilities.

Pages Used to Set Up Labor Agreement Control Tables

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Labor Job Classes	HR_LBR_JOB_CLS_TBL	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Labor Agreement, Labor Job Classes, Labor Job Classes	Set up job labor classes to use in labor agreements. Labor classes are required to group and rank job codes to create a bumping hierarchy.
Labor Facilities	HR_LBR_FAC_TBL	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Labor Agreement, Labor Facilities, Labor Facilities	Set up labor facilities as required to administer the labor agreement. They are used to identify worker sites. Facilities can be used when defining Layoff or Recall events as well as a selection parameter on the Seniority Report. They are not related to the Work Location values.

Defining Labor Agreements

To define labor agreements use the Labor Agreement component (HR_LABOR_AGRMNT) and Employee Categorization component (EMPL_CTG_L1). To clone an existing labor agreement use the Clone Labor Agreement component (HR_CLONE_LBR_AGRMT).

This section discusses how to:

- Define general labor agreement terms.
- Assign job codes to labor agreements.

- Assign seniority rules and tie breakers.
- Assign facilities to labor agreements.
- Define labor agreement employee categories.
- Clone labor agreements.

Pages Used to Define Labor Agreements

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Labor Agreement	HR_LABOR_AGR_DEFN1	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Labor Agreement, Labor Agreement, Labor Agreement	Define general information about labor agreements.
Job Codes	HR_LABOR_AGR_DEFN2	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Labor Agreement, Labor Agreement, Job Codes	If you want the system to validate the job code assigned to a worker Job Data - Job Information page (JOB_DATA_JOBCODE), enter job codes and associated information here.
Seniority Rules	HR_LABOR_AGR_DEFN3	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Labor Agreement, Labor Agreement, Seniority Rules	If the agreement includes rules regarding seniority, layoffs, and recalls, assign the recall expiration rule, seniority dates and tie breakers.
Facilities	HR_LABOR_AGR_DEFN4	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Labor Agreement, Labor Agreement, Facilities	If you are using facilities to manage layoff and recall events, assign the labor facilities that are tied to this agreement.
Employee Categorization	EMPL_CTG_L1	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Labor Agreement, Employee Categorization, Employee Categorization	If you use tiered pay plans, define labor agreement categories and associate them with labor agreements.

Page Name	Definition Name	Navigation	Usage
Clone Labor Agreement	HR_CLONE_LBR_AGRMT	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Labor Agreement, Clone Labor Agreement	Clone an existing labor agreement.

Defining General Labor Agreement Terms

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

Labor Agreement
Job Codes
Seniority Rules
Facilities

Set ID: USA Labor Agreement: K00001

Labor Agreement

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

Ratify Date: 01/01/1980

Contract Begin Date: 01/01/1980

Contract End Date: 12/31/2010

*Description: Professional Agreement 1980

Bargaining Unit: KU02 American Professional Union

Comments: Agreement made between Professional workers and Management

[Req Regions that use this Labor Agreement](#)

Find | View All First 1 of 1 Last

Agreement includes

Job Codes

Seniority Rules

Facilities

Short Description: Prof 1980

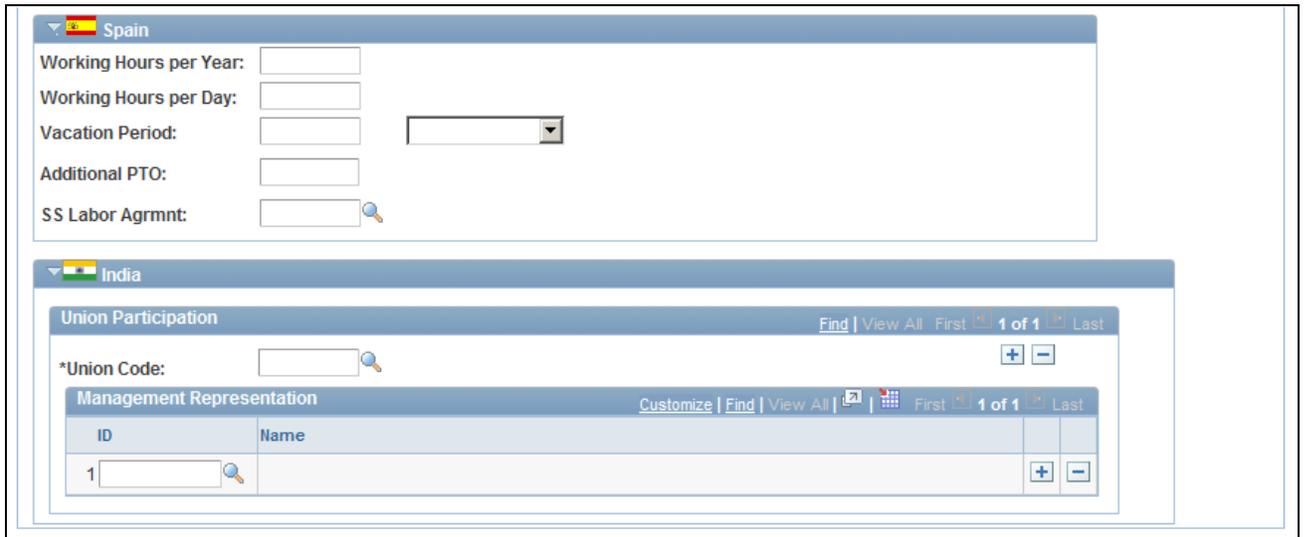
Wage Progression Rules

Carryover Rules apply when an employee's Job Code changes. Check the values that should be retained with a new Job assignment.

- Step ID
- Step Entry Date
- Wage Progression Hours Worked

[Clone Labor Agreement](#)

Labor Agreement page (1 of 2)



Labor Agreement page (2 of 2)

Assign labor agreements to workers on the Job Data - Job Labor page (JOB_LABOR).

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Increasing the Workforce," Entering National Labor Agreement Data.

Click the Reg Regions that use this Labor Agreement to review the regulatory regions that can use this labor agreement. Only workers assigned to one of these regulatory regions can be assigned to this labor agreement. Available regulatory regions are determined by the SetID assigned to the labor agreement.

Effective Date The system will only make labor agreements that are effective as of the Job Data row effective date available on the Job Labor page.

Ratify Date Enter the date the labor agreement was ratified. This field is information only.

Contract Begin Date and Contract End Date Enter the begin and end dates of the labor agreement. The begin date defaults from the Effective Date but can be changed. These fields are for information only.

Bargaining Unit Select the bargaining unit for this agreement.

Note. Bargaining units have a one to one relationship with labor agreements. You cannot assign a bargaining unit to more than one labor agreement.

The system will only display those bargaining units that are not already assigned to another labor agreement in the search window.

Clone Labor Agreement Displays the Clone Labor Agreement page.

See [Chapter 4, "Setting Up Labor Administration Data," Cloning Labor Agreements, page 48.](#)

Agreement Includes

Job Codes	The system selects this check box when you set up information on the Job Codes page. See Chapter 4, "Setting Up Labor Administration Data," Assigning Job Codes to Labor Agreements, page 40.
Seniority Rules	The system selects this check box when you set up information on the Seniority Rules page. See Chapter 4, "Setting Up Labor Administration Data," Assigning Seniority Rules and Tie Breakers, page 43.
Facilities	The system selects this check box when you set up information on the Facilities page. See Chapter 4, "Setting Up Labor Administration Data," Assigning Facilities, page 45.

(CAN) (USA) Wage Progression

Select if any of the following wage progression carry over options apply to the workers covered by this labor agreement when they change job codes in the Job Data pages:

Step ID	Select to have the system carry the worker's salary plan step to their newly assigned job code's pay plan. You can override the default value, if required. Deselect this check box if you want to always manually assign the step with a job code change.
Step Entry Date	Select to have the system carry the worker's salary step entry date to their newly assigned job code's step entry date. You can override the default value, if required. Deselect this check box to have the system insert the effective date of the new Job Data row as the new step entry date.
Wage Progression Hours Worked	Select to have the Update Wage Progression process carry over the worker's time worked towards a wage progression in their new job code. Deselect this check box to have the system reset workers' accumulated time to zero with the new job assignment.

(ESP) Spain

Working Hours per Year	Enter the annual number of working hours as agreed upon by the labor agreement.
Working Hours per Day	Enter the daily number of working hours as agreed upon by the labor agreement.

Vacation Period	Define the vacation period as agreed upon by the labor agreement. You have the option of defining the vacation period in <i>Months</i> , <i>Natrl Days</i> (natural days), <i>Weeks</i> , or <i>Work Days</i> . Natural days are like calendar days. They include weekends and holidays. Work days are like regular working days. They do not include weekends and holidays. For example, let's say that an employee's regular work days are Monday through Friday, and the employee is entitled to 23 work days of vacation, as defined in the employee's labor agreement. The employee can take a vacation from July 1 to July 31, using 23 work days. This is calculated as 4 weeks x 5 work days plus 3 more work days.
Additional PTO (additional paid time off)	Enter the amount of additional PTO (<i>dias moscosos</i>), if it applies to the labor agreement. Depending on the conditions of the labor agreement, an employee may or may not carry an additional PTO balance from one year to the next. Sometimes, if an employee does not use additional PTO within the current year, the employee will lose those days. Other times, it is possible to carry additional PTO balances to the next year.
SS Labor Agrmnt (social security labor agreement)	Select a social security labor agreement.
(IND) India	
Union Code	Select the appropriate Union Code. This is defined in the Unions component.
Management Representation ID	Enter the employee ID of the management representative to the union. This field should not be left empty if a Union Code is entered.

Assigning Job Codes to Labor Agreements

Access the Job Codes page (Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Labor Agreement, Labor Agreement, Job Codes).

[Labor Agreement](#) | [Job Codes](#) | [Seniority Rules](#) | [Facilities](#)

Set ID: USA **Labor Agreement:** K00001

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

Effective Date: 01/01/1980 **Status:** Active [Business Units that use these Job Codes](#)

Job Code Assignment Find | View All | First 1 of 4 Last

Labor Job Class: Clerical Workers + -

Job Codes								Customize Find View All First 1-5 of 6 Last	
Bumping Sequence	Job Code Set ID	Job Code	Description	Employee Category	Salary Set ID	Salary Plan	Grade		
<input type="text" value="1"/>	<input type="text" value="SHARE"/>	<input type="text" value="140035"/>	Analyst-Financial	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="2"/>	<input type="text" value="SHARE"/>	<input type="text" value="170005"/>	Assistant Administrative	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="3"/>	<input type="text" value="SHARE"/>	<input type="text" value="200005"/>	Auditor-General	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="4"/>	<input type="text" value="SHARE"/>	<input type="text" value="290075"/>	Clerk-Payroll	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="5"/>	<input type="text" value="SHARE"/>	<input type="text" value="290055"/>	Clerk-I	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Job Codes page

The system uses the information you enter on this page to:

- Validate the assigned job code with the assigned labor agreement on the Job Data pages.

Select a Labor Job Class and then choose the job codes that fall under that class for this labor agreement.

Note. If you enter job codes for this labor agreement on this page, you can only assign workers in this labor agreement (assigned on the Job Labor page) to one of those job codes. The system will not let you save the Job Data record if the job code is not valid with the labor agreement.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Increasing the Workforce," Adding Organizational Instances for Employees, Contingent Workers, and POIs.

- Rank job codes in this labor agreement to manage bumping rights in the event of a layoff.

Note. The management of bumping rights is a manual process. Use the Bumping report, which provides the details from the Job Code Assignment page as well as a history of a worker's job information, to help you manage bumping.

See Chapter 6, "Managing Layoffs and Recalls," Running the Bumping Report, page 90.

- Assign employee categories to the job codes in this labor agreement to create wage tiers.

- Assign the salary plan and grade you want to assign to people on the Job Data - Salary Plan page (JOB_DATA_SALPLAN).

The system will use these default values for people with this job code and labor agreement combination instead of the default values from the Location (LOCATION_TABLE) or Job Code components (JOB_CODE_TBL).

See [Chapter 7, "Managing Wage Progression,"](#) page 93.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Increasing the Workforce," Entering Salary Plan Information.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Compensation*, "Using Wage Progression with Administer Compensation."

Note. You can take advantage of none, one, or any combination of these features.

Labor Job Class

Select a class of jobs to identify the job codes selected in the Job Codes group box. Use this value to manage layoff bumping hierarchies.

See [Chapter 4, "Setting Up Labor Administration Data,"](#) [Setting Up Labor Agreement Control Tables,](#) page 35.

Add Multiple Job Codes

Click to display the Add by Job Code page. Search for job codes by Job Code Set ID and Job Family and select those job codes you want to add to the Job Codes grid for this Labor Job Class.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up Jobs."

Job Codes

Click the Business Units that use these Job Codes to view the business units that use the job codes you've selected in the Job Codes grid. When you create a Job Data record for a worker covered by this labor agreement, ensure that you select the appropriate business unit to enable you to assign them to one of these job codes.

Bumping Sequence

Enter the job code's position in the bumping sequence. The sequence defines a worker's place in the bumping hierarchy. Bumping is the practice of allowing a worker with more seniority to replace a junior worker in another department or job as long as the senior worker is qualified.

Job Code Set ID and Job Code

Select the Set ID and job code.

Note. You can only add a job code to a labor agreement once for a selected Labor Job Class unless you select an Employee Category as an additional qualifier.

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

- Employee Category** If you are using tiered wage assignment, select the employee category for this job code.
- This enables you to list a job code more than once and to assign different salary plans for different classes of workers. For example, if pilots hired prior to 1990 are on one pay plan while all those hired later are on another, create two employee categories to distinguish between these two groups on the Employee Categorization page. Enter two rows with the pilot job code, assign one the pre-1990 employee category and the other the post-1990 category and then assign the appropriate salary plan for each row.
- See [Chapter 4, "Setting Up Labor Administration Data," Defining Labor Agreement Categories, page 45.](#)
- Salary Set ID, Salary Plan, and Grade** Select a salary plan (with Set ID) and grade to associate with this job code and labor agreement.
- The system will assign this salary plan and grade on the Job Data - Salary Plan page when you assign a worker to this job labor agreement and job code.
- See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Increasing the Workforce," Entering Salary Plan Information.
- See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Compensation*, "Using Wage Progression with Administer Compensation."

Assigning Seniority Rules and Tie Breakers

Access the Seniority Rules page (Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Labor Agreement, Labor Agreement, Seniority Rules).

[Labor Agreement](#) | [Job Codes](#) | **Seniority Rules** | [Facilities](#)

Set ID: USA **Labor Agreement:** K00001

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

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

Recall Expiration Rule ID: Labor Facility Seniority

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

ID	Label	Default from Existing Field	User Editable		
<input type="text" value="K00DEP"/>	DEPT ENTRY DATE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	-
<input type="text" value="K00FAC"/>	FACILITY ENTRY DATE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	-
<input type="text" value="K00JOB"/>	JOB CODE ENTRY DATE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	-

Tie Breakers Customize | Find | View All | First 1-2 of 2 Last

ID	Description		
<input type="text" value="K00001"/>	National ID	+	-
<input type="text" value="K00002"/>	Date of Birth	+	-

Seniority Rules page

Recall Expiration Rule ID

Select the recall expiration rule to associate with this labor agreement. The system will determine recall rights of workers assigned to this labor agreement using this rule.

If the labor agreement does not have any predetermined rules about the expiration of recall rights, select a No Recall recall expiration rule. The layoff, reinstatement, and recall processes do not create recall rights for workers in a labor agreement with a No Recall recall expiration rule.

See Chapter 4, "Setting Up Labor Administration Data," [Setting Up Recall Expiration Rules](#), page 32.

Seniority Dates

Select the seniority dates associated with this labor agreement. When you assign a worker to this labor agreement, the system will display the seniority date fields you select here on the Job Labor page. On the Job Labor page, if the dates default from an existing field, the system will populate them with the value from the existing field. Only the seniority dates that you associate with this labor agreement are available for selection in the layoff and recall rosters, and seniority or candidate list reports for this labor agreement.

See Chapter 4, "Setting Up Labor Administration Data," [Setting Up Seniority Dates](#), page 29.

Tie Breakers

Select the tie breakers associated with this labor agreement. In cases where more than one worker has the same length of seniority, you can use one of the selected tie breakers to determine priority. The tie breakers you associate with this labor agreement are the only ones available on layoff or recall roster, or when running a seniority or candidate list report for this labor agreement.

See [Chapter 4, "Setting Up Labor Administration Data," Setting Up Tie Breakers, page 30.](#)

Assigning Facilities

Access the Facilities page (Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Labor Agreement, Labor Agreement, Facilities).

Labor Agreement		Facilities	
Set ID:	USA	Labor Agreement:	K00001
Effective Date:		01/01/1980	Status: Active
Labor Facility			
Labor Facility ID	Description		
K00001	Georgia Training Facility		

Facilities page

Facilities

Assign facilities to this labor agreement to enable you to categorize workers by facilities, in addition to other methods of grouping, such as by job code, department, and location. Facilities enable you to define groups for layoff and recalls or on the seniority or candidate list reports.

Note. If you enter labor facility IDs for this labor agreement on this page, you can only select from those facilities when you assign a worker to this labor agreement on the Job Labor page.

See [Chapter 4, "Setting Up Labor Administration Data," Setting Up Labor Agreement Control Tables, page 35.](#)

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Increasing the Workforce," Entering National Labor Agreement Data.

Defining Labor Agreement Categories

Access the Employee Categorization page (Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Labor Agreement, Employee Categorization, Employee Categorization).

Employee Categorization

Set ID: USA Labor Agreement: K00001 Professional Agreement 1980
Category: FT

Category Find | View All First 1 of 1 Last

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

*Description: Full Time Employee Sequence:

Short Desc: Full Time

Spain

Scheme ID:

SS Wrk Group:

FORCEM:

France

Category 24-83: Social Bilan Category:

Number of Columns:

Column 1 Description:

Column 2 Description:

Column 3 Description:

Column 4 Description:

Column 5 Description:

Employee Categorization page (1 of 2)

Subcategory 1 Find | View All First 1 of 1 Last

*Subcategory: Sequence:

Description: Short Desc:

Italy

Subcategory 2 Find | View All First 1 of 1 Last

*Subcategory 2: Sequence:

Description: Short Desc:

India

Agreement End Date:

Comments:

Employee Categorization page (2 of 2)

Labor agreement categories are used on the Labor Agreement - Job Codes page for administering tiered wage assignments for a job code. You must have set up a labor agreement before you can create a labor agreement category. Create and save the labor agreement, create the labor agreement categorizations, and then return to the Labor Agreement component to update the Job Code page. Employee categories are assigned to workers on the Job Data - Job Labor page.

Note. You do not need to set up labor categories if your organization does not use tiered pay plans.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Increasing the Workforce," Entering National Labor Agreement Data.

Category Enter the category name. Categories can be used to create tiered pay rate on the Labor Agreement - Job Codes page.

Each labor agreement has its own categories, subcategories, and naming conventions. For example, the French Collective Labor Agreement *KFOI* (which is for *Civil Engineering*) classifies employees in three categories: *CAD* (for *Executive*), *ETAM* (for *Manager*), and *OUV* (for *Workman*). In Germany, use categories, such as *Blue Collar Worker* or *White Collar Worker*.

Note. When you set up new employee categories, remember that PeopleSoft Enterprise Human Resources reserves categories starting with zero for use as system data.

Sequence Use to number the categories in the order the system should process them.

(ESP) Spain

Scheme ID Enter the social security scheme ID to tie employee categories with social security.

Note. You must enter a scheme ID before selecting the social security work group.

SS Wrk Group (social security work group) Every Spanish employee must belong to a work group defined by the Spanish government. Select a group from available options.

FORCEM (*Fundación para la Formación Continua*) The Spanish government requires employers to report on their employees' FORCEM(*Fundación para la Formación Continua*) categories. Values are:

- *None*
- *Executive*
- *Manager*
- *No Qualifi* (No Qualified Worker)
- *Office Wor* (Office Worker)
- *Qualified* (Qualified Worker)

(FRA) France

Category 24-83	Select the applicable code to link an employee category to a regulatory 2483 category. The Category 24-83 code is used for the 2483 Training Report.
Social Bilan Category	Select the applicable code to link an employee category to a regulatory Employee Survey category. The code is also used for the 2483 Training Report.
Number of Columns	Specify how the category is organized. When you enter a number of columns, the system dynamically changes the number of description fields that appear on the page when you move out of this field. For example, if you enter 2 in this field, the system adapts the number of description fields accordingly. For example, category <i>CAD</i> is organized with three column description criteria: <i>Number</i> , <i>Grade</i> , and <i>Step</i> .

Subcategory 1

Subcategory and Subcategory 2	Identify employee subcategories, such as <i>Technical Trainees</i> or <i>Day Laborers</i> . See the field description for the Category field for instructions on completing these fields.
--------------------------------------	---

(IND) India

Agreement End Date	Enter the end date of the labor agreement. Agreement End Date should always be greater than the labor agreement effective date.
Comments	Enter comments about the labor agreement. This might be a description of the labor agreement details.

Cloning Labor Agreements

Access the Clone Labor Agreement page (Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Labor Agreement, Clone Labor Agreement).

