

Oracle® HRMS for Spain

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- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

Note: Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the new Oracle E-Business Suite Release Online Documentation CD available on My Oracle Support and www.oracle.com. It contains the most current Documentation Library plus all documents revised or released recently.

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Preface

Intended Audience

Welcome to Release 12.1 of the *Oracle HRMS for Spain Supplement*.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Oracle HRMS.

If you have never used Oracle HRMS, Oracle suggests you attend one or more of the Oracle HRMS training classes available through Oracle University

- Oracle Self-Service Web Applications.
- The Oracle Applications graphical user interface.

To learn more about the Oracle Applications graphical user interface, read the *Oracle E-Business Suite User's Guide*.

See Related Information Sources on page x for more Oracle E-Business Suite product information.

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Structure

- 1 Enterprise and Workforce Management
- 2 Jobs and Positions
- 3 Employment Agreements and Legal Compliance
- 4 Workforce Sourcing and Deployment
- 5 Compensation and Benefits
- 6 FastFormula
- 7 Additional Implementation Steps

Related Information Sources

Oracle HRMS shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other user guides when you set up and use Oracle HRMS.

You can read the guides online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle store at <http://oraclestore.oracle.com>.

Guides Related to All Products

[Oracle E-Business Suite User's Guide](#)

This guide explains how to navigate, enter data, query, and run reports using the user interface (UI) of Oracle E-Business Suite. This guide also includes information on setting user profiles, as well as running and reviewing concurrent requests.

Guides Related to This Product

[Oracle Daily Business Intelligence for HRMS User Guide](#)

This guide describes the dashboards and reports available for HR Line Managers, Chief HR Officer, Budget Managers, and Benefits Managers using Daily Business Intelligence for HRMS. It includes information on using parameters, how DBI for HRMS derives values, and how to troubleshoot dashboards and reports.

[Oracle Daily Business Intelligence for HRMS Implementation Guide](#)

This guide provides basic setup procedures for implementing and maintaining HRMS-related dashboards.

[Oracle Daily Business Intelligence Implementation Guide](#)

This guide describes the common concepts for Daily Business Intelligence. It describes the product architecture and provides information on the common dimensions, security

considerations, and data summarization flow. It includes a consolidated setup checklist by page and provides detailed information on how to set up, maintain, and troubleshoot Daily Business Intelligence pages and reports for the following functional areas: Financials, Interaction Center, iStore, Marketing, Product Lifecycle Management, Projects, Procurement, Sales, Service, Service Contracts, and Supply Chain.

Oracle Daily Business Intelligence User Guide

This guide describes the common concepts for Daily Business Intelligence. It describes the product architecture and provides information on the common dimensions, security considerations, and data summarization flow. It includes a consolidated setup checklist by page and provides detailed information on how to set up, maintain, and troubleshoot Daily Business Intelligence pages and reports for the following functional areas: Financials, Interaction Center, iStore, Marketing, Product Lifecycle Management, Projects, Procurement, Sales, Service, Service Contracts, and Supply Chain.

Oracle Application Framework Personalization Guide

Learn about the capabilities of the OA Framework technologies.

Oracle Human Resources Management Systems Enterprise and Workforce Management Guide

Learn how to use Oracle HRMS to represent your enterprise. This includes setting up your organization hierarchy, recording details about jobs and positions within your enterprise, defining person types to represent your workforce, and also how to manage your budgets and costs.

Oracle Human Resources Management Systems Workforce Sourcing, Deployment, and Talent Management Guide

Learn how to use Oracle HRMS to represent your workforce. This includes recruiting new workers, developing their careers, managing contingent workers, and reporting on your workforce.

Oracle Human Resources Management Systems Payroll Processing Management Guide

Learn about wage attachments, taxes and social insurance, the payroll run, and other processes.

Oracle Human Resources Management Systems Compensation and Benefits Management Guide

Learn how to use Oracle HRMS to manage your total compensation package. For example, read how to administer salaries and benefits, set up automated grade/step progression, and allocate salary budgets. You can also learn about setting up earnings and deductions for payroll processing, managing leave and absences, and reporting on compensation across your enterprise.

Oracle Human Resources Management Systems Configuring, Reporting, and System Administration Guide

Learn about extending and configuring Oracle HRMS, managing security, auditing, information access, and letter generation.

Oracle Human Resources Management Systems Implementation Guide

Learn about the setup procedures you need to carry out in order to implement Oracle HRMS successfully in your enterprise.

Oracle Human Resources Management Systems FastFormula User Guide

Learn about the different uses of Oracle FastFormula, and understand the rules and techniques you should employ when defining and amending formulas for use with Oracle applications.

Oracle Self-Service Human Resources Deploy Self-Service Capability Guide

Set up and use self-service human resources (SSHR) functions for managers, HR Professionals, and employees.

Oracle Performance Management Implementation and User Guide

Learn how to set up and use performance management functions. This includes setting objectives, defining performance management plans, managing appraisals, and administering questionnaires.

Oracle Succession Planning Implementation and User Guide

Learn how to set up and use Succession Planning functions. This includes identifying succession-planning requirements, using talent profile, suitability analyzer, and performance matrices.

Oracle Human Resources Management Systems Deploy Strategic Reporting (HRMSi)

Implement and administer Oracle Human Resources Management Systems Intelligence (HRMSi) in your environment.

Oracle Human Resources Management Systems Strategic Reporting (HRMSi) User Guide

Learn about the workforce intelligence reports included in the HRMSi product, including Daily Business Intelligence reports, Discoverer workbooks, and Performance Management Framework reports.

Oracle Human Resources Management Systems Approvals Management Implementation Guide

Use Oracle Approvals Management (AME) to define the approval rules that determine the approval processes for Oracle applications.

Oracle Human Resources Management Systems Window Navigation and Reports Guide

This guide lists the default navigation paths for all windows and the default reports and processes as they are supplied in Oracle HRMS.

Oracle iRecruitment Implementation and User Guide

Set up and use Oracle iRecruitment to manage all of your enterprise's recruitment needs.

Oracle Learning Management User Guide

Use Oracle Learning Management to accomplish your online and offline learning goals.

Oracle Learning Management Implementation Guide

Implement Oracle Learning Management to accommodate your specific business practices.

Oracle Time and Labor Implementation and User Guide

Learn how to capture work patterns, such as shift hours, so that this information can be used by other applications, such as General Ledger.

Oracle Labor Distribution User Guide

Learn how to maintain employee labor distribution schedules, distribute pay amounts, encumber (commit) labor expenses, distribute labor costs, adjust posted labor distribution, route distribution adjustment for approval, and manage error recovery processes. You also learn how to set up effort reporting for Office of Management and Budget (OMB) compliance.

Other Implementation Documentation

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any product that includes workflow-enabled processes. It also describes how to manage workflow processes and business events using Oracle Applications Manager, how to monitor the progress of runtime workflow processes, and how to administer notifications sent to workflow users.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing Oracle E-Business Suite-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow User's Guide

This guide describes how users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle Workflow API Reference

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

Oracle E-Business Suite Flexfields Guide

This guide provides flexfields planning, setup, and reference information for the Oracle E-Business Suite implementation team, as well as for users responsible for the ongoing maintenance of Oracle E-Business Suite product data. This guide also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on My Oracle Support.

Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the Oracle E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

Do Not Use Database Tools to Modify Oracle E-Business Suite Data

Oracle **STRONGLY RECOMMENDS** that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle E-Business Suite data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle E-Business Suite data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle E-Business Suite tables are interrelated, any change you make using an Oracle E-Business Suite form can update many tables at once. But when you modify Oracle E-Business Suite data using anything other than Oracle E-Business Suite, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle E-Business Suite.

When you use Oracle E-Business Suite to modify your data, Oracle E-Business Suite automatically checks that your changes are valid. Oracle E-Business Suite also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

Enterprise and Workforce Management

Organizations

Key Concepts for Representing Enterprises

You represent your enterprise using key organization structures in Oracle HRMS. These structures provide the framework so you can perform legal reporting, financial control, and management reporting. You can set up these organization structures yourself, or use the Configuration Workbench.

The Configuration Workbench delivers an integrated configuration management toolset for HR systems and assists in the evaluation, configuration, deployment, and maintenance of HR applications. The workbench suggests a basic structure of organizations for your enterprise based on configuration models.

See: Configuration Models for Your Enterprise Framework, *Oracle HRMS Enterprise and Workforce Management Guide*

Once the basic enterprise structure is set up, you add the additional organizations and locations that exist in your enterprise. You define the internal organizations that represent your internal divisions and departments, and you define the external organizations that represent the organizations outside of your enterprise. For example, you can set up an external organization to represent the tax office for which your enterprise uses for reporting purposes.

You can use organizations to represent many levels of your enterprise, from the highest level of organization that represents the whole enterprise, to the lowest level of organization that represents a section or department.

See: Extending the Enterprise Framework, *Oracle HRMS Enterprise and Workforce Management Guide*

See: Organization Classifications, page 1-4

See: Setting Up Organizations, *Oracle HRMS Enterprise and Workforce Management Guide*

Business Group

The business group represents a country in which your enterprise operates. You create it as an organization in Oracle HRMS, but it does not represent a specific organization within your enterprise structure, and you do not include it in your organization hierarchies. A business group enables you to group and manage data in accordance with the rules and reporting requirements of each country, and to control access to data.

The critical factors for deciding when to use a separate business group, or an international business group, are based on the following factors:

- If you use Oracle Payroll

- The number of people you employ in a country
- If you require legislative support for Oracle HR

Generally the laws are so different in each country that to be compliant, there must be a different business group for each country in which an enterprise has employees.

Operating Company

An operating company represents a division or line of business within your enterprise that is legally registered for reporting in at least one country. An operating company is a holding company, a company within a company.

Ultimate Legal Entity

The ultimate legal entity represents the enterprise, and typically, the enterprise is the highest (global) level of a business organization. The ultimate legal entity is the parent company or organization for all its subsidiaries and divisions. Oracle HRMS represents the ultimate legal entity with the GRE/Legal Entity organization classification.

Legal Entity/Employer

A legal entity represents the designated legal employer for all employment-related activities. The legal authorities in a country recognize this organization as a separate employer. In an organization hierarchy, a legal entity may report to an operating company or to the ultimate legal entity.

A legal employer is a legal entity that is responsible for employing people in a particular country. Therefore, if you employ people in a country, then you must have at least one organization classified as a legal entity and a legal employer.

The Configuration Workbench classifies an organization as a GRE/Legal Entity where your enterprise operates in a country, and classifies it as an Employer if you employ people in that country also. For example, you can have a legal entity in a country where you do business, but do not employ people in that country.

Consolidated Legal Entity

A consolidated legal entity acts on behalf of multiple operating companies that are not legally registered, or simply on behalf of the enterprise in a country. You typically use the consolidated legal entity for when you have multiple operating companies in your enterprise, but for the purposes of consolidation, you group the information into one organization. For management reporting purposes, the organizations below the consolidated legal entity in an organization hierarchy, such as, your departments and sections, can report to any organization in the enterprise. However, for legal reporting purposes, they report up to the consolidated legal entity.

For information on how to model your enterprise using the key organization structures,

see: Configuration Models for Your Enterprise Framework, *Oracle HRMS Enterprise and Workforce Management Guide*

Organization Classifications

Organization classifications define the purpose of an organization and its functionality within Oracle HRMS. The classifications you assign to an organization control the additional information you can set up at the organization level. The Configuration Workbench automatically assigns the appropriate classifications to the organizations it creates.

For more information on the key organization structures you use to represent your enterprise, see: Key Concepts for Representing Enterprises, page 1-2

You can define one organization with multiple classifications or you can define separate organizations to represent different types of entity. For example, you can classify an organization as a legal entity as well as an HR organization if it's the same organization. If they are different, then you create two organizations.

Note: Oracle HRMS enables you to install your own additional information types for classifications.

You can select the following classifications in the Organization window, depending on your legislation:

All Legislations

All legislations can use the following classifications:

- **Business Group:** Use this classification to group, manage, and control access to data in accordance with the rules and reporting requirements of a country.
- **Operating Company:** An operating company represents a division or line of business within your enterprise that is legally registered for reporting in at least one country.
- **GRE/Legal Entity:** Use this classification to represent the following organizations:
 - **Ultimate Legal Entity:** this represents the enterprise, and typically, the enterprise is the highest (global) level of a business organization.
 - **Legal Entity:** this represents the designated legal employer for all employment-related activities. The legal authorities in a country recognize this organization as a separate employer. In an organization hierarchy, a legal entity may report to an operating company or to the ultimate legal entity.
 - **Consolidated Legal Entity:** this organization acts on behalf of multiple

operating companies that are not legally registered, or simply on behalf of the enterprise in a country.

For Chinese users only: Your organization hierarchy must contain at least one GRE with corporate and employer information. Statutory reporting requires this information.

- **Employer:** Use this along with the GRE/Legal Entity classification to define an organization as a legal entity that is responsible for employing people in a particular country.

For Indian users only: Your organization hierarchy must contain at least one GRE with income tax, challan bank, tax declaration and representative details. This information is used for statutory reporting.

- **HR Organization:** Use this classification for all organizations to which you want to assign employees and contingent workers.
- **Payee Organization:** Use this when defining an external organization that is the recipient of a third party payment from an employee, for example a court-ordered payment. You can then select this organization on the Personal Payment Method window when entering a third party payment method.
- **Bargaining Association:** Use this when defining an organization that is involved in negotiating a collective agreement. A bargaining association could be any organization representing the employees in negotiations, for example a trade union. The UK legislation also enables you to select a bargaining association in the Union Processing window to set up a union element.
- **Representative Body:** Use this when defining a representative body. This may be a body defined in legislation, such as a European Works Council, or may be defined by the employer, such as a Sports and Social Club.
- **Disability Organization:** Use this when defining an external organization with which employee disabilities are registered.
- **Medical Service Provider:** Use this when defining an organization that provides any medical services, such as medical assessments, to the people in your enterprise.
- **Constituency:** Use this to define a constituency to group together workers eligible to vote for particular elections.
- **Company Cost Center:** Use this to define organizations in Oracle HRMS that map to cost centers in Oracle GL. You can set up your application so that whenever a cost center is defined in GL, a corresponding organization with this classification is defined automatically.
- **Professional Body Information:** Use this to define an organization that is a

professional body. Organizations with this classification are available to assign to people in the Qualifications window.

- **Operating Unit** : Use the operating unit organization classification if you also use Multi-Org applications. You can associate an operating unit with an HR Organization. The application uses the HR Organization to find the operating unit to which a person belongs.

US Legislation

The US legislation can use the following classifications:

- **Reporting Establishment, Corporate Headquarters, or AAP Organization**: Use these when defining reporting organizations, that is, organizations required for the production of certain reports for government agencies.
- **Parent Entity**: Use this when defining an organization to be included at the top level of an establishment hierarchy. You can then use the hierarchy when producing certain reports for government agencies.

If you are assigning this classification to a Business Group, you must assign it to your default Business Group, that is the one defined in your security profile. If you do not, then your data will not be visible when you attempt to create your hierarchy in the Generic Hierarchy window.

- **Benefits Carrier, Workers' Compensation Carrier, or Beneficiary Organization**: Use these when defining an external organization belonging in one of these classifications. You can then select the organization when defining a benefit, entering information for Workers' Compensation calculations, or recording beneficiaries employees have named for certain benefits.

The Federal legislation can also use the **Beneficiary Organization** classification.

UK Legislation

The UK legislation can use the **Education Authority** classification to define a Local Education Authority (LEA) that is responsible for education within that council's jurisdiction.

Canadian Legislation

The Canadian legislation can use the following classifications:

- **Provincial Medical Carrier**: Use this to define a medical carrier for a province.
- **Provincial Reporting Establishment**: Use this to represent employees in the province of Quebec.

French Legislation

The French legislation can use the following classifications:

- **Company:** records one or more companies in your business group. A company is a legal entity registered to "Registre du Commerce et des Societes". You must have at least one company.
- **Establishment:** identifies the organization that serves as the legal point of contact for settling any disputes and manages the personal details of the workforce.

Note: Do not classify an organization as both a company and an establishment; create two separate organizations.

- **URSSAF Center or ASSEDIC Center:** specifies an external organization that is a Social Security organization. You can select the organization when entering additional organization information for an establishment. You can also select URSSAF organizations when entering additional organization information for a company.
- **Insurance Provider or Pension Provider:** defines an external organization that provides insurance or pensions. You can select the organization when entering additional organization information for a company or an establishment.
- **OPACIF or OPCA:** specifies an external organization that collects the company's yearly training contribution.
- **CPAM:** identifies an external organization as a CPAM office. You can select the organization when entering employment information in the People window.
- **Public Sector Other External Organization:** records details of the various types of external organizations with whom public-sector companies deal. Be sure to create organizations with this classification as external organizations.
- **Grouping of Employers:** identifies the employers (normally establishments) who have decided to group together to make it easier to lend each other workforce and also to list the employees, contingent workers, and employees on loan for an establishment from that grouping in the Personnel Registry report.
- **Tax Group:** defines an external tax office.

Dutch Legislation

The Dutch legislation can use the following classifications:

- **Dutch UWV Organization:** Use this to indicate if your organization is a social

insurance provider. If you enable this classification, you can enter additional information such as the type of provider in the Dutch UWV Organization window.

- **Dutch Tax Office:** Use this to define an external tax office.
- **Dutch Private Health Insurance:** Use this to define an external organization that provides private health insurance.
- **Pension Provider:** Use this to define an external organization that provides pensions to your employees.

German Legislation

The German legislation can use the following classifications:

- **Budget Plan Unit:** Use this to define internal organizations for which you can use for the budget plan structure. The budget plan structure defines the different levels of positions in your enterprise, and the budget plan units represent the different levels as organizations. You select which budget plan unit the position belongs to in the Position window.
- **German Additional Second Pension Insurance:** Use this to record information about the contributions an organization makes to a second pension.
- **German Capitalized Life Insurance Provider:** Use this to indicate if your organization is a provider of German capitalized life insurance.
- **German Mandatory Health/Special Care Insurance Provider:** Use this to indicate if your organization is a provider of German mandatory health or special care insurance. If you enable this classification, you can enter additional information using the German Social Insurance Providers window.
- **German Mandatory Pension Insurance Provider:** Use this to indicate if your organization is a provider of German mandatory pension insurance. If you enable this classification, you can enter additional information using the German Social Insurance Providers window.
- **German Private Health/Special Care Insurance Provider:** Use this to indicate if your organization is a provider of German private health or special care insurance. If you enable this classification, you can enter additional information using the German Social Insurance Providers window.
- **German Public Sector:** Use this to indicate if your organization is a public sector organization. If you set this to yes then certain public sector specific windows and fields are made available to you.
- **German Tax Office:** Use this to indicate if your organization is a tax office. If you

set this to yes then you can enter additional tax office information using the Others button.

- **German Unemployment Insurance Provider:** Use this to indicate if your organization is a provider of German unemployment insurance. If you enable this classification, you can enter additional information using the German Social Insurance Providers window.
- **German Voluntary Pension Provider:** Use this to indicator if your organization is a provider of German voluntary pensions.
- **German Work Incident Supervising Office:** Use this to indicate if your organization is a work incident supervising office.
- **German Workers' Liability Insurance Providers:** Use this to indicate if your organization is a provider of German workers' liability insurance.

Hong Kong Legislation

The Hong Kong legislation can use the **MPF Trustee Organization** classification to set up and enrol employees in an MPF Trustee. This classification allows you to record details of the trustee and details of the scheme provided by the trustee.

Mexico Legislation

The Mexico legislation must use the **legal employer** classification to define the legal entity. You can add additional organization information for your legal employer, if needed.

Use the **GRE/Legal Entity** classification to define an organization that is recognized as a separate employer by Social Security or other legal authorities. When you assign a location to a GRE, and you have not already associated them with each other in the generic hierarchy, HRMS will make the association for you.

Saudi Legislation

The Saudi legislation can use the following classifications:

- **Saudi GOSI Office:** Use this to represent the General Office of Social Insurance (GOSI) which the employer is registered. The GOSI office requires employers to make deductions for eligible employees and send all payments and reports to this office.
- **Saudi Employment Office:** Use this to represent an office to which the employer reports the status of its disabled employees.

Hungary Legislation

The Hungary legislation can use the following classifications:

- **Draft Agency:** Use this to represent an external defense organization to which you send employee military service details.
- **Company Information:** Use this to represent the organization which is legally entitled to hire employees.
- **Pension Provider:** Use this to indicate an external organization that provides pensions to your employees.

Spanish Legislation

The Spanish legislation can use the following classifications:

- **Work Center:** Use this to define an internal organization that represents a facility within your enterprise. You use these organizations for statutory reporting purposes.
- **Section:** Use this to define an internal organization that represents the place where people work. You use these organizations for internal reporting purposes only.
- **Tax Office:** Use this to indicate if the organization is an external tax office.
- **Tax Administration Office:** Use this to indicate if the organization is an external tax administration office.
- **Social Security Office:** Use this to define a social security office as an external organization. If you enable this classification, you can record the social security office details.
- **Social Security Province Office:** Use this to define an organization as an external social security office. If you enable this classification, you can enter the social security province office details.
- **Health Care Organization:** Use this to define an organization as an external health care organization. If you enable this classification, you can enter the insurance company details.

Korea Legislation

The Korean legislation can use the following classification:

- **Business Place:** Use this classification to define an organization as an employer to which you assign employees. You set up information such as the registration

number, representative information, and the health insurance number for the National Tax Service (NTS).

Indian Legislation

Your organization hierarchy should contain at least one GRE/Legal Entity (Tax Organization) and Registered Company.

The Indian legislation can use the following classifications:

- **Registered Company:** Records your company's Legal Name, Registration Number, Corporate Identity Number, Permanent Account Number (PAN) of the company and company's representative details.
- **Factory:** Records your factory's Registration Number, License Number, National Industrial Code, Production Commencement Date and factory's representative details.
- **Shops/Establishment:** Records your shops/establishment's registration number and representative details.
- **Contractor Details:** Records a contractor's details, work details, and representative details. A contractor supplies contingent workers to an enterprise and can be either an individual or an external organization.
- **ESI Organization:** Use this to define an external organization that provides Employee State Insurance (ESI) to your employees. Records your Employee State Insurance (ESI) organization's Challan Information, General Information and Representative Details. You can have multiple ESI organizations and select an employee's ESI organization in the Assignment window.
- **Provident Fund Organization:** Records your PF organization's PF challan information, PF information, and PF representative details. You can have multiple PF organizations and select an employee's PF organization in the Assignment window.
- **Professional Tax Organization:** Records your Professional Tax organization's information, Professional Tax Challan information, and Representative Details information. You can have multiple professional tax organizations and select an employee's professional tax organization in the Assignment window.
- **Income Tax Office:** Records your income tax organization's information. You can enter the location details of the income tax office. You can select the income tax organization in the GRE/Legal Entity: Income Tax Details window.

Polish Legislation

The Polish legislation can use the following classifications:

- **PL SII Branch:** Use this classification to represent a local branch of the Social Insurance Institute (SII), a public organization that deals with the social insurance benefits, such as sickness allowance, maternity allowance, and rehabilitation benefits. You use the SII branch information for social insurance reporting.
- **PL Statistic Office:** Use this to represent a local statistic office. You use this information in reports sent to the statistic office.
- **PL Tax Office:** Use this to define the tax office bank accounts for the employer and for the tax collected from the employees. You use this information in statutory reports.

Norwegian Legislation

The Norwegian legislation can use the following classifications:

- **Local Unit:** Use this classification to identify and report on the different work centers, within your enterprise, to which you assign employees.
- **Payee Organization:** Use this classification to define an external organization which receives third party payment from an employee
- **Social Security Office:** Use this to define external social security office organizations.
- **Pension Provider:** Use this classification to define an external organization that provides pensions to your employees.
- **Statement Provider:** Use this classification to define an external organization that provides reports on behalf of the legal employer.
- **Tax Office:** Use this classification to define an external tax organization.

Finnish Legislation

The Finnish legislation can use the following classifications:

- **Local Unit:** Use this classification to identify and report on the different work centers, within your enterprise, to which you assign employees.
- **External Company:** Use this to record details of the various types of external organizations with whom your organization deals. Ensure to create organizations with this classification as external organizations.

- **Pension Provider:** Use this to record the basic information about pension insurance providers to which you transfer the appropriate pension insurance deductions.
- **Accident Insurance Provider:** Use this to identify organizations that provide accident insurance coverage, group life insurance, and unemployment insurance.
- **Finnish Magistrate Office:** Use this for identifying the authority responsible for processing the employee court orders.
- **Finnish Trade Union:** Use this to record the basic information about the employees' trade unions to process employee deductions.
- **Provincial Tax Office:** Use this to identify the legal employer's tax office.

Danish Legislation

The Danish legislation can use the following classifications:

- **Service Provider:** Use this classification to record details of the various types of external service providers with whom your organization deals.
- **Pension Provider:** Use this classification to define external pension providers.

Swedish Legislation

The Swedish legislation can use the following classifications:

- **Local Unit:** Use this classification to identify and report on the different work centers, within your enterprise, to which you assign employees.
- **Social Security Office:** Use this to define external social security office organizations with which you coordinate medical reimbursements for the employees.
- **Swedish Enforcement Office:** Use this to define external enforcement office organizations with which you coordinate the attachment of earnings deductions for the employees.

South African Legislation

The South African legislation can use the following classification:

- **Training Provider:** Use this to indicate if an organization is a training provider.

UAE Legislation

The UAE legislation can use the **Legal Employer** classification to define and enter

additional organization information for your legal employer.

Irish Legislation

The Irish legislation can use the following classifications:

- **Legal Employer:** Use this classification to define and enter additional organization information for your legal employer.
- **Pension Provider:** Use this classification to define external pension provider.

Creating an Organization

Use the Organization window to create:

- Business groups
- External organizations (for example, tax offices, pension providers, insurance carriers, disability organizations, benefit carriers, or recruitment agencies)
- Internal organizations (for example, departments, sections or cost centers)
- GREs/Legal Entities

If you use the Configuration Workbench to configure your enterprise structure, then you only need to create the additional internal and external organizations you require. For example, you can set up additional organizations to represent the internal divisions or departments, and external organizations for reporting or third party payments.

See: *Extending the Enterprise Framework, Oracle HRMS Enterprise and Workforce Management Guide*

To create an organization:

1. Navigate to the Organization window and click New to create a new organization.

Note: For information about querying existing organizations, see: *Finding an Organization, Oracle HRMS Enterprise and Workforce Management Guide*

2. Enter a name for your organization in the Name field. A check is performed to see if organizations with the same name already exist.

All Oracle applications you install share the information entered in the Organization window. Therefore organization names must be unique within a business group, and business group names must be unique across your applications network.

You can create two organizations with the same name in different business groups but this can cause confusion later, if the HR: Cross business group profile option is set to Yes and you decide to share certain information across all business groups. If you decide to create two organizations with the same name, be sure that this will not cause you problems in the future.

3. Optionally, select an organization type in the Type field.

Organization types do not classify your organization, you use them for reporting purposes only. The type may identify the function an organization performs, such as Administration or Service, or the level of each organization in your enterprise, such as Division, Department or Cost Center. You create the organization types you require by entering values for the Lookup Type ORG_TYPE.

4. Enter a start date in the From field. This should be early enough to include any historical information you need to enter.

Note: You cannot assign an employee to an organization before the start date of the organization.

5. Enter a location, if one exists. You can also enter an internal address to add more details such as floor or office number.

Dutch only: If you are setting up external organizations for a tax office, a social insurance provider or a private health insurance provider, you must enter the postal address and contact details using the NL_POSTAL_ADDRESS Location EIT.

Mexico only: When defining a GRE/Legal Entity, if you select a location here, HRMS automatically associates it with this GRE in the Generic Hierarchy.

US only: If you are using Oracle Payroll in the US, every organization to which employees can have assignments, including business groups, must have on record a location with a complete address. This is because the system uses the location of the organization of the employee's primary assignment to determine employee work locations for tax purposes. This does not apply to GREs, because the assignment to a GRE exists in addition to the assignment to an organization.

India only: You can define an income tax organization and enter its location details. You can then select this organization at the GRE/Legal Entity Income Tax Office.

Note: If you are an Oracle Inventory user, then you must not assign a location to more than one organization classified as an Inventory Organization.

6. Enter internal or external in the Internal or External field. You cannot assign people to an external organization.

Examples of external organizations that may require entry are disability

organizations, benefits carriers, insurance carriers, organizations that employees name as beneficiaries of certain employee benefits, and organizations that are recipients of third party payments from employees' pay.

7. Save the basic organization details.

Entering Organization Classifications

To determine the purpose and use of each organization you create, you give it one or more classifications. The setup information you enter for an organization depends in large part on its classification.

See: Organization Classifications, page 1-4

Note: If you classify an organization as a business group, it is not reversible.

To enter organization classifications:

1. Enter the classification for your organization in the Name field.
2. Enable the classification by checking the Enable box. This allows you to use and enter the essential additional information for your organization.
3. Save the classification details.
4. You can either enter additional information for the classification type or enter another classification.

Note: Save each classification after entering and enabling it.

Entering Additional Information

For each classification you set up you can enter additional information. This information can be different for each classification.

For business group see: Business Group, page 1-17

For HR organization see: HR Organization, page 1-18

For representative body see: Representative Body, page 1-18

For constituency see: Constituency, page 1-19

For bargaining association see: Bargaining Association, page 1-20

For company cost center see: Company Cost Center, page 1-20

For professional body information see: Professional Body Information, page 1-20

For legal employer see: Legal Employer, page 1-21

For work center see: Work Center , page 1-22

For social security office see: Social Security Office, page 1-21

For social security province office see: Social Security Province Office, page 1-21

For healthcare organization see: Healthcare Organization, page 1-22

For tax office see: Tax Office, page 1-22

For tax administration office see Tax Administration Office, page 1-23

See Classification and Additional Information Types, page 1-4 if you need to check which classification to select.

To enter Business Group additional information:

1. Click on the organization classification for which you want to enter additional information.
2. Choose the Others button to open the Additional Organization Information window.
3. Select one of the following:
 - Business Group Information, see: Entering Business Group Information, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Budget Value Defaults, see: Business Groups: Entering Budget Value Defaults, *Oracle HRMS Enterprise and Workforce Management Guide*
 - SOE Information, see: Business Groups: Entering SOE Information, page 1-32
 - SOE Detail Information, see: Business Groups: Entering SOE Detail Information, page 1-33
 - Work Day Information, see: Business Groups and HR Organizations: Work Day Defaults, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Benefits Defaults, see: Business Groups: Defining a Default Monthly Payroll, *Oracle HRMS Enterprise and Workforce Management Guide*
 - PTO Balance Type, see Business Groups: Selecting a PTO Balance Type, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Recruitment Information, see: Business Groups: Entering Recruitment Information, *Oracle HRMS Enterprise and Workforce Management Guide*

- Payslip Information, see: Entering Payslip Information, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Self Service Preference Information, see: Entering Self-Service Preference Information, *Oracle HRMS Enterprise and Workforce Management Guide*
4. Repeat these steps to enter further information.

To enter HR organization additional information:

1. Click on the organization classification for which you want to enter additional information.
2. Choose the Others button to open the Additional Organization Information window.
3. Select one of the following:
 - Reporting Information, see: Entering Reporting Information for an HR Organization or a Company Cost Center., *Oracle HRMS Enterprise and Workforce Management Guide*
 - Costing Information, see: HR Organizations: Entering Costing Information, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Parent Organization, see: HR Organizations: Entering Parent Organizations, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Work Day Information, see: Business Groups and HR Organizations: Entering Work Day Defaults:, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Payslip Information, see Entering Payslip Information, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Self Service Preference Information, see Entering Self-Service Preference Information, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Related Organizations Information, see: Entering Related Organizations Information for an HR Organization, *Oracle HRMS Enterprise and Workforce Management Guide*
4. Repeat these steps to enter further information.

To enter representative body additional information:

1. Click on the organization classification for which you want to enter additional information.

2. Choose the Others button to open the Additional Organization Information window.
3. Select one of the following:
 - Representative Body Information, see: Entering Representative Body Information, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Constituency information, see: Entering Constituency Information for a Representative Body, *Oracle HRMS Enterprise and Workforce Management Guide*
4. Repeat these steps to enter further information.

To enter constituency additional information:

1. Click on the organization classification for which you want to enter additional information.
2. Choose the Others button to open the Additional Organization Information window.
3. Select one of the following:
 - Location, see Entering Location Information for Constituencies, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Organization, see Entering Organization Information for Constituencies, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Organization Hierarchy, see Entering Organization Hierarchy information for Constituencies, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Grade, see Entering Grade information for Constituencies, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Bargaining Unit, see Entering Bargaining Unit information for Constituencies, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Job, see Entering Job information for Constituencies, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Collective Agreement Grade, see Entering Collective Agreement Grade information for Constituencies, *Oracle HRMS Enterprise and Workforce Management Guide*
4. Repeat these steps to enter further information.

To enter bargaining association information:

1. Click on the organization classification for which you want to enter additional information.
2. Choose the Others button to open the Additional Organization Information window.
3. Select Trade Union Information, see: *Entering Trade Union Information for a Bargaining Association, Oracle HRMS Enterprise and Workforce Management Guide*
4. Repeat these steps to enter further information.

To enter company cost center information:

1. Click on the organization classification for which you want to enter additional information.
2. Choose the Others button to open the Additional Organization Information window.
3. Select one of the following:
 - GL Company Cost Center, see: *Entering GL Company Cost Center Information for a Company Cost Center, Oracle HRMS Enterprise and Workforce Management Guide*
 - Reporting Information, see: *Entering Reporting Information for an HR Organization or a Company Cost Center., Oracle HRMS Enterprise and Workforce Management Guide*
4. Repeat these steps to enter further information.

To enter professional body information:

1. Click on the organization classification for which you want to enter additional information.
2. Choose the Others button to open the Additional Organization Information window.
3. Select Professional Body Info, see: *Entering Additional Information for a Professional Body, Oracle HRMS Enterprise and Workforce Management Guide.*
4. Repeat these steps to enter further information.

To enter legal employer information:

1. Click on the organization classification for which you want to enter additional information.
2. Choose the Others button to open the Additional Organization Information window.
3. Select one of the following:
 - Statutory Information. See: Entering Statutory Information, page 1-24
 - Work Center Reference. See Entering Work Center Reference, page 1-27
 - Benefit Uplift Details. See: Entering Benefit Uplift Details, page 1-25
 - Disability Deduction. See: Entering Disability Management Deductions, page 1-25
 - Exempt Situations. See: Entering Exempt Situations Deductions, page 1-26
4. Repeat these steps to enter further information.

To enter social security office details:

1. Click on the organization classification for which you want to enter additional information.
2. Choose the Others button to open the Additional Organization Information window.
3. Select Social Security Office Details. See: Entering Social Security Office Information, page 1-30.
4. Repeat these steps to enter further information.

To enter social security province office details:

1. Click on the organization classification for which you want to enter additional information.
2. Choose the Others button to open the Additional Organization Information window.
3. Select Social Security Province Details. See: Entering Social Security Province Office Information, page 1-31.

4. Repeat these steps to enter further information.

To enter work center details:

1. Click on the organization classification for which you want to enter additional information.
2. Choose the Others button to open the Additional Organization Information window.
3. Select one of the following:
 - Work Center Details. See: Entering Work Center Details, page 1-27
 - Section Reference. See: Entering Section Reference Information, page 1-29.
 - Natural Disaster. See: Entering Natural Disaster Information, page 1-27
 - Partial Unemployment. See: Entering Partial Unemployment Information, page 1-28
 - Work Center Shutdown. See: Entering Work Center Shutdown Information, page 1-29
4. Repeat these steps to enter further information.

To enter healthcare organization details:

1. Click on the organization classification for which you want to enter additional information.
2. Choose the Others button to open the Additional Organization Information window.
3. Select Healthcare Organization. See: Entering Healthcare Organization Information, page 1-31
4. Repeat these steps to enter further information.

To enter tax office details:

1. Click on the organization classification for which you want to enter additional information.
2. Choose the Others button to open the Additional Organization Information window.

3. Select Tax Office Details. See: Entering Tax Office Details, page 1-30

To enter tax administration details:

1. Click on the organization classification for which you want to enter additional information.
2. Choose the Others button to open the Additional Organization Information window.
3. Select Tax Administration. See: Entering Tax Administration Details, page 1-30

Setting Up Spanish Organizations

You must set up your organizations in the order shown below. If you do not set up your organizations correctly, your RED System reports may contain inaccurate information.

1. Set up a business group and any other non-Spanish specific organizations required by your enterprise.
2. Create your legal employers and enter statutory information for them.
3. Create the sections that your work centers include. (A section is the department or facility where an employee works). Sections are used for internal reporting purposes only and do not affect your statutory reports.
4. Create your work centers and enter their additional information, including the sections they include.
5. Query the legal employers you have created, and attach the work centers to the appropriate employers as additional information.

For more information on how to create the organizations and additional information described in this topic, please see: Creating an Organization, page 1-14 and Entering Additional Information, page 1-16

6. Attach the employee assignment to a work center. You can select any work center that has been attached to any legal employer in your organization. See: Entering Additional Assignment Details., page 4-24

Warning: Typically, your legal employer and HR Organization are different organizations. If, however, you have an organization that is both the Legal Employer and the HR Organization and you attach the assignment to a work center in this organization, but you assign the entire assignment to a different legal employer organization, your statutory reporting may include inaccurate

information.

7. Select the section in which this employee works. You can select any section for the work center associated with this assignment. See: *Entering Additional Assignment Details.*, page 4-24

Entering Statutory Information

Use the Statutory Information window to record information about the legal employer. The information you enter here appears on statutory reports such as Company Certificate and RED System: New Hires, Leavers, and Contract Changes reports.

To enter statutory information:

1. In the Organization window, query the organization if it does not already appear there. In the Organization Classifications region, select Legal Employer, choose Others, and select Statutory Information.
2. Click the field on the Additional Organization Information to open the Statutory Information window.
3. Enter the full name of the organization.
4. Select the employee who represents your organization.
5. Enter the position the representative holds within the organization.
6. Select the type of the organization.
7. Enter the tax number. The application uses this information to identify your organization with the tax office.
8. Select the tax office you defined as an external organization.
9. Select the tax administration office to which your organization reports.
10. Enter the social insurance code of your organization. The application uses this code on RED System: New Hires, Leavers, and Contract Changes Report.
11. Select the local and provincial social security offices for your organization.
12. Enter details such as the identification number, password, and silcon certificate number of your organization. You use this information to communicate to the social insurance authority any changes in workforce.

13. Select the healthcare organization for your organization.
14. Save your work.

Entering Benefit Uplift Details

Use the Benefit Uplift Details window to record the benefit uplift information for employees. Employers provide a benefit uplift to employees to increase their statutory earnings during absences such as a temporary disability, maternity, or a pregnancy at risk. The application uses this information to determine the available benefit uplift amount for the employee.

To enter benefit uplift details:

1. In the Organization window, query the organization if it does not already appear there. In the Organization Classifications region, select Legal Employer, choose Others, and select Benefit Uplift Details.
2. Click the field on the Additional Organization Information to open the Benefit Uplift Details window.
3. Select an absence type.
4. Select a calculation method to calculate the benefit amount based on the employee's statutory earnings or their gross pay. If you select Gross Pay, you must select the daily rate formula to calculate the benefit amount.

Note: Use Oracle FastFormula to define a Benefit Uplift Daily Rate Formula and Benefit Uplift Duration formula, to return the percentages applicable to the absence and the number of days paid at that percentage.

See: Benefit Uplift Overview and Oracle HRMS FastFormula

5. Select the formula to identify the duration for which this benefit uplift is applicable.
6. Enter the start and end dates for the benefit uplift situation.
7. Save your work.

Entering Disability Deduction Information

Use the Disability Deduction window to record the disability deduction information of employees for legal employers. Legal employers manage certain non-IA/ID temporary disability situations and expenses of employees and be eligible for certain exemptions

on social security contributions. You record the disability deduction information determine the rebates and reductions the legal employer is eligible for.

To enter disability deduction information:

1. In the Organization window, query the organization if it does not already appear there. In the Organization Classifications region, select Legal Employer, choose Others, and select Disability Deduction.
2. Click the field on the Additional Organization Information to open the Disability Deduction window.
3. Select the type of the expenses incurred by the legal employer towards managing the temporary disability. The application uses this information to determine the rebates and reductions the legal employer is eligible for.
4. Enter the start and end dates for the disability deduction management.
5. Save your work.

Entering Exempt Situations Information

Use the Exempt Situations window to record the information about the contribution exempt situation for a legal employer. Legal employers and employees are eligible for certain exemptions from their contribution quotas from the regular situations or non industrial risk situations, for example temporary disability due a non industrial risk or accident. Legal employers must record this information to calculate their contribution quotas.

To enter exempt situation information:

1. In the Organization window, query the organization if it does not already appear there. In the Organization Classifications region, select Legal Employer, choose Others, and select Exempt Situations.
2. Click the field on the Additional Organization Information to open the Exempt Situations window.
3. Select the type of situation that requires an exemption from the list.
4. Enter the start and end dates for contribution exempt situation.
5. Save your work.

Entering Natural Disaster Information

Use the Natural Disaster Information window to record information about the natural disaster dates. The application uses this information for calculating rebates on social security deductions.

To enter natural disaster information:

1. In the Organization window, query the work center if it does not already appear there. In the Organization Classifications region, select Work Center, choose Others, select Natural Disaster.
2. Click in the field on the Additional Organization Information to open the Natural Disaster window
3. Enter the start and end dates for the natural disaster.
4. Save your work.

Entering Work Center Reference

Use the Work Center Reference window to link a work center to a legal employer. The work center is the facility where an employee works, such as a manufacturing plant or a headquarter office. The application uses this information for administrative purposes such as computing payroll for employees assigned to a particular work center.

To enter Work Center Reference:

1. From the Organization window, query the organization if it is not already displayed and select the Legal Employer in the Organization Classifications region. Choose the Others button to open Additional Organization Information window.
2. From the Additional Organization Information window, select Work Center Reference.
3. Click the field to open the Work Center Reference window.
4. Select a work center from the list of previously defined work centers.
5. Save your work.

Entering Work Center Details

Use the Work Center Details window to record details about the internal organization where employees work.

To enter work center details:

1. In the Organization window, query the work center if it does not already appear there. In the Organization Classifications region, select Work Center, choose Others, select Work Center.
2. Click in the field on the Additional Organization Information to open the Work Center Details window.
3. Enter the secondary account code that identifies the work center on statutory reports.
4. Select the code that identifies the main activity of your company. This application uses this information to determine your company's IA/ID contributions.
5. Select the social security scheme that your company follows, for example General Scheme.
6. Select the contribution account type to which the employee belongs, whether a member of the board or a trainee. The application uses this information to determine the employee's IA/ID contribution.
7. Save your work.

Entering Partial Unemployment Information

Use the Partial Unemployment window to record the partial unemployment information of employees in a work center. You require this information to calculate the statutory earnings and social security deductions for employers and employees.