Clone Labor Agreement		
Set ID:	USA	United States Table Sets
Labor Agreement:	K00001	Professional Agreement 1980
Effective Date:	01/01/1980	
Bargaining Unit:	KU02	American Professional Union
<hr/>		
New Set ID:	USA	United States Table Sets
New Labor Agreement:	<input type="text"/>	
Effective Date:	<input type="text"/>	
Bargaining Unit:	<input type="text"/>	

Clone Labor Agreement page

After selecting the labor agreement you want to clone, enter a name and an effective date for this new labor agreement. The effective date must be greater than or equal to the labor agreement that is being cloned. You cannot clone labor agreements across different set IDs.

After you click the Save button, the Labor Agreement page displays. The system automatically populates the pages of the Labor Agreement component with the data of the originating labor agreement. This includes wage progression rules, job codes, salary plans, labor job classes, seniority dates, tie breakers, labor facilities, employee categories, and country specific data. You can verify or modify the labor agreement data.

Setting Up Labor Administration Disciplinary, Grievance, and Resolution Classifications

To set up labor administration disciplinary, grievance, and resolution classifications use the Disciplinary Steps or Disciplinary Steps USF component (DISCIP_STEP_TABLE), Disciplinary Type or Disciplinary Type USF component (DISCIP_TYPE_TABLE), Disciplinary Events USF component (GVT_DIS_EVENTS_TBL), Grievance Type Table component (GRIEV_TYPE_TABLE), Grievance Step Table component (GRIEV_STEP_TABLE), and Resolution Type component (RESLTN_TYPE_TBL). Use the DISCIP_STEP_TABLE component interface to load data into the tables for the Disciplinary Steps component and the GRIEV_STEP_TABLE component interface to load data into the tables for the Grievance Step Table component.

This section discusses how to:

- Define disciplinary steps.
- (USF) Define the first penalty matrix for indicating offense level penalties.
- (USF) Define the recommended disciplinary actions for each offense level and type.
- Set up disciplinary events.
- Set up grievance types.

- Set up grievance steps.
- Define resolution types.

See Also

Chapter 8, "Tracking Disciplinary Actions and Grievances," page 117

Pages Used to Set Up Labor Administration Classifications

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Disciplinary Steps	DISCIP_STEP_TABLE	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Disciplinary Steps, Disciplinary Steps	Enter steps to be taken in the disciplinary process.
Disciplinary Step Table	GVT_DISCIP_STEP	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Disciplinary Steps USF, Disciplinary Step Table	Enter steps to be taken in the disciplinary process.
Disciplinary Type Disciplinary Type USF	DISCIP_TYPE_TABLE	<ul style="list-style-type: none"> • Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Disciplinary Type, Disciplinary Type • Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Disciplinary Type USF, Disciplinary Type USF 	Set up types of actions that may require managers to impose disciplinary actions on workers.
Disciplinary Penalty Matrix 1	GVT_DISCIP_OFFENSES	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Disciplinary Type USF, Disciplinary Penalty Matrix 1	(USF) Set up the first penalty matrix indicating the offense levels for the discipline type.

Page Name	Definition Name	Navigation	Usage
Disciplinary Penalty Matrix 2	GVT_RECND_ACTIONS	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Disciplinary Type USF, Disciplinary Penalty Matrix 2	(USF) Set up the second penalty matrix indicating the recommended disciplinary step for each offense levels.
Disciplinary Events USF	GVT_DIS_EVENTS_TBL	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Disciplinary Events USF, Disciplinary Events USF	Set up disciplinary events that can be assigned to a worker in the event of disciplinary action.
Grievance Type Table	GRIEV_TYPE_TABLE	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Grievance Type Table	Set up the different types of grievances that workers, applicants, or unions might file.
Grievance Step Table	GRIEV_STEP_TABLE	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Grievance Step Table	Set up steps that can be taken to resolve grievances.
Resolution Types	RESLTN_TYPE_TABLE	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Resolution Types	Set up resolutions to track disciplinary or grievance outcomes.

Defining Disciplinary Steps

Access the Disciplinary Steps page (Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Disciplinary Steps, Disciplinary Steps).

Disciplinary Steps

Disciplinary Step: ADM

Disciplinary Actions				Customize Find View All First 1 of 1 Last
*Effective Date	*Status	*Description	Short Description	
1 01/01/2009	Active	Admonishment	Admonish	+ -

Disciplinary Steps page

(USF) Defining Disciplinary Steps

Access the Disciplinary Step Table page (Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Disciplinary Steps USF, Disciplinary Step Table).

Disciplinary Step Table			
Disciplinary Step: ADM			
Disciplinary Actions			
*Effective Date:	01/01/2009	*Status:	Active
*Description:	Admonishment	<input type="checkbox"/> Action Reportable to Union	
Short Description:	Admonish	Days To Complete: <input type="text"/>	

Disciplinary Step Table page

Action Reportable to Union Select if the action disciplinary action should be reported to the union.

Days to Complete Enter the number of days it takes the person to complete the disciplinary action.

Defining Disciplinary Types

Access the Disciplinary Type page (Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Disciplinary Type, Disciplinary Type) or the Disciplinary Type USF page (Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Disciplinary Type USF, Disciplinary Type USF).

Disciplinary Type			
Disciplinary Type: FGH			
Disciplinary Type Information			
*Effective Date	*Status	*Description	Short Description
1 01/01/2009	Active	Fighting	Fighting

Disciplinary Type page

(USF) Defining the First Penalty Matrix for Indicating the Offense Level Penalties

Access the Disciplinary Offenses Table - Disciplinary Penalty Matrix 1 page (Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Disciplinary Type USF, Disciplinary Penalty Matrix 1).

Enter a row for each Disciplinary Offense Level.

(USF) Defining the Recommended Disciplinary Actions for Each Offense Level and Type

Access the Disciplinary Offenses Table - Disciplinary Penalty Matrix 2 page (Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Disciplinary Type USF, Disciplinary Penalty Matrix 2).

Recommended Actions Enter the recommended actions. The system automatically displays the Usual Days To Complete, as defined on the Disciplinary Events USF page.

This display helps managers approximate how long it will take to complete this action so they can plan how to fit each course of action into their workloads. Your labor administration specialists can establish these as experience dictates. However, government and agency policies or union agreements may affect these recommendations.

Chapter 5

Setting Up Works Councils

This chapter discusses how to:

- Set up works councils.
- (DEU) Set up the German works councils business process.

Setting Up Works Councils

To set up works councils, use the Works Council component (WC_COUNCIL_TBL_GBL), the Works Council Decision component (WC_DECISION_TBL_GBL), the Works Council Decision Group component (WC_DECSIONGRP_TBL_GBL), the Job Change by Reg Region component (WC_ACTN_REASON_TBL_GBL), and the Workflow Parameters component (WC_USER_NOTIFY_GBL).

This section provides an overview of the works councils business process and discusses how to:

- Define works councils.
- Define job changes per regulatory region.

Understanding the Works Councils Business Process

If your organization does business in countries where workers can belong to works councils, define the works councils that your workers can join.

The works councils for your company are internal committees elected by the non-management workers to represent their interests. If your organization does business in countries where workers can belong to works councils, every work location in your company may have a local works council. The company as a whole may have a central works council. The works council's duties may include:

- Watching the implementation of collective bargaining agreements.
- Promoting integration of minorities, young, older, and handicapped workers.
- Monitoring fair compensation and working hours.
- Providing codetermination concerning layoffs, short-time work, and other labor issues.

Pages Used to Set Up Works Councils

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Works Council	WC_COUNCIL_TBL	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Works Council, Works Council	Specify the works councils to which your workers may belong.
Works Council Decision	WC_DECISION_TBL	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Works Council Decision, Works Council Decision	Maintain works council decisions.
Works Council Decision Group	WC_DECISIONGRP_TBL	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Works Council Decision Group, Works Council Decision Group	Define works council decision groups.
Job Change by Reg Region (job change by regulatory region)	WC_ACTN_REASON_TBL	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Job Change by Reg Region, Job Change by Reg Region	Define Job Change actions and reasons per regulatory region. This is the main setup page for configuring works council transactions for job changes that require works council approval.
Workflow Parameters	WC_USER_NOTIFY	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Workflow Parameters, Workflow Parameters	Define Job Change request workflow parameters.

Defining Works Councils

Access the Works Council page (Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Works Council, Works Council).

Works Council

Set ID: DEU01
Works Council ID: GDWC00912

Works Council Information Find | View All First 1 of 1 Last

*Effective Date: + -

*Status as of Effective Date:

Description:

Short Description:

Posting: (Days between Internal and External Posting)

Default Approval After: Week(s)

Spokesperson

Spokesperson		
<input type="text" value="GD110000010"/>	Sabine Azubinefive	+ -

Works Council page

Works Council ID The ID you entered to access this page. This is the ID you'll define.

Posting Enter the number of days between internal and external posting.

Default Approval After The Default Approval After date will automatically approve works council relevant job change requests if the works council doesn't react by the date specified. Any worker Job Change approval requests that have not been approved or denied after the specified date will automatically set to *Approved by Works Council* via an automatic update process and will trigger all workflow associated with Works Council approval.

Spokesperson Select the ID for the person (or persons) to whom you want to route works council approvals. Any job change request that has been configured for works council approval in the Job Change by Reg Region page can be assigned. The spokesperson(s) will receive any works council hire approval requests for job requisitions that have a works council ID. Enter as many spokesperson IDs as needed.

Linking Works Councils to the Company Location Table

The Company Location page (COMPANY_TABLE1) is used to assign the works council ID to a company location to route works council relevant job change requests to the appropriate works council spokesperson. During approval processing for job actions which require works council approval, the system first checks which works council ID is relevant for the worker's company and location and then check the Works Council Table to see which spokesperson(s) should be notified.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up Organization Foundation Tables," Setting Up Company Locations

Defining Job Changes per Regulatory Region

Access the Job Change by Reg Region page (Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Job Change by Reg Region, Job Change by Reg Region).

Job Change by Reg Region

Regulatory Region: DEU Germany
 Action: HIR Hire
 Reason Code: NPS New Position

Job Change by Reg Region Find | View All First 1 of 1 Last

*Effective Date: *Status:

Originated by New Manager?

Checklist Code: Hire

Mandatory Search Criteria

Employee ID First Name Last Name Department Personnel Status Birth date

Process Participants Find | View All First 1 of 3 Last

*Process Participant:

Data Customize | Find | | First 1-7 of 7 Last

*Relevant Information	Show Current Info	Show New Info		
1. Organization Information	☑	☑	+	-
2. Job Information	☑	☑	+	-
3. Salary Plan	☑	☑	+	-
4. Payroll	☑	☑	+	-
7. HR Decision			+	-
8. Request WC Approval			+	-
10. Process Job Change			+	-

Job Change by Reg Region page

58

Copyright © 1988, 2010, Oracle and/or its affiliates. All Rights Reserved.

The Job Change by Reg Region page identifies which combination or regulatory region, action, and action reason may be selected from the Request Job Change - Works Council page. All of the setup information required for a Works Council relevant job change request may be defined here, including which page areas are relevant for which roles, whether a given role may also view current information, and so on. Define which job changes require works council approval before they take place, by regulatory region, action, and action reason.

Note. If you are processing a worker transfer request, you can define whether the current or new manager requests the job change.

Originated by New Manager? Select this check box to indicate that transfer job change requests will be initiated by the worker's new manager.

Checklist Code Select a Checklist Code. The Checklist Code refers to a checklist that consists of all to-do items maintained for a single worker or applicant with the specified status and date. You can associate the checklist with a job change here. During the business process the HR person can generate the relevant checklist from the job change request page.

Mandatory Search Criteria

Employee ID, First Name, Last Name, Department, Personnel Status and Birthdate Select each associated check box for the search criterion that you want to appear on the Job Change Request search page.

Process Participants

Process Participant Select a Process Participant from the drop down list. Select *Current Manager*, *HR Administrator*, *New Manager*, or *Works Council*.

Relevant Information For each process participant selected, define the relevant information that participant will be able to view in the job change process.

Show Current Info and Show New Info For each Relevant Information selected, choose whether the process participant will be able to view only the current information, only the new information or both current and new information.

(DEU) Setting Up German Works Councils Business Process

To set up German works councils business process, use the Tariff Area component (TARIFF_AREA_GBL) and Speaker Committee DEU component (SPK_COMM_GER_GBL).

In addition to the core functionality setup tables, if you're administering a German workforce, you can use several German setup tables to define codes for labor administration matters that affect your company, such as tariff areas and spokesmen committees.

Rules defining worker labor administration for your German workforce are negotiated between the trade unions and the employers' associations. Additional rules are defined between the workers and their employers through two groups of elected representatives. The works councils represent non-management workers. The spokesmen committee represents management workers. Although the works councils and spokesmen committees are groups of people elected to represent the interests of workers, they aren't union representation.

Use the codes and information that you set up in these tables to track information about decisions made by the works councils at your operating locations.

Understanding Tariff Areas

A tariff is a contract between the workers' unions and the employers' association, defining labor agreements on issues such as standard working hours, income, and vacation. This contract is valid for all of Germany for the business or industrial sector the company is working in (such as banking or metal). Tariffs are already in the system.

Additional labor agreement terms, such as salary plans or workforce reviews, can also be applied based upon the tariff area. Region or location (such as Bavaria or Berlin) often define the tariff area.

Understanding Spokesperson Committees

The spokesmen committee (*sprecherausschuss*) represents the interest of the management personnel in your company before the ownership or executive management. The spokesmen committee mainly consults; however, it also helps determine individual employment contracts, hiring, and dismissals. The committee also helps monitor employment fairness, equity, and nondiscrimination in terms of nationality, race, religion, sex, and age.

See Also

PeopleSoft Enterprise Talent Acquisition Manager 9.1 PeopleBook, "Creating Job Openings," Entering Basic Job Opening Data

Pages Used to Define German Labor Administration Codes

Page Name	Definition Name	Navigation	Usage
Tariff Area Ger (German tariff area)	TARIFF_AREA_GER	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Tariff Area, Tariff Area Ger	Enter tariff areas for later use on the Job Labor - Germany page (JOB_LABOR). In PeopleSoft Enterprise Human Resources, the tariff areas for the metal tariff are included as system data.
Spokesmen Comm (spokesmen committee)	SPK_COMM_GER	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Speaker Committee DEU, Spokesmen Comm.	Describe the spokesmen committee for your work locations.

Chapter 6

Managing Layoffs and Recalls

This section provides an overview of the layoff and recall process and describes how to:

- Define groups of workers to layoff or recall.
- Manage layoffs.
- Manage recall rights.
- Manage recalls and reinstatements.
- Processing layoffs and recalls using PeopleSoft Mass Update.
- Run layoff, recall, and reinstatement reports.

Common Elements Used in this Chapter

Effective Date	<p>You can enter any number of effective-dated rows into a roster, but only one row per calendar day. When you insert a new row, the system makes the previous rows unavailable for entry.</p> <p>You can create future-dated rosters and insert future-dated rows into a roster. You can generate and maintain future-dated rosters, but you cannot process them for layoff, reinstatement, or recalls.</p>
Mass Update to be used	<p>Select to use mass update to update workers' Job Data records with their layoff or recall status instead of the Run Layoff Process or Run Recall Process processes. When you select the Mass Update to be used check box the system makes the Run Layoff Process or Run Recall Process buttons unavailable.</p> <p>Use the Process Recall Rights process to update candidates' Recall Rights records.</p> <p>See Chapter 6, "Managing Layoffs and Recalls," Processing Layoffs and Recalls Using PeopleSoft Mass Update, page 87.</p>

Group ID

Select the ID of the group containing the candidates used for this roster. The system displays the Labor Agreement associated with the group ID.

The system displays the groups you created in the Labor Group Definition component (HR_LBR_GRP_DEFN) and groups created in the Group Build - Group Definition component (GB_GRP_DEFN_TABLE). You can only select groups with a valid labor agreement.

Note. You must select a Group ID to create a layoff roster. To create a recall roster, you can select a Group ID or a Layoff Roster ID.

See [Chapter 6, "Managing Layoffs and Recalls," Defining Groups of Workers to Layoff or Recall, page 65.](#)

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Group Definitions."

Labor Agreement

Collective labor agreement managing the labor administration between a group of workers and the organization.

Seniority Dates or Seniority Date ID

Select the seniority dates the system should use to sort the candidates in the roster. Only those seniority dates assigned to the specified Labor Agreement are available for selection.

The sequence number of each seniority date entered specifies the sequence the system should use to sort the candidates in the roster. You cannot select a seniority date more than once.

Tie Breakers or Tie Breaker ID

Select the tie breakers the system should use to rank the candidates in the roster in the event that people share seniority dates and indicate if the system should apply the tie breaker in ascending or descending order. Only those tie breakers assigned to the specified Labor Agreement are available for selection.

The sequence number of each tie breaker entered specifies the order in which the system should implement them. You cannot select a tie breaker more than once.

For example, if you select a tie breaker based on the national identification number and select the Descending Order? check box, the system identifies those people with a higher national identification number as having more seniority in the event that there is a tie for seniority.

Generate Roster

When you've defined the extraction criteria for the roster, save the page. The system will make the Generate List button available. Click to generate a roster list. The system will set the roster status to *In Progress* and move you to the next page in the component.

When you generate a:

- Layoff roster, the system selects all workers defined by the selected group ID, removes those who are exempt from layoff (as indicated on the Job Labor page), and sorts them by the seniority dates and tie breakers you selected.
- Recall roster, the system selects the workers defined by the selected group ID or who were laid off on the selected layoff roster, removes those whose recall rights have expired, and sorts them by the seniority dates and tie breakers you selected.
- Reinstatement roster, the system selects the workers who were laid off on the selected layoff roster, removes those whose recall rights have expired, and sorts them by the seniority dates and tie breakers you selected.

Refresh Roster

Click to update the roster. The system will insert a new, effective-dated row and generate a new roster list for that row. The system will include candidates that you had manually added to the previous roster. The system retains the previous roster but makes it display-only.

Note. If you have processed anyone on the roster, you cannot refresh it. This is enables you to maintain history and data integrity.

Regenerate Roster List

If you make some changes to the roster setup, for example change a seniority date or Group ID, click to generate a new roster list. The system completely overwrites the previous roster with the regenerated one.

Note. If you have processed anyone on the roster, you cannot regenerate it. This is enables you to maintain history and data integrity.

Roster Status

Insert a new row and update the roster status as needed. When you create a roster, the system assigns the status to *Open*. When you generate the roster, the system sets the status to *In Progress*. When you select a roster of *Closed*, the system makes the roster component unavailable for entry. Use the other statuses to manage the roster process.

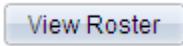
Default Rehire Date

Enter the default hire date. The system will populate the roster Rehire Date field with this value.

Nbr in Group to Consider(number in group to consider)

Enter the number of candidates in the group you are considering for layoff or recall. The system will populate the list with this number of candidates, taking from the top of the list as determined by the seniority date(s).

For example, if there are a total of thirty people in the group and you want to consider ten of them for layoff, the system will populate the roster with the ten most junior people, as determined by the selected seniority date, from that group of thirty.



Click after you've selected how many candidates you want to consider and the system will populate the roster list.

Total in Group

Displays the total number of people defined by the selected group ID, including candidates that you have added manually.

Apply To

Choose whether to apply a status to all candidates, just those displayed on the page, or on an individual basis (select those candidates for the selected status using the Select check box in the grid).

Status

Select a status to apply to multiple candidates in the roster.



Click to apply the status you selected in the Status field to the candidates.



This icon indicates that a candidate was added to the roster manually. The only candidates you can remove from a roster are those that are added manually.

Tie

Selected if the system had to use a tie breaker to determine the candidate's ranking because more than one person shared seniority.



Click to add comments to a candidate. You can add multiple, effective-dated comments.

The system creates a note for those candidates who were affected by a tie breaker, indicating that a tie breaker was used and what it determined the candidate's ranking to be.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Working with Common Components," Configuring and Working with the HR Notepad.

Rank

The system lists the candidates by seniority and tie breaker. To modify the list order, enter a new ranking number.

Note. Candidates you've added to the roster manually have a permanent rank of zero (0).

Select

Click to select individuals people to apply roster status to as a group. For example, to apply the roster status of Layoff Accepted to the four candidates who have accepted to date, select the candidates, select the *Individual* Apply To value, select the status in the Status field, and click Apply.

Status

Select the candidates roster status.

See Chapter 4, "Setting Up Labor Administration Data," Setting Up Employee Roster Statuses, page 34.

Defining Groups of Workers to Layoff or Recall

To define groups of workers to layoff or recall, use the Labor Group Definition component (HR_LBR_GRP_DEFN).

This section discusses how to:

- Define groups.
- Select group members.
- Maintain group security.

Note. You can also access the Labor Group Definition component from a link on the Layoff Roster Setup page or Recall Roster Setup page.

Note. You can also create groups using the Group Build - Group Definition component but the groups must include a single, valid labor agreement as a part of the definition for them to be valid selections on the Layoff Roster component (HR_LAYOFF_ROSTER) and the Recall Roster component (HR_RECALL_ROSTER). Groups are not used with the Reinstatement Roster component (HR_REINST_ROSTER).

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Group Definitions"

Pages Used to Define Groups

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Labor Group Definition	HR_LBR_GRP_DEFN	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Layoffs and Recalls, Labor Group Definition, Labor Group Definition	Use the group definition page to define the parameters of the labor management group.
Labor Group Members	HR_LBR_GRP_MEMBERS	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Layoffs and Recalls, Labor Group Definition, Labor Group Members	Review group members.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Labor Group Security	HR_LBR_GRP_SCTY	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Layoffs and Recalls, Labor Group Definition, Labor Group Security	Grant or remove security access to the group.