To enter partial unemployment information:

1. In the Organization window, query the work center if it does not already appear there. In the Organization Classifications region, select Work Center, choose Others, select Partial Unemployment.
2. Click in the field on the Additional Organization Information to open the Partial Unemployment window.
3. Enter a percentage of unemployment. This percentage must be greater than 30%.
4. Enter the start and end dates for partial unemployment.
5. Select the calculation method to calculate the uplift amount based in employee's statutory earnings or their gross pay. If the calculation is based on their gross pay, you must enter the daily rate formula to calculate the benefit amount. Use Oracle

FastFormula to create the daily rate formula and the duration formula based on the employee's gross pay. See: Oracle FastFormula, *Oracle HRMS FastFormula Guide*

6. Select the duration formula to determine the duration for this benefit.
7. Save your work.

Entering Work Center Shutdown Information

Use the Work Center Shutdown window to record information about the shutdown dates for a work center. You require this information to process the social security deduction calculations and benefits the employers and employees are eligible to receive from the social security administration when there is a shutdown.

To enter work center shutdown information:

1. In the Organization window, query the work center if it does not already appear there. In the Organization Classifications region, select Work Center, choose Others, select Work Center Shutdown.
2. Click in the field on the Additional Organization Information to open the Work Center Shutdown window.
3. Enter a description or reason for the shutdown of the work center.
4. Enter the start and end dates for the shutdown.
5. Save your work.

Entering a Section Reference

Use the Section Reference window to add sections, such as departments or facilities, to a work center.

To enter a Section Reference:

1. From the Organization window, query the organization if it is not already displayed and select the Work Center in the Organization Classifications region. Choose the Others button to open Additional Organization Information window.
2. From the Additional Organization Information window, select Section Reference.
3. Click in the field to open the Section Reference window.
4. Select one or more sections to add to the work center.

5. Save your work.

Entering Tax Office Details

Use the Tax Office window to enter information about the tax office. The tax office is an external organization that your organization reports to for tax purposes.

To enter tax office details:

1. In the Organization window, query the tax office if it does not already appear there. In the Organization Classifications region, select Tax Office, choose Others, select Tax Office.
2. Click in the field on the Additional Organization Information to open the Tax Office window.
3. Enter the code that identifies the tax office.
4. Save your work.

Entering Tax Administration Details

Use the Tax Administration window to enter information about the tax administration. The tax administration is an external organization that your organization communicates with for tax purposes.

To enter tax administration details:

1. In the Organization window, query the tax administration if it does not already appear there. In the Organization Classifications region, select Tax Administration, choose Others, select Tax Administration.
2. Click in the field on the Additional Organization Information to open the Tax Admin Details window.
3. Enter the code that identifies the tax administration office.
4. Save your work.

Entering Social Security Office Information

Use the Social Security Office window to record details about this external organization.

To enter social security office information:

1. In the Organization window, query the social security office if it does not already appear there. In the Organization Classifications region, select Social Security Office, choose Others.
2. Click in the field on the Additional Organization Information to open the Social Security Office window.
3. Enter the code of the social security office for reporting purpose.
4. Save your work.

Entering Social Security Province Office Information

Use the Social Security Province Office window to record details about the external organization to whom your organization submits social security contributions.

To enter social security province office information:

1. In the Organization window, query the social security province office if it does not already appear there. In the Organization Classifications region, select Social Security Province Office, choose Others.
2. Click in the field on the Additional Organization Information to open the Social Security Province Office window.
3. Enter the code of the social security province office for internal reporting purposes.
4. Save your work.

Entering Healthcare Organization Information

Use the Company Details window to record details about the external insurance organization for social security contributions and Industrial Accidents and Industrial Diseases (IA/ID) reporting.

To enter healthcare organization information:

1. In the Organization window, query the healthcare organization if it does not already appear there. In the Organization Classifications region, select Healthcare Organization, choose Others.
2. Click in the field on the Additional Organization Information window to open the Company Details window.

3. Enter the name and address of the insurance company that records your insurance information.
4. Enter the code of the healthcare organization for internal reporting purpose.
5. Save your work.

Business Groups: Entering SOE Information

You enter statement of earnings (SOE) information at the business group level to specify what information appears on each region of the statement of earnings. You can enter element set names for earnings, deductions, and any imputed earnings to ensure that the elements within these sets appear on the statement of earnings. You can also supply balance attributes for SOE display.

To enter SOE information:

1. In the Organization window, query the business group if it does not already appear. In the Organization Classifications region, select Business Group, click Others, and select SOE information
2. Click in a field of the Additional Organization Information window to open the SOE Information window.
3. Select the SOE user category. You use this information to restrict the type of users who can view the SOE.
4. Select the Earnings element set in the Elements 1 field. (The set name typically begins with a legislative identifier, and then incorporates SOE EARNINGS as the next part of the name).
5. Select the Deductions element set in the Elements 2 field. (The set name typically begins with a legislative identifier, and then incorporates SOE DEDUCTIONS as the next part of the name).
6. If you have an element set for imputed earnings, select it in the Elements 3 field.
Note: For South Africa only: You select the ZA SOE Fringe Benefits and Other Non Payments element set in the Elements 3 field.
7. Select the Information element set in the Information 1 field. You create this element set when you set up your statement of earnings.

See: *Setting Up a Global Statement of Earnings, Oracle HRMS Payroll Processing Management Guide*

8. Select your predefined balance attributes in the Balances fields (Balance 1, Balance 2 and so on)
9. Save your work.

Business Groups: Entering SOE Detail Information

The statement of earnings (SOE) displays details of earnings, deductions and other payroll-related information for an employee assignment. Oracle HRMS enables you to determine the display name for elements and balances, and the sequence in which they display.

To enter SOE detail information:

1. In the Organization window, query the business group if it does not already appear. In the Organization Classifications region, select Business Group, click Others, and select SOE Detail Information.
2. Click in a field of the Additional Organization Information window to open the SOE Detail Information window.
3. Select the type of SOE details that you want to record, by selecting balance or element.
 - If you select balance, then select the balance, dimension, and balance display name that you want the SOE to display.
 - If you select element, then select the element name, input value, and element display name that you want the SOE to display
4. Save your work.

Jobs and Positions

Defining a Job

You use the Job window to define jobs, the skills that jobholders require, and the grades to which they can be assigned. You can also enter job evaluation scores, if you have set up a job evaluation system.

Check with your HR manager or system administrator whether this is the right window for entering job requirements. You use the Job window if requirements were defined using Special Information Types. You use the Competence Requirements window if you are following the competence approach.

If you intend loading historic assignment details into Oracle HRMS, make sure you enter valid start dates for your jobs. You cannot assign an employee to a job before the start date of the job.

Tip: Consider using a fixed date as a default for your initial setup, for example, 01-JAN-1901. This simplifies your data entry.

To define a job:

1. Enter a start date early enough to handle any historical information you want to enter.
2. Select the required job group. This defaults to the Default HR Job Group for your Business Group and should not be changed unless you want to enter a job that describes a supplementary role to a person's normal employment, such as a fire warden or health and safety representative, or you are setting up a job to be used in Oracle Projects.

Only jobs entered in the Default HR Job Group will be available in other windows in Oracle HRMS such as Position, Competencies, or Assignment. The only windows within Oracle HRMS that can access jobs outside of the Default HR Job Group are

the Supplementary Roles window and the Elections window.

3. Enter a unique name for the job. If there is at least one enabled segment in the Job Name flexfield, a window opens when you enter the Name field. You must enter a unique combination of segments in this window.

The flexfield that opens is dependent on the Job Group you have selected.

4. Enter a numerical approval authority value to define an approval level for incumbents of this job. This value is used by Oracle Approvals Management to determine whether a person has sufficient authority to approve a transaction.
5. Indicate whether the job carries any additional employment rights or is a benchmark job. A benchmark job is one that can be used to represent a number of jobs in reports such as salary surveys.
6. Select a benchmark job, if required.
7. Click the Further Information field and to enter additional Spanish-specific information.
8. Specify if the employee performing this job may be eligible for additional salary supplements while working in shift patterns:
 - Night Shift Supplement - for employees who do night work.
 - Shift Work Supplement - for employees who work in regular shift patterns.
9. Save the job. You can now enter further information for the job you have defined. Note that you can only enter some types of further information, such as valid grades or work choices, for jobs defined in the Default HR Job Group.
10. Choose the Evaluation button to enter evaluation information and an overall evaluation score for the job.

See: Entering Evaluation Information, *Managing Your Workforce Using Oracle HRMS*
11. Choose the Requirements button to enter job requirements, such as required qualifications or valid experience, to help you match people to roles.

See: Entering Job and Position Requirements, *Using Oracle HRMS - The Fundamentals*

Note: You use the Competence Requirements window to enter competencies if you are following the competence approach.
12. Choose the Valid Grades button to enter the grades to which jobholders can be assigned.

See: Entering Valid Grades for Jobs or Positions, *Using Oracle HRMS - The Fundamentals*

13. Choose the Survey Mapping button to link salary survey lines to your job.

See: Mapping Salary Survey Lines, *Using Oracle HRMS - The Fundamentals*

14. Choose the Extra Information button to enter job categories for the job. You can link as many categories as you need to a job.

Note: You can investigate the job categories in your enterprise using HRMS Intelligence.

See: Oracle HRMS Intelligence, *BIS 11i User Guide Online Help*.

There may also be other types of job extra information defined for your enterprise.

Note: You can only access job categories and other types of Extra Information if your system administrator has set them up for your responsibility.

Employment Agreements and Legal Compliance

Entering Disability Information

HRMS enables you to enter detailed disability information for the people in your enterprise.

You use the Disability window to enter this information.

Note: If you want to record that a person is registered as disabled, but you do not need to hold information about that disability, you can just check the Registered Disabled check box on the Personal tab in the Person window.

See: Entering a New Person (People Window), *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

To enter disability information:

1. Set your effective date early enough to handle any historical disability information that you want to enter.

Note: If you want to associate this disability record with an existing medical assessment or work incident, your current effective date must be later than the assessment and incident dates. Ask your system administrator to enable the Work Incidents and Medical Assessments windows if they are not available.

2. Select the category of disability, for example, Severely Disabled.
3. Enter into the FTE field the full-time equivalent that this person represents towards

your enterprise's quota of disabled employees. If no quota scheme exists, then leave the default value as 1.00.

Note: You can enter a number that is greater than 1.00, depending on the level of disability.

The actual figure will normally be provided by the official disability organization.

4. Select the status of this disability information.
 - Active: This information will be included in reports. You cannot enter an Active status if the record has an end date.
 - Inactive: This information will not be included in reports.
 - Pending: This information is not yet complete because you entered it before you entered the medical assessment confirming this disability (where the consultation result was Disability.)
 - Closed: This information has an end date because the person no longer has this disability.

For Russian users only: Disability status is not applicable in Russia, so the Status field is not available to Russian users. Instead, select the type of disability. You can find this information in the disability certificate provided by the Office of Medical Examination. The application uses this information to calculate any tax benefits and deductions for the employee.

5. Select the reason for the disability, for example, Occupational Incident. If the disability was diagnosed as the result of a medical assessment, select Occupational Assessment.
6. Enter the percentage of disability as determined by the official assessment of this disability.

For Hungarian and Spanish users only: The degree of disability depends on the category of disability. For example, if the person's disability category states that the disability decreases the work capacity by 50%, enter 50 as the percentage.

7. Select the incident that is related to, or caused, this disability. The list of incidents is limited to incidents that occurred before the current effective date of this disability. When you select an incident, its date is displayed automatically.
8. Select the medical assessment that recorded this disability.

The list of assessments is limited to assessments that:

 - have a result of Disability

- have a consultation date that is earlier than the current effective date of the disability
- are not already linked to a disability record for this person
- were linked to any incident that you selected in the previous step

To link an incident to an assessment, see: *Entering Medical Assessments, Oracle HRMS Enterprise and Workforce Management Guide*

This field is not datetracked.

Entering Disability Registration Information:

1. Choose the Registration tabbed region to enter the disability registration details.
2. Enter into the ID field the registration number assigned by the disability organization.
3. Select the name of the official disability organization with whom the person's disability is registered.

You create disability organizations in the Organization window, selecting the Disability Organization classification.

See: *Creating an Organization*, page 1-14

4. Enter the date on which the employee was registered as disabled with the disability organization and the date on which this registration expires.

Entering Additional Disability Information:

1. Choose the Other tabbed region to enter additional details about this disability.
2. Enter a description of the disability.

For Russian users only: Disability description is not applicable in Russia. Instead, enter the job conditions under which the disabled employee can work. You can find this information in the disability certificate provided by the Office of Medical Examination. You can use this information to identify suitable assignments for the disabled employee.

3. Enter information about the work restrictions that the employee is subject to as a result of their disability.
4. Enter further information about this disability if the Further Information field has been set up by your Oracle localization team.

For Hungarian users only: Record if the employee is blind. The application uses

this information to calculate any additional holiday or tax benefit for the employee.

For Indian users only: Indicate if the employee has provided proof of disability, for claiming disability benefits.

For Korea users only: Specify the following:

- Disability grade
- Effective date of the disability
- If a certificate of disability is available or not.
- Disabled type

You require this information when the employee is eligible for disable exemption.

For Mexican users only: Specify the following:

- Disability ID of any related disabilities
The list-of-values displays all previous disabilities for your employee.
- Number of disability days subsidized by the social security agencies

- Type of disability

Valid values are:

- General Disease
- Maternity
- Risk Incident
- Result of the disability
The Consequence field provides the following options:
 - None
 - Temporary Disability
 - Provisional Initial Assessment
 - Definitive Initial Assessment
 - Death
 - Relapse
 - Assessment after start date

- Provisional re-assessment
 - Relapse without medical discharge
 - Definitive re-assessment
-
- Disability control

For Spanish users only: Record if the employee or dependent contact has a condition with reduced mobility. This information affects the employee's tax withholding rate.

For UAE users only: Indicate if the employee's disability will impact their social insurance contribution. Only one disability can be considered for calculating the social insurance contribution.

5. Save your work.

What Next?

To set up an assessment to evaluate this disability, choose the Medical Asse. (Assessment) button.

See: Entering a Medical Assessment, *Oracle HRMS Enterprise and Workforce Management Guide* for more information.

Maintaining Disability Information

You can make changes to the disability information that you saved previously, but if your disability record includes either incident or medical assessment information, you cannot change or delete this information once you have saved it.

Workforce Sourcing and Deployment

People

Windows for Maintaining Personal Information

Every enterprise must be able to record personal information for its employees, applicants, and contacts. HRMS enables you to enter and update this information using windows based on templates designed for your own working environment. Your system administrator can configure the predefined templates to match your people management processes.

If the template windows are not set up at your site, you can record personal information for all person types on the People and Assignment windows.

Note: The template windows are an efficient way to perform most basic HR management actions, such as hiring, ending an application, and updating assignments. However, the template windows do not support all DateTrack options, so for complex retroactive changes to history, you may have to use the People and Assignment windows.

Your system administrator can set up task flows from the template windows or the People and Assignment windows to give you access to all the windows in which you can record personal and employment information. You can enter information about:

- New employees
- Employment
- Office location
- Applicants
- Background checks
- Re-hire recommendations
- Further names
- Medical details
- Address details
- Telephone numbers
- Picture record

- Dependents, beneficiaries and other contacts
- Contracts
- Supplementary role
- Elections
- Previous Employment
- Documents of Record
- Allocated Checklists

You can also use these windows to update people's statuses, for example, from applicant to employee.

Note: The system administrator can create configured versions of the People window and the template windows so that you use each version for certain person types only or for certain functions only (entering employees, entering applicants, or hiring applicants).

Displaying Personal Information

Oracle HRMS enables you to easily access all the information you enter about people. There are lots of ways to view information about people held in Oracle HRMS. You can select the approach that best fits your needs. For example, you can:

- Use Employee Direct Access to view and update your own personal details using a web browser.
- Use Line Manager Direct Access to view information about people in your organization.
- Use the Find and Summary windows of the People Management templates to display the people who interest you, then 'drill down', by clicking on buttons, to the information you need.

If the template windows are not set up at your site, you can display the same information using the Find Person window or a People folder.

- Use an inquiry window to view specific information about a person, such as employment or absence history.

See: *Using Inquiry Windows and Folders, Oracle HRMS Configuring, Reporting, and System Administration Guide*

- Use QuickPaint to design a report incorporating personal, assignment, application, or compensation information.

See: QuickPaint, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Person Extra Information Types

You can define as many Extra Information Types as you require to hold information about people. There are also some predefined person EITs.

Note: To be able to access the predefined EITs, you must link the EIT to your responsibility.

See: Setting Up Extra Information Types Against a Responsibility, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

The predefined person EITs are:

- Oracle Student System (OSS) Person Details - records OSS identification data for the student employee. The field Synchronize OSS Data controls synchronization of student employee address and telephone information between HRMS and OSS.
- Passport Details - employee's passport number, profession, issue date, expiry date and place of issue.
- Residency Details - employee's residency permit number, profession, issue date, expiry date, and place of issue.
- Work Permit Details - employee's work permit number, profession, issue and expiry dates, and place of issue.

Entering a New Person (People Window)

Use the People window to enter and maintain basic personal information for all person types, including employees and contingent workers.

Note: You can also use one of the template windows such as Entering Employees or Entering Contingent Workers to enter new people.

The minimum information to enter for all categories of people is name and action type. In addition, for employees you must enter gender, employee number (if your enterprise uses manual number entry), and date of birth (for assignment to a payroll).

Your localization may require additional mandatory information for a person. See: Entering Additional Personal Information, page 4-8

To enter a new person:

1. Set your effective date to the appropriate date for adding the person to the application. If you are entering an employee, this should be their hire date.
2. Enter the person's name and other details in the Name region. The application uses the first and second last names for display purposes and on all statutory reports.
 - In the Title field, select a title such as Mrs. or Doctor.
3. Select a gender.
4. In the Action field, select an action type (such as Create Employment) and a person type. The person type you select displays immediately in the Person Type for Action field before you save it. If only one user person type exists for the action type, it displays automatically in the Person Type for Action field.

Note: If you enter a contingent worker who has a previous person type such as ex-employee, you can choose to revert the contingent worker back to the previous person type by using the Cancel Placement action.

You create user person types in the Person Types window. If you want to change a person type to another person type with the same system person type you must use the Person Type Usage window.

See: *Changing Person Type Usage and Deleting OAB Person Type Usage, Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

Entering Employee Information:

Enter the following information if the person is an employee. Otherwise, proceed to step 6.

1. If desired, change the Latest Start Date field.
 - The Latest Start Date field displays your effective date.
 - For employees who have previously worked for your enterprise, the Date First Hired field displays the start date of the employee's earliest, previous period of service. This date must be on or before the start date of the earliest period of service. The Date First Hired field is situated on the Benefits Tab.

If the latest start date and the date first hired are the same, when you amend the latest start date, the date first hired is set to the same date.

If you amend the latest start date to earlier than the date first hired, the date first hired is set to the same date.

Note: In the US, before making a change to a latest hire date already entered for an employee, ensure that the start date of the employee's primary address is the same as or earlier than the new hire date. This preserves the integrity of the employee's tax records.

Entering Identification Information:

Enter the person's identification information in the Identification region:

1. If your enterprise uses a manual number generation scheme, enter an employee, applicant or contingent worker number. If your enterprise uses automatic number generation (including Use Employee Numbering for contingent workers), the employee, applicant, or contingent worker number automatically displays when you save your entries in this window.

Note: If you query a person who has a combination of employee, applicant, and contingent worker numbers, the employee number displays in the Number field. If the person lacks an employee number but has a contingent worker number and an applicant number, the contingent worker number displays. However, you can choose to view any of the identification numbers held for a person by selecting them from the list.

2. Enter the NIF or tax number for a Spanish resident. If the person does not hold a NIF number, you can record either the DNI or NIE number using the Employment tab. See: Entering Additional Person Information, page 4-8

Entering Personal Details:

Enter personal details in the Personal tabbed region.

1. Enter a date of birth. You must do this before you can assign an employee to a payroll. The application also uses this information to calculate tax reductions for employees aged 65 and over.
2. Enter additional birth information into the Town of Birth, Region of Birth, and Country of Birth fields.
3. If the Work Telephone field is displayed, enter a work telephone number. Otherwise, use the Phone Numbers window to enter this information.
4. In the Status field, select a marital status.
5. Select a nationality.

6. Select whether your employee, applicant or contingent worker is:

- Registered disabled
 - Not registered disabled
- Partially disabled
- Fully disabled

Note: Whether employees are fully or partially disabled affects benefits eligibility calculations.

7. Save your work.

Multiple Person Records:

1. If your data already includes a person with the same national identifier, or with the same surname and a first name and date of birth that is either the same or not entered, then a list of values shows all the people who share the details.

Note: People who are only entered with a person type of Other, that is someone external to your enterprise, are not shown in this list.

If you have entered neither a first name nor a date of birth, then the list of values displays all the records that match the information you have entered.

Note: The list of values displays only if your system administrator has set the HR: Cross Business Group profile option to Yes.

Do one of the following four tasks:

- If the person you are entering already exists, but in a different business group, then select that person from the list of values. The person you are entering is saved in your current business group and linked to the existing person record to indicate they are the same person. If your application has person synchronization enabled, then the personal information entered for the new person is copied across to existing records in other business groups. If existing records have values for fields that the new record leaves blank, then these values appear in the new record. See: *Person Record Synchronization, Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*.
- If the person already exists in your current business group then select that person from the list of values. The application retrieves the existing record and

cancels the save you were trying to make, as one business group cannot contain two records for the same person. Close the new record and scroll down to display the existing record.

Note: You cannot link to any entry in the list of values marked with an asterisk as these either belong to your business group, or are linked to a person in your business group.

- If the person already exists in TCA, but not in HRMS, then select that person from the list of values. The person you are entering is saved in your current business group and linked to the existing person record to indicate they are the same person. The information held for the person in TCA is updated with that entered in HRMS. See: *People in a Global Enterprise, Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*
- If the person you are entering does not match any of the records displayed, then select No Match in the lookup. Your new person record is saved.

What Next?:

Optionally, you can enter additional information for people in the tabbed regions. See: *Entering Additional Personal Information, page 4-8*

Note: The Background Information, Medical Information, and Rehire Information tabbed regions appear only if your system administrator has enabled them for you.