Defining Groups

Access the Labor Group Definition page (Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Layoffs and Recalls, Labor Group Definition, Labor Group Definition).

Labor Group Definition
Labor Group Members
Labor Group Security

Group ID: K00001

*Description:

*Short Desc:

*As Of Date:

*Bargaining Unit: American Professional Union

Labor Facility ID:

Event Type

Layoff

Recall

Labor Agreement

Agreement	Description	Contract Begin Date	Contract End Date
K00001	Professional Agreement 1980	01/01/1980	12/31/2010

Job Codes Customize | Find | View All | First 1-8 of 15 Last

Job Code	Description	Include
140035	Analyst-Financial	<input checked="" type="checkbox"/>
170005	Assistant-Administrative	<input checked="" type="checkbox"/>
170045	Assistant-Nursing	<input checked="" type="checkbox"/>
200005	Auditor-General	<input checked="" type="checkbox"/>
290075	Clerk-Payroll	<input checked="" type="checkbox"/>
660005	Nurse-Head	<input checked="" type="checkbox"/>
660010	Nurse-Licensed Practical	<input checked="" type="checkbox"/>
660015	Nurse-Registered	<input checked="" type="checkbox"/>

Labor Group Definition page

Event Type

Select the type of event in which this group will be used:

- Select *Layoff* to include only workers with an HR status of *Active* in your group definition.
- Select *Recall* to include workers with an HR status of either *Active* or *Inactive*. This enables you to include workers who have been laid off (HR status of *Active*) or terminated (HR status of *Inactive*) in your recall group.

As of Date Only bargaining units, labor agreements, labor facilities, and job codes active as of this date are available on this page.

Bargaining Unit Select the bargaining unit that you are using to define this group. The system will display the labor agreement, and its contract dates, associated with this unit in the Labor Agreement grid.

Note. You must select a bargaining unit associated with a labor agreement since the layoff, recall, and reinstatement processes use the information you set up on the labor agreement.

See [Chapter 3, "Setting Up Unions," Setting Up Bargaining Units, page 10.](#)

Labor Facility ID Select the ID of the labor facility you are using to define this group. Leave this field blank to include people in all the facilities.

The system will populate the options with the labor facilities assigned to the labor agreements associated with the selected bargaining unit.

See [Chapter 4, "Setting Up Labor Administration Data," Setting Up Labor Agreement Control Tables, page 35.](#)

Job Code and Include The system displays the job codes associated with the labor agreements. Select the Include check box next to those job codes you want to include in this group definition.

See [Chapter 4, "Setting Up Labor Administration Data," Assigning Job Codes to Labor Agreements, page 40.](#)

Save

Click to save the group definition without populating the Labor Group Members page.

Save and Populate Group

Click to save the group definition and populate the group members page with the people assigned to the labor agreements, labor facilities, and job codes selected on this page.

See [Chapter 4, "Setting Up Labor Administration Data," Defining Labor Agreements, page 35.](#)

Reviewing Group Members

Access the Labor Group Members page (Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Layoffs and Recalls, Labor Group Definition, Labor Group Members).

Labor Group Definition			Labor Group Members			Labor Group Security		
Group ID:	K00001							
Description:	Labor Agreement K00001							
As Of Date:	08/01/2004							
Data			Customize Find View All [?] [grid]			First 1-23 of 23 Last		
EmplID	Empl Record	Name						
K0HU10	0	Allison Smith						
K0HU10	1	Allison Smith						
K0HU11	0	Thomas Holmes						
K0HU12	0	Patricia Happs						
K0HU13	0	Joseph Barnes						
K0HU14	0	Hector Walpoe						
K0HU15	0	Penelope Gustaf						
K0HU16	0	Roberta Wong						
K0HU17	0	Mas Ravi						
KU0010	0	Antonio Santos						
KU0021	0	Salish Bir						
KU0039	0	Shawn Quilligan						
KU0042	0	Danny Johnson						
KU0044	0	Daryl Reese						
KU0045	0	Jorge Enriquez						

Labor Group Members page

The Labor Group Members page lists the people who meet the criteria you defined on the Labor Group Definition page.

Maintaining Group Security

Access the Labor Group Security page (Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Layoffs and Recalls, Labor Group Definition, Labor Group Security).



Labor Group Security page

Only people who have security access to this group can create layoff, recall, or reinstatement rosters for this group. The system automatically adds the name of the user who creates the group.

The group security access you grant on this page overrides the data permission security associated with a user's Row Security Permission List. For example, a user who does not have row security access to Department 604CAN but that is added to this list for a group that contains people in Department 604CAN will be able to view the data of those people in the layoff, recall, and reinstatement rosters.

Remove Select to remove the user's security access to this group when you save the component.

Add another authorized user Click to access the Labor Group Security - Add User page and grant another user security access to this group.

Managing Layoffs

To manage layoffs, use the Layoff Roster component (HR_LAYOFF_ROSTER) and the Process Layoff component (HR_RUNCTL_LAY).

This section discusses how to:

- Set up a layoff roster.
- Manage the layoff roster list.
- Run the layoff process.

Pages Used to Manage Layoffs

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Layoff Roster Setup	HR_LAYOFF_SETUP	Workforce Administration, Labor Administration, Layoffs and Recalls, Layoff Roster, Layoff Roster Setup	Define the layoff roster parameters.
Layoff Roster List	HR_LAYOFF_CAND_LST	Workforce Administration, Labor Administration, Layoffs and Recalls, Layoff Roster, Layoff Roster List	Manage the layoff roster.
Layoff Process Run Control	HR_RUNCTL_LAY	Workforce Administration, Labor Administration, Layoffs and Recalls, Layoff Roster, Layoff Roster List Click the Process Layoff button on the Layoff Roster List page.	Process layoffs.

Setting Up the Layoff Roster

Access the Layoff Roster Setup page (Workforce Administration, Labor Administration, Layoffs and Recalls, Layoff Roster, Layoff Roster Setup).

The screenshot displays the 'Layoff Roster Setup' page. At the top, there are tabs for 'Layoff Roster Setup' and 'Layoff Roster List'. Below the tabs, the 'Roster ID' is K00001 and the 'Roster Status' is 010 - Open. The 'Extraction Criteria' section includes:

- *Effective Date: 08/01/2004
- *Roster Type: Temporary
- *Description: Layoff - Labor Agreement K00001
- Group ID: K00001
- Mass Update to be used? (checkbox)
- Labor Agreement: K00001 Professional Agreement 1980

 There are buttons for 'Regenerate Roster List' and 'Refresh Roster'. Below this is the 'Sort Criteria' section, which contains two tables:

Seniority Dates					
Sequence	*Seniority Date ID	Seniority Date Label			
2	K00DEP	DEPT ENTRY DATE			

Tie Breakers					
Sequence	*Tie Breaker ID	Record	Field Name	Descending Order?	
1	K00002	PERSON	BIRTHDATE	<input type="checkbox"/>	

Layoff Roster Setup page

You can enter any number of effective-dated rows into a roster, but only one row per calendar day. When you insert a new row, the system makes the previous rows unavailable for entry.

You can create future-dated rosters and insert future-dated rows into a roster. You can generate and maintain future-dated rosters, but you cannot process the layoff.

Roster Type

Select if the layoff is one of the following:

- *Temporary*

The system makes workers laid off in a temporary layoff available for reinstatement and recall.

- *Permanent*

The system makes workers laid off in a permanent layoff available for recall only.

Mass Update to be used? Select to use Mass Update to update worker Job Data records with the layoff or recall status instead of using the Layoff process

Labor Group Definition Click this link to add a new group definition using the Labor Group Definition page.

Maintaining the Layoff Candidate List

Access the Layoff Roster List page (Workforce Administration, Labor Administration, Layoffs and Recalls, Layoff Roster, Layoff Roster List).

The screenshot displays the 'Layoff Roster List' page. At the top, there are tabs for 'Layoff Roster Setup' and 'Layoff Roster List'. The 'Roster ID' is K00001 and the 'Roster Status' is 020 - In Progress. The 'Layoff Roster Information' section includes: Effective Date (08/01/2004), Date First Notified (08/16/2004), Planned Termination Date (08/16/2004), Total in Group (23), and Nbr in Group to Consider (10). A 'View Roster' button is present. Below this is the 'Apply Employee Roster Status' section with 'Apply To' set to 'All' and 'Status' set to 'K00LAYA'. The 'Layoff Roster List' table has the following data:

Select	EmplID	Name	Empl Record	Tie	Notes	Rank	Status	Term Date
<input type="checkbox"/>	K0HU10	Allison Smith	0	<input checked="" type="checkbox"/>		1	K00LAYA	
<input type="checkbox"/>	K0HU10	Allison Smith	1	<input checked="" type="checkbox"/>		2	K00LAYA	
<input type="checkbox"/>	K0HU11	Thomas Holmes	0	<input checked="" type="checkbox"/>		3	K00LAYA	
<input type="checkbox"/>	K0HU12	Patricia Happs	0	<input checked="" type="checkbox"/>		4	K00LAYA	
<input type="checkbox"/>	K0HU13	Joseph Barnes	0	<input checked="" type="checkbox"/>		5	K00LAYA	

At the bottom, it shows 'Candidates to be Processed: 10' and a 'Process Layoff' button.

Layoff Roster List page

Note. The system will not include as candidates those workers who are identified as being exempt from layoff on the Job Labor page.

Planned Termination Date

Select a termination date. The system will enter this date in the Term Date column of the Layoff Roster list, but you can override it if necessary to terminate candidates on different days. The system will process the layoffs as of this date.

The system uses this date as the termination date when you layoff a candidate so you must select a date if there are any candidates in your roster to be laid off.

Date First Notified

Select the date the workers were or will be notified of the layoff for informational purposes.

Expected Reinstatement Date

If you've selected a roster type of *Temporary*, the system displays this field. Enter the date you expect to reinstate the workers.

Process Layoff

Click to run the Layoff process. The system will move you to the Layoff Process search component.

You can process candidates in batches. The layoff process processes those candidates who have a status with the Process Event? check box selected as part of its definition. After the layoff process processes candidates with a process event status, the system resets the candidates' status to one with the Event Complete? check box selected as part of its definition. The layoff process will not reprocess candidates with an event complete status.

To process another group of candidates, set the status of a new group of candidates to a process event status and run the layoff process again.

This button is not available when you use Mass Update to update workers Job Data records.

Candidates to be processed:

Displays the number of candidates the Layoff Process will process.

Note. The Layoff Process will process those candidates with a status that has the Process Event? check box selected.

See [Chapter 4, "Setting Up Labor Administration Data," Setting Up Employee Roster Statuses, page 34.](#)

Note. You cannot remove candidates who were included in the roster because they were a part of the selected group.

Adding Candidates Manually

You can manually add candidates to the roster (for example, workers who were bumped from their position). To add a candidate manually, add a row and select an EmplID and employee record number. Click the Man Emp (Manual Employee) button to retrieve the person's job details. When the person's details have been retrieved the button becomes display only. The system assigns all manually-added candidates the permanent rank of zero.

The system updates the Nbr in Group to Consider and Total in Group values to reflect the additional candidates.

Note. You can remove candidates who were manually added to the roster.

Running the Layoff Process

Access the Layoff Process Run Control page (click the Process Layoff button on the Layoff Roster List page).

Layoff Process Run Control

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

Report Request Parameter(s)

Roster ID: K00001 Layoff - Labor Agreement K00001

*Action:

Action Reason:

Auto Reinstatement

Auto Reinstatement

Action:

Action Reason:

Reinstatement Date:

Layoff Process Run Control page

The layoff process:

- Inserts a new row in the Job Data pages with the effective date of the layoff.

The system copies all of the data from the previous Job Data row to the new row and includes the Action and Action Reason values you select here. If the system is unable to enter a job row for an employee due to an error on their job record a message will be entered for that employee number in the log.

- Inserts a new row into the Recall Rights page with the effective date of the layoff.

The system enters the value of *Layoff* in the Reason field.

The system calculates the Expiration Date using the recall expiration rule attached to the labor agreement being processed.

The system will not insert a record into the Recall Rights page:

- If you select the Auto Reinstatement check box on the Layoff Process Run Control page.
- If the candidate does not have a value for the seniority date used by the recall expiration rule to calculate recall rights.
- If the Recall Expiration rule attached to the Labor Agreement is a No Recall rule.

See [Chapter 4, "Setting Up Labor Administration Data," Understanding Recall Rights, page 31.](#)

See [Chapter 6, "Managing Layoffs and Recalls," Managing Recall Rights, page 77.](#)

- Updates the status of the processed candidates in the layoff roster with an event complete status.

See [Chapter 4, "Setting Up Labor Administration Data," Setting Up Employee Roster Statuses, page 34.](#)

Note. If the system encounters any errors when processing a candidate's layoff, the system will skip the person and enter a note into the process logged. The Layoff process includes the candidate on post processing reports, but their job data information is blank.

Roster ID Displays the ID of the roster from which the process was launched.

Action and Action Reason Select the action the layoff process is executing and the reason for the action. The system will insert these values into the Job Data row it creates for the people it is processing for lay off.

Auto Reinstatement

The auto reinstatement fields are available for temporary layoffs only.

Auto Reinstatement Select if all of the people being laid off are to be reinstated at the same time. If you use the Auto Reinstatement field, the system will not insert a record into the Recall Rights page for the candidates being laid off.

Note. When you select an action, ensure that this action corresponds to the layoff Action. For example, if you process the layoff with the action of LOF (layoff), you can only reinstatement the candidates using the REC (recall) action. Candidates laid off with the action TER (termination) can only be reinstated with the action of REH (rehire).

See [Chapter 6, "Managing Layoffs and Recalls," Maintaining Recall Rights, page 78.](#)

Action and Action Reason Select the action and the action reason for the reinstatement

Reinstatement Date The system populates this with the expected reinstatement date from the layoff roster when you select the Auto Reinstatement check box, but you can edit it if necessary.

Layoff Reports

The Layoff Process produces two reports:

- Layoff Roster Post Processing (HRLAY006).

This report displays a list of those workers laid off.

The Layoff Roster Post Processing report lists candidates that were not processed for layoff successfully without job data. Review this report to identify candidates that were not processed by looking for those without job data on this report.

- Recall Rights Post Processing (HRLAY007).

This report lists those workers who have received recall rights.

Note. The system does not generate this report if you select the Auto Reinstatement check box.

Managing Recall Rights

To manage recall rights, use the Process Recall Rights component (HR_RUNCTL_RGT) and the Recall Rights component (HR_RCL_RIGHTS).

This section discusses how to:

- Process recall rights.
- Maintain recall rights.

Note. Recall rights are the rights a laid off worker has to accept a lower level job (bumping) or to be recalled back to work when a position becomes available. Each labor agreement has a recall expiration rule that calculates how long a worker has recall rights following a layoff and under what circumstances those rights would expire.

Pages Used to Manage Recall Rights

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Process Recall Rights	HR_RUNCTL_RGT	Workforce Administration, Labor Administration, Layoffs and Recalls, Process Recall Rights, Process Recall Rights	Use to update the Recall Rights component with information from the Job Data records of those candidates who have a process event status on the roster and who were processed using PeopleSoft Mass Update.
Recall Rights	HR_RCL_RIGHTS	Workforce Administration, Labor Administration, Layoffs and Recalls, Recall Rights	View and maintain a worker's reemployment rights.

Processing Recall Rights

Access the Process Recall Rights page (Workforce Administration, Labor Administration, Layoffs and Recalls, Process Recall Rights, Process Recall Rights).

Process Recall Rights page

Note. Use this process only when using PeopleSoft Mass Update to update candidates' job information. The layoff, recall, and reinstatement processes create recall rights automatically.

Roster ID Select the ID of the layoff or recall roster whose candidates' recall rights you want to update. The system will create a record in the Recall Rights component for those candidates who have a process event status on the roster. When an employee's recall rights have been processed for a particular Roster ID they cannot be processed a second time for the same Roster ID.

Reason Select the reason for the new recall rights record. The system will insert this value in the Reason field on the Recall Rights page.

Maintaining Recall Rights

Access the Recall Rights page (Workforce Administration, Labor Administration, Layoffs and Recalls, Recall Rights).

Recall Rights page

You can manually enter and maintain recall rights for a person but the system will create and populate a row on this page for each person being processed when you run the:

- Process Layoff process.
- Process Recall or Process Reinst (Reinstatement) processes.

Note. The system will create rows for those who accept a recall. Employees who reject recalls may lose their Recall Rights depending on the recall rights expiration rule assigned to their labor agreement. If a person rejects a recall, update the Recall Rights manually.

- Process Recall Rights process.

This table shows the values that the system enters depending on which process you run:

Process	Effective Date	Recall Expiry Date:	Reason ID:	Roster ID:
Run Layoff Process	The date the layoff takes effect, as entered in the Termination Date field on the Layoff Process component.	The system populates this date using the recall expiration rule associated with the person's labor agreement.	<i>LAYOFF</i>	The system populates this field with the ID of the layoff roster that prompted the layoff action.
Recall or Reinstatement processes	The date the recall or reinstatement takes effect as entered in the Rehire Date column on the Recall Roster List or Reinstatement Roster List pages.	The system populates this date using the recall expiration rule associated with the person's labor agreement.	<i>RECALL</i>	The system populates this field with the ID of the recall or reinstatement roster that prompted the recall or reinstatement action.
Process Recall Rights On the Process Recall Rights page, you can select a: <ul style="list-style-type: none">• Layoff roster.• Recall roster.	<ul style="list-style-type: none"> • The system uses layoff roster termination date. • The system uses recall roster rehire date. 	<ul style="list-style-type: none"> • The system populates this date using the recall expiration rule associated with the person's labor agreement. • The system populates this field with the rehire date from the recall roster. 	<i>LAYOFF</i> <i>RECALL</i>	The system populates this field with the ID of the roster that was selected on the Process Recall Rights page.

Recall Expiration Date Enter the date the person's recall rights expire.

The system does not include candidates whose recall rights have expired when creating recall or reinstatement rosters.

Reason Select the reason the person obtained the recall right.

See [Chapter 4, "Setting Up Labor Administration Data," Setting Up Layoff and Recall Control Tables, page 30.](#)

Roster ID The system populates this with the layoff or recall roster ID.

Managing Recalls and Reinstatements

To manage recalls and reinstatements, use the Recall Roster component (HR_RECALL_ROSTER), the Reinstatement Roster component (HR_REINST_ROSTER), and the Recall/Reinstatement Process component (HR_RUNCTL_REINSTAT).

This section provides an overview of reinstatements and recalls and discusses how to:

- Set up a recall roster.
- Manage a recall roster.
- Set up a reinstatement roster.
- Manage a reinstatement roster.
- Process recalls and reinstatements.

Understanding Reinstatements and Recalls

You have two methods of rehiring employees laid off using the Layoff process. The Reinstatement process is intended to enable you to rehire laid off workers quickly while the Recall process gives you some more flexibility in who you rehire and how, but takes a bit more time. This table lists some of the key differences between the two processes:

<i>Recalls</i>	<i>Reinstatements</i>
Populate the roster with rehire candidates from a group or from a layoff roster.	Populate the roster with reinstatement candidates from a layoff roster only.
Candidates are sorted by seniority and tie breakers.	Candidates are sorted by EmplID number
You can use PeopleSoft Mass Update, instead of the recall process, to update the system with the candidates' recall information.	You can only update the system with the Reinstatement process.
Processes permanent and temporary layoff rosters.	Processes temporary layoff rosters only

Pages Used to Manage Recalls and Reinstatements

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Recall Roster Setup	HR_RECALL_SETUP	Workforce Administration, Labor Administration, Layoffs and Recalls, Recall Roster, Recall Roster Setup	Define the recall roster parameters.

Page Name	Definition Name	Navigation	Usage
Recall Roster List	HR_RECALL_CAND_LST	Workforce Administration, Labor Administration, Layoffs and Recalls, Recall Roster, Recall Roster List	Manage the recall roster.
Reinstatement Roster Setup	HR_REINST_SETUP	Workforce Administration, Labor Administration, Layoffs and Recalls, Reinstatement Roster, Reinstatement Roster Setup	Define the reinstatement roster parameters.
Reinstatement Roster List	HR_REINST_CAND_LST	Workforce Administration, Labor Administration, Layoffs and Recalls, Reinstatement Roster, Reinstatement Roster List	Manage the reinstatement roster.
Process Recall/Reinstatement	HR_RUNCTL_REINSTAT	<ul style="list-style-type: none"> • Workforce Administration, Labor Administration, Layoffs and Recalls, Recall Roster, Recall Candidate List Click the Recall Process button. • Workforce Administration, Labor Administration, Layoffs and Recalls, Reinstatement Roster, Reinstatement Roster List Click the Run Reinstatement button on the Reinstatement Roster List page. 	Use the HR_REIN_EXEC process to recall or reinstatement workers.

Setting Up a Recall Roster

Access the Recall Roster Setup page (Workforce Administration, Labor Administration, Layoffs and Recalls, Recall Roster, Recall Roster Setup).

Recall Roster Setup page

The system only includes candidates whose recall rights are still valid or those candidates who have a No Recall recall rights rule attached to their labor agreement in the recall roster.

Group ID To populate the recall roster with members in a group, select a group ID. If you select a group ID, confirm that it includes candidates with the HR status you want for this roster (either *Active* or *Active and Inactive*).

Layoff Roster ID To populate the recall roster with workers laid off from a roster, select the ID of the layoff roster. When generating the roster, the system first checks that the layoff for those candidates was successful and excluded those candidates that weren't successfully laid off.