Entering Additional Personal Information (People Window)

Optionally, you can enter additional information for people in the tabbed regions of the People window described in the following steps.

Note: The Background Information, Medical Information, and Rehire Information tabbed regions appear only if your system administrator has enabled them for you.

To enter office information for a new hire, an existing employee, or contingent worker:

1. Choose the Office Details tabbed region.
2. Enter the office number.

3. Enter the internal location of this office.
4. Enter the office identifier for internal mail.
5. Enter the person's email address.
6. In the Mail To field, select Home or Office to indicate the person's preferred mail destination.

To enter information for an applicant:

1. Choose the Applicant tabbed region.
2. If the applicant's resume is on file, check the Exists check box.
3. If the applicant's resume is on file, select the date indicating when the resume was last updated.
4. Select a final date a file is to be maintained for this applicant.

To enter background check information:

1. Choose the Background tabbed region.
2. Check whether the person background check has been performed.
3. Select the date the background check was performed.

To enter rehire recommendation information for an applicant who was a former employee or contingent worker:

1. Choose the Rehire tabbed region.
2. If the former manager has recommended the applicant for rehire, check the Recommended check box.
3. Select the reason for this recommendation.

To enter further name information:

1. Choose the Further Name tabbed region.
2. Enter the maiden name for identification purposes.
3. Enter the name the person prefers, perhaps a nickname.
4. Enter the first part of the person's name, such as De, Del la, in the Prefix field. For

example, for the person Javier de la Morena, the last name is Morena, the prefix is De la. If you enter the whole name de la Morena in the Last Name field, the name will appear alphabetically under De.

5. The Suffix field holds part of the last name, such as Junior or II. You can report on the suffix separately, as required in some government-mandated reports.
6. Enter any honors or degrees (BA, MBA, or JD, for example) the person earned.

To enter medical information for a person:

1. Choose the Medical tabbed region.
2. Select the person's blood type.
3. Select the date of the person's last medical test.
4. Enter the name of the physician who performed this test.

To enter other information for a person:

1. Choose the Other tabbed region.
2. Enter the number of days the employee usually works in a typical week.
3. Enter the person's current full time/part time availability to work with your company.
4. Select the language the person prefers for correspondence. For example, select German if the person prefers to correspond or receive company information such as terms of pension plan in German.

Note: The Correspondence Language list includes languages in the FND_LANGUAGES table. This table contains the languages that Oracle National Language Support Runtime Library (Oracle NLSRTL) supports. Check with your System Administrator for information on NLSRTL supported languages.

5. If the person has died, enter the date of death.
Date of death defaults to the person's termination date if:
 - You enter the termination reason of Deceased.
 - You do not provide the actual termination date.
 - You do not enter a date of death.

6. If the person is a student, select the current student status.
7. In the Date Last Verified field, you can enter the date the person last checked this personal information for accuracy.
8. Indicate if the person works for a military service. Check the Military Service box if the person is employed in a military service.
This selection can affect benefits calculations.
9. Check the Second Passport Exists check box if the person possesses multiple passports.

To enter benefits information:

1. Choose the Benefits tabbed region.

Note: All fields in the Benefits tabbed region are optional. Most can help to determine plan eligibility or rates.

Note: If necessary, you can add the Benefits Tab to the People window. Query the BEN_MANAGER menu in the Menus window and add the HR View Benefits function to the menu.

2. Enter a benefit group for your employee or applicant. Benefit groups help determine a person's eligibility for a plan or set benefit rates. For example, benefit groups can address mergers and acquisitions where eligibility is complicated, or assist in grandfathering a person into a very old plan.
3. Enter what kind of tobacco (cigarettes, pipe, cigar, or chewing, for example) your employee uses, if any.
4. Enter the medical plan number, which is the policy or group plan number of an externally provided medical plan.
5. Enter the adoption date, if the employee has adopted a child. This information, with the child's date of birth, can determine dependent eligibility. You can enter the adoption date only if you have entered a date of birth for the person. The adoption date must be the date of birth or later.
6. Enter the date you received the death certificate of a deceased employee. You can enter this only after you have entered the date of death in the Other Information region. The receipt of the death certificate must be after or equal to the date of death.

7. Enter an adjusted service date for your employee. Benefits can use this date, rather than the date first hired, to determine the length of service for eligibility, enrollment, and rates. The adjusted service date can credit service for former employers, grandfathered benefits, or in the case of mergers and acquisitions. The application uses this information while calculating the social security deductions for employees.
8. Change the date first hired. For employees who have previously worked for your enterprise, the Date First Hired field displays the start date of the employee's earliest, previous period of service. This date must be on or before the start date of the earliest period of service.
9. Check the Other Coverage check box, if the employee or applicant has externally provided coverage.
10. Check the Voluntary Service check box, if your employee or applicant is volunteering, for example as a missionary.

To enter employment information:

1. Choose the Employment tabbed region.
2. Select the type of identification, for example, the DNI Number, and enter the number.
3. Specify if the person has contributed towards social security contributions for over 35 years. This information determines an employee's contribution rates on social security.
4. Specify if the person is under 18 years of age and has the approval to work overtime.
5. Save your work.

Contract Information

Contracts

Using Oracle HRMS you can record contractual information for your employees and employee applicants. Information relating to the contract reference, contract status, and contract type must all be entered. This information can then be used for reporting purposes, or to produce a hard copy of the contract to send to the person for reference and signing.

Once a contract is entered for a person you can refer an assignment to it using the Assignment window. Each person may have multiple contracts, but an assignment may refer only to one contract.

German public sector users can use contracts to control the values of certain fields in the Assignment window. Once you refer an assignment to a contract then fields such as Position, Grade, Employment Category, and Collective Agreement display the values set for the contract, and cannot be updated in the Assignment window. To update these values you must make changes to the contract.

To give your managers access to more complete records for their direct reports, you can display details of their current contracts of employment, as well as any historical contract information, in the My Employee Information pages in SSHR.

You can also display contract details to the My Information pages so that your employees can also view their own information whilst accessing SSHR.

There are a number of rules that relate to the creation and maintenance of contracts:

- A contract cannot exist without a person. Therefore, if a person who has a contract attached to them is deleted, the contract will also be deleted.
- Contract statuses are set up depending on the needs of your enterprise. If you have any queries about contract statuses, please contact your system administrator.
- If the alteration of a hire date for an employee results in the start date for the contract being before the hire date, the contract start date is automatically amended to the new hire date.

Tip: If the alteration of a hire date results in future-dated changes being before the contract start date, the changes are deleted.

- If the alteration of a hire date for an employee results in the start date for the contract being after the start date of the referencing assignment, the contract start date is automatically amended to the new hire date.

- A contract cannot be deleted if an assignment currently refers to it, irrespective of the assignment status.
- When you are selecting a contract to reference to an assignment you will only be able to select from contracts that have start dates on or before the assignment start date.

Entering Contracts

You enter and maintain information about an employee's contract in the Contracts window. You can attach an electronic copy of any written contract that accompanies the record using the Attachments button. See: *Using Attachments, Configuring, Reporting, and System Administration in Oracle HRMS*

To enter a new contract:

1. Set your effective date to the start date of the contract.
2. Enter the reference code for the contract. The code for each contract attached to a person must be different, though more than one person can use the same contract reference code.
3. Select the status that indicates the contract is active. The period of service dates will also be displayed if a corresponding period of service exists.
See: *Creating Contract Statuses, Managing Your Workforce Using Oracle HRMS*
4. Select the contract type.
5. Select the status of the contract, such as pending, opened, printed and so on. You must set up document statuses using the user extensible Lookup Type DOCUMENT_STATUS. Enter the date the document status of the contract changed.

Note: The document status is not DateTracked.

6. You can enter any remaining information relating to the contract such as start reason, duration, or contractual job title.
7. Enter further information about this contract using the Further Contract Information window.

Entering Further Contract Information

8. Click in the More Information field to open the Further Contract Information window.

9. Select the subtype, for example, if the person is on a training or supporting long term employment program.
10. Enter the number of training hours, if the person for whom you are entering is undergoing a training program. The training could be a classroom program or a distance learning program.
11. If the contract is for a fixed period, enter the date when it is due to end.
12. To enter information for a person who is on maternity leave or is transferred to another department, select the subtype substitution. Enter the name of the person.
13. Save your changes.

Maintaining Contracts

The amendments made to a contract are datetracked. The result of any changes made to the status of a contract is dependent on whether the record is being corrected or updated. For example:

- If you change the status of an active contract to make it inactive, and choose the Update button, the contract record will be ended. A new contract record with an inactive status will be created and the fields in the Active Contracts Dates region will become blank.
- If you change the status of an active contract to make it inactive and choose the Correction button, the current contract record will be amended to appear as if the most recent active period has never occurred.

Deleting Contracts

If you mistakenly save information in the Contracts window you can delete it. You cannot perform this action if the contract is referenced by an assignment.

Note: Contracts cannot be date effectively end dated.

To delete a contract:

1. Query the contract in the Contract window.
2. Select Delete Record from the Edit menu and proceed as instructed in the displayed windows.

Assignments

Working Shift Patterns

You can use Oracle payroll to store records that define shifts and combinations of shifts. You can also assign these shift details to an employee and use them to calculate the hours worked between two dates.

Shifts and Shift Patterns

You can store information about:

- Shifts - a shift is a unit of work representing one attendance at the place of employment. For example, if your employee is contracted to work 8 hours in one day, this is the daily shift.
- Shift patterns - a shift pattern is a sequence of consecutive shifts

A Shift Pattern of Five Days

Day	Hours Worked
Day 01	8
Day 02	8
Day 03	5
Day 04	8
Day 05	8

You can create a shift pattern of up to 28 days, and you can specify the number of shift hours to be worked on each day within the shift pattern.

How Oracle Payroll Represents Shift Patterns

Oracle Payroll stores shift patterns in the user defined table PQP_COMPANY_WORK_PATTERNS. You can modify existing patterns and add new ones.

You can apply shift patterns to an employee assignment and then calculate the hours

worked within a given period.

Setting Up Shifts and Shift Patterns

Use the Table Values window to set up shift patterns.

Oracle Payroll enables you to create the complete set of shift patterns applicable to your organization.

You can then use these details to calculate:

- Total working time for an employee in the period between any two given dates
- Overtime payments
- Unsocial hours payments

To set up shift patterns:

1. Query the table PQP_COMPANY_WORK_PATTERNS.
2. Define a new column for each new work pattern.
3. Give the new column a header which is the same as the work pattern name.
4. Create a new row value for each day that you want to include in the work pattern. For example, if your work pattern contains seven days, then create seven new rows.

Note: When you subsequently link to this work pattern from an assignment you can specify which day of the work pattern the assignment is to start from. You are not obliged to start the assignment from the first day defined in your work pattern.

Assigning Working Shift Patterns to an Employee

Use the Extra Details of Service window to assign working shift patterns to an employee.

You can specify which shift pattern and contract type is applicable to an employee. When you next run a payroll for this employee, Oracle Payroll uses the shift pattern information to determine salary and other entitlements that are based on working hours.

To assign a working shift pattern to an employee:

1. Query the employee name.

2. Select the contract type.
3. Select the work pattern.
4. Enter the day of the work pattern which is the starting day of the shift for this employee. You do not have to make this the first day of the shift - you can submit a payroll process for an employee who starts work at any point within a shift cycle.
5. Save your work

Tax Information

Assignment Statuses

Statuses enable you to track the progress of your applicants, employees, and contingent workers through your enterprise. If you use Oracle Payroll, they also control how employee assignments are used during a payroll run. Oracle HRMS is installed with a number of predefined system statuses, for which you can set up multiple user statuses.

Note: You do not process contingent workers in a payroll run.

Primary Statuses

There are four system statuses for assignments:

- **Active Assignment:** For employees and contingent workers you use this status to show that the person is working in accordance with his or her usual conditions of working.
- **Suspend Assignment:** For employees you use this status to show that an employee is on leave of absence, but remains an employee with your enterprise. Similarly for contingent workers the suspend assignment indicates that a contingent worker is not currently working in the assignment they are allocated to. For example, the contingent worker may have taken an unauthorized absence or the assignment may have been suspended due to an internal review.
- **Terminate Assignment:** Use this to show that your enterprise no longer employs the person in that assignment. It can still be possible to make payments through Oracle Payroll for assignments at this status. This status is not available for use with contingent workers.
- **End:** Use this to end any assignment except the primary assignment for an employee or contingent worker with multiple assignments. This status is not recorded on the assignment; it causes the assignment to end. For employees all payroll processing for the assignment is complete and the assignment becomes an historical record.

For information about system statuses for applicants see: *Applicant Assignment Statuses, Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide.*

User Statuses

On your system, you can give these statuses different *user statuses* appropriate to your enterprise. Each system status can have several user statuses related to it. For example, for the system status Suspend Assignment, you could define the user statuses Paternity

Leave, Disability Leave, or Education Leave. When you use Oracle HRMS, you only see the user statuses.

Note: Each system status has a predefined user status of the same name.

Primary user statuses help you track the current working circumstances of your employees and contingent workers. You can also define secondary user statuses having no associated system statuses. You can use these for reporting purposes.

Note: The User Statuses you define provide the list of values for Status in the Assignment window. If you want to change any of the predefined default values you must overwrite the User Name.

Using Assignment Statuses to Control Compensation

When you define user statuses, consider how you will use them in reports, inquiries, and processing.

When you use a validation formula to validate entries to element input values, you can make the valid values for an entry dependent on the assignment status.

To use the statuses to control whether the payroll run processes an employee assignment, you choose a Payroll user status of Process or Do not Process for each user status. Additionally, in Oracle Payroll you can set up your pay calculation formulas so that a status change also changes the formula used to calculate the employee's pay. For example, an employee could receive half pay while on Military Leave.

Secondary Assignment Statuses

For analysis and reporting purposes, you can set up and use *secondary* assignment statuses, for employee, applicant and contingent worker assignments. These statuses have no effect on assignment processing.

For example, suppose your primary status Maternity Leave applies to employees both when a child is born and when one is adopted, and you want to study its use in these two cases. To accomplish this you can set up the secondary statuses Maternity Birth and Maternity Adopt, and enter them for employees taking maternity leave.

You enter secondary statuses in the Secondary Statuses window.

To enter reasons for giving secondary statuses to assignments, define valid reasons as values for the Lookup Type EMP_SEC_ASSIGN_REASON (for employee assignments), CWK_SEC_ASSIGN_REASON (for contingent workers), and APL_SEC_ASSIGN_REASON (for applicant assignments).

Setup To Allow Processing After Termination

To enable payroll processing for employees after they leave your enterprise, in your system setup you must do the following:

- Set the Termination Rule to *Final* on the element definition of all elements you want to process after the actual leaving date.

If you use Oracle Payroll and have a Payroll responsibility, you can set the Termination Rule to *Last Standard Process* for elements whose entries should close down after the last normal payroll run. Set the Termination Rule to *Final* for elements you want to process as late payments after the last normal payroll run.

- Use the Assignment Statuses window to make sure your system has a user status that corresponds to:
 - the HR system status of *Terminate Assignment*
 - the Payroll system status of *Process*

Your startup data includes the user status *Terminate Process Assignment*, which matches this definition. Use this status (or your own equivalent status) when you terminate employment or end an assignment.

Entering an Assignment (Assignment Window)

When you enter an employee or contingent worker, or hire an applicant, Oracle HRMS automatically creates a default assignment. You can view and update the default assignment in the Assignment window.

You can then enter additional assignments, if required, using the Assignment window.

To enter an assignment:

1. Set your effective date to the start date of the new assignment.

Germany only: If you want to link a contract to this assignment, you should do so before completing any further fields, as some fields in the Assignment window default to values defined on the contract and cannot be overridden here. Add contract details using the Contract field on the Employment Terms tabbed region. If you are assigning a contingent worker, the Employment Terms tabbed region does not display, preventing you from adding a contract.

2. Select the organization to which you want to assign the employee or contingent worker. By default, the employee has an assignment either to the business group, or to the organization to which he or she applied. Contingent workers have a default assignment connected to the business group.

If you overwrite these defaults, a window appears asking if the change is an update or a correction. Select Correction.

If you are creating an additional assignment, no default business group or organization is displayed.

3. Select the job or position for which this person has been assigned.

France only: For a public sector type organization, the Position field is read only. Oracle HRMS displays the position details you recorded using the HR Administrator Actions pages.

Russia only: Click the Attachments Menu icon on the tool bar to enter the contingent worker's job description.

India only: The position selected is displayed on the employee's Form 16.

4. For employee assignments, select a grade for information or to use grade rates or grade scales to determine the appropriate compensation levels for the employee.
5. If you defined a location for the business group or other organization, it appears as a default. Change this, if required.

Mexico only: The assignment's location determines its GRE.

- If you have assigned multiple GREs to a location (through the generic hierarchy), you must choose which one applies to this assignment. Navigate to the Statutory Information tabbed region and make a selection in the Government Reporting Entity field.
- If you change your assignment's GRE, you must specify a Social Security Leaving Reason (under the Social Security Affiliation tabbed region).

See: *Transferring Employees, Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide (Mexico)*

6. **France only:** Select the establishment as it serves as the legal point of contact for settling any disputes and manages the personal details of the workforce.

Note: For a public sector type organization, the Establishment field is read only. Oracle HRMS displays the establishment details you recorded using the HR Administrator Actions pages.

7. **Netherlands only:** Select the reporting employer. The assignment is reported under this employer in the wage report. If you change the employer establishment after running the payroll and before running the Wage Report, the collective report section on the Wage report will not match the sum of nominative reports.

Note: By default, the assignment is reported under the employer linked to the assignment's payroll. Changing the employer does not change the Payroll Object Group. To change the Payroll Object Group, terminate the existing assignment and create a new assignment with a new payroll. You can change the employer linked to the payroll using the Payroll window.

8. Select the people group and enter information defined in your people group flexfield. This is optional.
9. Select a payroll if you are paying an employee using Oracle Payroll, or if you intend to record for the employee certain types of compensation and benefits (represented on the system by *nonrecurring elements*).

Note: If Oracle Payroll is installed and you are an HR User, you cannot assign employees to payrolls. Ask your system administrator to change your HR:User Type profile option if you need to assign employees to payrolls.

Note: Denmark Users: Select Salaried or Hourly. There is no relation to the Payroll frequency.

10. Select a status for the assignment. By default a new assignment has the status Active Assignment (or an equivalent user status defined on your system).

See: Assignment Statuses, page 4-19

Australia Only: Select if the employee works overseas or as part of Joint Petroleum Development Area (JPDA). The status you specify determines which earnings appear on which Payment Summary.

11. **Korea Only:** Select the business place to which you assign your employee.
12. Enter an assignment number to uniquely identify the assignment. By default, this number is the same as the employee or contingent worker number, for the first assignment.
13. For employee assignments, select a collective agreement if the employee is covered by one.

You can calculate values based on a collective agreement only for an employee's primary assignment.
14. Select an assignment category, for example part-time or full-time.

Hungary only: Select an employment category, for example part-time or full-time.

Ireland only: Select an employment category, for example part-time or full-time. Select Apprentice/Trainee if the assignment is an apprentice or a trainee.

Mexico only: Select the employee's Social Security employment type.

See: Define the Social Security Employment Types, *Oracle HRMS Implementation Guide (Mexico)*

Romania only: Select a labor contract category as reported to REVISAL.

Russia only: This field is mandatory to enable you to use them for reporting purposes. Use only the four values available for this field. For these values, the suffix Regular refers to an assignment with an indefinite period (permanent). The suffix Temporary refers to an assignment having a limited term.

15. For employee assignments, select the employee category, for example blue collar or white collar.

Ireland only: Select a valid employment category from the list. The list displays all the occupation categories for reporting in the EHECS report.

Mexico only: Select the employee's Social Security employment category.

Spain only: Select the professional category, for example administration clerk or civil servant.

16. Enter the information you want to hold in the tabbed regions, for example, supervisor details, special ceiling progression points, or salary information.

See: Entering Additional Assignment Details, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

You can use the Oracle HRMS and Common application Components (CAC) integrated schedule features to assign a schedule to the worker's assignment. If you want the application to only display schedules the worker is eligible for, then run the Eligibility Engine process for the worker.

See: Setting Up Availability, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

Entering Additional Assignment Details (Assignment Window)

Once you have set up basic assignment details, you can enter additional information, such as supervisor details, special ceiling progression points, and salary information, in the tabbed regions of the Assignment window. The tabbed regions that appear in the Assignment window vary according to person type and localization.

To enter salary information for an employee:

Using the Salary Administration window, you can enter a proposed salary change for

an employee, associate this change with a performance review, and accept or revise the change later. To administer an employee's salary in this way, you first assign the employee to a salary basis in the Salary Information region.

1. Choose the Salary Information tabbed region.
2. Select a salary basis for the employee.
3. You can also enter the frequency of salary and performance reviews.

Warning: If you change an employee's salary basis to one that uses a different salary element, the employee's existing salary element entry ends. Using the Salary Administration window, you should make a new salary entry for the employee, effective from the date of the salary basis change.

For more information about salary administration, see: *Salary Administration, Managing Total Compensation Using Oracle HRMS*

To enter supplier information for a contingent worker:

You use the Supplier tabbed region to record information about the supplier providing the contingent worker to your enterprise. The procedure depends on whether you are using Oracle Services Procurement to provide purchase order information for contingent worker assignments.

If you are not using Oracle Services Procurement:

1. Choose the Supplier tabbed region.

Note: The Supplier tabbed region does not display for employees.

2. Select the names of the supplier and the supplier site for the contingent worker.
3. Enter supplier IDs for the contingent worker and the assignment, if available. These values identify the worker and the assignment to the supplier.