Maintaining a Recall Candidate List

Access the Recall Roster List (Workforce Administration, Labor Administration, Layoffs and Recalls, Recall Roster, Recall Roster List).

Recall Roster Setup
Recall Roster List

Roster ID: K0001B Roster Status: 020 - In Progress

Recall Roster Information Find First 1 of 1 Last

Effective Date: 04/20/2009 Default Rehire Date: 04/20/2009

Total in Group:

Nbr in Group to Consider: 4 View Roster

Apply Employee Roster Status

Apply To: All

Status: K00RECA

Apply

Recall Roster List Customize Find View All First 1-5 of 5 Last

Employee Job-I Job-II

Select	Empl ID	Name	Empl Record	Man Empl	Tie	Notes	Rank	Status	Rehire Date		
<input type="checkbox"/>			0		<input type="checkbox"/>		2	K00RECA	04/20/2009	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	K0HU10	Allison Smith	1	<input type="checkbox"/>	<input type="checkbox"/>		0	K00RECA	04/20/2009	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	K0HU10	Allison Smith	0	<input type="checkbox"/>	<input type="checkbox"/>		0	K00RECA	04/20/2009	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	K0HU11	Thomas Holmes	0	<input type="checkbox"/>	<input type="checkbox"/>		0	K00RECA	04/20/2009	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	K0HU12	Patricia Happs	0	<input type="checkbox"/>	<input type="checkbox"/>		0	K00RECA	04/20/2009	<input type="checkbox"/>	<input type="checkbox"/>

Process Recall Candidates to be Processed: 0

Recall Roster List page

The system will populate the Recall/Reinstatement Roster in one of two different ways:

- If the labor agreement has a no recall expiration rule, the system populates the roster with candidates that were previously laid off.
- If the labor agreement has recall expiration rule that gives workers recall rights, the system populates the roster with candidates who have been previously laid off and who have valid recall rights.

Those workers whose recall rights have expired (as determined by the recall rights expiration rule attached to their labor agreement) are not eligible for recall.

You can process candidates in batches. The recall process processes those candidates who have a status with the Process Event? check box selected as part of its definition. After the recall process processes candidates with a process event status, the system resets the candidates' status to one with the Event Complete? check box selected as part of its definition. The recall process will not reprocess candidates with an event complete status.

To process another group of candidates, set the status of a new group of candidates to a process event status and run the recall process again.

Click Process Recall to access the Recall/Reinstatement Process page and process the candidates for recall.

Adding Candidates Manually

You can manually add candidates to the roster (for example, only six former workers still have recall rights but you need to recall eight). To add a candidate manually, add a row and select an EmplID and employee record number. Click the Man Emp (Manual Employee) button to retrieve the person's job details. Once the worker's details have been retrieved, the button becomes display only. The system assigns all manually-added candidates the permanent rank of zero.

The system updates the Nbr in Group to Consider and Total in Group values to reflect the additional candidates.

Note. You can remove candidates who were manually added to the roster.

Setting Up a Reinstatement Roster

Access the Reinstatement Roster Setup page (Workforce Administration, Labor Administration, Layoffs and Recalls, Reinstatement Roster, Reinstatement Roster Setup).

Reinstatement Roster Setup page

Layoff Roster ID Select the ID of the temporary layoff roster that you are reinstating.
 People laid off using a permanent layoff roster need to be recalled using the Recall Roster component and process.

Default Employee Roster Status Select the default roster status of the recall candidates. The system will populate the roster Status field with this value and you can modify it as necessary.

Maintaining a Reinstatement Roster List

Access the Reinstatement Roster List page (Workforce Administration, Labor Administration, Layoffs and Recalls, Reinstatement Roster, Reinstatement Roster List).

Process Recall/Reinstatement

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

Report Request Parameter(s)

Roster ID:

*Action: Recall from Suspension/Layoff

Action Reason:

Process Recall/Reinstatement page

Running the Recall/Reinstatement Process for a Recall Roster

When you run the recall/reinstatement process (HR_REIN_EXEC) for a recall roster, the process:

- Inserts a new row in the Job Data pages with the effective date equaling the rehire date entered on the recall roster.

The system copies all of the data from the previous Job Data row to the new row and includes the Action and Action Reason values you select here.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Increasing the Workforce," Adding Organizational Instances for Employees, Contingent Workers, and POIs.

- Inserts a new row into the Recall Rights page expiring their recall rights, with the effective date equaling the rehire date entered on the recall roster.

The system enters the value of *Recall* in the Reason field.

The system enters the recall roster's rehire date as the Expiration Date.

See [Chapter 6, "Managing Layoffs and Recalls," Maintaining Recall Rights, page 78.](#)

- Updates the status of the processed candidates in the recall roster with an event complete status.

See [Chapter 4, "Setting Up Labor Administration Data," Setting Up Employee Roster Statuses, page 34.](#)

Running the Recall/Reinstatement Process for a Reinstatement Roster

When you run the recall/reinstatement process (HR_REIN_EXEC) for a reinstatement roster, the process:

- Inserts a new row in the Job Data pages with the effective date equaling the rehire date entered on the reinstatement roster.

The system copies all of the data from the previous Job Data row to the new row and includes the Action and Action Reason values you select here.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Increasing the Workforce," Adding Organizational Instances for Employees, Contingent Workers, and POIs.

- Inserts a new row into the Recall Rights page expiring their recall rights, with the effective date equaling the rehire date entered on the reinstatement roster.

The system enters the value of *Recall* in the Reason field.

The system enters the reinstatement roster's rehire date as the Expiration Date.

See [Chapter 6, "Managing Layoffs and Recalls," Maintaining Recall Rights, page 78.](#)

- Updates the status of the processed candidates in the reinstatement roster with an event complete status.

See [Chapter 4, "Setting Up Labor Administration Data," Setting Up Employee Roster Statuses, page 34.](#)

Recall/Reinstatement Report

The recall and reinstatement process creates the Recall/Reinstatement Roster Post Processing report (HRLAY008) after it completes the recall process. This report lists those workers rehired. It also creates the Recall Rights Post Processing report (HRLAY007) which list the recall rights created for the rehired workers.

These reports list candidates that were not processed successfully without job data. Review the reports to identify candidates that were not processed by looking for those without job data on this report.

Processing Layoffs and Recalls Using PeopleSoft Mass Update

To process a layoff or a recall using PeopleSoft Mass Update:

1. Select the Use Mass Update? check box on the Layoff Roster Setup or Recall Roster Setup page.
2. Set the status of the candidates you want to process to a process event status on the Layoff Roster List or Recall Candidate List page.

See [Chapter 4, "Setting Up Labor Administration Data," Setting Up Employee Roster Statuses, page 34.](#)

3. In the Query Manager component (QUERY_MANAGER), define a query that selects the roster and the candidates to be processed for layoff or recall.

Note. We have included two sample queries, HR_UNION_LAYOFF and HR_UNION_RECALL, that you can modify to meet your needs.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Query*

4. Create a group in the Group Build - Group Definition component.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Group Definitions."

5. Attach the query to the group.

Note. We have included two sample groups, KOLAYOFF and KORECALL, that you can use if you use the sample queries.

6. Set up a Mass Update ID on the Define Mass Update component (MU_SETUP). Enter the following information:
 - In the Population Selection Criteria grid on the Common Changes (MU_SETUP_CHANGES) page, select *Group Build* in the Select By field and the name of the group you are processing in the Group field.
 - Select the job data that you want to update for the candidates that you are processing for layoff or recall.

For example, in addition to selecting to update the Action and Action Reason fields with the value of *Recall*, you may also want to update the Standard Hours field with a value of *30*.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Processing Mass Updates," Setting Up Mass Update Definitions.

7. Prepare the Mass Update ID on the Create Mass Updates page.
8. Preview the Mass Update ID on the Report Mass Updates or Manage Mass Updates pages.
9. Process the Mass Update ID on the Execute Mass Updates (RUNCTL_MU_EXECUTE) page.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Processing Mass Updates."

Running Layoff and Recall Reports

To run layoff and recall reports, use the Seniority Report component (HR_RUNCTL_LAY003), Layoff Roster Report component (HR_RUNCTL_LAY001), Bumping Report component (HR_RUNCTL_LAY002), Candidate List Report component (HR_RUNCTL_LAY004), and the Recall Roster Report component (HR_RUNCTL_LAY005).

This section discusses how to:

- Run the Seniority report.
- Run the Layoff Roster report.
- Run the Bumping report.

Pages Used to Run Layoff and Recall Reports

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Layoff Roster Report	HR_RUNCTL_LAY001	Workforce Administration, Labor Administration, Reports, Layoff Roster Report	Use to run a report on the setup and roster list information of a layoff roster (HRLAY001).
Bumping Report	HR_RUNCTL_LAY002	Workforce Administration, Labor Administration, Reports, Bumping Report	Use to run the Bumping report (HRLAY002). This report displays worker job data history and bumping sequence as set up on the labor agreement.
Seniority Report	HR_RUNCTL_LAY003	Workforce Administration, Labor Administration, Reports, Seniority Report	Use to run the Seniority report (HRLAY003). The report lists workers, their seniority dates, and the values for those dates.
Candidate List Report	HR_RUNCTL_LAY004	Workforce Administration, Labor Administration, Reports, Candidate List Report	Use to run the Candidate List Report (HRLAY004). This report lists the workers with recall rights that have not expired.
Recall Roster Report	HR_RUNCTL_LAY005	Workforce Administration, Labor Administration, Report, Recall Roster Report	Use to run a report (HRLAY005) on the setup and roster list information of a recall roster.

Running the Layoff Roster Report

Access the Layoff Roster Report page (Workforce Administration, Labor Administration, Reports, Layoff Roster Report).

Layoff Roster Report

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

Language:

Roster Information

*Roster ID: Layoff - Labor Agreement K00001

Employee Roster Status Selection (optional) [Customize](#) | [Find](#) | | | 1 of 1

Sequence	Employee Roster Status		
1	<input type="text" value="K00LAYA"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Layoff Roster Report page

Select the Roster ID you want to report on. To further categorize, select one or more employee roster status in the order in which you want the report to list the people with those statuses.

Running the Bumping Report

Access the Bumping Report page (Workforce Administration, Labor Administration, Reports, Bumping Report).

Bumping Report

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

Language:

Selection Criteria

Roster ID: Layoff - Labor Agreement K00001

EmplID:

Set ID:

Labor Agreement:

Department:

Location Code:

Labor Facility ID:

Job Code:

Bumping Report page

Select the roster ID you want to report on. To further limit your search, select values in the other fields. The system will only return the information for those workers that meet the criteria you specify.

Running the Seniority Report

Access the Seniority Report page (Workforce Administration, Labor Administration, Reports, Seniority Report).

Seniority Report

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

Language:

Selection Criteria

As of Date:	<input type="text" value="04/20/2009"/>	Department Set ID:	<input type="text"/>
*Set ID:	<input type="text" value="USA"/>	Department:	<input type="text"/>
*Labor Agreement:	<input type="text" value="K00001"/>	Location Set ID:	<input type="text"/>
*Seniority Date ID:	<input type="text" value="K00DEP"/>	Location:	<input type="text"/>
Labor Facility ID:	<input type="text"/>	Job Code Set ID:	<input type="text"/>
Job Family:	<input type="text"/>	Job Code:	<input type="text"/>

Tie Breakers [Customize](#) | [Find](#) | [View All](#) | [Print](#) | [Grid](#) | First **1 of 1** Last

Sequence	*Tie Breaker ID	Record	Field Name	Descending Order?		
1	<input type="text" value="K00001"/>	PERS_NID	NATIONAL_ID	<input type="checkbox"/>	+	-

Seniority Report page

Select values in the fields to limit your search. The system will only return the seniority information for those workers that meet the criteria you specify.

Chapter 7

Managing Wage Progression

This section provides an overview of wage progression and discusses how to:

- Set up wage progression run IDs.
- Extract information from PeopleSoft Payroll for North America.
- Maintain worker wage progression information.
- Approve and process wage advancement.

Understanding Wage Progression

When you assign a worker to a labor agreement and bargaining unit on the Job Data - Job Labor page (JOB_LABOR) and a salary plan with wage progression rules on the Job Data - Salary Plan page (JOB_DATA_SALPLAN), you can manage their wage plan's step progression using the wage progression processes.

Wage progression is the step-by-step advancement of a worker's compensation rate from a beginning rate to one of full parity. The progression is based on a wage progression rule associated with the worker's salary plan. The rule includes step progression requirements and a rate calculation formula.

The Update Wage Progression processes gather the data required to make a decision about the worker's eligibility to advance and stores that information in the Review Wage Progression component (HR_WP_MAINT_ACTVTY). Once all of the necessary data is accumulated, the system can flag qualified workers for advancement. The system inserts a new Job Data row for the qualified workers with their new step and related wage rate. The system processes the new compensation rate in the next payroll.

If, during the calculation of a worker's new rate, they reach or exceed the maximum rate for the salary grade, the system considers them at parity for their job wage rate. In these circumstances, the system increments the worker to the next highest step for the grade and no longer includes them in the wage progression processes.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Compensation*, "Using Wage Progression with Administer Compensation."

Wage Progression Business Process

To insure timely reflection of the increased pay rate in a worker's paycheck, evaluate workers on wage progression for step increases prior to each payroll.

To manage wage progression:

1. Set up wage progression run IDs on the Wage Progression Run ID page (HR_WP_ID_DEFN).

Wage progression run IDs determine the population of workers considered for processing. The run ID is the key value in progression processes.

See [Chapter 7, "Managing Wage Progression," Understanding Wage Progression Run IDs, page 95.](#)

2. To process wage progression rules based on time worked, you must import time data into the wage progression staging table.

Use the Extract Payroll Data process (HR_EXTRT_NAP) to extract the last pay period's confirmed time data from Payroll for North America. Write additional processes to extract data from other time sources. The Update Wage Progression - Update Activity with Time Data process retrieves the time data from this table.

See [Chapter 7, "Managing Wage Progression," Understanding the Extract Payroll Data Process, page 97.](#)

3. Run the Update Wage Progression processes from the Update Wage Progression page (RUN_UPD_WP_ACTVTY).

To be included in wage progression processing, a worker must have the following:

- A labor agreement.
- A bargaining unit.
- The Stop Wage Progression check box on the Job Data - Job Labor and Review Wage Progression page is not checked.

See [Chapter 7, "Managing Wage Progression," Understanding the Update Wage Progression Process, page 98.](#)

4. Use the Approve Employees to Advance page (HR_WP_ADVANCE) to approve workers for wage progression if approval is required by the salary plan's wage progression rule.

See [Chapter 7, "Managing Wage Progression," Approving and Processing Wage Advancements, page 113](#)

.

Note. To set up a salary plan requiring advancement approval, select the Advancement Approval Required check box on the Salary Plan Table - Define Wage Progression Rule page (SALARY_PLAN_TABLE2).

The system will automatically approve workers for advancement if their job and time data meets the advancement criteria and if their plan's wage progression does not require approval for advancement.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Compensation*, "Using Wage Progression with Administer Compensation."

5. Process workers approved for advancement using the Advance Employees to next Step process (HR_WP_ADV) from the Process Wage Progression page (RUN_UPD_WP_ADVC).

See [Chapter 7, "Managing Wage Progression," Processing Wage Progression, page 115.](#)

At any point in the process, you can review or modify a worker's wage progression activity details on the Review Wage Progression page (HR_WP_MAINT_HIST).

See [Chapter 7, "Managing Wage Progression," Reviewing and Manually Adjusting Wage Progression Details, page 105.](#)

Setting Up Wage Progression Run IDs

To set up wage progression run IDs use the Wage Progression Run ID component (HR_WP_ID_DEFN).

This section provides an overview of wage progression run IDs and describes how to set up wage progression run IDs.

Understanding Wage Progression Run IDs

Wage progression run IDs enable you to create discrete populations of workers and manage their wage progression consistently throughout the process. The run ID is a key on the process run control pages and the Approve Employees to Advance page.

Determine the best way to define your population (for example, by salary plan), and then use that method for all your wage progression run IDs.

Note. Be sure to configure run ID populations in such a way that you will be including a worker's Job Data record in only one population.

Page Used to Set Up Wage Progression Run IDs

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Wage Progression Run ID	HR_WP_ID_DEFN	Workforce Administration, Labor Administration, Wage Progression, Wage Progression Run ID, Wage Progression Run ID	Define groups of workers to manage throughout the wage progression process.

Setting Up Wage Progression IDs

Access the Wage Progression Run ID page (Workforce Administration, Labor Administration, Wage Progression, Wage Progression Run ID, Wage Progression Run ID).

Wage Progression Run ID

Wage Progression Run ID: KUWP2

*Description: By Salary Plan KUH2

Population Basis

Labor Agreement
 Salary Plan
 Group ID

Wage Progression by Salary Plan

Set ID	Salary Administration Plan	Step Increment Type		
1 SHAR	KUH2	Hours Worked	Administrative Workers	+ -

Wage Progression Run ID page

Wage Progression Population Basis

Choose the method by which to determine the population for the wage progression run ID:

- Labor Agreement
- Salary Plan
- Group ID

Wage Progression by Bargaining Unit

When you select Labor Agreement as your run ID population basis, enter one or more labor agreements in the grid and the workers associated with the selected labor agreements will make up the run ID population.

Wage Progression by Salary Plan

When you select Salary Plan as your run ID population basis, enter one or more salary plans in the grid and the workers associated with the selected plans will make up the run ID population.

Wage Progression by Group ID

When you select Group ID as your run ID population basis, enter one group ID and the workers associated with the selected group ID will make up the run ID population.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Group Definitions."

Extracting Information from PeopleSoft Enterprise Payroll for North America

To obtain time-worked information from PeopleSoft Enterprise Payroll for North America, use the Extract Payroll Data component (HR_WP_NA_PY_EXTRCT).

This section provides an overview of the Extract Payroll Data process and discusses how to extract information from Payroll for North America.

Understanding the Extract Payroll Data Process

If you are using Payroll for North America to process your workers' payroll and if you have workers in a salary plan with wage progression rules that use special accumulators for hours worked or leave hour limits, use the Extract NA Payroll Data process (HR_EXTRT_NAP) to extract time data of your workers.

Run the process once per pay cycle. The Extract NA Payroll Data process:

- For the selected company, extracts all the previous payroll's confirmed time data specified in the wage progression rule's accumulator ID and places it in an HR staging tables HR_PAY_STG and HR_PAY_STG_ERNS.
- Sets the HR_WP_PROCESS_FLG on the PAY_CHECK record to indicate that the time data has been processed and to prevent the system from gathering the same data multiple times.

The Update Wage Progression - Payroll Update process retrieves the time data from the staging table and updates the Review Wage Progression page with the information to enable you to manage wage progression and process workers for advancement. After you run the Update Wage Progression process you can review the detailed time data using the Review Time Details page.

See [Chapter 7, "Managing Wage Progression," Reviewing Time Details, page 112.](#)

See [Chapter 7, "Managing Wage Progression," Understanding the Extract Payroll Data Process, page 97.](#)

See [Chapter 7, "Managing Wage Progression," Understanding the Update Wage Progression Process, page 98.](#)

See *PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook*.

Extracting Off-Cycle Runs

The Extract Payroll Data process will not extract off-cycle payrolls for a Pay Run ID until an on-cycle payroll has been run first for the same Pay Run ID.

If the year-ending month is opened up for an off-cycle payroll after the next period on-cycle payroll has already been run, make sure to accommodate the payroll time entries in wage progression while the off-cycle payroll is open. The extraction process will not recognize the additional entries for the Pay Run ID once the off-cycle payroll has been closed again.

Pages Used to Extract Time Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Extract Payroll Data	HR_WP_NA_PY_EXTRCT	Workforce Administration, Labor Administration, Wage Progression, Extract Payroll Data, Extract Payroll Data	Run the Extract Payroll Data process. Select the company whose payroll data you want to extract.

Maintaining Worker Wage Progression Information

To maintain worker wage progression information use the Update Wage Progression component (RUN_UPD_WP_ACTVTY) and Review Wage Progression component (HR_WP_MAINT_ACTVTY).

This section provides an overview of the Update Wage Progression process and discusses how to:

- Update wage progression details systematically.
- Review and manually adjust wage progression details.
- Review time details.
- View and acknowledge exception conditions.

Understanding the Update Wage Progression Process

The Update Wage Progression process is made up of three processes that gather the job and payroll time information related to wage progression for workers included in the Wage Progression Run ID, and determine when a worker is qualified to advance based on their wage progression rule. Each process updates the Review Wage Progression page.

The three processes are:

1. The Update Activity with Job Data process (HR_WP_UPD_JC).
Run to update workers' wage progression records with relevant updates from their job data records.
2. The Update Activity with Time Data process (HR_WP_UPD_PY0).
Run to update workers' wage progression records with time worked information extracted from the payroll system.
3. The Qualify Employees process (HR_WP_UPD_QL).
Run to evaluate and qualify if workers are ready for advancement.

Note. You must run these processes in sequence.

Update Activity with Job Data Process

If a worker is assigned to a bargaining unit, labor agreement, and salary plan that includes a wage progression rule, the Update Activity with Job Data process:

- Detects changes to the following fields on the current Job Data record:
 - Bargaining unit.
 - Labor agreement.
 - SETID_JOBCODE, if the change is the result of a change in the worker's business unit.
 - JOBCODE, if the new value is manually entered.
 - SETID_SALARY, if the change is the result of a change in the worker's business unit.
 - SAL_ADMIN_PLAN, if the new value is manually entered or changed as a result of a system rule.
 - GRADE, if the new value is manually entered or changed as a result of a system rule.
 - STEP, if the new value is manually entered.
 - STEP_ENTRY_DT , if the value is updated
 - WPP_STOP_FLAG, if the new value is manually entered.

Note. The system processes the Job Data record that is current on the process' As of Date.

- When a Job Code change occurs, checks and applies the carryover rules selected for the worker's labor agreement on the Labor Agreement page (HR_LABOR_AGR_DEFN1).

See [Chapter 4, "Setting Up Labor Administration Data," Defining General Labor Agreement Terms, page 37.](#)

- Inserts a new row into the Review Wage Progression page with the updated information.

The system identifies this row by populating the Type field with the value of *Job Change*.

- Updates the Last Process Dates date and time stamps.

Note. After the process initially records a selected Stop Wage Progression check box for a worker, it will no longer gather job data for workers who have the Stop Wage Progression check box selected on the Job Labor page or Review Wage Progression - Activity tab.

Update Activity with Time Data Process

Run this process when the wage progression rule is based on hours worked or when an elapsed-time wage progression rule has leave limits in effect. The process processes all staged time data, processed by the Extract Time Data process, for workers active in wage progression. The staging tables (HR_PAY_STG and HR_PAY_STG_ERNS) must first be populated with data extracted from Payroll for North America or another external subsystem.

If the process detects previously extracted and staged time data, it:

- Inserts a new row into the Review Wage Progression page with the updated information.
The system identifies this row by populating the Type field with the value of *Payroll Update*.
- Inserts a new row into the Review Time Detail page.
See [Chapter 7, "Managing Wage Progression," Reviewing Time Details, page 112.](#)
- Deletes the row from the staging table after processing.
Updates the Last Process Dates date and time stamps.

Note. The process will not gather time data for workers who have the Stop Wage Progression check box selected on the Job Labor page or Review Wage Progression - Activity tab but it will delete the row in the staging table so that the time will not be processed once you deselect the Stop Wage Progression check box for the worker.

Note. You do not need to enter an As of Date to run this process as all rows in the staging tables will be processed. The system will create a separate Review Wage Progression entry for each pay period.

See [Chapter 7, "Managing Wage Progression," Extracting Information from PeopleSoft Enterprise Payroll for North America, page 97.](#)

Qualify Employees Process

The Qualify Employees process determines if a worker is ready for step advancement. The process should be the last update run prior to Process Wage Progression which will perform the actual wage advancement.

The process qualifies workers under an elapsed-time wage progression rule by looking at the adjusted step entry date in the most recent job change or manual row in the Review Wage Progression page comparing it to the as of date entered on the run control page.

The process qualifies workers under hours-worked rules by looking at the first payroll update row in the Review Wage Progression page with hours that qualify. Whenever there is a manual row with the same date as a job change or payroll update row, the process gives the manual row's data precedence. The process:

- Calculates and populates the Estimated Advancement Date value.

This calculation is based on the wage progression rule's advancement parameters, the worker's adjusted step entry date, as of date, hours worked, on the Review Wage Progression page and, for hours worked rules, the standard hours on the Job Data - Job Information page.

- The process will set the worker's wage progression status depending on the type of wage progression rule:
 - For hours-worked wage progression rules, the process determines if the worker has accumulated enough hours since the step's original entry date.

If the Accumulated Hours Worked is greater than the step's Required Hours and the wage progression rule does not indicate that approval is required, the system sets the worker's status to *Approved*; or if Approval is required, *Qualified-Approval Required* or *Almost Qualified*, if the wage progression approval rule allows for an hours within tolerance.

- For elapsed-time rules, the process determines if the calendar time between the worker's adjusted step entry date and the process As of Date exceeds the time required in the salary step.

If the time has been met and the wage progression rule does not indicate that approval is required, the system sets the worker's status to *Approved*. If the rule does require approval, the system sets the status to *Qualified - Approval Required*. If the wage progression approval rule allows for an hours within tolerance, the system may set the status to *Almost Qualified*.

In all other circumstances, the process sets the status to *Not Qualified*.

- Updates the qualifying row on the Review Wage Progression page with the Status field accordingly.

Updates the Last Process Dates date and time stamps.

Process Exceptions

All Update Wage Progression processes identify circumstances that fall outside the basic wage progression definition and flags the workers' Review Wage Progression records with an exception condition. The system will not process for advancement workers with a row in an exception state but all other wage progression processes will continue.

During any of the Update Wage Progression processes, the system will mark a worker for exception when it encounters an exception condition. The system inserts a red alert icon (!) on the worker's Review Wage Progression page. Additionally, you can generate a list of workers with exceptions using the Wage Progression Exception report. The table below lists the various exceptions, what triggered the exception, and the action you might take before acknowledging the exception.

Exception Condition	What it Means	Action Required
Job Data Correction	A user has made a correction to a Job Data row, effecting job data that impacts wage progression.	Review the worker's Job Data record and make modifications to the job data record or the worker's wage progression record, if necessary.
Manual Step Advance	A user has manually changed a worker's grade step level on the Job Data - Salary Plan page.	Review the change for accuracy.
Exceeded Leave Hours	The worker's leave hours have exceeded the leave limit prior to meeting the elapsed time required for step advancement.	Review the worker's wage progression record and modify the Orig Step Entry Date value if appropriate.

Exception Condition	What it Means	Action Required
Exceeded Time Limit	The worker has worked the required number of hours in the required calendar period.	Review the worker's wage progression record and modify the Orig Step Entry Date or Hours Worked value if appropriate.
Approved but Stop Wage Progression	A user has selected one of the Stop Wage Progression check boxes of a worker who was approved for advancement.	Review the worker's Job Data record and wage progression record and make modifications to the job data record or the worker's wage progression record, if necessary.
Released Stop Wage Progression	A user has cleared one of the Stop Wage Progression check boxes.	Review the worker's Job Data record and wage progression record and make modifications to the job data record or the worker's wage progression record, if necessary.
Two Earnings Periods	The Update Activity with Time Data process includes time from two or more earnings periods.	Review the worker's Job Data record and wage progression record and make modifications to the job data record or the worker's wage progression record, if necessary.
Special Accumulator ID Changed	A user has changed the wage progression rule's accumulator ID on the Salary Plan Table – Define Wage Progression Rule page.	Review the worker's wage progression record and modify if appropriate.
New Time < Old Time	The Update Activity with Time Data process has caused the worker's new Hours Worked total to be less than the previous Hours Worked value.	Review the worker's wage progression record and modify if appropriate.

Pages Used to Maintain Worker Wage Progression Information

Page Name	Definition Name	Navigation	Usage
Update Wage Progression	RUN_UPD_WP_ACTVTY	Workforce Administration, Labor Administration, Wage Progression, Update Wage Progression, Update Wage Progression	To update a worker's wage progression activity record, run the following wage progression processes in sequence: <ol style="list-style-type: none"> 1. Update Activity with Job Data process. 2. Update Activity with Time Data process. 3. Qualify Employees process.

Page Name	Definition Name	Navigation	Usage
Review Wage Progression	HR_WP_MAINT_HIST	Workforce Administration, Labor Administration, Wage Progression, Review Wage Progression, Review Wage Progression	Review a worker's wage progression activity rows and add new rows to make manual adjustments to the activity record.
Review Time Details	HR_WP_EARN_INQUIRY	<ul style="list-style-type: none"> Workforce Administration, Labor Administration, Wage Progression, Review Wage Progression, Review Wage Progression <p>Click the Time Detail button on the Review Wage Progression - Elapsed Time tab (leave hours) and Review Wage Progression - Reported Time tab (hours worked) on the Review Wage Progression page.</p> <ul style="list-style-type: none"> Workforce Administration, Labor Administration, Wage Progression, Review Time Details, Review Time Details 	Review earning period details per pay period about a worker's leave and worked hours.
Exception Messages	HR_WP_MSG_SEC	Workforce Administration, Labor Administration, Wage Progression, Review Wage Progression, Review Wage Progression	Review system messages about why a worker was excepted from advancement. Acknowledge exception to resume wage advancement eligibility.
Wage Progression Exception Rpt	RUN_WP002	Workforce Administration, Labor Administration, Wage Progression, Wage Progression Exception Rpt, Wage Progression Exception Rpt	Run the exceptions report (WP002). It lists all employees within a Wage Progression Run ID group that have unacknowledged exceptions and indicates the exception type.

Updating Wage Progression Details Systematically

Access the Update Wage Progression page (Workforce Administration, Labor Administration, Wage Progression, Update Wage Progression, Update Wage Progression).

Update Wage Progression

Run Control ID: KUH2 [Report Manager](#) [Process Monitor](#)

Report Request Parameter(s)

*Wage Progression Run ID: By Salary Plan KUH2

As of Date:

▼ Last Process Dates

Last Process to Run:	Qualification
Job Changes Process Date:	09/20/04 4:10PM
Payroll Update Process Date:	09/20/04 4:22PM
Qualification Process Date:	09/20/04 4:25PM
Approve for Advancement Date:	
Advancement Process Date:	

Update Wage Progression page

You must run the three update process one at a time, in this order:

1. Update Activity with Job Data process (HR_WP_UPD_JC)
2. Update Activity with Time Data process (HR_WP_UPD_PY0)
3. Qualify Employees process (HR_WP_UPD_QL)

Wage Progression Run ID Select the run ID representing the information group on which you want to collect activity data.

As of Date Select the date as of which you want to incorporate changes to the Job Data pages or qualify an Elapsed Rule based worker for advancement.

Last Process Dates There are five wage progression programs. This group box lists the last time each of the processes were run and which process was run most recently.

Reviewing and Manually Adjusting Wage Progression Details

Access the Review Wage Progression page (Workforce Administration, Labor Administration, Wage Progression, Review Wage Progression, Review Wage Progression).

Review Wage Progression

Mas Ravi EMP ID: K0HU17 Empl Record: 0

Activity Details Customize | Find | View All | First 1 of 1 Last

Activity | Elapsed Time | Reported Time | Exception | Job | Wage Plan | Labor Agreement

Notes	Activity Date	Type	Progression Type	Status	Approved By	Stop WP	Estimated Advance	Date Posted
	01/01/2003	Job Change	Elapsed Time Based	Qualified - Approval Required	Manual	<input type="checkbox"/>	01/29/2003	08/28/2009

[Insert Manual Row](#)

Review Wage Progression (1 of 7)

Review Wage Progression

Mas Ravi EMP ID: K0HU17 Empl Record: 0

Activity Details Customize | Find | View All | First 1 of 1 Last

Activity | Elapsed Time | Reported Time | Exception | Job | Wage Plan | Labor Agreement

Notes	Activity Date	Type	Progression Type	Status	Orig Step Entry Date	Adj Step Entry Date	Leave Limit	Leave Hours	Time Detail
	01/01/2003	Job Change	Elapsed Time Based	Qualified - Approval Required	01/01/2003	01/01/2003			

[Insert Manual Row](#)

Review Wage Progression (2 of 7)

Review Wage Progression									
Mas Ravi		EMP	ID: K0HU17	Empl Record: 0					
Activity Details									
Activity	Elapsed Time	Reported Time	Exception	Job	Wage Plan	Labor Agreement			
Notes	Activity Date	Type	Progression Type	Status	Required Hours	Hours Worked	Adj Hours	Time Detail	
	01/01/2003	Job Change	Elapsed Time Based	Qualified - Approval Required					

[Insert Manual Row](#)

Review Wage Progression (3 of 7)

Review Wage Progression									
Mas Ravi		EMP	ID: K0HU17	Empl Record: 0					
Activity Details									
Activity	Elapsed Time	Reported Time	Exception	Job	Wage Plan	Labor Agreement			
Notes	Activity Date	Type	Progression Type	Status	Date Posted				
	01/01/2003	Job Change	Elapsed Time Based	Qualified - Approval Required	08/28/2009				

[Insert Manual Row](#)

Review Wage Progression (4 of 7)

Review Wage Progression									
Mas Ravi		EMP	ID: K0HU17	Empl Record: 0					
Activity Details									
Activity	Elapsed Time	Reported Time	Exception	Job	Wage Plan	Labor Agreement			
Notes	Activity Date	Type	Progression Type	Status	Job Code	Description			
	01/01/2003	Job Change	Elapsed Time Based	Qualified - Approval Required	170045	Assistant-Nursing			

[Insert Manual Row](#)

Review Wage Progression (5 of 7)

Review Wage Progression								
Mas Ravi			EMP	ID:	K0HU17	Empl Record:	0	
Activity Details								
Customize Find View All First 1 of 1 Last								
Activity	Elapsed Time	Reported Time	Exception	Job	Wage Plan	Labor Agreement		
Notes	Activity Date	Type	Progression Type	Status	Salary/Wage Plan	Salary Grade	Step	
	01/01/2003	Job Change	Elapsed Time Based	Qualified - Approval Required	KUH1	1	1	
Insert Manual Row								

Review Wage Progression (6 of 7)

Review Wage Progression								
Mas Ravi			EMP	ID:	K0HU17	Empl Record:	0	
Activity Details								
Customize Find View All First 1 of 1 Last								
Activity	Elapsed Time	Reported Time	Exception	Job	Wage Plan	Labor Agreement		
Notes	Activity Date	Type	Progression Type	Status	Labor Agreement	Description	Bargaining Unit	
	01/01/2003	Job Change	Elapsed Time Based	Qualified - Approval Required	K00001	Professional Agreement 1980	KU02	
Insert Manual Row								

Review Wage Progression (7 of 7)

Static Columns

These columns appear on each tab.

! For workers with unacknowledged exceptions, the system marks the rows with a red alert icon.

See [Chapter 7, "Managing Wage Progression," Viewing and Acknowledging Exception Conditions, page 112.](#)

Notes

Click to access the Notepad feature to enter or review notes about a row of wage progression activity. You should add a note of explanation for all manual adjustments.

Activity Date	<p>The date the wage progression activity took place. The activity date for rows with a type of:</p> <ul style="list-style-type: none"> • <i>Job Change</i> equals to the effective date of the Job Data record. • <i>Payroll Update</i> equals to the pay period end date. • <i>Manual</i> defaults to the system date, but can be overridden. The date must be greater than or equal to the last activity date.
Type	<p>The system populates this field with one of the following values to indicate what type of update has been made to the worker's wage progression history:</p> <ul style="list-style-type: none"> • <i>Job Change</i> <p>The Job Data subprocess from the Update Wage Progression process page processed changes on the Job Data pages that impacted wage progression.</p> • <i>Payroll Update</i> <p>The worker is assigned to a wage progression rule that requires time data and the Time Data subprocess from the Update Wage Progression process page has processed the time data.</p> • <i>Wage Advancement</i> <p>The Process Wage Progression process has advanced this worker to a new step ID.</p> • <i>Manual</i> <p>You manually updated the worker's wage progression activity on this page.</p> <hr/> <p>Note. You should include a note explaining the manual updates you make.</p> <hr/>
Progression Type	<p>Displays the progression rule's increment type, either <i>Elapsed Time Based</i> on <i>Reported Time Based</i>.</p>

Status

The Qualification subprocess from the Update Wage Progression process page or an individual manual row entry may trigger a status change if the data supports it. When there is a manual row on the same date as another type of row, the system gives the manual row precedence. The system will evaluate this row for proper status and adjust the other rows accordingly. The system updates the Status field with the following values:

- *Not Qualified*: Not ready for advancement. This status is applied when a worker first enters a step.
- *Almost Qualified*: This status is only applied to workers with salary plan whose wage progression rules require approval and have a time within tolerance.
- *Qualified - Approval Required*: Worker has met advancement criteria but the wage progression rule requires manual approval. Approve workers for advancement on the Approve Employees to Advance page.

See [Chapter 7, "Managing Wage Progression," Approving Workers for Advancement, page 114.](#)

- *Approved*: Worker has met advancement criteria and has been approved automatically (wage progression rule does not require manual approval).
- *Not Approved*: The worker previously had the status of *Qualified - Approval Required* or *Almost Qualified* but you did not manually approve them prior to running the Process Wage Progression process. The system will reset the worker's status to *Qualified - Approval Required* or *Almost Qualified* the next time you run the Qualify Employees process from the Update Wage Progression page.
- *Advanced*: Assigned to the last row with the old salary step to indicate that the worker has advanced to a new step.
- *Completed Wage Progression*: Assigned to workers who have reached the top step of the plan's wage progression rule.

Activity**Approved By**

- If the system automatically approved the worker for advancement, the system sets the value to *System*.
- If the worker requires manual approval, for advancement, the system sets the value to *Manual* once you approve them on the Approve Employees to Advance page.

Stop WP(stop wage progression)

Select this check box here or on the Job Labor page to suspend a worker's participation in the wage progression process. When you select this check box here the system inserts a new Job Data row and selects the Stop Wage Progression check box on the Job Data - Job Labor page.

When you select the Stop Wage Progression on the Job Labor page, the system updates the wage progression activity when you next run the Update Activity with Job Data process.

When you select the check box, the system:

- Makes the salary plan and grade fields available for entry on the Job Data - Salary Plan page.
- No longer includes the worker in the Update Wage Progression processes (except for the first Update Activity with Job Data process that updates this field with the value from the Job Labor page, if that's where you first selected the check box).

The system also selects this check box when a worker completes the wage progression.

Estimated Advance

Displays the system-calculated estimated date the worker will be eligible to advance based on the wage progression rule of their salary plan.

For rules based on hours worked, the system bases this calculation on the standard hours on the worker's Job Data record. The date will always be the first day of the next pay period after the worker qualifies.

This is only an estimate since various other factors could impact the actual advancement date.

See [Chapter 7, "Managing Wage Progression," Understanding the Update Wage Progression Process, page 98.](#)

Date Posted

Displays the system date the row was generated or created.

Elapsed Time

These fields are applicable for elapsed time-based wage progression rules only.

Orig Step Entry Date
(original step entry date)

Displays the date the worker *originally* entered their current salary step. The system draws this value from the Step Entry Date field on the Job Data - Salary Plan page.

Adj Step Entry Date
(adjusted step entry date)

Manually adjust the step entry date here to maintain wage progression accuracy.

Leave Limit

(Optional) Displays the maximum number of leave hours a worker can accumulate while in the step, as defined in the salary plan's progression rule.

Leave Hours

(Optional) Displays the leave hours the worker has accumulated since the original step entry date. The Update Activity with Time Data process updates this value.

Time Detail (Optional) Click to view the Review Time Details page.
See [Chapter 7, "Managing Wage Progression," Reviewing Time Details, page 112.](#)

Reported Time

These fields are applicable for hours-based wage progression rules only.

Required Hours Displays the number of hours the worker needs to accumulate to advance to the next grade step defined in the salary plan's progression rule.

Hours Worked Displays the qualifying hours the worker has worked since the original step entry date. The Update Activity with Time Data process updates this value and also adds in any adjusted hours from a previous manual row.

Adj Hours (adjusted hours) Manually enter hours here to establish a new total for hours worked. Adjust the hours as necessary to maintain wage progression accuracy. The next Update Wage Progression with Time Data will incorporate manual adjustments. The system uses this adjusted value to qualify if the worker is ready to progress to the next step by comparing it to the Required Hours.

Time Detail (Optional) Click to view the Review Time Details page.
See [Chapter 7, "Managing Wage Progression," Reviewing Time Details, page 112.](#)

Exception

Exception Detail These columns only appear if there is a row with an exception. Click to view the details about the worker's exception from advancement.

See [Chapter 7, "Managing Wage Progression," Viewing and Acknowledging Exception Conditions, page 112.](#)

Acknowledge Exception Select to indicate that you acknowledge the exception message and return the worker to advancement eligibility.

Job

Job Code and Description Displays the job code and a description of the worker's job.

Wage Plan

Salary/Wage Plan, Salary Grade and Step Displays the wage progression salary plan, grade, and step currently held by the worker.

Labor Agreement

Labor Agreement, Description, and Bargaining Unit Displays the worker's labor agreement and bargaining unit.

Reviewing Time Details

Access the Review Time Details page (click the Time Detail button on the Review Wage Progression - Elapsed Time tab (leave hours) and Review Wage Progression - Reported Time tab (hours worked) on the Review Wage Progression page).

Review Time Details						
Mas Ravi		EMP	ID:	K0HU17	Empl Record:	0
Time Detail						
Pay Period End Date	Earnings Begin Date	Earnings End Date	Hours	Earnings Code	Payroll Seq	Earnings Seq

Review Time Details page.

Note. The data populated on this page depends on the source of the data and process by which you populate this page. The Extract Payroll Data process populates the page with Payroll for North America pay period and earning period time data for the special accumulator identified in the worker's wage progression rule.

Viewing and Acknowledging Exception Conditions

Access the Exception Messages page (click the Exception Detail button on the Review Wage Progression - Exception tab of the Review Wage Progression page).

When a worker's wage progression conditions warrant manual review and a possible manual adjustment, the Update Wage Progression process will flag their Review Wage Progression record. When a worker is excepted, you cannot advance the person until you have acknowledged the exception by selecting the Acknowledge Exception check box on the Review Wage Progression - Exception tab. However, the system will continue to update the worker's Review Wage Progression record when you run the Update Activity with Job Data and the Update Activity with Time Data processes.