If you are using Oracle Services Procurement:

1. Choose the Supplier tabbed region.
2. Select a purchase order number for this assignment.
3. If only one purchase order line exists, it appears in the Purchase Order Line field. Otherwise, select a purchase order line. Note that the Purchase Order Line field is enabled only when you select a purchase order.
4. Information from the purchase order appears automatically in the Supplier Name

and Supplier Site fields. If the purchase order line includes a job value, it replaces any value in the Job field.

5. Enter supplier IDs for the contingent worker and the assignment, if available. These values identify the worker and the assignment to the supplier.

To enter supervisor information for an employee or contingent worker:

1. Choose the Supervisor tabbed region.
2. Select the name and number of the worker's personal supervisor. If you use assignment-based supervisor hierarchies, select the supervisor's assignment number.

You can select a contingent worker as a supervisor only if the HR: Expand Role of Contingent Worker user profile option is set to Yes.

You can select a supervisor from another Business Group if the HR:Cross Business Group user profile option is set to Yes at your site.

Note: The application does not update this information. Use organization and position hierarchies to show management reporting lines.

To enter probation period and notice information for an employee:

The probation period defaults from the employee's position.

1. Choose the Probation and Notice Period tabbed region.
2. Amend the default probation period for your employee's assignment, if required.
3. Enter the notice period for the assignment, if required.

To enter standard conditions information for an employee or contingent worker:

The standard work day information (apart from the Hourly/Salaried field) defaults from the position. If standard conditions are not defined for the position, they default from the organization or Business Group.

1. Choose the Standard Conditions tabbed region.
2. Amend the standard work day information for your employee or contingent worker assignment, if required.
3. Enter the number of days the employees typically work in a month.

4. This step is for employees only. For benefit administration, enter whether the assignment is hourly or salaried.

Note: If you are setting up benefits based on salaried or hourly pay you must set up the Hourly/Salaried field in addition to the Pay Basis. The Pay Basis identifies how pay is quoted within Salary Administration and enables an employee to have their pay quoted as hourly, but be paid a salary. Therefore, for benefits, you need to set up whether your employee is paid hourly or receives a salary.

To enter primary or secondary assignment and miscellaneous information for an employee or contingent worker:

1. Choose the Miscellaneous tabbed region.
2. Enter the internal address details (such as the floor or office number), if required. The system adds the details to the location address.
3. Select a reason for adding or changing the assignment. For example, you can record promotions for your employees. You define valid reasons as values for the lookup types Reason for Change to Employee Assignment (EMP_ASSIGN_REASON) for employees and Contingent Worker Assignment Reasons (CWK_ASSIGN_REASON) for contingent workers.
4. Select the Manager box if the assignment is at manager level and you want to include this worker in the Organization Hierarchy Report as a manager. (You can select Manager for a contingent worker assignment only if the HR: Expand Role of Contingent Worker user profile option is set to Yes.)
5. By default, the first assignment entered is the primary assignment, and the Primary box is automatically checked. If you are now entering a secondary assignment, you must ensure that the Primary box is unchecked.

Check the Primary check box to update a secondary assignment to Primary.

See: Changing Primary Assignments, *Managing Your Workforce Using Oracle HRMS*

6. If you use Oracle Services Procurement to provide purchase order information for contingent worker assignments, the purchase order line may include the projected assignment end date. In this case, the date appears in the Projected Assignment End field. Otherwise, enter the projected end date of the assignment.

To enter special ceiling information for an employee:

A special ceiling progression point is the highest point to which the Increment Progression Points process can automatically progress the employee.

1. Choose the Special Ceiling tabbed region.
2. Enter a special ceiling only if the employee is assigned to a grade, and if a grade scale is defined for this grade. This special ceiling overrides the ceiling defined for the grade scale.

To enter a billing title for an employee or contingent worker (Oracle Projects only):

1. Choose the Project Information tabbed region.

Note: The Project Information tabbed region displays only if you have installed Oracle Projects.

2. Enter a billing title. The information you enter in the Billing Title field serves as the default title on project customer invoices. You can override this information using Project Accounting.
3. Enter a project title.

To enter grade ladder information for an employee:

You must enter grade ladder information to use the Grade/Step Progression process.

1. Choose the Grade Ladder tabbed region.
2. Select the grade ladder for this assignment. If you selected a grade for this assignment previously, all the grade ladders that use that grade are available. If you have not selected a grade, all the active grade ladders in your enterprise are available.

To enter bargaining unit and union membership information for an employee:

1. Choose the Bargaining Unit tabbed region.
2. Enter a bargaining unit code for your employee's assignment. This is usually the legally recognized collective negotiating organization.

Note: You set up your different bargaining units as values for the Lookup type BARGAINING_UNIT_CODE

3. Select whether the employee associated with the assignment is a member of a union.

To enter employment terms for an employee:

1. Choose the Employment Terms tabbed region.
2. Select the contribution group for your employee to determine the maximum and minimum monthly social security contribution. The contribution group you select should correspond to the employee's professional category.
3. Select the contract applicable to the assignment. The list of contracts includes those entered for the employee with the start dates on or before the assignment start date.
4. Select the agreement grade structure for the collective agreement. A window shows the grade factors for that grade structure.
5. Enter values for the grade factors. Or, choose the Combinations button and enter search criteria for one or more grade factors to display the reference grades that meet those criteria.

If you enter values directly into the grade factor fields, they must correspond to an existing reference grade unless the Override Allowed check box in the Agreement Grades window is checked.

Note: Any new combinations of values that you enter are unavailable for reuse with other assignments. To reuse a combination, you must define it as a reference grade in the Agreement Grades window.

To enter work center and section information for an employee:

1. Choose the Work Center tabbed region.
2. Select the employee's work center. The work center details include the epigraph code for the employee's activity type. This code determines the social security contributions for an employee.
3. Select the employee's section for internal reporting purpose.

Linking Professional Categories to Contribution Groups

The contribution group and professional category associated with an employee assignment determine the monthly minimum and maximum social security contributions for which the employee is eligible. As the contribution group relates directly to an employee's professional category, you must link them together to ensure accurate social security reporting. You do this using the User Types and Statuses window.

The following table shows the statutory contribution group and professional category mappings.

Contribution Group and Professional Category

Contribution Group	Professional Category
1	Engineers, College Graduates, Executives not inc. in clause 1.3.c) of Workers Act
2	Technical Engineers and any staff with a college degree
3	Admin. and Shopfloor Supervisors
4	Staff without a College Degree
5	Admin. Clerks
6	Subaltern
7	Admin. Staff
8	First and second class/category shopfloor worker
9	Third class/category shopfloor worker and specialists
10	Construction / temporary workers
11	Workers below 18 years old

If your enterprise uses additional professional categories, you must add them as lookup codes to the EMPLOYEE_CATG lookup type before you link them to a contribution group.

See: Adding Lookup Types and Values, *Configuring, Reporting and System Administration in Oracle HRMS*

To link professional categories to contribution groups:

1. Select EMPLOYEE_CATG from the lookup types.
2. Select your business group. If you do not select the business group, the link is valid

for all business groups.

3. Select the professional category.
4. Enter a brief description about the category you have selected.
5. Refer to the table above and enter the code for the category you have selected.
6. Select Professional Category using the Further Information column.
7. Repeat steps 3 to 6 for each professional category listed in the table (and for any other professional categories you have created yourself).
8. Save your work.

What's Next

You can now select the professional category defined for an employee. See: Entering an Assignment (Assignment Window), page 4-21

Entering Tax Information for Employees

You store the tax details for employees in the Tax window. The tax information is only valid for the period between the start and end dates you have entered for an assignment.

To enter tax details for an employee:

1. Select the current employment status such as active or retired to determine the employee's tax base.
2. Select the payment key method and sub-payment key for tax reporting. The application uses this information and the labor relationship to calculate the tax withholding rate for employees. The labor relationship type will have a number of sub-payment key.
3. Enter the date when the employee changed residence while taking up this employment, if required.
4. If the employee is married and the spouse is employed, select Other Situation. This option affects the minimum exempt amount for the employee.
5. If the employee is hired to support the America's Cup event in 2007, select America's Cup 2007. This information affects the special tax deductions and rebates for the employee.

6. The employee's computed tax withholding rate is displayed when the tax-withholding rate process or a payroll is run.
7. Save your work.

To enter tax-withholding rate overrides:

Enter any annual override values in the Tax-Withholding Rate Overrides region. The figures you enter here override any figures manually entered or calculated by the application. You must run the tax-withholding rate process or the payroll run again to use these new values for computing the tax-withholding rate.

1. Enter a percentage to override the regular rate used in tax-withholding calculations.
2. Enter the override amounts for the following:
 - Contractual Earnings
 - Deductible Expenses
 - Irregular Earnings
 - Spouse Alimony
 - Child Support
3. Save your work.

Setting Up the Contract Key Relation User table

Oracle HRMS for Spain references the Contract Key Relation table to identify the relationship between the contract type and contract key. The contract type and contract key determine the rebates and reductions on the social insurance contributions for which your enterprise and employees are eligible.

To enable the social security administration to identify your enterprise's contract type, you must have a valid contract key for every contract type that applies to your employees. If your enterprise requires any contract keys that have not been predefined for you, you must create them. You do this by setting up the Contract Key Relation table. Then, you map each contract key to a contract status, start reason, contract type, and subtype by entering their values into the same table.

To set up the Contract Key Relation table:

You set up the Contract Key Relation table using the Table Structure window.

1. Enter your effective date.

2. Query the ES_CONTRACT_KEY_RELATION table.
3. In the Row region, enter a sequence number and contract key.
4. Repeat the previous step for every new contract key you want to add.
5. Save your work.

To enter values in the Contract Key Relation table:

You do this using the Table Values window.

1. Enter your effective date.
2. Query the ES_CONTRACT_KEY_RELATION table.
3. In the Column region, select Contract Start Reason in the Name field.
4. In the Values region, map the contract key to the contract start reason:
 - Select the contract key you created in the Exact field.
 - Enter the contract start reason in the Value field. You must enter a valid contract start reason code from the lookup type, ES_CONTRACT_START_REASON_UDT.
5. Repeat the previous step until you have mapped each contract key to a contract start reason.
6. Save your work.
7. In the Column region, select Contract Status in the Name field.
8. In the Values region, map the contract key to a contract status:
 - Select the contract key you created in the Exact field.
 - Enter the contract status in the Value field. You must enter a valid contract status from the lookup type, ES_CONTRACT_STATUS.
9. Repeat the previous step until you have mapped each contract key to a contract status.
10. Save your work.
11. In the Column region, select Type in the Name field.
12. In the Values region, map the contract key to a contract type:

- Select the contract key you created in the Exact field.
 - Enter the contract type in the Value field. You must enter a valid contract type from the lookup type, ES_CONTRACT_TYPE.
13. Repeat the previous step until you have mapped each contract key to a contract type.
 14. In the Column region, select Subtype in the Name field.
 15. In the Values region, map the contract key to a contract subtype:
 - Select the contract key you created in the Exact field.
 - Enter the contract type in the Value field. You must enter a valid contract subtype from the lookup type, ES_CONTRACT_SUB_TYPE_UDT.
 16. Repeat the previous step until you have mapped each contract key to a subtype.
 17. Save your work.

Entering Social Security Information for Employees

Enter social security and multiple employment information for employees in the Social Security window. The application uses this information in Payroll to calculate and process the social security contributions and to determine the rebates or reductions on the social security contributions for an employee or organization.

You record social security information for employees who have an active assignment with a payroll attached. The social security information is only valid for the assignment, defined by the start and end dates.

To enter social security information for an employee:

1. Choose the Social Security tabbed region, if it is not selected already.
2. Enter the employee's social security identifier.
3. Select the epigraph code for the processing of social security contributions for IA/ID situations. The application uses this code to identify the industrial activity the employee performs and provides the contribution rates for IA/ID situations such as temporary disability, death, permanent disability, and surviving spouse support.
4. Select the contribution account of your organization for processing the social security contributions. The application uses this account to identify the industrial activity the employee performs and for reporting purposes.

5. If the employee is performing a temporary task that involves an additional responsibility or risk at work, select Yes in the Epigraph 114 field. The application uses this information to calculate any additional rebate or reduction the employee may be eligible for while performing the job.
6. Select Yes in the Epigraph 126 field. The application uses this information to record the temporary disability social security deduction contribution.
7. Select the contract key to determine the rebates and reductions on the social security contributions your organization and employees may be eligible. The values for the status, type, subtype, and start reason appear automatically.
8. Select the identifier to record the rebate and reduction on social security contributions, and the date the rebate and reduction is effective.
9. Enter the law that supports the contract type, for example, RD Ley 5/2100 and the date when this law is effective.
10. Enter a percentage your organization makes towards the social security contribution.
11. Select the previous employment status of the employee. The application uses this information to calculate the social security benefit available to the employee.
12. Specify the following fields applicable for an employee that affects their social security contributions. The application uses this information for social security reporting.
 - Undergoing an employment support program
 - Disabled and rehired
 - First contractor
 - Socially excluded
 - Underrepresented women
 - Hired two years after childbirth
13. Enter a percent for reducing retirement age for social security reporting.
14. Specify if the employee's contract transferred from an existing employer to a new employer within the specified period.
15. Select the relationship type, whether an employee is a professional athlete or a sales representative for social security reporting.

16. Select the relationship date for social security reporting purposes.
17. Specify if the employee holds multiple assignments in the Multiple Assignment field.

To enter multiple employment information:

This tab is only enabled if you have selected Yes in the Multiple Employment field on the Social Security tab. Enter the multiple employment details to distribute the minimum and maximum contribution limits for an employee across assignments.

1. Enter a percent to distribute the social security contribution amount against each assignment the employee holds.

Note: The total percentage across all assignments must be equal to 100.

2. Enter the authorization number for each new assignment for social security reporting.
3. Enter a percentage your organization contributes towards the wage maintenance fund for employees
4. Enter a percentage for employees and employer contribution associated with non-industrial risk activities. These include contributions towards temporary and permanent disability, death, retirement and survival, healthcare, pregnancy at risk, maternity, and adoption situations.
5. Enter the amount for minimum and maximum contribution bases if an employee is affected by an industrial accident or industrial disease. This also includes contributions towards death, retirement, and spouse survival.
6. Save your work.

Termination

Workforce and Applicant Termination

Every enterprise needs to be able to terminate employees, contingent workers, and applicants.

Terminating an Employee or Contingent Worker

When an employee or contingent worker leaves your enterprise you terminate them. Oracle HRMS enables you to terminate an employee or contingent worker by entering a termination date. This is the minimum amount of information required for a termination. You can record further information, including:

- Reason for termination (including death)
- Date notified (employees only)
- Final payroll processing date (employees only)
- Terminated user person type
- Terminated assignment status (employees only)

See: Ending Employment, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

See: Ending a Placement, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

Terminating an Employee or Contingent Worker with Multiple Assignments

If your organization uses multiple assignment functionality, you should take extra care when terminating an employee or contingent worker. If assignment-level security is enabled, you should only terminate an employee or contingent worker if you have access to the primary assignment for that person. To avoid the situation where a manager without access to the primary assignment terminates a person, Oracle recommends that you carry out the termination process in Self-Service Human Resources (SSHR) using the Self-Service Actions functionality.

For more information on security, see: Assignment-Level Security, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

For more information on the Termination process in SSHR, see: Termination, *Oracle SSHR Deploy Self-Service Capability Guide*

Terminating an Assignment

Each employee and contingent worker in Oracle HRMS must have at least one active assignment.

If a person has more than one active assignment, you can end any of their individual assignments by selecting an assignment status of End or Terminate Assignment for employees, or an assignment status of End for contingent workers, in the Assignment window. (For employees, the assignment status End ends the assignment immediately. The assignment status Terminate Assignment leaves the assignment effective but changes its status from Active to Terminated.) At least one assignment (the primary assignment) must remain active. If you want to end all assignments at the same time (or end the primary assignment), you must terminate the employment or placement, otherwise a warning is displayed.

Mexico only: When you terminate an employee, or an employee's secondary assignment, you must provide a Social Security Leaving Reason.

If you use Oracle Payroll, you can choose to include the employee assignment in a payroll run after the assignment has ended.

See: *The Employee Assignment, Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

See: *Ending an Assignment, Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

If you use Oracle Services Procurement to provide purchase order information for contingent worker assignments, the purchase order line may include the projected assignment end date. In this case, the projected assignment end date is copied automatically from the purchase order line to the assignment. Otherwise, you can record the projected assignment end date at any time during the assignment.

Terminating an Application

When you reject an application for employment you terminate the application. Oracle HRMS enables you to terminate a single application from an applicant with multiple applications or terminate all outstanding applications for an applicant. You can terminate applicants even if future changes, such as application status updates, exist for the person after the proposed termination.

If you want to terminate a single application from an applicant with multiple applications you can do this by updating the applicant assignment status to Terminate Application.

If you want to terminate all applications for an applicant you can do this by entering a termination date. This is the minimum amount of information required for this type of applicant termination. You can choose to record further information including:

- Reason for rejecting the application

- Terminated user person type
- Terminated applicant status

See: Rejecting an Application, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

You can also use Oracle HRMS to trigger the generation of a formal rejection letter.

See: Letter Generation, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Canceling a Termination

There are a number of reasons why you may want to cancel a termination for an employee or contingent worker. For example, an employee may decide not to leave, the date of leaving may change for a contingent worker, or you may have terminated an employee or contingent worker in error. In each of these cases Oracle HRMS enables you to cancel or *reverse* a termination.

See: Canceling a Termination, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

Linking Termination Reasons to Social Security Reasons

The leaving reason you select when terminating employees must map to a Social Security termination or suspension reason to enable you to complete the termination process, so you must link these reasons. You do this using the User Types and Statuses window.

The following table shows the termination reason and statutory Social Security reason mappings.

Leaving Reason	Social Security Termination or Suspension Reason
Deceased	Death
Disability	Retirement
End of contract	Non-Voluntary Resignation
Gross misconduct	Non-Voluntary Resignation
Maternity	Maternity

Leaving Reason	Social Security Termination or Suspension Reason
Retirement	Retirement
Redundancy	Non-Voluntary Resignation
Mutual agreement	Voluntary Resignation
By contract	Non-Voluntary Resignation
By employee's initiative	Voluntary Resignation
Loss of contracting legal status by party	Non-Voluntary Resignation
Act of God	Non-Voluntary Resignation
Major lay-off	Non-Voluntary Resignation
By employee's initiative with a reasonable cause	Voluntary Resignation
Other legally accepted reasons	Other Reasons
Military/Draft	Military/Draft
Taking Public Office	Non-Voluntary Resignation
Termination at end of Temporary Disability period	Termination at end of Temporary Disability period

If your enterprise uses additional leaving reasons, you must add them as lookup codes to the LEAV_REAS lookup type before you link them to a Social Security termination or suspension reason

See: Adding Lookup Types and Values, *Configuring, Reporting and System Administration in Oracle HRMS*

To link termination reasons to social security reasons:

1. Select the name LEAV_REAS from the lookups.
2. Select your business group. If you not select the business group, the link is valid for all business groups.

3. Select the termination reason.
4. Enter a brief description about the reason you have selected.
5. Refer to the table above and select the Social Security reason for the leaving reason you selected.
6. Select the Statutory Termination Reason using the Further Information column.
7. Repeat steps 3 to 6 for each leaving reason listed in the table (and for any other leaving reasons you have created yourself).
8. Save your work.

What's Next

You can now terminate an employee using the new leaving reason. See: Ending Employment, page 4-41

Ending Employment

If an employee is leaving your enterprise or agency, you *terminate* him or her in the Terminate window.

The ex-employee's records remain in the application. You can reinstate, or rehire, the person to create a new period of service.

Be aware that many Oracle Applications work with employees as of dates in the future. This means that any future date terminations you enter here will be reflected and the employee with the future dated termination will not be available in such cases. You should take this into account when dealing with terminations where the end date is a sensitive piece of information.

The Final Process date is the last date on which you can process payments for a terminated employee, if you are using Oracle Payroll. To process unanticipated late payments or to make corrections, you can change the Final Process date, provided the new date does not conflict with other information held for the employee.

See: Updating an Employee's Final Process Date, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

Note: If you perform a *back-to-back* rehire an ex-employee person type will not be recorded for the employee's first period of service. This is because there is no period of time when the employee exists as an ex-employee.

See: Rehiring an Ex-Employee, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

You can also reverse a termination reinstating elements assigned to the employee prior to termination action being taken.

See: Canceling a Termination, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

Note: If you mistakenly add someone to the application or you want to remove all records for an ex-employee, you can *delete* the person in the Delete Person window. However, you cannot delete an employee whom Oracle Payroll has processed in a payroll run.

See: Deleting a Person from the System, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

If you mistakenly hire an applicant, you can cancel the hire in the Person window.

See: Canceling a Hire, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

Terminating an Employee

To terminate an employee:

1. Optionally, enter the reason for the termination. You can define valid reasons as values for the Lookup Type LEAV_REAS. The leaving reason must match a statutory Social Security reason.

Note: When you enter the termination reason of deceased and an actual termination date, if an employee's date of death has not been entered in the Other Information tabbed region of the People window, it is set to the actual termination date.

To enter vacation information

2. If the Additional Periods of Service Information window does not appear automatically, click in the Further Information field. You enter vacation information to calculate the amount the employee may be eligible for due to the vacation accrued within the organization. The application uses this information for the Company Certificate Report.
3. Specify if the employee has accrued any vacation in the current employment.
4. Enter the number of vacation days accrued, taken, and owing to the employee.
5. Enter the dates for the period of accrued vacation.
6. Enter the termination dates. Only the Actual date is required. This is the date when

the employee's person type changes. Enter the last working day in the Last Worked field. The Notified and Projected dates are for information only. The Last Standard Process date is the last date for normal processing. The application closes the element entries on the Last Standard Process date, the Actual date, or Final Process date, depending on how you have defined the elements.