When you select the Acknowledge Exception check box and save the Review Wage Progression page, the system updates the Acknowledged By and Acknowledged On fields with your user ID and the date and time you acknowledged the exception. Click the Notepad button to enter comments. You should add a note of explanation for all exception acknowledgements.

Approving and Processing Wage Advancements

To approve and process wage advancements, use the Approve Employees to Advance component (HR_WP_ADVANCE) and the Process Wage Progression component (RUN_UPD_WP_ADVANCE).

This section provides an overview of the Advance Employees to the Next Step process and discusses how to:

- Approve workers for advancement.
- Process wage progression.

Understanding the Process Wage Progression Process

The Process Wage Progression process (HR_WP_ADV) advances employees to their next wage step, inserting a new Job Data row for each worker being processed.

If workers have a status of *Approved* on the Review Wage Progression page or you have manually approved them for advancement on the Approve Employees to Advance page, the process:

- Updates the Job Data - Salary Plan page with the new step information and executes a Default Pay Components action to enter the new pay rates on the Compensation page (JOB_DATA3). Only rate codes with a Source of Sal Step will be updated. The process will not modify rate codes with a source of Manual.
- Updates the qualifying row on the Review Wage Progression page for the completed salary step, setting the status to *Advanced*.
- Inserts a new row into the Review Wage Progression page for the new salary step and sets the status to *Not Qualified*.

Note. If the worker has a status of *Completed Wage Progression* on the Review Wage Progression page, indicating that they have already reached the top of the wage progression, the process selects the Stop Wage Progression check box on the Job Data - Job Labor page.

You can also launch a preview report, Employees Due Advancement (WP001.SQR), from the Process Wage Progression page to create a list of all of the workers that the Process Wage Progression process will advance. The system will not include workers who have already been processed for advancement.

Pages Used to Approve and Processing Wage Advancements

Page Name	Definition Name	Navigation	Usage
Approve Employees to Advance	HR_WP_ADVANCE	Workforce Administration, Labor Administration, Wage Progression, Approve Employees to Advance, Approve Employees to Advance	If the worker's wage progression rule requires approval, approve workers for wage progression from the online list displayed by a Wage Progression Run ID.
Process Wage Progression	RUN_UPD_WP_ADVC	Workforce Administration, Labor Administration, Wage Progression, Process Wage Progression, Process Wage Progression	<ul style="list-style-type: none"> Run a preview report of all advancement candidates in a Wage Progression Run ID. Process advancements, inserting new steps and wage rates, for all qualified candidates in a Wage Progression Run ID.

Approving Workers for Advancement

Access the Approve Employees to Advance page (Workforce Administration, Labor Administration, Wage Progression, Approve Employees to Advance, Approve Employees to Advance).

Approve Employees to Advance

Wage Progression Run ID: KUWP2 By Salary Plan KUH2

▶ Last Process Dates

Use Select All to approve all employees on the list. Select Save when review and selection are complete. Employees remain on the list until Process Wage Progression is run to advance employee's Step and compensation rate.

Employees Pending Advancement Customize | Find | View All | First 1 of 1 Last

Select	Activity Date	Name	Status	Estimated Advance	Activity Detail
<input type="checkbox"/>					

Select All Deselect All

Approve Employees to Advance page: Activity tab

Employees Pending Advancement					
Select	Activity Date	EmplID	Empl Record	Job Code	Description
<input type="checkbox"/>			0		

Approve Employees to Advance page: Job tab

Employees Pending Advancement				
Select	Activity Date	Salary Plan	Grade	Step
<input type="checkbox"/>				

Approve Employees to Advance page: Wage Plan tab

To approve a worker for wage progression, select the Select check box.

The system only displays those workers who have a status of *Qualified - Approval Required* or *Almost Qualified* on the Review Wage Progression page. Click the Activity Detail button to review a worker's wage progression information on the Review Wage Progression page.

If a worker has an unacknowledged exception, the system marks their row with a red alert icon (!) and makes the Select check box next to their name unavailable. Click the Exception Detail button to review the Exception Messages page.

Workers remain on the Employees Pending Advancement list until you process the wage advancement using the Process Wage Progression process. If you do not approve a worker on this list prior to running the Process Wage Progression process, the system changes their status on the Review Wage Progression page to *Not Approved*. You need to run the Update Wage Progression - Qualify Employees process to reset their status to *Qualified - Approval Required* or *Almost Qualified* and make them appear on this page for approval again.

Processing Wage Progression

Access the Process Wage Progression page (Workforce Administration, Labor Administration, Wage Progression, Process Wage Progression, Process Wage Progression).

Process Wage Progression

Run Control ID: KUH2 [Report Manager](#) [Process Monitor](#)

Report Request Parameters

*Wage Progression Run ID:

Update Future Rows

▼ Last Process Dates

Last Process to Run:

Job Changes Process Date:

Payroll Update Process Date:

Qualification Process Date:

Approve for Advancement Date:

Advancement Process Date:

Process Wage Progression page

Wage Progression Run ID Select the wage progression run ID representing the population of workers you want to process for advancement.

Update Future Rows Select whether to update future-dated Job Data rows.

If a worker has future-dated Job Data rows (rows whose effective dates are greater than the date the of the Job Data row the Advance Employees to next Step process will insert), the system will update the step and compensation data in the future Job Data rows in addition to adding the new current row. The process will only update future-dated Job Data rows with salary plan, grade, and step values identical to the new row.

Last Process Dates This collapsible group box contains a log of the five wage progression programs. It indicates the last time each of the processes were run and which of the processes was run most recently.

Chapter 8

Tracking Disciplinary Actions and Grievances

This chapter discusses how to:

- Track disciplinary actions.
- Track grievances.
- Track union negotiability appeals.

Tracking Disciplinary Actions

This section discusses how to:

- Enter disciplinary incidents.
- (USF) Enter disciplinary offences.
- Document disciplinary action details.
- (USF) Document disciplinary action details.
- Record disciplinary incident resolutions.
- (USF) Record disciplinary incident resolutions.

Pages Used to Track Disciplinary Actions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Disciplinary Action	DISCIPLINARY_ACTN	Workforce Administration, Labor Administration, Record Disciplinary Actions, Disciplinary Action	Describe the incident that led to a disciplinary action against a worker.
Action Taken	ACTION_TAKEN	Workforce Administration, Labor Administration, Record Disciplinary Actions, Action Taken	Document details of disciplinary actions taken against a worker.

Page Name	Definition Name	Navigation	Usage
Disciplinary Resolution	DISCIP_ACTN_RESLTN	Workforce Administration, Labor Administration, Record Disciplinary Actions, Disciplinary Resolution	Record the final resolution of an incident that required disciplinary action.

Entering Disciplinary Incidents

Access the Disciplinary Action page (Workforce Administration, Labor Administration, Record Disciplinary Actions, Disciplinary Action).

The screenshot displays the 'Disciplinary Action' page for Shannon Bacci (Person ID: EIS09). It shows a 'Total Incident' count of 1. The incident details are as follows:

- *Type:** LAL (Absent Without Leave)
- *Reported Date:** 04/28/2009
- *Description:** (Empty text area)
- Supervisor ID:** EIS06 (Diane Chambers)
- *Purge Date:** 10/28/2009

Below the incident details is the 'Disciplinary Letter Information' section:

- *Letter Code:** DAF (Filing)
- Date Letter Printed:** 04/23/2009

Disciplinary Action page

- Total Incident** Each time you enter a new disciplinary offense for this worker, the system calculates and displays the total number of incidents.
- Type** Select a disciplinary action type.
- Reported Date** Select the date the disciplinary action is reported.
- Supervisor ID** Select the worker's supervisor ID if the default supervisor ID selected from the worker's Work Location page isn't accurate.

Purge Date The system automatically inserts a purge date of six months from the Reported Date.

Note. This field is informational only and the system does not purge data automatically based upon this date. You may use this field to write an SQR to purge old disciplinary incidents, but the system will not do this automatically.

Letter Code Select the type of letter you want to issue the worker.

Date Letter Printed The system generates this date when you run the standard letter process.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Generating Form Letters"

Documenting Disciplinary Action Details

Access the Action Taken page (Workforce Administration, Labor Administration, Record Disciplinary Actions, Action Taken).

The screenshot displays the 'Action Taken' page for Shannon Bacci (Person ID: EIS09). The page is divided into several sections:

- Person Information:** Shannon Bacci, Person ID: EIS09.
- Total Incident:** 1
- Disciplinary Information:**
 - Disciplinary Type: LAL (Absent Without Leave)
 - Reported Date: 04/28/2009
- Action Taken:**
 - *Disciplinary Step: ADM (Admonishment)
 - Step Resolution: 002
 - *Action Date: 04/28/2009
 - Discussed With: (Empty field)
 - Comment: (Empty text area)

Action Taken page

Action Taken

Enter as many rows as necessary to resolve the disciplinary issue.

Disciplinary Step Select a disciplinary step for the disciplinary type.

Step Resolution and Action Date Select the resolution type that occurred for this step and the date when the disciplinary step took place.

Discussed With Enter the name of the person with whom you discussed the step.

Recording Incident Resolutions

Access the Disciplinary Resolution page (Workforce Administration, Labor Administration, Record Disciplinary Actions, Disciplinary Resolution).

The screenshot shows a web application interface for recording disciplinary resolutions. At the top, there are three tabs: 'Disciplinary Action', 'Action Taken', and 'Disciplinary Resolution', with the last one being active. Below the tabs, the user's name 'Shannon Bacci' and 'Person ID: EIS09' are displayed. A summary line indicates 'Total Incident: 2'. The main content area is titled 'Disciplinary Resolution' and includes a search bar with 'Find | View All' and a pagination indicator '1 of 2'. The data is presented in a table-like format with the following fields:

- Reported Date:** 04/28/2009
- Disciplinary Type:** LAL (Absent Without Leave)
- Final Resolution:** 002 (Performance Rating Warranted)
- Resolution Comments:** A large, empty text area for entering details.

Disciplinary Resolution page

Final Resolution Select the resolution type that indicates how the incident was finally resolved.

(USF) Tracking Disciplinary Actions

This section provides an overview of the disciplinary tracking system and discusses how to:

- Enter disciplinary offences.
- Document disciplinary action details.
- Record disciplinary incident resolutions.

See Also

Chapter 3, "Setting Up Unions." (USF) Setting Up Unions, page 19

Pages Used to Track Disciplinary Actions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Disciplinary Offenses	GVT_DISCIPLIN_ACT1	Workforce Administration, Labor Administration, Record Disciplinary Actions USF, Disciplinary Offenses	Describe the incident that led to a disciplinary action against a worker.
Disciplinary Actions	GVT_DISCIPLIN_ACT2	Workforce Administration, Labor Administration, Record Disciplinary Actions USF, Disciplinary Actions	Record what actions took place in response to the offense. First enter data on the Disciplinary Offenses page.
Disciplinary Action Events	GVT_DISP_ACTN_EVNT	Workforce Administration, Labor Administration, Record Disciplinary Actions USF, Disciplinary Action Events	Enter an event that discusses the steps of the disciplinary action that have taken place thus far. First enter data on the Disciplinary Offenses and Disciplinary Actions pages.

(USF) Describing Disciplinary Offenses

Access the Disciplinary Offenses page (Workforce Administration, Labor Administration, Record Disciplinary Actions USF, Disciplinary Offenses).

Disciplinary Offenses		Disciplinary Actions		Disciplinary Action Events	
Sharon Keys			Person ID: LE0002		
Total Incident: 1					
Disciplinary Offenses Find View All First 1 of 1 Last					
*Reported Date:	<input type="text" value="04/28/2009"/>	<input type="text" value="31"/>			
*Purge Date:	<input type="text" value="10/28/2009"/>	<input type="text" value="31"/>			
Offense Type:	<input type="text" value="LMS"/>	<input type="text" value="Misrepresentation"/>			
Offense Nbr:	<input type="text" value="1"/>	<input type="text" value="1st Offense"/>			
Supervisor ID:	<input type="text" value="LEPOI01"/>	<input type="text" value="Shiela Hoffman"/>			
*Description:	<input type="text"/>				
Recommended Actions Find View All First 1 of 1 Last					
Days To Complete: 0					

Disciplinary Offenses page

Note. Most of the fields on this page are shared by the Disciplinary Action page.

See [Chapter 8, "Tracking Disciplinary Actions and Grievances," Entering Disciplinary Incidents, page 118.](#)

Offense Type and
Offense Nbr (offense
number)

Select an offense type and number.

Once you have selected an offense type and number, the system automatically displays a list of all disciplinary actions recommended for this particular offense. The system also displays the recommended number of Days To Complete each action. These recommendations were created on the Disciplinary Penalties Matrix 1 page (GVT_DISCIP_OFFENSES) and Disciplinary Penalties Matrix 2 page (GVT_RCMND_ACTIONS).

See [Chapter 4, "Setting Up Labor Administration Data," \(USF\) Defining the First Penalty Matrix for Indicating the Offense Level Penalties, page 52.](#)

See [Chapter 4, "Setting Up Labor Administration Data," \(USF\) Defining the Recommended Disciplinary Actions for Each Offense Level and Type, page 53.](#)

See Also

[Chapter 4, "Setting Up Labor Administration Data," Setting Up Labor Administration Disciplinary, Grievance, and Resolution Classifications, page 49](#)

Recording Related Disciplinary Actions

Access the Disciplinary Actions page (Workforce Administration, Labor Administration, Record Disciplinary Actions USF, Disciplinary Actions).

The screenshot displays the 'Disciplinary Actions' page for Edalia George (Person ID: FA0872). It shows a total of 1 incident. The 'Disciplinary Actions' section lists a reported date of 04/28/2009 for an offense of 'LAT Late for Work' (Offense Nbr: 1). The 'Action Taken' section shows an action type of 'REP Reprimand' initiated on 04/28/2009 with a step length of 1 day, reported to the union on 04/28/2009. There are fields for 'Discussed With' and a large 'Comment' text area.

Disciplinary Actions page

- Action Type** Select a discipline step to record the action taken to resolve the problem. See [Chapter 4, "Setting Up Labor Administration Data," Setting Up Labor Administration Disciplinary, Grievance, and Resolution Classifications, page 49.](#)
- Date Initiated** Defaults to today's date. Change unless the action taken was initiated today.
- Step Length (Days)** If the action has a limited time frame, enter the duration, in days.
- Reported To Union** If your agency identified this type of action as reportable to the union(s), enter the date it was reported to the union(s).

Entering Disciplinary Events to Support Disciplinary Actions

Access the Disciplinary Action Events page (Workforce Administration, Labor Administration, Record Disciplinary Actions USF, Disciplinary Action Events).

Disciplinary Offenses | Disciplinary Actions | **Disciplinary Action Events**

Edalia George Person ID: FA0872
Total Incident: 1

Disciplinary Actions Find | View All | First | 1 of 1 | Last
Reported Date: 04/28/2009 Offense: LAT Late for Work Offense Nbr: 1

Disciplinary Action Steps Find | View All | First | 1 of 1 | Last
Disciplinary Step: REP Reprimand

Disciplinary Action Events Find | View All | First | 1 of 1 | Last

*Event Nbr: 0
*Event: IPA Initiate Personnel Action
Initiated: 04/28/2009
*Days To Complete: 15 *Follow-Up Date: 05/13/2009
Name: Resolution Date:
Comment:

Disciplinary Action Events page

Event Nbr (event number)

These disciplinary action events are stored and presented in numerical order based on the event number you assign. PeopleSoft recommends that you assign event numbers chronologically to give yourself a picture of the events as they happened. For events initiated on the same day, the event number can play a critical role when trying to avoid or settle litigation.

Event

Select an event that discusses what took place at this point.

Initiated

The date the event was initiated defaults to today's date. Change the date unless it was actually initiated today.

Days To Complete

(Optional) Estimate a number of days to complete this event if you want or let it default from the Disciplinary Events table.

Name

Include the name (if any) of the person who initiated this event or was primarily responsible for resolving it.

Tracking Grievances

This section provides an overview of grievance tracking and discusses how to:

- Enter new grievances.
- Track steps in the grievance process.
- Record grievance resolutions.

Pages Used to Track Grievances

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Grievance	GRIEVANCES1	Workforce Administration, Labor Administration, Record Grievances, Grievance	Add a new grievance into the system. You can create grievances for workers, applicants, unions, or another group or person.
Grievance Steps	GRIEVANCES2	Workforce Administration, Labor Administration, Record Grievances, Grievance Steps	Record the steps taken to resolve the grievances. A grievance may require a number of steps before it is resolved.
Grievance Resolution	GRIEVANCE_RESLTN	Workforce Administration, Labor Administration, Record Grievances, Grievance Resolution	Document the final resolution of a grievance.

Entering New Grievances

Access the Grievance page (Workforce Administration, Labor Administration, Record Grievances, Grievance).

Grievance		Grievance Steps		Grievance Resolution	
Grievance ID:	0000000001				
Filed By					
<input checked="" type="radio"/> Employee/Applicant	HXTEST011	Jane Fonda			
<input type="radio"/> Union					
<input type="radio"/> Other					
Security					
Business Unit:	HXBU1	HRSYSBU	Department:	HXDEPT01	HRMSDIV
*Grievance Date:	05/12/2001		*Type:	FUP	Unfair Labor Practice
Description:	They don't like my political views.				
Contract Ref:					
*Status:	Pending		*Status Date:	05/12/2001	

Grievance page

Assigning Grievance IDs

When you open the Grievances component, the system prompts you for a grievance ID. Use the grievance ID to track a grievance through the entire resolution process. There are two ways to assign grievance IDs:

- Automatically

If you use automatic ID assignment, the system adds IDs sequentially as you add new grievances.

If you let the system assign the number automatically, it first appears as *0000000000*. The actual number assigned to the grievance appears after you save the information you enter in the Record Grievances component (GRIEVANCES).

- Manually:

Enter grievance IDs yourself, using whatever system you choose for your organization. If you choose manual entry, you don't need to assign IDs sequentially.

Note. To avoid maintaining two different sets of grievance IDs, PeopleSoft recommends that you choose only one way of assigning them. *Either* always assign IDs manually *or* always let the system assign them—not both.

Filed By

Employee/Applicant If you are adding a grievance filed by a worker or applicant, click this button and enter the person or applicant ID in the adjacent field.

Union Select if you are entering a grievance filed by a union on behalf of union members and enter a union code in the adjacent field.

Other Select if you are entering a grievance that doesn't fall into either of the previous categories. In the adjacent field, enter free-form text up to 40 characters to describe who filed the grievance.

Security

Business Unit and Department If you enter a business unit and department here, then only those users with security access to that department can access the grievance record when you save the information for this grievance. For example, if you select Department *10200* for Grievance ID *0000000001*, then when you save the page only users with security access to Department *10200* can access this record.

Note. If you don't enter a value in the Department field, then you won't set department level security for this record and the system defaults to no department security for grievance records.

Note. These system does not default a worker's business unit and department into these fields.

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

Grievance Details

Type (Required) Select a grievance type.
See [Chapter 4, "Setting Up Labor Administration Data," Setting Up Labor Administration Disciplinary, Grievance, and Resolution Classifications, page 49.](#)

Contract Ref (contract reference) Enter the contract reference for this grievance, if applicable.

Status and Status Date Select the status of the grievance — *Settled*, *Pending*, or *Appealed* — and the date that status was reached.

Tracking Steps in the Grievance Process

Access the Grievance Steps page (Workforce Administration, Labor Administration, Record Grievances, Grievance Steps).

Grievance		Grievance Steps		Grievance Resolution	
Grievance ID:	0000000001				
Grievance Date:	05/12/2001	Grievance Type:	Unfair Lbr	Status:	Pending
Data Find View All First 1 of 1 Last					
*Grievance Step:	<input type="text" value="002"/>	Manager/Emp. Rel. Discussion + -			
*Action Date:	<input type="text" value="05/12/2001"/>				
Resolution Date:	<input type="text"/>				
Discussed With:	<input type="text"/>				
Letter Code:	<input type="text"/>				
Letter Dt:	<input type="text"/>				
Step Resolution:	<input type="text"/>				
Comment:	<input type="text" value="Talked about my feelings"/>				

Grievance Steps page

Note. Grievances are sorted in descending order—you'll see the most recent one first.

Grievance Step and Action Date

Select the grievance step and the date it was taken.

Note. You can enter multiple grievance steps as you process this grievance.

See [Chapter 4, "Setting Up Labor Administration Data," Setting Up Labor Administration Disciplinary, Grievance, and Resolution Classifications, page 49.](#)

Resolution Date

When the step is resolved, update this page by entering a resolution date, if applicable.

Discussed With

Enter the name of the person with whom you discussed the step.

Letter Code

If you want to send a standard letter about the grievance, select the appropriate letter code.

Letter Date

Enter the date when the letter was sent.

Step Resolution

Select the action you took to resolve this step.

See [Chapter 4, "Setting Up Labor Administration Data," Setting Up Labor Administration Disciplinary, Grievance, and Resolution Classifications, page 49.](#)

Comment

You can enter comments longer than the three lines shown.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Generating Form Letters"

Recording Grievance Resolutions

Access the Grievance Resolution page (Workforce Administration, Labor Administration, Record Grievances, Grievance Resolution).

Grievance	Grievance Steps	Grievance Resolution
Grievance ID:	0000000001	
Grievance Date:	05/12/2001	
Short Description:	Unfair Lbr	Pending
Final Resolution:	<input type="text"/> 	
Resolution Comments:	<input type="text"/>	

Grievance Resolution page

Final Resolution Select the resolution type that indicates how the incident was finally resolved. See [Chapter 4, "Setting Up Labor Administration Data," Setting Up Labor Administration Disciplinary, Grievance, and Resolution Classifications, page 49.](#)

Resolution Comments Enter any comments you have about the final resolution.

(USF) Entering Union Negotiability Appeals

This section discusses how to track union negotiability appeals.

Page Used to Enter Union Negotiability Appeals

Page Name	Definition Name	Navigation	Usage
Record Negotiability Appeal USF	GVT_NEGBLTY_ITEMS	Workforce Administration, Labor Administration, Record Negotiability Appeal USF, Record Negotiability Appeal USF	Track union negotiability appeal items and the steps taken to resolve them.

Tracking Union Negotiability Appeals

Access the Record Negotiability Appeal USF page (Workforce Administration, Labor Administration, Record Negotiability Appeal USF, Record Negotiability Appeal USF).

Record Negotiability AppealUSF

Bargaining Unit: 0055 Natl Assoc of Govt Employees
 Union Code: 432 American Fed of Govt Employees Item Appealed: OVTM

Negotiability Appeals Items Find | View All | First | 1 of 1 | Last

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

*Description: Overtime *Item Status: Pending

Negotiability Appeals Tracking Find | View All | First | 1-2 of 2 | Last

*Appeal Step: 01 *Description: Discuss with Union + -

Long Description: Need additional discussion Date: 01/01/1992

*Appeal Step: 02 *Description: Resolve Issue + -

Long Description: Union agreed that this was not negotiable. Date: 01/01/1996

Record Negotiability Appeal USF page

- Item Status** Indicate the status of the appeal of this item. If the resolution affects the status of the item being appealed, update the Item Status field at the same time.

- Appeal Step** Use only for sequencing the events or steps. Enter steps in the order in which they happened, if known.

- Description and Long Description** When that step is resolved, describe the resolution.

- Date** Enter the date on which the step was or will be resolved.

Chapter 9

Requesting Works Councils Approval

This chapter provides an overview of the works councils approval business process and discusses how to enter a job change request.

Understanding the Works Councils Approval Business Process

This section discusses how to set up the Works Council business process.

To set up and run the Works Council business process:

1. Set up codes and values on the Job Change by Reg Region page (WC_ACTN_REASON_TBL).
2. Human Resources Administrator or Manager requests a Job Change for an worker.

If a manager submits the request, the HR Administrator is notified and reviews the request. If the HR Administrator approves the request, the Works Council is notified.

For job change requests such as transfers that involve a change in reporting managers, the new manager enters the job change request and the current manager approves or denies the job change request.

3. Works Council reviews and approves or denies the worker job change request.

The processing for the works council review and approval is automated. The works council member reviews the job change request, uses the Job Change Request pages (WC_JOB_CHG_REQ) to look at the information about the worker and the action, and enters a response (or decision). Once a decision is entered, the human resources administrator is notified with an email and worklist.

4. Review the works council's decisions.

The human resources administrator uses the Review All Job Change Request page (WC_JCR_STATUS2_INQ) to review the works council's decision and chooses to accept or override the works council's decision. If the human resources administrator overrides the works council decision, the works council is notified with an email and worklist.

5. Load changes to job data.

Changes can be loaded manually or automatically.

Important! Managers can only enter job change requests using the self service pages as delivered with PeopleSoft Enterprise eProfile. The request as part of Manage Labor Administration must be entered by the HR Administrator.

The following tables discuss the delivered processes by role and business process.

Hire Process

Business Process	Requested by	Approved by
Human Resources	HR Administrator	Works Council
eProfile	Manager	Works Council

Termination Process

Business Process	Requested by	Approved by
Human Resources	HR Administrator	Works Council
eProfile	Manager	Works Council

Transfer Process

Business Process	Requested by	Approved by
Human Resources	HR Administrator	Works Council
eProfile	New Manager	Manager, Works Council

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "Increasing the Workforce"

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "Updating Person and Job Information"

PeopleSoft Enterprise eProfile Manager Desktop 9.1 PeopleBook, "Managing Direct Reports," Understanding the Management of Direct Reports

Prerequisites

Works councils members should use the Job Change Request pages to record works councils decisions about personnel actions affecting workers. HR managers should use them to request changes. Before using these pages, however, you must define job changes and reasons by regulatory region on the Job Change by Reg Region page.

All job change requests can be represented by a single process flow, with the exception of an Employee Transfer. Employee Transfers are an exception because they involve both a new requesting manager and the current manager who must approve the transfer. Once the current manager approves the transfer, the Employee Transfer business process is identical to the standard Request Job Change - Works Councils process.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Working with Regulatory Regions"

Entering a Job Change Request

This section provides an overview of job change request processing and discusses how to:

Understanding the Job Change Request Process

The Job Change Request pages enable you to easily notify the works councils of an worker job change before the change takes place so the change may be approved.

The Works Councils Notification process requires the following dynamic roles to be defined before generating a job change request. These dynamic roles will be used to route all workflows and email notifications:

Works Councils Member

Define the Works Council Member on the Works Council page as you define the works council. The Works Council ID is associated with the company on the Company Location page (COMPANY_TABLE1). When you select a worker, the system uses the associated company data contact the works council for that worker.

The Works Councils ID will be used to route job change requests for a worker to the appropriate works councils spokesperson. If no works councils spokesperson is found for the worker, or if the works councils has no associated spokesperson, the HR Administrator will receive an error message when the Works Councils Notification process is triggered from the Request Job Change page.

HR Administrator

The HR Administrator who works on the job change request owns the request until the job change is complete. The system determines this according to department security setup—anyone with the role of HR administrator who has access the worker's department is notified with change request—the first HR administrator who takes action in the page is responsible for following the process from that point on.

Note. In the case of a worker transfer or any job change resulting in a department change, the HR Administrator of the worker's *new* department will be notified rather than the HR Administrator of the worker's current department. If no HR Administrator is found for the worker, you will receive an error message when the Works Councils Notification process is triggered from the Request Job Change page.

Manager

Manager self service security setup is used to route Works Councils related workflows to the correct manager. If no Manager is found for the worker, you will receive an error message when the Works Councils Notification process is triggered from the Request Job Change - Works Councils page.

Employee

Workers will be automatically notified via email once a job change request is complete.

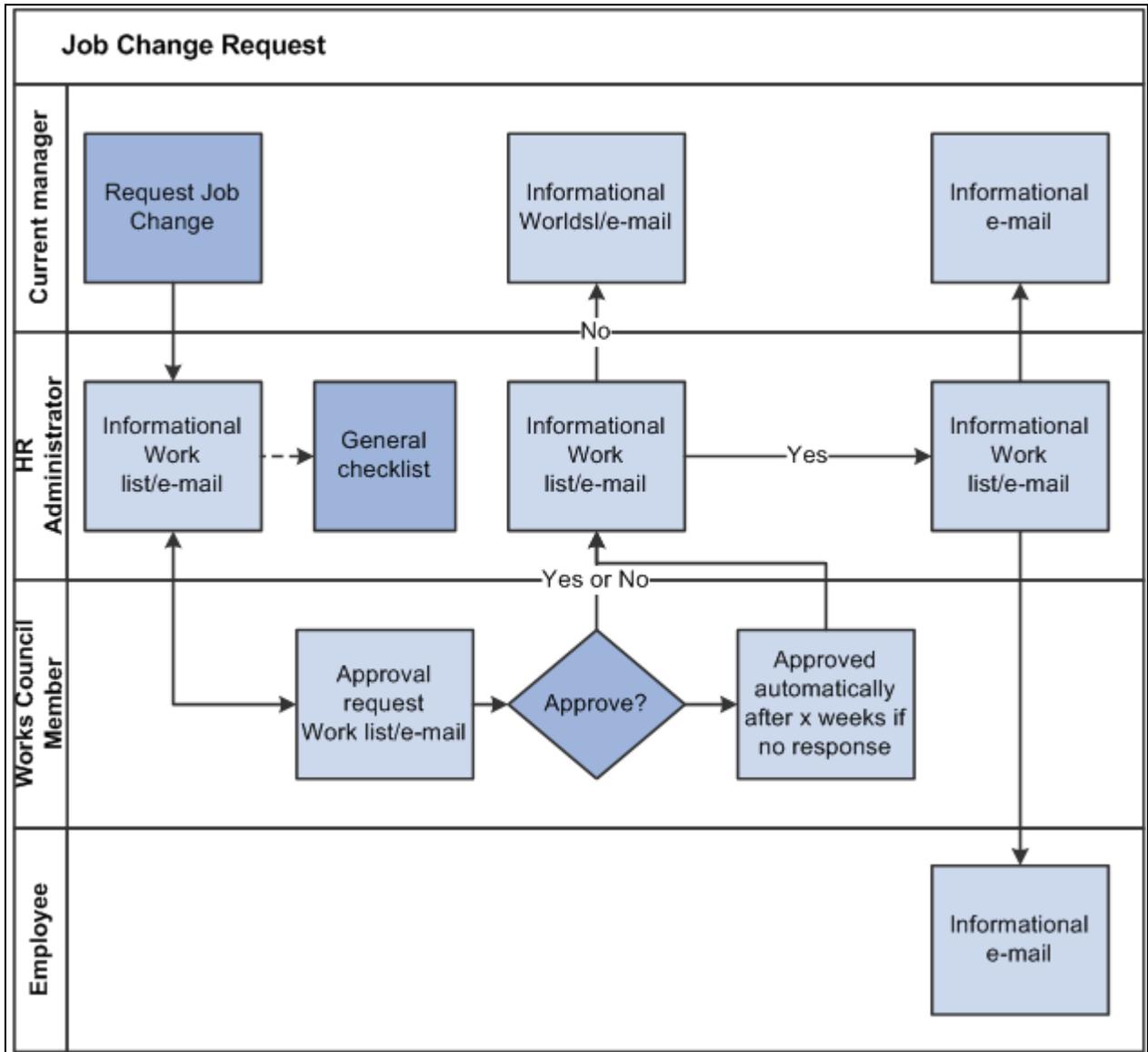
Security

A transaction requiring Works Councils approval may be initiated by the new manager, the current manager, or the HR Administrator. If the current manager initiates the job change request, they can then select the direct reports. If the new manager makes the request, they may select all workers. You must know the exact mandatory search criteria, which you configured on the Job Change by Reg Region page, to find the right worker.

If the HR Administrator initiates the request, they may select all workers in the departments for which they are responsible as defined in the standard department security.

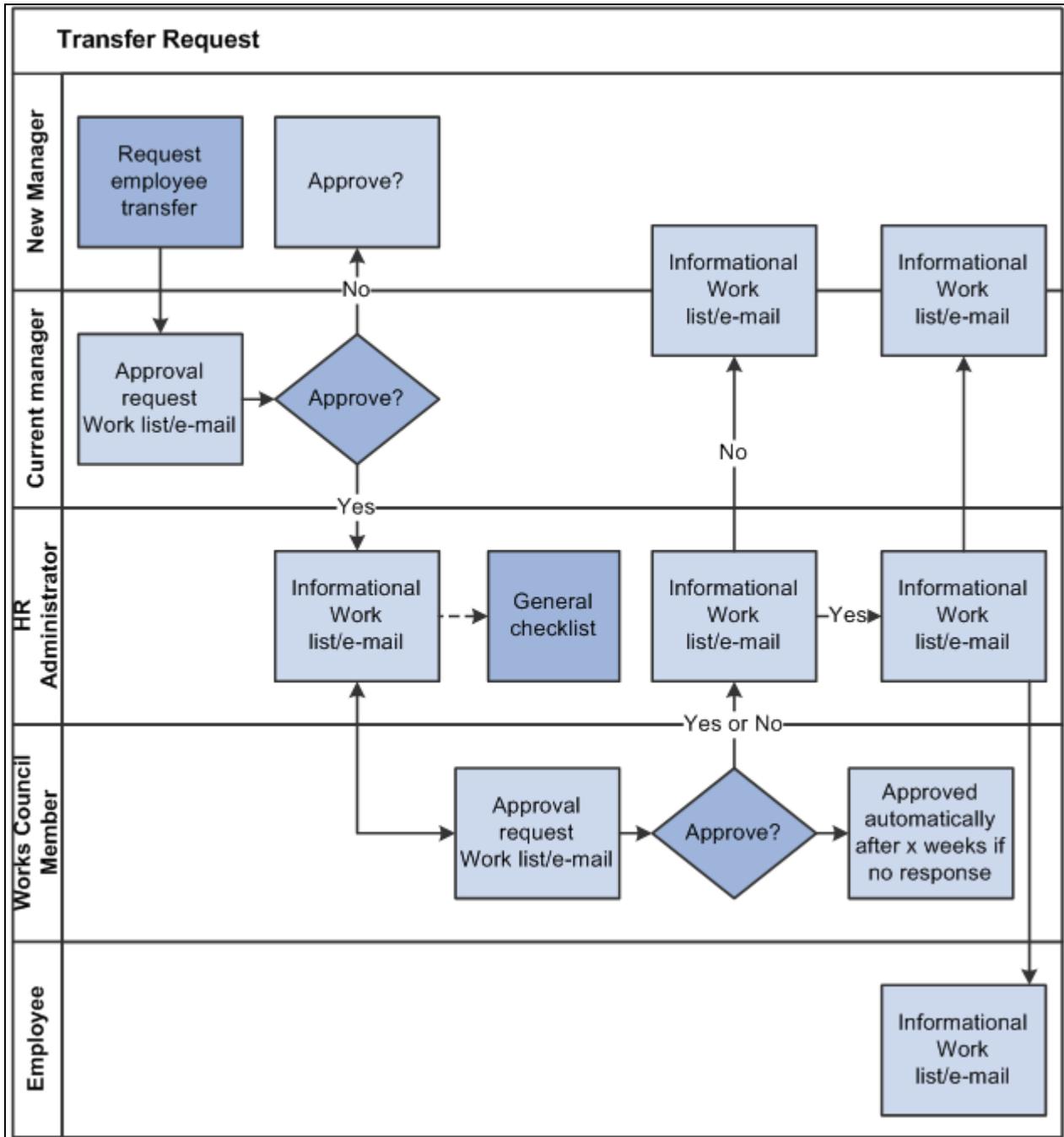
Note. In the case of a transfer, the new HR representative can select from all workers based on specific criteria.

This diagram illustrates the approval process for a job change request:



Employee Job Change approval process

This diagram illustrates the approval process for a transfer request:



Employee Transfer approval process

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up Organization Foundation Tables," Setting Up Company Locations

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Delivered Workflows for PeopleSoft HRMS"

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

Pages Used to Enter Job Change Requests

Page Name	Definition Name	Navigation	Usage
Job Change Request - Select Employee	WC_JCR_SEARCH	<ul style="list-style-type: none"> Workforce Administration, Job Information, Request Job Change, Select Employee Manager Self Service, Job and Personal Information, Request Job Change, Select Employee Manager Home Page, Job and Personal Information, Request Job Change, Select Employee 	Enter the required data and initiate the job change request. The Job Change Request - Select Employee page requires different data entry depending on the type of request—either hire, transfer, or termination.
Job Change Request Review All Job Change Requests	WC_JOB_CHG_REQ	<ul style="list-style-type: none"> Click the Search button on the Job Change Request - Select Employee page. Workforce Administration, Job Information, Review All Job Change Request, Job Change Request Workforce Administration, Job Information, Review All Job Change Request 	Enter job change details and request information. Note. Some Reason Codes require additional mandatory search criteria as defined on the Job Change by Reg Region page.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Job Change Request Status	WC_JCR_STATUS_INQ	Manager Self Service, Job and Personal Information, Review Job Change Request, Review My Job Change Request	Search for job change requests to review the status. This page is available to all roles in the job change approval process though only to the specific users involved in each particular job change request.
Review My Job Change Request	WC_JCR_STATUS2_INQ	Workforce Administration, Job Information, Review My Job Change Request	The Review My Job Change Request page shows job change requests that the user is or has been involved with.
Decision Details	WC_JCR_USER_SEC	Enter Job Change Details and click Search. <ul style="list-style-type: none"> • Workforce Administration, Job Information, Request Job Change • Workforce Administration, Job Information, Review All Job Change Request 	Click Comments in the Process Participants group box. Enter comments or view general information and related comments for this job change request.
Job Change Request Approval	WC_JCR_APPR_INQ	Workforce Administration, Labor Administration, Job Change Request Approval	Mass-approve job change requests.

Entering Job Change Request Details for Hiring

Access the Job Change Request - Select Employee page (Workforce Administration, Job Information, Request Job Change, Select Employee).

Note. The Job Change Request - Select Employee page behaves differently depending on the requested action and the user role. The following sections discuss each action option—Hire, Transfer, and Termination—separately.

Job Change Request
Select Employee

To hire an employee, enter First Name, Last Name, City and select the GO button.

Job Change Details

Regulatory Region:

Action:

Reason Code:

Hire

First Name:

Last Name:

City: 

Job Change Request - Select Employee page: Hire

Job Change Details

Begin the Works Council hiring approval process by completing all fields on the Job Change Request–Select Employee page, using the action of *Hire*.

Hire

All fields in this group box are mandatory

Go Click to access the Job Change Request page to initiate the job change request process.

See Also

[Chapter 9, "Requesting Works Councils Approval," Submitting a Job Change Request, page 141](#)

Entering Job Change Request Details for Termination

Access the Job Change Request - Select Employee page (Workforce Administration, Job Information, Request Job Change).

Job Change Request

Select Employee

Enter the Job Change Request Details and select an employee to initiate the Job Change Request by selecting the employee name, selecting Search for Employee, or selecting the chart icon to find an indirect report.

Job Change Details

Regulatory Region:

Action:

Reason Code:

Job Change Request - Select Employee page: Termination

Job Change Details

Search for an employee Complete the fields in the Job Change Details group box and click this button. Select a worker from the list.

For HR Administrators, the page displays a list of all workers with row level access as defined in the department security tree.

For managers, the page displays a list of direct reports as defined in the self-service setup.

Entering Job Change Request Details for Transfer

Access the Job Change Request - Select Employee page (Workforce Administration, Job Information, Request Job Change).

Job Change Request

Select Employee

To Transfer an employee, enter all mandatory search criteria and select the SEARCH button.

Job Change Details

Regulatory Region:

Action:

Reason Code:

Mandatory Search Criteria

EmpID:

First Name:

Last Name:

Business Unit: Department:

Birthdate:

Job Change Request - Select Employee page, Transfer

Mandatory Search Criteria

Mandatory search criteria fields are defined on the Job Change by Reg Region page. The fields that display here depend on the Job Change by Reg Region page setup. As these are mandatory search criteria, any field in this group box is a required field.

Note. The worker's new manager enters the transfer request. The worker's current manager and the works council must approve the request.

See Also

[Chapter 9, "Requesting Works Councils Approval," Approving Job Change Requests, page 149](#)

Submitting a Job Change Request

Access the Job Change Request page (click the Search button on the Job Change Request - Select Employee page).

The following screen shots show the Job Change Request page for the current manager submitting a hire request.

▼ Salary Plan

Plan:	KD01	Metal
Grade:	G1	Plan
Step:	1	G1

▼ Payroll

Payroll System:	Payroll for North America	
Pay Group:	KD01	German M

▼ Process Participants

[Customize](#) | [Find](#) | [Print](#) | [First](#) | [1-2 of 2](#) | [Last](#)

Participants	Actions	
--------------	---------	--

Participant	Name	Employee ID	JCR Originator?	Comments
1 HR Administrator	Betty Locherty	KU0007	<input checked="" type="checkbox"/>	Comments
2 Works Council	Friedrich Bauer	KD0004	<input type="checkbox"/>	Comments

▼ Request WC Approval

Job Change Request page, Hire (2 of 2)

The following screen shots show the Job Change Request page for manager submitting a termination request.

Job Change Request		
Andreas Groninger		
EmplID:	GD110000004	Empl Record: 0
First Start Date:	01/01/2001	Nationality: German
Date of Birth:	01/01/1945	
Job Change Details		
Regulatory Region:	DEU	Germany
Action:	TER	Termination
Reason Code:	CON	Misconduct
*Effective Date:	<input type="text" value="05/01/2009"/>	
Job Change Request Status		
Status:		Status Date/Time:
Current Info		New Info
Organization Information		
Position Number:		
Reg Region:	DEU	Germany
Company:	GD1	GP GER1
Business Unit:	DEU01	DEU BU
Department:	21601	Sal/Serv
Location Code:	GD913	HH

Job Change Request page, Termination (1 of 2)

▼ Job Information

Job Code: 790000 Sales Mgr

Standard Hours: 18.00

Work Period: W Weekly

▼ Salary Plan

Plan: KD01 Metal Plan

Salary Grade: G2 Group 2

Step: 1

[View Compensation Details](#)

▼ Process Participants
Customize | Find | First 1-3 of 3 Last

Participants

Actions

	Participant	Name	Employee ID	JCR Originator?	Comments
1	HR Administrator	Betty Locherty	KU0007	<input checked="" type="checkbox"/>	Comments
2	Works Council	Sabine Azubinefive	GD110000010	<input type="checkbox"/>	Comments
3	Employee	Andreas Groninger	GD110000004	<input type="checkbox"/>	Comments

▼ Request WC Approval

Job Change Request page, Termination (2 of 2)

Note. When entering termination requests, this page is display only. The Comments link remains active to access the Decision Details page to add comments to this request.

The following screen shots show the Job Change Request page for the new manager entering a transfer request.