For the Final Process date:

- If you need to process pay for the employee after his or her termination, set the Final Process date later than the Actual date, or leave it blank.
- If you do not need to continue processing, set the Final Process date to the Actual date.

Note: The Final Process field is enabled at all times, you can change the value subject to other information held for the employee.

7. Select a terminated user person type in the Type field.

Note: The Type field is only enabled when the Actual date is entered for the first time. When you enable the Type field it is populated by the default value for your system person type of Ex-employee.

The person type you select is assigned to the person's record following termination. The person type is displayed as the Actual date plus one day.

8. Select a terminated assignment status in the Status field.

Note: The Status field is only enabled when the Actual date is entered, the Final Process has not been entered or the Final Process date has been entered but is different to the Actual date. When you enable the Status field it is populated by a default value.

The terminated assignment status you select is used for the primary assignment. This assignment status is displayed as the Actual date plus one day. If you update the primary assignment status the termination window will still display the status as the Actual date plus one day.

9. When the information is complete, choose the Terminate button to complete the termination.

Contact Information

Contact Information Overview

Oracle HRMS enables you to record the ways in which you communicate with the people in your enterprise and the people whom they have a relationship with, such as an employee's partner.

Entering People as Contacts

You enter people as contact records to identify:

- People to contact in an emergency
- Dependents of the employed person
- Beneficiaries of certain benefits, such as insurance policies or stock purchase plans
- Individuals who receive a wage attachment payment

Entering Contact Information

Entering contact information includes entering contact details for the people in your enterprise, such as their home address. As an employer, you need to record contact details so that you can contact people either by email, phone, fax or post, and for reporting purposes. For example, in the Netherlands you must record a person's house number for social insurance reporting.

Entering Next of Kin and Other Contacts

Use the Contact window to hold information about contacts, for example:

- People to contact in an emergency.
- Dependents.
- Beneficiaries of benefits such as insurance policies or stock purchase plans.
- Individuals receiving payment of a wage attachment/third party payment deducted from the employee's salary.

A person entered as a contact can be one, some, or all of the above.

The coverage start date for an employee contact, is the employee hire date or the contact relationship start date, whichever is later. This can be important in benefits processing,

where eligibility for certain benefits starts from the start date of a contact relationship.

Creating The Same Contact Relationship More Than Once

You can set up the same relationship more than once between the same two people. However, these relationships must not occur in the same time period. For example, you can set up that Person A married Person B from 01-Jan-1990 to 01-Feb-1991. Person A could then marry Person B again, starting from the 02-Feb-1991. However, you cannot enter that the couple remarried on 01-Jan-1991, as this would mean that they were married twice in the same time period.

Updating a Contact Relationship Start Date to Make it Earlier

You can update the contact relationship start date between two people, creating a supplementary record to cover the additional period.

For example, Person A exists on the application as an employee with a hire date of 01-Apr-1990. Person B exists on the application as a contact, with a creation date of 01-Jun-1990. Person A then marries Person B on 01-May-1990. As the application holds a contact coverage start date of 01-Jun-1990, a new contact record is entered to cover 01-May-1990 and 31-May-1990.

To enter a contact:

1. Do one of the following:
 - Enter the name of a new person.
 - Select from a list of people already entered on the system.

2. If you enter a new person:
 - Enter their gender and date of birth.

For UAE users only: Additionally, you must enter the father, grandfather, and family name.

For Romanian users only: Enter the Numerical Person Code (NPC/FRN) as the identification information.
 - Select the user person type.

You can only select user person types which are set up for the system person type of Other, for example contact.

3. Enter details about the different contacts for your employee in the Contact Relationship fields.

To enter contact relationships:

1. Select the contact relationship, for example child or spouse.
2. Enter the start and end date (if known) of the relationship.

Note: For Dutch users only, if you set up a spouse as a contact for an employee, whose full name format includes partner's prefix and surname, the full name of the employee changes automatically based on the spouse's name, if the contact relationship covers the employee's full period of employment. If it does not cover the full period the changes to the full name of the employee must be set manually on all datetrack records.

3. If you use Oracle Advanced Benefits or Standard Benefits, select a start and end reason for the relationship.
4. Select whether the contact:
 - Is the primary contact.
 - Is the recipient of a third party payment (for example, from a court-ordered deduction/wage attachment).

This enables you to select this person on the Personal Payment Method window when entering a third party payment method for the employee.

- Shares the same residence as the employee.
 - Has a personal relationship with the employee. This identifies whether the third party should be considered as a possible dependent and/or beneficiary.
 - Is a beneficiary or dependent. You can only enter these fields if you do not use Standard or Advanced benefits.
5. You can enter a sequence number for the contact relationship. This must be a unique number for each contact the employee has. However, because sequence numbers are employee based, these numbers only need to be unique within the employee's record.

For example, Person A has a relationship type of spouse with Person B. This is given the sequence number of 1. Person A also has a relationship type of father to Person C. This is given the sequence number of 2.

Person A also has a relationship type of emergency contact with Person B. This must also have the sequence number of 1 as a relationship between these two people is already recorded against Person A.

Person B is also an employee and therefore has her own set of contacts recorded against her. She has a relationship type of spouse with Person A. However, this relationship does not have to have the same sequence number as the relationship recorded against Person A, that is, this relationship has a sequence number of 5.

6. Select whether you want to create a mirror relationship and enter the mirror relationship type.

Important: You can only enter a mirror relationship and type when you first create the contact. Once the mirror relationship is saved, the relationships are maintained independently of each other, except for mirror relationships that are created automatically.

Oracle HRMS automatically creates a mirror relationships when you enter a spouse, parent or child. For example, if you create the spouse relationship from person A to person B, when you query person B in the Contact window, a mirror relationship of spouse to person A is automatically created.

Furthermore, if you update a relationship that has had a mirror relationship automatically created, the mirror is also updated accordingly. For example, if you end date the relationship of spouse for person A, the spouse relationship for person B is also ended. If the relationship type is changed the relationships become independent.

7. Enter further information about the contact if your localization team has setup the configuration of the further information field.

For Spanish users only: Record if the contact (disabled dependant or a dependant) is financially dependent on the employee. The application uses this information to calculate the tax reductions the employee may be eligible for. You can also record if the employee is a single parent as this affects the employee's the tax-withholding rate.

For Russian users only: If the contact type is child, indicate whether the child is in full-time education. The application uses this information to calculate the employee's tax reductions. You must also record any disability information for the child contact, as this affects an employee's social security contributions, tax, and leave benefits.

See: Entering Disability Information, page 3-1

8. Save your work. If a person already exists on your application with the same surname and a first name that is either the same or not entered, then a list of values is displayed that shows all the people who share the details. See: Multiple Person Records, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

What Next?

If you want to enter addresses or phones for the contact, choose the Contact Details

button.

People Management Templates

Entering Employees Window

This window has been created using the pre-defined People Management template called Entering Employees.

Every enterprise must be able to record personal information for its employees, applicants, and contacts. HRMS enables you to enter and update this information for all person types using the Entering Employees window. You can enter information about:

- New employees
- Employment
- Office location
- Applicants
- Background checks
- Re-hire recommendations
- Further names
- Medical details
- Address details
- Telephone numbers
- Picture record
- Dependents, beneficiaries and other contacts
- Contracts

You can also use this window to update people's statuses, for example, from applicant to employee.

Note: The system administrator can create customized versions of this window so that you use each version for certain person types only or for certain functions only (entering employees, entering applicants, or hiring applicants).

Entering a New Employee

Three templates are provided in Oracle HRMS that enable you to enter employees. These are:

- **Enter Employees** - This is intended to be used by users who are only interested in entering new employees onto the system, for example data entry clerks. It only uses the Maintain window and includes all the fields required to set up an employee.
- **Maintain Employees** - This enables users to enter employees onto the system, and also to maintain existing records. It uses the Find, Summary and Maintain window to enable users to control a large amount of information relating to employees and their assignments.
- **Enter and Maintain Employees (HR Foundation)** - This template is included on the HR Foundation menu, but can also be used by people who have a full Oracle HR license. It uses the Find and Maintain windows and includes all the fields required to enter and maintain an employee. It has a very simple user-interface and does not have any date-track functionality enabled.

Your system administrator will have set up these templates according to the needs of your enterprise and will have restricted your access according to the role you have to perform.

To enter a new employee using the Enter Employees template:

1. If the New window is not displayed choose the New icon in the toolbar. Select New Employee.
2. Enter the personal details for the new employee. You must enter:
 - name
 - type
 - gender
 - employee number and hire date
 - date of birth (for assignment to a payroll)
 - BSN/SOFI number (Netherlands users only). By default this field is mandatory, however, you can change it to optional by setting the HR: Make National Identifier Optional profile option to Yes.
 - Social Security Code (Hungarian users only)

- NIF Number (Spanish users only)
- Marital status and nationality (Polish users only)
- Family name (UAE users only)

All other personal information is optional.

3. Enter the assignment details for the new employee. You must enter:

- organization (this defaults to the current Business Group)
- professional category and contribution group (Spanish users only)

You can also select other employment information, such as, job or position, grade, supervisor, and payroll details.

4. Your localization team may have created further tabs for you to complete. If you are a Belgian user, then on the Further Details tab, you must select the preferred correspondence language in the Communication field and the required business group in the Business Group Name field.

If you are a Hungarian user then you must enter the tax identification number on the Employment tab and mother's maiden name on the Further Name tab.

If you are a Spanish user then you must enter the work center to which the employee belongs. You can also specify if the employee has contributed towards social security for over 35 years.

Netherlands users can enter the IZA participant number and specify whether the employee is on contract with another organization on the Further Details tab.

Polish users can enter NIP (personal tax identifier) number and the legal-employer name on the Employment Information tab.

If you are a UAE user, you must enter the following information:

- Nationality on the Additional Information tab

Important: The Date of Change and Reason for Change fields are enabled only if you enter a nationality that matches the local nationality for the legal employer and a previous nationality for the employee.

- Legal employer name on the Employment Details tab

In addition, UAE users can also enter personal details such as first name, family, and mother's name in an alternate language on the Additional Name Details tab.

5. Save your work. If you have missed any mandatory information, you are prompted

to enter it before the new record is saved.

To enter a new employee using the Maintain Employees template:

1. Display the Summary window of the Maintaining Employees form.
2. Choose the New icon in the toolbar or right-click on People By Name in the Data Organizer and choose New from the right mouse menu.
3. Select New Employee and choose OK.
The Personal tab is displayed for you to start entering information about the employee.
4. Set your effective date to the date when you want the assignment to begin, such as the hire date. You can enter a date in the Date field next to the timeline bar and choose Go.
5. Enter personal information for the employee. You must enter:
 - name
 - type
 - gender
 - employee number and hire date
 - date of birth (for assignment to a payroll)
 - BSN/SOFI number (Dutch users only)
 - Mother's maiden name, tax identification number, and social security code (Hungarian users only)
 - NIF number (Spanish users only)
 - Marital status, nationality, and legal-employer name (Polish users only)
 - Family name and nationality (UAE users only)All other personal information is optional.
6. Choose the Communication tab if you want to enter contact information, such as addresses and phone numbers.

Note: It is mandatory for Belgian users to select the preferred correspondence language in the Communication field on this tab.

7. Enter application information in the Assignment, Compensation, and Schedule tabs, as required.

See: Entering Employment Information, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

8. Enter information in any other tabs that may have been created for your localization. For example, many localization teams will include an Extra Information tab to enable you to enter country-specific information.

If you are a UAE user, you must enter the employer name on the Employment Details tab.

9. Save your work. If you have missed any mandatory information, you are prompted to enter it before the new record is saved.

If a person already exists on your application with the same national identifier, or with the same surname and a first name and date of birth that is either the same or not entered, then a list of values is displayed that shows all the people who share the details. See Multiple Person Records, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

Entering Employment Information

When you enter an employee or hire an applicant, Oracle HRMS automatically creates a default assignment for that employee. You can view and update the default assignment using the Maintain Employee windows.

To update employee information:

1. In the Summary window, use the Data Organizer to select the employee and choose Show Details.
2. Set your effective date to the date the information should change.
3. Choose the Assignment tab. If the employee has multiple assignments you can select a different assignment from the drop-down list.
4. Select the organization to which you want to assign the employee. By default, the employee has an assignment either to the Business Group, or to the organization to which he or she was an applicant.
5. Select the job or position for which this person has been assigned.
6. Select a grade for information or to use grade rates or grade scales to determine the appropriate compensation levels for the employee.
7. If a location is defined for the Business Group or other organization, it appears as a

default. Change this, if required.

8. Check the Manager check box if the assignment is at manager level.
9. Enter an assignment number to uniquely identify the assignment. By default, this number is the same as the employee number, for the employee's first assignment.
10. Select a status for the assignment. By default a new assignment has the status Active Assignment (or an equivalent user status defined on your system).
See: Assignment Statuses, page 4-19
11. Select the employment category, for example part-time or full time.
12. Select the professional category, for example administration clerk or civil servant.
13. Select the contribution group that corresponds to the professional category.
14. Select the name and employee number of the employee's personal supervisor.
15. Select the work center and section to which the employee belongs.
16. Choose the Compensation tab to enter a payroll, salary basis, or salary. The salary basis is the duration for which salary is quoted, such as per month or per year.
17. Choose the Schedule tab to enter information about normal working hours, probation period and the number of days an employee typically works in a month for the assignment.
18. Choose Correction or Update. Remember to choose Correction if you are correcting information that was created by default.
19. Save your work.

Reporting on the Workforce

The Workforce Headcount Report Set

The workforce headcount report set includes the Workforce Count Report, the Workforce Count Report (Spread Sheet Version) and the Head Count Detail Report. The reports display headcount information for your organization on a local or world-wide basis for the search parameters you specify.

The Workforce Count Reports

Both of the workforce count reports enable you to access simple workforce information for all organizations within an organization hierarchy and date range you specify. The difference between the workforce count reports is that the Workforce Count Report (Spread Sheet Version) enables you to open the report in a spreadsheet format. The reports display a breakdown of the information using the following headers:

- Organization
- Rev/Non-Rev
- Start (Total)
- End (Total)
- Net Change
- Hires
- Terminations
- Other (Net)

Important: The dates you specify must fall within one version of the Organization Hierarchy on which you are reporting.

The reports display a count of defined worker types, including all types of contingent and temporary workers. The reports also display transition information, for example the number of new hires and terminations.

The reports return a headcount value for the assignment ID based on either the assignment budget value, or the supplied TEMPLATE_HEAD FastFormula. You can create custom FastFormulas on which to return the headcount values by creating a FastFormula named BUDGET_HEAD. For more information, see *Running the Workforce Count Reports, Oracle HRMS Workforce Sourcing, Deployment, and Talent*

The Head Count Detail Report

The Head Count Detail Report enables you to display detailed headcount information for an organization hierarchy. The report displays a breakdown of the information using the following headers:

- Organization
- Division
- Rev/Non-Rev
- Beginning Head Count
- Regular
- Contract
- Temp
- New Hires
- Offers
- Vacant FTE
- Termination
- Ending Headcount
- # Change
- % Change
- Attrition Rates

Three FastFormulas are supplied with the Head Count Detail Report, that are used to control the output of the report. These are:

- HR_PERSON_TYPE_TEMPLATE which maps person types and employment categories to worker types regular, temporary and contract.
- HR_MOVE_TYPE_TEMPLATE which maps leaving reason to voluntary or involuntary termination types for employees.
- HR_CWK_MOVE_TYPE_TEMPLATE which maps leaving reason to voluntary or involuntary termination types for contingent workers.

If your enterprise has different requirements to those defined in the supplied formulas, then you can create your own FastFormulas to accurately represent the setup of your enterprise. You can define worker type mappings to person type and employment category by creating a FastFormula named HR_PERSON_TYPE. Similarly, you can create your own FastFormula to define leaving reasons by creating a FastFormula named HR_MOVE_TYPE for your employees and HR_CWK_MOVE_TYPE for your contingent workers. If you define a formula with one of these names, then it overrides the corresponding supplied formula when you run the report. For more information, see: *Running the Head Count Detail Report, Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

Setting Up Statutory Reports

Follow these steps to set up the following statutory reports:

- Spanish Company Certificate Report
 - Spanish RED System: New Hires, Leavers, and Contract Changes Report
1. **Spanish Company Certificate Report:**
 1. Run the Spanish Company Certificate Report Generator Process to select the relevant information to include in the report.
See: *Running the Spanish Company Certificate Report Generator*, page 4-59
 2. Run the Spanish Company Certificate Report.
See: *Running the Spanish Company Certificate Report*, page 4-58
 2. **Spanish RED System: New Hires, Leavers, and Contract Changes Report:**
 1. Set up the Spanish RED System Reports to enable the use of dynamic triggers.
See: *Setting Up the Spanish RED System Reports*, page 4-59
 2. Run the Spanish RED System: New Hires, Leavers, and Contract Changes Report Generator process to create the report. The report lists any workforce and contract change information.
See: *Running Spanish RED System: New Hires, Leavers, and Contract Changes Report Generator*, page 4-60
 3. Run the Spanish RED System: Data Lock Process to lock the reported data such that the application does not select the data again.
See: *Running the Spanish RED System: Data Lock Process*, page 4-61

Running the Spanish Company Certificate Report

You can produce the Spanish Company Certificate for terminated employees or employees on leave by running the Spanish Company Certificate report. The report includes information about the organization, the employee's personal and social security information. If an employee has accrued any vacation or has taken any vacation, the report also contains these details.

The report includes the following information:

- Company name, address, and contribution account code
- Employee name and address
- National Identifier (DNI) or Passport Number
- Social Security Identifier
- Professional Category and contribution group
- Occupation
- Hire and end date of employment
- Contract End Date
- Reason for Leaving
- Vacation accrual information
- Temporary Disability information
- Employee Contribution Bases Data
- Company Certificate Issued due to Sickness

Run report in the Submit Requests window.

To run the Spanish Company Certificate Report:

1. Select Spanish Company Certificate Report in the Name field.
2. If the Parameters window does not open automatically, click in the Parameters field.
3. Select the archive request ID for Spanish Company Certificate Report Generator Process. Only if you have previously run the Spanish Company Certificate Report Generator Process, you can select the archive id.

4. Select the Legal Employer to which the employee belongs. If you do not select the employer, all employees terminated or employees on leave within the specified dates are reported.
5. Select the employee name, if you want run the report for a particular employee.
6. Choose the Submit button.

Running the Spanish Company Certificate Generator

You run the Spanish Company Certificate Report Generator for employees terminated or on leave within the specified date range. This ensures that the data remains unchanged while you run the reports the next time. You can use this data to produce Spanish Company Certificate Report.

You run the Spanish Company Certificate Generator in the Submit Requests window.

To run the Spanish Company Certificate Report Generator:

1. Select Spanish Company Certificate Report Generator in the Name field.
2. If the Parameters window does not open automatically, click in the Parameters field.
3. Specify the dates when you want to run the generator process. The report will include all the employees whose actual termination date is within the specified date range.
4. Select a legal employer for whom you want to produce the report.
5. Choose the Submit button.

Setting Up the Spanish RED System: New Hires, Leavers, and Contract Changes Report

Before you run the Spanish RED System: New Hires, Leavers, and Contract Changes Report, you must follow these steps:

1. Set up the functional area at the business group and legislation level to enable the use of dynamic triggers. Then group the Dynamic Triggers under the functional area.
 - Create the functional area ES_SS_REP_FUNC_AREA, specify the legislation code (ES) and the business group.
 - Select the dynamic triggers from the list under the functional area.

- ES_SS_REP_ASG_I
- ES_SS_REP_ASG_U
- ES_SS_REP_ELEMENT_I
- ES_SS_REP_ELEMENT_U

These triggers track changes in the specific columns to the Assignment window in the PER_ALL_ASSIGNMENTS_F table and Element Entry window in the PAY_ELEMENT_ENTRY_VALUES_F table and insert records in the PER_ASSIGNMENT_EXTRA_INFO table.

See: Grouping Dynamic Triggers under Functional Area, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

2. Set up the information type for reporting the Spanish Social Security details. Use the Information Type Security window. Query your responsibility and assign the Extra Information Type ES_SS_REP to your responsibility.

See: Setting Up Extra Information Types For a Responsibility, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

3. Ensure that you have the primary assignment attached to a Work Center. The work center should belong to a Legal Employer.

Running the Spanish RED System: New Hires, Leavers, and Contract Changes Report

Oracle HRMS provides the Spanish RED System: New Hires, Leavers, and Contract Changes report to enable you to submit the workforce and contract changes information to the Social Security Administration using the RED System. You must run the generator process to create the report. You can run the generator process any number of times. Each time you run the generator process, the process creates a new generator ID. This report uses dynamic triggers to ensure it includes in the report employees that meet the following criteria:

- New, rehired, or terminated employee
- Changes to contribution group such as Admin. Assistant to College Graduate
- Changes to contract type or rate, such as set duration to non-set duration
- Changes to epigraph code

Run reports from the Submit Request window.

To run the Spanish RED System: New Hires, Leavers, and Contract Changes Report Generator

1. Select Spanish RED System: New Hires, Leavers, and Contract Changes Report Generator in the Name field.
2. If the Parameters window does not open automatically, click in the Parameters field.
3. Enter the date to report any workforce and contract changes that have occurred before that date but since the last data lock process was run.
4. Select the test flag. Select Yes to enable you to communicate any further changes to the RED System. Select No to report these changes to the Social Security registration database.
5. Select the legal employer. If you do not select the legal employer, it reports all the workforce and contract changes for all legal employers.
6. Select the assignment set. If you do not select any assignment set, it reports changes to all the assignments set for this legal employer.
7. Choose the Submit button.

Running the Spanish RED System Data Lock Process

Use the Spanish RED System Data Lock Process to lock the data reported through the generator process. You can run the generator process multiple times within the reporting date and run the Data Lock Process to lock the data identified with a generator ID. This ensures that the application does not select any workforce or contract change when you run the report again.