Job Change Request

Andreas Groninger

EmplID:	GD110000004	Empl Record:	0
First Start Date:	01/01/2001	Nationality:	German
Date of Birth:	01/01/1945		

Job Change Details	
Regulatory Region:	DEU Germany
Action:	XFR Transfer
Reason Code:	CIT Completion of Int Cpny Trans
*Effective Date:	05/01/2009  <input type="checkbox"/> No Handicapped App Recommended

Job Change Request Status	
Status:	Status Date/Time:

Current Info	New Info
Organization Information	
Position Number:	Position Number: <input type="text"/> 
Reg Region: DEU Germany	
Company: GD1 GP GER1	Company: <input type="text"/> 
Business Unit: DEU01 DEU BU	Business Unit: <input type="text"/> 
Department: 21601 Sal/Serv	Department: <input type="text"/> 
Location Code: GD913 HH	Location: <input type="text"/> 

Job Change Request page, Transfer (1 of 2)

▼ Job Information

Job Code:	790000	Sales Mgr	Job Code:	<input type="text"/>
Standard Hours:	18.00		Standard Hours:	<input type="text" value="40.00"/>
Work Period:	W	Weekly	Work Period:	<input type="text" value="W"/> Weekly

▼ Salary Plan

Plan:	KD01	Metal Plan	Plan:	<input type="text"/>
Salary Grade:	G2	Group 2	Grade:	<input type="text"/>
Step:	1		Step:	<input type="text"/>

[View Compensation Details](#)

▼ Process Participants
Customize | Find | First 1-3 of 3 Last

Participants
Actions

Participant	Name	Employee ID	JCR Originator?	Comments
1 HR Administrator	Betty Locherty	KU0007	<input checked="" type="checkbox"/>	Comments
2 Works Council	Sabine Azubinefive	GD110000010	<input type="checkbox"/>	Comments
3 Employee	Andreas Groninger	GD110000004	<input type="checkbox"/>	Comments

▼ Request WC Approval

Job Change Request page, Transfer (2 of 2)

Current Info (current information) This column displays the current information for this worker. Current information will not be displayed if the role is a new manager performing a job change request of a transfer. Additional new manager transactions can also be configured on the Job Change by Reg Region page.

New Info (new information) Use the fields in this column to enter new job details for this job change request.

Job Change Details

No Handicapped App Recommended (no handicapped applicants recommended) The HR Administrator is the only role that may select No Handicapped App Recommended before submitting, approving or denying a request . Some works councils want to ensure that the Labor Bureau had no qualified handicapped applicants to recommend prior to hiring other external candidates.

Job Change Request Status

After submitting a job change request, this group box displays the status as the request proceeds through the workflow.

Organization Information

If you select a position number, the organization, job and salary plan data will default from the position data. You can edit the defaulted information. If you do not select a position number, complete the fields in the group box.

Job Information

Complete the fields in this group box if the information does not default from the position data. Defaulted information can be edited here.

Salary Plan

Complete the fields for salary plan, grade, and step data.

View Compensation Details Click to access the current compensation details of an existing worker. This link is not visible for job change requests with Action *Hire*.

Process Participants

This group box displays everyone involved with requesting or approving job change requests. On the Job Change by Reg Region page you define who is involved with a request and what information they can view.

JCR Originator? The selected check box indicates which process participant initiated this job change request.

Comments Access the Decision Details page to provide additional information about this request.

Request Job Change

Once the request has been submitted, this group becomes Request WC Approval.

The buttons that appear in this group box will depend on which action has been selected or where the job change request stands in the approval process.

Submit Click to submit a new job change request after completing all of the fields on the page.

Generate Checklist Click to generate a checklist for this job change request.

Save for Later Click to save this job change request to complete later. To access this after saving it, use the Review All Job Change Requests page.

Approve and Deny Click approve or deny a job change request routed to you.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "Increasing the Workforce," Entering Employee Job Location and Position Information

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "Increasing the Workforce," Entering Job Information

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "Increasing the Workforce," Entering Salary Plan Information

Viewing the Job Change Request Status

Access the Review My Job Change Request page (Workforce Administration, Job Information, Review My Job Change Request).

Review My Job Change Request						
Regulatory Region:	DEU	Germany				
Action:	HIR	Hire				
Reason Code:	NPS	New Position				
Job Change Request Status:	Works Cncl Approval Requested					
Job Change Request						
<div style="float: right;">Customize Find First 1 of 1 Last</div>						
<div style="float: left;"> Status Actions </div>						
Name	EmpID	Record	Eff Date	Status	Status Date/Time	
1 Schneider, Frederick	0050	0	08/27/2009	Works Cncl Approval Requested	08/27/2009 3:31PM	

Job Change Request Status page

Status and Actions

The Status tab displays the current status of the request. The Action tab displays the Action and Reason for this request.

Click the worker name to view the Job Change Request page. The Job Change Request page displays the job change request details and current status of the request in the Job Change Request Status group box. The Job Change Request page also contains links to view the status history and comments from the process participants.

Approving Job Change Requests

Access the Job Change Request Approval page (Workforce Administration, Labor Administration, Job Change Request Approval).

Job Change Request Approval

To view the Job Change Request that need approval, enter the Job Change Request Details and select the button Search.

Search fields

Regulatory Region:

Action:

Reason Code:

Job Change Request Approval page

Search for all job change requests and approve all selected requests at once.

When you select a job change request to approve, the system accesses the Job Change Request page for this job change request.

The following table discusses approval access by role.

<i>Manager</i>	<i>HR Administrator</i>	<i>Works Council</i>
Enters job change requests. For job change requests such as transfers that involve a change in reporting manager, the new manager enters the transfer request and the current manager approves or denies the transfer request.	Approves or deny job change requests either before or after Works Council review and decision.	Approves or denies a job change request.

Index

A

Action Taken page 117, 119
advancement
 approving wage advancement 114
 processing wage progression 113, 115
allowable earnings codes (CAN) 18
allowable earnings codes (USA) 18
appeals
 (USF) tracking union negotiability appeals 129
Approve Employees to Advance page 114

B

Bargaining Unit component
 Contact Information page 10
 General Bargaining Unit Data page 10
bargaining units
 attaching to labor agreements 37
 setting up 9
bargaining unit tables
 setting up (CAN) 10
 setting up (USA) 10
 setting up (USF) 10
Bargaining Unit Table USF
 Contact/Partnership Data page 11
 Contact Information page 10
 General Bargaining Unit Data page 10
bumping
 classifying job codes for bumping rights 35
 reporting on job data information to determine bumping 89
Bumping Report page 89, 90
business processes, overview 1

C

Candidate List Report page 89
Clone Labor Agreement page 37, 48
Contact/Partnership Data page 11
Contact and Contract Info page 19, 22
Contact Info page 20, 23
Contact Information page 10, 11
contingent workers
 laying off 70
 managing recall rights 77
Contract/Partnership Data page 12
contract data
 entering (CAN) 17
 entering (USA) 17
Contract Data page 14, 16

D

dates
 setting up seniority dates 29
Decision Details page 138
Disciplinary Action Events page (USF) 121, 123
Disciplinary Action page 117, 118
disciplinary actions (USF)
 defining 53
Disciplinary Actions page (USF) 121, 123
disciplinary data
 defining discipline steps 51, 52
 documenting incident details 119
 entering disciplinary incidents 118
 entering disciplinary types 50
 recording resolutions 120
 setting up 49
 tracking 117
disciplinary data (USF)
 defining disciplinary actions 53
 defining disciplinary penalties 52
 defining discipline steps 52
 entering disciplinary types 50
 entering incidents 121
 recording for offense 123
Disciplinary Events USF page 51
disciplinary offenses (USF)
 entering events to support disciplinary actions 123
 recording action 123
Disciplinary Offenses page (USF) 121
Disciplinary Offenses Table
 Disciplinary Penalty Matrix 1 page (USF) 52
 Disciplinary Penalty Matrix 2 page (USF) 53
Disciplinary Penalty Matrix 1 page 50
Disciplinary Penalty Matrix 1 page (USF) 52
Disciplinary Penalty Matrix 2 page 51
Disciplinary Penalty Matrix 2 page (USF) 53
Disciplinary Resolution page 118, 120
Disciplinary Steps page 50, 51
Disciplinary Steps page (USF) 52
Disciplinary Step Table page (USF) 50
disciplinary tracking (USF) 120
Disciplinary Type page 50, 52
Disciplinary Type USF page 50
dynamic roles 133

E

Earnings Codes page 20, 25
Empl Class Table page 35
employee categories
 Employee Categorization page 36
Employee Categorization page 36, 45
employee classes 35
Employee Roster Status page 31, 34
employees
 laying off 70
 managing recall rights 77
event complete
 setting up roster statuses 34
Exception Messages page 103, 112

- exceptions
 - reviewing and acknowledging exceptions 112
 - understanding wage progression exceptions 101
- expiration rules
 - attaching recall expiration rules to labor agreements 43
- Extract Payroll Data page 98

F

- facilities
 - attaching to labor agreements 45
 - setting up labor facilities 35
- Facilities page 36, 45
- FORCEM
 - See* Fundación para la Formación Continua
- Fundación para la Formación Continua 47

G

- General Bargaining Unit Data page 10
- General Bargaining Unit Data Page 11
- Germany
 - setting up works councils 59
- grievance IDs
 - assigning 126
- Grievance page 125
- Grievance Resolution page 125, 129
- grievances
 - setting up 49
 - tracking 124
 - tracking grievances 125
 - tracking resolutions 129
 - tracking steps in the grievance process 127
- Grievance Steps page 125, 127
- Grievance Step Table page 51
- Grievance Type Table page 51
- group build
 - defining groups for layoffs or recalls 66
 - defining groups for wage progression processing 95
 - identifying group members for layoffs or recalls 68
 - setting up groups for layoff or recall 65
 - setting up labor facilities 35
 - setting user security for layoff or recall groups 69
- groups
 - defining groups for layoffs or recalls 66
 - defining groups for wage progression processing 95
 - identifying group members for layoffs or recalls 68
 - setting up groups for layoff or recall 65
 - setting up labor facilities 35
 - setting user security for layoff or recall groups 69
 - understanding groups for wage progression processing 95

H

- HRLAY001
 - reporting on the layoff roster 89
- HRLAY002
 - reporting on job data information to determine bumping 89
- HRLAY003
 - reporting on workers and their seniority dates 89
- HRLAY004
 - reporting on workers whose recall rights have not expired 89
- HRLAY005
 - reporting on recall rosters 89
- HRLAY006
 - running the Layoff Roster Post Processing report 76
- HRLAY007
 - running the Recall Rights Post Processing report 76, 87
- HRLAY008
 - running the Recall/Reinstatement Roster Post Processing report 87

I

- implementation
 - overview 2

J

- Job Change by Reg Region page 56, 58
- job change request
 - entering 133
 - hiring request 138
 - prerequisites 132
 - terminating request 139
 - transferring request 140
- Job Change Request - Select Employee page 137
- Job Change Request - Select Employee page (Hire) 138
- Job Change Request - Select Employee page (Termination) 139
- Job Change Request - Select Employee page (Transfer) 140
- Job Change Request Approval page 138, 149
- Job Change Request page 137, 141
- Job Change Request Status page 138
- job classes
 - setting up labor job classes 35
- job codes
 - attaching to labor agreements 40
 - classifying for bumping rights 35
 - ranking for bumping 40
 - setting up labor job classes 35
- Job Codes page 36, 40
- job data
 - reviewing wage progression information 105
 - running the Update Activity with Job Data process 104
 - updating wage progression information

- 98, 99, 104
- job labor class
 - attaching to labor agreements 40

L

- labor administration
 - France (FRA) 48
 - India (IND) 40, 48
 - setting up control values 30
 - setting up union data (USF) 19
 - Spain (ESP) 39, 47
- Labor Administration data
 - overview 27
- Labor Agreement page 36, 37
- labor agreements
 - categorizing labor agreements 45
 - Clone Labor Agreement page 37
 - cloning labor agreements 48
 - defining 35
 - defining employee classes 35
 - defining groups for wage progression
 - processing 95
 - defining labor facilities 35
 - defining labor job classes 35
 - Employee Categorization page 36
 - Facilities page 36, 45
 - Job Codes page 36, 40
 - Seniority Rules page 36, 43
 - setting up general terms 37
 - setting up labor facilities 35
- labor facilities 35
 - setting up 35
- Labor Facilities page 35
- Labor Group Definition component
 - Labor Group Definition page 65
 - Labor Group Members page 65
 - Labor Group Security page 66
- Labor Group Definition page 65, 66
- Labor Group Members page 65, 68
- Labor Group Security page 66, 69
- labor job classes 35
- Labor Job Classes page 35
- Layoff Candidate List page 71
- Layoff Exemption Reasons page 31
- Layoff Process Run Control page 71, 74
- layoff roster
 - Layoff Candidate List page 71
 - Layoff Process Run Control page 71, 74
 - Layoff Roster List page 73
 - Layoff Roster Setup page 71
 - reporting on the layoff roster 89
- Layoff Roster List page 73
- Layoff Roster Report page 89
- Layoff Roster Setup page 71
- layoffs
 - common fields 61
 - maintaining a person's recall rights 78
 - managing 70
 - managing recall rights 77
 - managing the layoff roster 73
 - processing 73
 - processing recall rights 77
 - processing using PeopleSoft Mass Update 87
 - reporting on job data information to
 - determine bumping 89

- reporting on the layoff roster 89
- reporting on workers and their seniority dates
 - 89
- running reports 88
- running the layoff process 74
- running the Layoff Roster Post Processing
 - report 76
- running the Recall Rights Post Processing
 - report 76
- setting up control values 30
- setting up groups for layoffs 65
- setting up labor facilities 35
- setting up recall expiration rules 32
- setting up rosters of candidate 71
- setting up roster statuses 34
- setting up seniority dates 27
- setting up tiebreakers 27
- understanding recall rights 31

M

- mass update
 - processing recall rights for mass update
 - layoffs or recalls 77

P

- Partnership Data/Steward Info page 20, 24
- Payroll for North America
 - extracting time-worked data for wage
 - progression 97, 98
 - understanding the extract payroll data
 - process 97
- process event
 - setting up roster statuses 34
- Process Layoff page
 - maintaining a person's recall rights 78
- Process Recall/Reinstatement page 81, 85
 - maintaining a person's recall rights 78
- Process Recall Rights page 77
 - maintaining a person's recall rights 78
- Process Wage Progression page 114, 115

Q

- qualify
 - approving workers for wage advancement
 - 113, 114
 - running the Qualify Employees process 104

R

- recall
 - attaching recall expiration rules to labor
 - agreements 43
 - processing recall rights 77
 - understanding recall rights 31
- recall expiration rules
 - setting up 32

- Recall Expiration Rules page 31, 32
 - Recall Reason page 32
 - recall rights
 - attaching recall expiration rules to labor agreements 43
 - managing 77
 - Process Recall Rights 77
 - Process Recall Rights page 77
 - Recall Rights page 77, 78
 - reporting on workers whose recall rights have not expired 89
 - running the Recall Rights Post Processing report 76, 87
 - setting up recall expiration rules 32
 - understanding recall rights 31
 - Recall Rights page 77, 78
 - recall roster
 - Process Recall/Reinstatement page 81, 85
 - Recall Candidate List 81
 - Recall Roster List page 82
 - Recall Roster Setup page 80, 81
 - Recall Roster List page 81, 82
 - Recall Roster Report page 89
 - recall rosters
 - reporting on recall rosters 89
 - Recall Roster Setup page 80, 81
 - recalls
 - common fields 61
 - maintaining a person's recall rights 78
 - managing recall rights 77
 - managing the recall roster 82
 - processing 80, 82
 - processing using PeopleSoft Mass Update 87
 - reporting on job data information to determine bumping 89
 - reporting on recall rosters 89
 - reporting on workers and their seniority dates 89
 - reporting on workers whose recall rights have not expired 89
 - running reports 88
 - running the process recall/reinstatement process 85
 - running the Recall/Reinstatement Roster Post Processing report 87
 - running the Recall Rights Post Processing report 76, 87
 - setting up control values 30
 - setting up groups for recall 65
 - setting up labor facilities 35
 - setting up recall expiration rules 32
 - setting up rosters of candidate 81
 - setting up roster statuses 34
 - setting up seniority dates 27
 - setting up tiebreakers 27
 - understanding the difference between recalls and reinstatements 80
 - Record Disciplinary Actions
 - Action Taken page 117
 - Disciplinary Action page 117
 - Disciplinary Resolution page 118
 - Record Negotiability Appeal USF page 130
 - reinstatement
 - processing recall rights 77
 - running reports 88
 - reinstatement roster
 - Process Recall/Reinstatement page 81, 85
 - Reinstatement Candidate List page 81
 - Reinstatement Roster List page 84
 - Reinstatement Roster Setup page 81, 84
 - Reinstatement Roster List page 81, 84
 - Reinstatement Roster Setup page 81, 84
 - reinstatements
 - common fields 61
 - maintaining a person's recall rights 78
 - managing the reinstatement roster 84
 - processing 80, 84
 - reporting on job data information to determine bumping 89
 - reporting on workers and their seniority dates 89
 - reporting on workers whose recall rights have not expired 89
 - running the process recall/reinstatement process 85
 - running the Recall/Reinstatement Roster Post Processing report 87
 - running the Recall Rights Post Processing report 87
 - setting up control values 30
 - setting up recall expiration rules 32
 - setting up rosters of candidate 84
 - setting up roster statuses 34
 - setting up seniority dates 27
 - setting up tiebreakers 27
 - understanding recall rights 31
 - understanding the difference between recalls and reinstatements 80
 - resolutions
 - setting up 49
 - tracking 117
 - Resolution Types page 51
 - Review All Job Change Request page 137
 - Review My Job Change Request page 138, 149
 - Review Time Details page 103, 112
 - Review Wage Progression page 103, 105
 - roles 133
 - rosters
 - setting up layoff rosters 71
 - setting up recall rosters 81
 - setting up reinstatement rosters 84
 - setting up roster statuses 34
- ## S
- salary plans
 - approving workers for wage advancement 113, 114
 - attaching to labor agreements 40
 - extracting time-worked data from Payroll for North America for wage progression 97, 98
 - maintaining worker wage progression information 98
 - processing wage advancement 113
 - processing wage progression 115
 - qualifying workers for wage progression 98, 100, 104
 - reviewing and acknowledging exceptions 112
 - reviewing time details 112
 - reviewing wage progression information 105
 - setting up wage progression run IDs 95
 - understanding the extract payroll data process 97
 - understanding the wage progression business

- process 93
- understanding the wage progression process 113
- understanding wage progression exceptions 101
- understanding wage progression plans 93
- understanding wage progression run IDs 95
- updating wage progression information 98, 99, 100, 104

seniority

- attaching to labor agreements 43
- reporting on workers and their seniority dates 89
- selecting a system date as a seniority date 29
- setting up labor facilities for reporting 35
- setting up recall expiration rules 32
- setting up seniority dates 27, 29
- setting up tiebreakers 30
- understanding seniority dates 27

Seniority Dates page 28, 29

Seniority Report page 89, 91

Seniority Rules page 36, 43

Spokesmen Comm page 60

T

Tariff Area Ger page 60

tiebreakers

- attaching to labor agreements 43
- setting up 30
- setting up tiebreakers 27
- understanding tiebreakers 28

Tie Breakers page 29, 30

time

- extracting time-worked data from Payroll for North America for wage progression 97, 98
- reviewing time details 112
- reviewing wage progression information 105
- understanding the extract payroll data process 97
- updating the Update Activity with Time Data process 104
- updating wage progression information 98, 99, 104

U

Union Address Information page 19, 21

Union Address page 19, 20

Union Agreement page 20, 24

union data

- (USF) tracking union negotiability appeals 129
- entering (BRA) 16
- entering (IND) 16
- setting up 9, 13
- setting up unions (USF) 19

Union Earnings Distribution page 14, 18

Union Location page 14

unions

- Contract Data page 14
- Union Earnings Distribution page 14
- Union Location page 14

unions USF

- Contact and Contract Info page 19
- Contact Info page 20
- Earnings Codes page 20
- Partnership Data/Steward Info page 20
- Union Address page 19
- Union Agreement page 20

Update Wage Progression page 102, 104

W

wage progression

- approving workers for wage advancement 113, 114
- extracting time-worked data from Payroll for North America 97, 98
- maintaining worker wage progression information 98
- processing wage advancement 113
- processing wage progression 115
- qualifying workers for wage progression 98, 100, 104
- reviewing and acknowledging exceptions 112
- reviewing time details 112
- reviewing wage progression information 105
- select rules for a labor agreement 37
- setting up run IDs 95
- understanding 93
- understanding exceptions 101
- understanding run IDs 95
- understanding the business process 93
- understanding the extract payroll data process 97
- understanding the wage progression process 113
- updating wage progression information 98, 99, 100, 104

Wage Progression Exception Rpt page 103

Wage Progression Run ID page 95

Workflow Parameters page 56

workforce

- laying off 70
- managing recall rights 77

Works Council Decision Group page 56

Works Council Decision page 56

Works Council page 56

works councils

- defining 56
- linking to company location table 57
- mandatory search criteria 59
- prerequisites 132
- process participants 59
- requesting approval 131
- setting up 55
- setting up (DEU) 59
- spokesperson committee (DEU) 60
- tariff areas (DEU) 60
- understanding *See Also* job change request

Works Councils Notification process 133

WP002

- running the exceptions report 103