Run report from the Submit Request window.

To run the Spanish RED System: Data Lock Process

1. Select Spanish RED System: Data Lock Process in the Name field.
2. If the Parameters window does not open automatically, click in the Parameters field.
3. Select the generator request ID for which you want to lock the data. This is the ID created for the generator process.
4. Choose the Submit button.

Compensation and Benefits

Elements

Predefined Elements

The following table shows the predefined elements for Spain.

Information Elements

Element Name	Description
Social Security Details	A recurring element to hold the social security information within the Social Security window.
Multiple Employment Details	A recurring element to hold the multiple employment information within the Social Security window.
Tax Details	A recurring element to hold the tax information within the Tax window.
Tax Withholding Rates Override	A recurring element to hold the override information within the Tax window.
Employee Temporary Disability Contribution Bases	A non - recurring element to hold the values for contribution bases for disability information.
Employee Termination Contribution Bases	A non - recurring element to hold the values for contribution bases for termination.

Benefits in Kind

Element	Description
Company Loan	A recurring element attached to an assignment for processing company loans.
Company Vehicle	A recurring element attached to an assignment for processing company vehicles.

Element	Description
Company Housing	A recurring element attached to an assignment for processing company housing.
Other Payments in Kind Non Recurring	A non - recurring element attached to an assignment for processing other payments in kind.
Other Payments in Kind Recurring	A recurring element attached to an assignment for processing other payments in kind.

Absence Elements

Element	Description
Adoption Detail	A recurring element to define the adoption absence type.
Maternity Detail	A recurring element to define the maternity absence type.
Part Time Maternity Detail	A recurring element to define the part-time maternity absence type.
Partial Unemployment Detail	A recurring element to define the partial unemployment absence type.
Pregnancy at Risk Detail	A recurring element to define the pregnancy at risk absence type.
Sickness Detail	A recurring element to define temporary disability absence type.

Statutory Earnings:

Element	Description
Adoption Benefit	A non - recurring element to hold the adoption benefit amount. The predefined statutory earnings formula feeds this value.
Adoption Benefit Uplift	A non - recurring element to hold the adoption benefit uplift amount. The predefined statutory earnings formula feeds this value.
Adoption Benefit Uplift Additional Bands	A non - recurring element to hold additional information to calculate the adoption benefit uplift. The predefined statutory earnings formula feeds this value.
Maternity Benefit	A non - recurring element to hold the maternity benefit amount. The predefined maternity benefit formula feeds this value.
Maternity Benefit Uplift	A non - recurring element to hold the maternity benefit uplift amount. The predefined statutory earnings formula feeds this value.
Maternity Benefit Uplift Additional Bands	A non - recurring element to hold additional information to calculate the maternity benefit uplift. The predefined statutory earnings formula feeds this value.
Part Time Maternity Benefit	A non - recurring element to hold the part-time maternity benefit amount. The predefined statutory earnings formula feeds this value.
Part Time Maternity Benefit Uplift	A non - recurring element to hold the part-time maternity benefit uplift amount. The predefined statutory earnings formula feeds this value.

Element	Description
Part time Maternity Benefit Uplift Additional Bands	A non - recurring element to hold additional information to calculate the part-time maternity benefit uplift. The predefined statutory earnings formula feeds this value.
Partial Unemployment Benefit	A non - recurring element to hold the partial unemployment benefit amount. The predefined statutory earnings formula feeds this value.
Partial Unemployment Benefit Uplift	A non - recurring element to hold the partial unemployment benefit uplift amount. The predefined statutory earnings formula feeds this value.
Partial Unemployment Benefit Uplift Additional Bands	A non - recurring element to hold additional information to calculate the partial unemployment benefit uplift. The predefined statutory earnings formula feeds this value.
Pregnancy at Risk Benefit	A non - recurring element to hold the pregnancy at risk benefit amount. The predefined statutory earnings formula feeds this value.
Pregnancy at Risk Benefit Uplift	A non - recurring element to hold the pregnancy at risk benefit uplift amount. The predefined statutory earnings formula feeds this value.
Pregnancy at Risk Benefit Uplift Additional Bands	A non - recurring element to hold additional information to calculate the pregnancy at risk benefit uplift. The predefined statutory earnings formula feeds this value.
Sickness Benefit	A non - recurring element to hold the sickness benefit amount. The predefined statutory earnings formula feeds this value.
Sickness Benefit Uplift	A non - recurring element to hold the sickness benefit uplift amount. The predefined statutory earnings formula feeds this value.

Element	Description
Sickness Benefit Uplift Additional Bands	A non - recurring element to hold additional information to calculate the sickness benefit. The predefined statutory earnings formula feeds this value.

Earnings Adjustment:

Element	Description
Adoption Earnings Adjustment	A non - recurring element to hold the adoption earnings adjustment amount. The statutory earnings adjustment formula feeds the value.
Maternity Earnings Adjustment	A non - recurring element to hold the maternity earnings adjustment amount. The statutory earnings adjustment formula feeds the value.
Part time Maternity Earnings Adjustment	A non - recurring element to hold the part-time maternity earnings adjustment amount. The statutory earnings adjustment formula feeds the value.
Partial Unemployment Earnings Adjustment	A non - recurring element to hold the partial unemployment earnings adjustment amount. The statutory earnings adjustment formula feeds the value.
Pregnancy at Risk Earnings Adjustment	A non - recurring element to hold the pregnancy at risk earnings adjustment amount. The statutory earnings adjustment formula feeds the value.
Sickness Earnings Adjustment	A non - recurring element to hold the sickness earnings adjustment amount. The statutory earnings adjustment formula feeds the value.

Partially Exempt Earnings:

Element	Description
Meal Allowance	A non - recurring element attached to an assignment for processing meal allowances.
Mileage Allowance	A non - recurring element attached to an assignment for processing mileage allowances.
Transportation Allowance	A recurring element attached to an assignment for processing transportation allowances.
Other Partial Exempt Allowance Non Recurring	A non - recurring element attached to an assignment for processing the other partial exemptions that include tools and machinery.

Social Security:

Element	Description
Social Security	A recurring element attached to an assignment for social security processing.
IA and ID Social Security	A non - recurring element to hold the IA and ID social security deductions for an employee. The social security deductions formula feeds this value.
Non IA and Non ID Social Security	A non - recurring element to hold the non IA and ID social security deductions for an employee. The social security deductions formula feeds this value.
Non Structural Overtime Social Security	A non - recurring element to hold the non structural overtime social security deductions for an employee. The social security deductions formula feeds this value.

Element	Description
Structural Overtime Social Security	A non - recurring element to hold the structural overtime social security deductions for an employee. The social security deductions formula feeds this value.
Occupational Training Social Security	A non - recurring element to hold the occupational training social security deductions for an employee. The social security deductions formula feeds this value.
Wage Maintenance Fund Social Security	A non - recurring element to hold the wage maintenance fund social security deductions for an employee. The social security deductions formula feeds this value.
Social Security Days	A non - recurring element to hold the number of days contributed towards social security.
Social Security Hours	A non - recurring element to hold the number of hours contributed towards social security.

Employer Charges:

Element	Description
Employer Social Security	A non - recurring element to hold the social security deduction amount the employer contributes for an employee towards social security.

Social Security Rebates:

Element	Description
Natural Disaster Rebate	A non - recurring element to hold the natural disaster rebate amount. The social security deduction formula feeds the value.

Element	Description
Rebates and Reductions	A non - recurring element to hold the rebate and reduction amount. The social security deduction formula feeds the value.
Remote Training Hours Rebate	A non - recurring element to hold the rebate amount for employees undergoing remote training. The social security deduction formula feeds the value.
In Class Training Hours Rebate	A non - recurring element to hold the rebate amount for employees undergoing classroom training. The social security deduction formula feeds the value.
Contribution Exempt Rebate	A non - recurring element to hold the rebate amount. The social security deduction formula feeds the value.
Special Employment Center Rebate	A non - recurring element to hold the rebate amount for employees working in special employment center. The social security deduction formula feeds the value.
Temporary Disability Management Rebate	A non - recurring element to hold the temporary disability rebate amount. The social security deduction formula feeds the value.

Tax Withholding Rate:

Element	Description
Tax Withholding Rate	A recurring element attached to the employee's assignment to initiate the Tax Withholding Rate process.
TWR Deduction Information	A non - recurring element to hold the Tax Withholding Rate deduction information for reporting purpose. The Tax Withholding Rate formula feeds the value.

Element	Description
TWR Employee Ascendants Information	A non - recurring element to hold the Tax Withholding Rate employee ascendant information for reporting purpose. The Tax Withholding Rate formula feeds the value.
TWR Employee Descendants Information	A non - recurring element to hold the Tax Withholding Rate employee descendant information for reporting purpose. The Tax Withholding Rate formula feeds the value.
TWR Employee Information	A non - recurring element to hold the Tax Withholding Rate employee information for reporting purpose. The Tax Withholding Rate formula feeds the value.

Tax:

Element	Description
Tax	A recurring element attached to the employee's assignment to initiate the tax process.
Regular Tax	A non - recurring element to hold the tax deduction information. The Tax formula feeds the value.
Benefits in Kind Tax Withheld	A non - recurring element to hold the Benefit in Kind tax deduction information. The Tax formula feeds the value.

Court Orders:

Element	Description
Child Support	A recurring element to hold the child support information and linked to the assignment to initiate the court order processing. The predefined Child Support formula feeds the value.
Child Support Arrears	A non - recurring element to hold the child support arrears information and linked to the assignment to initiate the court order processing. The predefined Child Support formula feeds the value.
Child Support Arrears Payment	A non - recurring element to hold the child support arrears payment information and linked to the assignment to initiate the court order processing. The predefined Child Support formula feeds the value.
Other Court Order Deductions	A recurring element to hold the other court order deductions information and linked to the assignment to initiate the court order processing. The predefined Other Court Order Deductions formula feeds the value.
Other Court Order Deductions Arrears	A non - recurring element to hold the other court order deductions arrears information and linked to the assignment to initiate the court order processing. The predefined Other Court Order Deductions formula feeds the value.
Other Court Order Deductions Arrears Payment	A non - recurring element to hold the other court order deductions arrears payment information and linked to the assignment to initiate the court order processing. The predefined Other Court Order Deductions formula feeds the value.

Element	Description
Spouse Alimony	A recurring element to hold the spouse alimony information and linked to the assignment to initiate the court order processing. The predefined Spouse Alimony formula feeds the value.
Spouse Alimony Arrears	A recurring element to hold the spouse alimony arrears information and linked to the assignment to initiate the court order processing. The predefined Spouse Alimony formula feeds the value.
Spouse Alimony Arrears Payment	A non - recurring element to hold the spouse alimony arrears payment information and linked to the assignment to initiate the court order processing. The predefined Spouse Alimony formula feeds the value.

Advance Pay:

Element	Description
Advance Payment	A non - recurring element used to identify assignments to pay in advance.
Advance Indicator	A non - recurring element to identify advanced pay period.
Advance Cleanup	A non - recurring element for post tax advancement clear up.

Retro Social Security:

Element	Description
Retro IA and ID Social Security	A non - recurring element to hold backdated changes for IA and ID social security.

Element	Description
Retro Non IA and Non ID Social Security	A non - recurring element to hold backdated changes for non IA and ID social security.
Retro Non Structural Overtime Social Security	A non - recurring element to hold backdated changes for non structural overtime social security.
Retro Occupational Training Social Security	A non - recurring element to hold backdated changes for occupational training social security.
Retro Structural Overtime Social Security	A non - recurring element to hold backdated changes for structural overtime social security.
Retro Unemployment Social Security	A non - recurring element to hold backdated changes for unemployment social security.
Retro Wage Maintenance Fund Social Security	A non - recurring element to hold backdated changes for wage maintenance fund social security.
Retro Social Security Days	A non - recurring element to hold backdated changes for social security days.
Retro Social Security Hours	A non - recurring element to hold backdated changes for social security hours.

Social Security Rebates:

Element	Description
Retro Contribution Exempt Rebate	A non - recurring element to hold the backdated changes for contribution exempt rebate.
Retro Employee Social Security Arrears	A non - recurring element to hold the backdated changes for social security arrears.

Element	Description
Retro Employer Social Security	This is a non recurring element to hold backdated changes for employer contributions towards social security.
Retro In Class Training Hours Rebate	A non - recurring element to hold backdated changes for in-class training hours rebate.
Retro Natural Disaster Rebate	A non - recurring element to hold backdated changes for natural disaster rebate.
Retro Rebates and Reductions	A non - recurring element to hold backdated changes for rebates and reductions.
Retro Remote Training Hours Rebate	A non - recurring element to hold backdated changes for remote training hours rebate.
Retro Social Security Days	A non - recurring element to hold backdated changes for social security days.
Retro Social Security Hours	A non - recurring element to hold backdated changes for social security hours.
Retro Special Employment Center Rebate	A non - recurring element to hold backdated changes for special employment center rebate.
Retro Temporary Disability Management Rebate	A non - recurring element to hold backdated changes for temporary disability management rebate.

Retro Statutory Earnings

Element	Description
Retro Adoption Benefit	A non - recurring element to hold the backdated changes for adoption benefit amount.
Retro Adoption Benefit Uplift	A non - recurring element to hold the backdated changes for adoption benefit uplift amount.

Element	Description
Retro Adoption Benefit Uplift Additional Bands	A non - recurring element to hold the backdated changes for any additional adoption benefit uplift amount.
Retro Maternity Benefit	A non - recurring element to hold the backdated changes for maternity benefit amount.
Retro Maternity Benefit Uplift	A non - recurring element to hold the backdated changes for maternity benefit uplift amount.
Retro Maternity Benefit Uplift Additional Bands	A non - recurring element to hold the backdated changes for any additional maternity benefit uplift amount.
Retro Part Time Maternity Benefit	A non - recurring element to hold the backdated changes for part maternity benefit amount.
Retro Part Time Maternity Benefit Uplift	A non - recurring element to hold the backdated changes for part maternity benefit uplift amount.
Retro Part time Maternity Benefit Uplift Additional Bands	A non - recurring element to hold the backdated changes for any additional part maternity benefit uplift amount.
Retro Partial Unemployment Benefit	A non - recurring element to hold the backdated changes for partial unemployment benefit amount.
Retro Partial Unemployment Benefit Uplift	A non - recurring element to hold the backdated changes for partial unemployment benefit uplift amount.
Retro Partial Unemployment Benefit Uplift Additional Bands	A non - recurring element to hold the backdated changes for any additional partial unemployment benefit uplift amount.
Retro Pregnancy at Risk Benefit	A non - recurring element to hold the backdated changes for pregnancy at risk benefit amount.

Element	Description
Retro Pregnancy at Risk Benefit Uplift	A non - recurring element to hold the backdated changes for pregnancy at risk benefit uplift amount.
Retro Pregnancy at Risk Benefit Uplift Additional Bands	A non - recurring element to hold the backdated changes for any additional pregnancy at risk benefit uplift amount .
Retro Sickness Benefit	A non - recurring element to hold the backdated changes for sickness benefit amount.
Retro Sickness Benefit Uplift	A non - recurring element to hold the backdated changes for sickness benefit uplift amount.
Retro Sickness Benefit Uplift Additional Bands	A non - recurring element to hold the backdated changes for any additional sickness benefit uplift amount.

Retro Earnings Adjustment:

Element	Description
Retro Adoption Earnings Adjustment	A non - recurring element to hold the backdated changes for adoption earnings adjustment amount. The statutory earnings adjustment formula feeds the value.
Retro Maternity Earnings Adjustment	A non - recurring element to hold the backdated changes for maternity earnings adjustment amount. The statutory earnings adjustment formula feeds the value.
Retro Part time Maternity Adjustment	A non - recurring element to hold the backdated changes for part time maternity earnings adjustment amount. The statutory earnings adjustment formula feeds the value.

Element	Description
Retro Partial Unemployment Earnings Adjustment	A non - recurring element to hold the backdated changes for partial unemployment earnings adjustment amount. The statutory earnings adjustment formula feeds the value.
Retro Pregnancy at Risk Earnings Adjustment	A non - recurring element to hold the backdated changes for pregnancy at risk earnings adjustment amount. The statutory earnings adjustment formula feeds the value.
Retro Sickness Earnings Adjustment	A non - recurring element to hold the backdated changes for sickness earnings adjustment amount. The statutory earnings adjustment formula feeds the value.

Retro Social Security Deductions:

Element	Description
Retro Contribution Increment	A non - recurring element to hold the backdated changes for contribution exempt amount.
Retro Employee Social Security Arrears	A non - recurring element to hold the backdated changes for social security arrears amount.
Retro Employer Social Security	A non - recurring element to hold the backdated changes for social security amount.

Survey of Classifications

The survey of classifications identifies:

- The function of elements within each primary classification, page 5-18
- The processing priority range, default priority, and cost type for each classification, page 5-19
- A list of the predefined secondary classifications within each primary classification,

Primary Classifications

Primary element classifications are supplied as startup data, and you cannot delete or update them as they are designed to meet legislative requirements.

Element	Classification
Balance Initialization	Use Balance Initialization elements specifically for the loading of initial values into balances. You would mainly use these elements when transferring data from another payroll system.
Information	Information elements store information that is not directly used by payroll processing. The information may be used by other elements or by Fast Formulas.
Direct Payment	Direct Payment elements are for expenses or loans made through the payroll that are not subject to tax. They are not included in gross or net pay balances.
Earnings	Earnings elements represent most payments made to an employee. These payments are usually subject to tax deductions and are normally processed in the regular payroll run each period.
Statutory Earnings	Earnings elements represent the earnings set by law are normally processed in the regular payroll run each period, such as Maternity Benefit, Sickness Benefit.
Earnings Adjustment	Earnings Adjustment elements store the adjusted amount deducted from an employee's earnings.
Partially Exempt Earnings	Partially Exempt Earnings represent the earnings that are partially exempt from tax and social security earnings such as Meal Allowance and Transportation Allowance.

Element	Classification
Employer Charges	Employer Charges element represent the payments the employer makes on behalf of the employee.
Pensions	Pension elements represent employee contributions to the pension scheme.
Social Security	Social Security elements classification holds the social security deductions amount such as the IA/ID deductions.
Tax	Tax elements classification represent the tax withheld amount such as the Regular Tax and Benefit in Kind.
Court Orders	Court Orders elements represent deductions from employee earnings under orders from courts.
Voluntary Deductions	Voluntary Deductions elements are for deductions, such as union dues, that the employee authorizes the employer to make voluntarily on their behalf after tax.
Advance Earnings	Advance Earnings elements represent the payments in advance.

Primary Classification Processing Properties and Cost Types

The following table shows the default processing priority and costing details for the primary classifications supplied.

Classification	Priority Range	Default Priority	Cost Type
Information	1 - 1000	500	Debit
Direct Payment	1001 - 1500	1250	Debit
Earnings	1501 - 2500	2000	Debit

Classification	Priority Range	Default Priority	Cost Type
Statutory Earnings	2501 - 3000	2750	Debit
Earnings Adjustment	3001 - 3500	3250	Debit
Partially Exempt Earnings	3501 - 4000	3750	Debit
Employer Charges	4001 - 5000	4500	Debit
Pensions	5001 - 5500	5250	Credit
Social Security	5501 - 6000	5750	Credit
Tax	6001 - 6500	6250	Credit
Court Orders	6501 - 7000	6750	Credit
Voluntary Deductions	7001 - 8000	7500	Credit
Advance Earnings	10000 - 11000	10500	Credit

Predefined Secondary Element Classifications

This table shows the predefined secondary classifications supplied. You cannot update or delete these predefined classifications.

An element is automatically given any default secondary classifications defined for its primary classification.

Primary Classification	Secondary Classification	Default
Information	Attachable Earnings Adjustment : Information	No
Information	IA and ID Earnings Adjustment : Information	No
Information	IA and ID Social Security : Information	No

Primary Classification	Secondary Classification	Default
Information	Non IA and Non ID Earnings Adjustment : Information	No
Information	Non IA and Non ID Social Security : Information	No
Information	Pensionable Earnings Adjustment : Information	No
Information	Retro Attachable Earnings Adjustment : Information	No
Information	Retro IA and ID Earnings Adjustment : Information	No
Information	Retro IA and ID Social Security : Information	No
Information	Retro Non IA and Non ID Earnings Adj : Information	No
Information	Retro Non IA and Non ID Social Security : Information	No
Information	Retro Pensionable Earnings Adjustment : Information	No
Information	Retro Taxable Earnings Adj Current Year : Information	No
Information	Retro Taxable Earnings Adj Previous Year : Information	No
Information	Taxable Earnings Adjustment : Information	No

Primary Classification	Secondary Classification	Default
Earnings	Attachable Earnings : Earnings	Yes

Primary Classification	Secondary Classification	Default
Earnings	Attachable Earnings Adjustment : Earnings	Yes
Earnings	Benefit Uplift Base : Earnings	Yes
Earnings	Complementary Hours : Earnings	No
Earnings	Earnings Adjustment Base : Earnings	Yes
Earnings	Extra-pay : Earnings	No
Earnings	Extra-pay Base : Earnings	No
Earnings	IA and ID Earnings Adjustment : Earnings	Yes
Earnings	IA and ID Social Security : Earnings	Yes
Earnings	Irregular Earnings : Earnings	No
Earnings	Non IA and Non ID Earnings Adjustment : Earnings	Yes
Earnings	Non IA and Non ID Social Security : Earnings	Yes
Earnings	Non-Structural Overtime : Earnings	No
Earnings	Partial Social Security Exemption : Earnings	No
Earnings	Partial Tax Exemption : Earnings	No
Earnings	Pensionable Earnings : Earnings	No

Primary Classification	Secondary Classification	Default
Earnings	Pensionable Earnings Adjustment : Earnings	No
Earnings	Retro Attachable Earnings Adjustment : Earnings	No
Earnings	Retro IA and ID Earnings Adjustment : Earnings	No
Earnings	Retro IA and ID Social Security : Earnings	No
Earnings	Retro Non IA and Non ID Earnings Adjustment : Earnings	No
Earnings	Retro Non IA and Non ID Social Security : Earnings	No
Earnings	Retro Non Structural Overtime : Earnings	No
Earnings	Retro Pensionable Earnings Adjustment : Earnings	No
Earnings	Retro Structural Overtime : Earnings	No
Earnings	Retro Tax Current Year : Earnings	No
Earnings	Retro Tax Previous Year: Earnings	No
Earnings	Retro Taxable Earnings Adj Current Year : Earnings	No
Earnings	Retro Taxable Earnings Adj Previous Year : Earnings	No
Earnings	Structural Overtime : Earnings	No

Primary Classification	Secondary Classification	Default
Earnings	Taxable : Earnings	Yes
Earnings	Taxable Earnings Adjustment : Earnings	Yes

The following is the list of Earnings Adjustment:

Primary Classification	Secondary Classification	Default
Earnings Adjustment	Attachable Earnings : Earnings Adjustment	Yes
Earnings Adjustment	IA and ID Social Security : Earnings Adjustment	Yes
Earnings Adjustment	Non IA and Non ID : Earnings Adjustment	Yes
Earnings Adjustment	Pensionable Earnings : Earnings Adjustment	No
Earnings Adjustment	Retro IA and ID Social Security : Earnings Adjustment	No
Earnings Adjustment	Retro Non IA and Non ID Social Security : Earnings Adj	No
Earnings Adjustment	Retro Tax Current Year : Earnings Adjustment	No
Earnings Adjustment	Retro Tax Previous Year : Earnings Adjustment	No
Earnings Adjustment	Taxable : Earnings Adjustment	Yes

Defining an Element

Use the Element window to create an element to represent compensation and benefit

types or earnings and deductions.

This procedure describes how to define elements using a Payroll responsibility (that is, a responsibility with the HR User Type profile option set to *Payroll User* or *HR with Payroll User*). If you are an HR-only user, you will not see certain fields relating to element processing information. You can just ignore the steps that apply to these fields.

Note: Depending on your localization and the types of element you want to create, you may not need to start from scratch in the Element window. Check which earnings and deductions are available in the template library in the Configuration Workbench. If these template elements do not meet your requirements, you may be able to generate earnings and deductions using Earnings and Deductions windows or the Element Design Wizard. You can use the Element window to further configure template elements and generated elements.

- For the United States and Canada, see: Earnings and Other Payments Overview, *Oracle HRMS Compensation and Benefits Management Guide* and Deductions Overview, *Oracle HRMS Compensation and Benefits Management Guide*
- For Mexico, see: Element Design Wizard, *Oracle HRMS Compensation and Benefits Management Guide*
- For UAE, see: Element Design Wizard, *Oracle HRMS Compensation and Benefits Management Guide*
- For Norway: For each element, you must enter the End of Year codes using the list of values provided in the Further Information field.

Dates, Names and Classifications

To enter dates, names, and a classification for the element:

1. Set your effective date early enough to handle any historical element entries you want to make. Note that an element cannot be linked or entered until its start date.
2. Enter a unique:
 - Name
 - Reporting name

Start the names with a letter of the alphabet (not a number or symbol). The reporting name is a short identifier for reports and pay advices.

3. Enter a description for the element.
4. Select a Primary Classification.

This controls an element's processing priority and the balances it feeds. If you are defining a salary element for Salary Administration, you must select the classification Earnings.

Processing Information

To enter processing information for the element:

1. Select the processing type. Select *Recurring* if an entry of this element applies in every period until the entry is ended, or *Nonrecurring* if an entry applies in one pay period only. The dates of the pay period are determined by the payroll to which the employee is assigned.

Note: If you are defining a salary element for salary administration, you must select the type *Recurring*. If you are defining a net-to-gross element you must select the type *Nonrecurring*.

2. Select a termination rule to determine how entries of the element are processed after termination of the employee:

Note: UK only: Always select *Actual Termination* for UK proration.

- *Actual Termination* if you want recurring entries to close down on the date the employee leaves. For a nonrecurring element, select *Actual Termination* if you want the entries to close down at the end of the pay period in which the employee leaves, or on the date the assignment ends (the final process date) if this is earlier.
- *Final Close* if you want the entries to stay open beyond the employee's leaving date so that you can continue to pay the employee.

If you are a Payroll user, you can also select:

- *Last Standard Process* for all recurring and nonrecurring elements if you want their entries to close down on the Last Standard Process date or on the date the assignment ends (the final process date) if this is earlier. The Last Standard Process date defaults to the last day of the pay period in which the employee is terminated, but you can set it to a later period when you terminate an employee.

3. Select the Multiple Entries Allowed check box if you want to give an employee

more than one entry of the element at the same time. If you are creating a net-to-gross element, you must select Multiple Entries Allowed.

4. Select the Additional Entries Allowed check box if you want to make occasional one-time entries of a recurring element (instead of, or in addition to, a normal recurring entry).

US and Canada only: The Additional Entry Allowed rule is not applicable for US and Canadian installations.

5. Select the Closed for Entry check box if you want to prevent any new entries being made for the element, either temporarily or permanently. This does not affect any existing entries of the element.

Important: Use this feature with caution. When you perform certain important tasks in Oracle HRMS, the application may automatically create or delete element entries. These tasks include hiring and terminating people, and updating assignments. Therefore, if you check Closed for Entry on an element, this might prevent users terminating employees and updating assignments. If there are standard links for the element, it will also prevent users hiring people who are eligible for the element.

HR-only users: Go to Currency.

Oracle Payroll Users:

6. Select the Process in Run check box if you want the element to process in payroll runs.
7. Select the Once Each Period check box to ensure that only the first payroll run of each period processes entries of this element.

Note: If this check box is not available for your localization, you can select a ONCE_EACH_PERIOD skip rule for the element instead.

8. Select the Indirect Results check box if you want the element only to accept entries from indirect formula results. Leave the check box unchecked if you want to accept entries both from indirect formula results and from manual entries in the Element Entries window.
9. Select the Adjustment Only check box if you want to use the element only for creating balance adjustments.
10. Select the Third Party Payments check box if you want to use the element only for creating third party payments.

11. Overwrite the default priority number in the Priority field if you want to determine the order in which the element processes within its classification range. Lower numbers process before higher ones.

If the order of processing within the element classification is not important, you can accept the default priority number, which is the midpoint of the range.

12. Select a formula in the Skip Rule field if you have written a skip rule formula to determine the circumstances in which the element should be processed.

UK only: If you are using different run types, select the ONCE_EACH_PERIOD skip rule for all earnings, to ensure they are not processed by each child run type.

Currency

The default currency for element entry values is the currency defined for the Business Group. You can select a different currency for the element if required.

Advanced Processing Information

Oracle Payroll users only: Use the Advanced tab to enter further processing information if you are defining:

- An earnings type, such as a bonus, that is to be taxed separately from the normal payroll run. The element can also be paid separately.
- An earnings type that requires a net-to-gross calculation. For example, this applies to bonus payments that are a fixed net amount. Oracle Payroll calculates the gross amount needed to meet the net pay.
- **UK:** A pre-tax deduction that you want to reduce if there is insufficient pay to cover the deduction along with taxes and court orders. This requires iterative processing.

Note: The Advanced tab may not be available for some localizations.

To define an element as a separate payment:

1. On the Advanced tab, select the Separate Payment check box.

The Process Separate box is checked automatically.

UK users: Do not select this check box. This functionality is not currently available for UK Payroll.

To define an element to process separately:

1. On the Advanced tab, select the Process Separate check box.

To define an element for net-to-gross calculation:

1. On the Advanced tab, select the Gross Up check box.

The Iterative Flag and Process Separate boxes are checked automatically.

2. Select DEFAULT_GROSSUP in the Iterative Formula field. This formula controls the iterative calculation of the pay value, adjusting an input value as necessary to get a result that is defined to be close enough to the required net payment.

Note: After saving your element, choose the Iterative Rules button to specify how to use the formula results. Also choose the Exclude Balances button to select which balances are grossed up for the element (meaning that these deductions are paid by the employer).

3. Optionally, enter a value in the Iterative Priority field to determine the sequence in which elements are adjusted during iterative calculations. Elements with lower iterative priority values are adjusted first.
4. Select the Separate Payment box if you want the payment to be made separately from the regular payment. **UK Payroll, Irish Payroll:** Do not select this check box.
5. Save your work.

To set up iterative processing for a pre-tax deduction (UK):

1. Check the Iterative Flag box.
2. Select PQP_GB_ITERATIVE_ARREARAGE in the Iterative Formula field.
3. Enter an Iterative Priority number in the range 1 to 1500. The element with the lowest iterative priority number is reduced first. If this deduction is reduced to zero and net pay is still insufficient to cover taxes and court orders, the element with the next lowest priority number is reduced, and so on.

Important: Iterative priority numbers must be in the reverse sequence of the processing priority numbers. This means that the element that is processed first is reduced last.

4. Choose Iterative Rules, and select the L_stopper rule.

Advance Pay Processing Information

Oracle Payroll Users only except Ireland. If Advance Pay by Element is enabled in your legislation, use the Advance Pay tab to:

- Indicate that an element may be processed as an Advance Pay element
- Establish the processing conditions for your Advance Pay element.

To define an element as an Advance Pay element:

1. On the Advance Pay tab, check the Mark as an Advance Pay Indicator check box.

This marks the element as an Advance Pay indicator. This means that when you run the Advance Pay by Element process, it will identify this that this element can be potentially processed as an Advance Pay element according to the processing conditions that you define.

To set the processing conditions for an Advance Pay element:

On the Advance Pay tab:

1. Check the Include as an Advance Element check box if you want to process this element as an Advance Pay element.
2. If you want to specify a separate Advance Pay element, select this element from the list of available elements in Use Advance Element. If you leave Use Advance Element blank and do not specify an element, then you do not select a separate advance pay element. You can still process advance payments, but all the entries are held within your current earnings element rather than reported separately in an advance pay element.
3. Check the Deduct Advance Amount check box if you want to show the deduction for the advance in the current payroll period. Every advance payment has a deduction associated with it to bring the overall payroll amounts back into balance. You can use this check box to control the point at which the deduction should be applied.
4. If you want to specify a separate Deduction element, select this element from the list of available elements in Use Deduction Element. If you leave Use Deduction Element blank and do not specify an element, then you do not create a separate deduction element. You can still process deductions for advance payments, but all the entries are held within your current earnings elements rather than reported separately in a deduction element.

Note that when you create either an Advance Pay element, or a Deductions element, you must ensure that it exists for the same period of time as the underlying earnings element, and that the input values match those on the underlying element.

5. Check the Process Advance Entry in Run check box if you want to include this element in a payroll run, If you do not check this box, then the element does not process in a payroll run and is reported as information in your Statement of

Earnings report.

Continuous Calculation

For prerequisite steps to set up continuous calculation, see: Setting Up Continuous Calculation, *Oracle HRMS Payroll Processing Management Guide*

To set up an element for continuous calculation:

1. Choose the Recalculation tab and select a RetroPay element. This is an event group that defines the events that trigger proration for this element.

Proration

In some localizations, Oracle Payroll can calculate proportionate earnings amounts whenever payroll-relevant data changes during a payroll period. The Payroll Earnings and Deductions section describes the full setup steps for the relevant localizations. To enable proration for an element, choose the Proration tab.

To set up an element for proration:

1. Choose the Proration tab and select a proration group. This is an event group that defines the events that trigger proration for this element.
2. Optionally, select a proration formula. Alternatively you can edit the element's payroll formula to handle proration.

Further Information

1. Enter the Further Information field if:
 - Your Oracle localization team has set up additional fields for element definition
 - You are in the UK, and you use Oracle SSP/SMP

French Payroll

- Select a group, which is the name by which this element, and the others in the group, appears as one line on the pay advice.
- On the pay advice, most earnings and deductions are shown as a base, a rate, and an amount. Select the base unit if you want this displayed on the pay advice.

South African Payroll

- Enter a clearance number for Statutory Information and Deduction elements, if applicable. This number appears on the tax certificate.

Kuwait Payroll

- Select a deduction type for the Deductions elements. This information is used

by the PIFSS report.

New Zealand Payroll:

- If you want to display custom elements with the classification of Employer Charges in the Online Payslip, SOE form, and Statement of Earnings under Employer Superannuation Contribution section, select Yes in the Super Section Display field.

2. Choose Input Values to define input values for the element

See: Defining an Element's Input Values, page 5-34

Oracle Payroll Users:

3. Choose Balance Feeds to select balances you want this element to feed

See: Creating Balance Feeds for Individual Elements, *Oracle HRMS Compensation and Benefits Management Guide*

4. Click Balance Feed Control to add or remove secondary element classifications for this element.

Mexico only: Click this button to attach sub-classifications to your element.

See: Creating Classes of Balance Feeds, *Oracle HRMS Compensation and Benefits Management Guide*

5. Choose Frequency Rules to enter frequency rules to determine when the element should be processed.

See: Defining Frequency Rules, *Oracle HRMS Compensation and Benefits Management Guide*

6. For a net-to-gross element, choose Exclude Balances to select the deductions to be paid by the employer.

7. For a net-to-gross element, or any other element that is processed iteratively, choose Iterative Rules to specify how to use the Iterative Formula results.

Extra Information

Choose the Extra Information button to enter extra attribution for the element. You can link as much attribution as you need to an element.

Note: You can only access Extra Information types if your system administrator has set them up for your responsibility.

If Payslip Modeling feature has been enabled for your localization, you can specify whether to enable the element for payslip modeling. If you select No, the elements will not be available for the users during payslip modeling process.

Payslip Modeler

If Payslip Modeler has been enabled, then you can specify whether to enable the element for payslip modeling. If you select No, the element will not be available for the users during payslip modeling process.

To enable an element to be available for payslip modeling, query the element and select Yes in the Enable Simulation field in the Element Extra Information window. You can select input values of this element which are to be made available for simulation. Only user enterable input values are available for Payslip modeling. Ensure to select all mandatory input values to be made available for simulation, if the element is available for simulation.

If the Multiple Entries checkbox is enabled for an element, then you cannot use this element for payslip modeling. Instead, create a copy of the base element, enter input values, attach the appropriate formulas and balances as the base element and then use this element for payslip modeling. Ensure that this new element is not used for payroll run.

Note: Please note that there is a restriction for predefined elements being used for payslip modeling. For predefined elements, if you setup the details in one business group, then these details will be accessible to other business groups. For example, for predefined element Regular Salary element, if you want to enable Input Value A for one Business Group and Input Value B for another Business group, then this is not possible. This limitation occurs for predefined elements applicable to all localizations. Therefore, if there are multiple business groups, then you must define a single structure for the predefined elements. If there are custom elements, then the custom elements are accessible only for that business group.

Usages

To exclude the element from a run type:

1. Choose the Usages button if you want to exclude this element from a run type, or combination of run types.
2. Select the run type or combination of run types from which you want to exclude this element.

Note: For Norway: You must select the Employer Contributions run type to exclude the elements.

3. Select the effective dates for your exclusions.

4. Save your work.

Defining an Element's Input Values

Use the Input Values window to define the input values for the element. You can define up to 15 input values for an element.

Depending on the type of element you have defined, Oracle HRMS may have applied one or more default input values.

North America users: All elements must have the default Jurisdiction input value.

Norway users: All elements that feed the Holiday Pay Base classification must have the Tax Municipality input value. This input value must have the HR_NO_TAX_MUNICIPALITY valueset attached to it.

Payroll users: If you are creating balance feeds for individual elements, ensure you define an input value of the same unit of measure as the balance. Money units must be the same currency.

You can add new input values to a saved element only if you have not entered the element for any employees. To add an input value, you must set your effective date to the element's start date.

To define input values:

1. Set your effective date early enough to handle any historical element entries you want to make.
2. Enter or query the element in the Element or Element Link window and choose the Input Values button.
3. Enter the name of the first input value. Remember that if you want to define a *pay value* to hold run results, you must name it Pay Value.
4. Select the unit type of your input value (money, hours, character, date, number, or time). A Pay Value must have the unit type Money if the element is in a Payments type classification.
5. You can enter numbers in the Sequence field to change the order in which the input values appear in the Entry Values window.
6. Check the Required check box if all entries of the element must have a value for this input.

Note: When you have saved an input value, you cannot change it to be Required. If you have saved it as Not Required by mistake (or you have generated an element that has an input value you want to

make required), delete the input value and re-enter it with the correct values. If you are re-entering a generated input value, be careful to enter exactly the same name. You cannot delete the input value if you have made any entries of the element for employees.

7. Check the User Enterable check box if users can enter a value for this input. Uncheck it if you want to ensure that the default value is entered for all employees.
8. Check the Database Item check box if you want the value to be available to formulas or QuickPaint inquiries.

Database Items are simple identifiers that the system uses to find specific items of information in the human resources database. Any spaces in the input value name are converted to underscores in the Database Item name.

Entering Element-Level Defaults

If you enter defaults at the element link level, these override the defaults at element level. If you update an element-level default, remember to check the values on the element links too.

To enter a default for an input value:

1. Enter the value in the Default field.
2. If you want existing entries to be updated whenever the default is changed, check the Hot Default check box. The input value must be required if you want to use this option.

A hot default appears in the Entry Values window in quotation marks.

Important: If a user overrides a hot default in the Entry Values window, subsequent changes to the default will *not* affect the entry. For this reason, you may prefer to use BEE to change defaults for large groups of employees, rather than the hot default feature.

Defining Entry Validation

To enter validation for an input value:

1. Do *one* of the following:
 - Enter maximum and minimum values for the input.
 - Select a Lookup Type to act as a lookup supplying a list of valid values.

- Select a formula to validate entries for this input value. Formulas can return messages to users about the success or failure of the validation.
2. Select Warning or Error to determine whether the system warns users that an entry is invalid or prevents them from saving an invalid entry. You cannot select a value if you chose a Lookup because a user cannot enter an invalid value for an input value validated by lookup.

Defining Element Links

Use the Element Link window to define groups of assignments that are eligible for an element.

Note: When you define a link for a benefit or for an entitlement item in a collective agreement, do not select any eligibility criteria. Instead use participation eligibility profiles to restrict eligibility for the benefit or entitlement item.

Note: When querying data the Element Link window returns values for Payroll, Location and Position and Organizations, irrespective of the security profile restrictions set, enabling you to view the links already created. You cannot create links for data outside your security profile.

To define an element link:

1. Set your effective date to the date you want the eligibility criteria to come into effect.
2. In the Element Name field, select the Element for which you are defining a link.
3. Check the Standard check box if you want all employees who are made eligible by the link to receive the element automatically.

You can only create a standard link if the element is recurring and multiple entries are *not* allowed by the element definition.

4. In the Eligibility Criteria region, select the assignment components that constitute this eligibility rule. If you want to link to all employees, do not enter any eligibility criteria.

You can link to all payrolls or to a specific payroll. Do one of the following:

- Leave the Payroll field blank and check the Link to all Payrolls check box if you want employees assigned to *any* payroll to be eligible. This rule excludes employees who are not assigned to a payroll.

- Select the name of a specific payroll if you want only employees on that payroll to be eligible for the element. Do not check the Link to all Payrolls check box.
- Leave both fields blank if assignment to a payroll is irrelevant to eligibility for the element.

Costing

To enter costing information for the link:

1. Select the Costable Type. The default is *Not Costed*, meaning that the system maintains no costing information for the element.
 - To allow entry of costing information at all levels, including the assignment and element entry levels, select *Costed*. This is the appropriate selection for most elements representing earnings types.
 - If you do not need to cost the element at organization and assignment levels, select *Fixed Costed*. This is appropriate for some deductions, which are irrelevant to labor distribution analyses.
 - If you want to distribute overhead costs (such as employer contributions to a pension plan) over other elements, select *Distributed*. Then select a Distribution Set.

Note: Some element classifications for your legislation may be predefined as Not Costed and you cannot override this.

2. Check the Transfer to GL check box if the payroll run results from this link should be transferred to the general ledger.
3. Use the Costing field to select a GL account code and, if present, account codes of labor distribution or other systems in which to collect the run results of this element. Then use the Balancing field to select the GL account that balances this one.

For deductions elements:

- Select the code for the GL account to credit in the Costing field, and the code for the account to debit in the Balancing field.

For elements in all other classifications:

- Select the code for the GL account code to debit in the Costing field, and the code for the account to credit in the Balancing field.

Note: Depending on your set up of the Cost Allocation flexfield, the Balancing field may not be enabled.

Batch Creation of Element Links

You can use a batch process to create multiple links more efficiently than creating each link individually.

To create element links in a batch operation

1. Check the Create in Batch Mode check box to specify that you want to defer creation of this element link until later when you run the Generate Element Links process. Alternatively, leave the box unchecked if you want to create this element link immediately.
2. View the Link Status to confirm the status of your link:
 - Unprocessed - you have selected this element link for creation as part of a batch, but the Generate Element Links process has not started yet.
 - Processing - the Generate Element Links process is now attempting to create this link.
 - Complete - the Generate Element Links process has completed, and you have successfully created this element link.
 - Incomplete - the Generate Element Links process has completed, but this element link was not included in the processing and you have not yet created the element link. Correct the link definition before rerunning the Generate Element Links process.
 - Error - the Generate Element Links process failed to complete, and you have not yet created the element link. Correct the link definition before rerunning the Generate Element Links process.
3. Run the Generate Element Links process to complete the creation of those links that you selected for batch processing.

See *Generating Element Links, Oracle HRMS Compensation and Benefits Management Guide*

Qualifying Conditions

To enter qualifying conditions for the link:

1. Go to the Qualifying Conditions region. Here you can add or change age or length of service requirements for this particular eligibility rule.

The system checks these conditions when you make an entry of the element. If the employee does not meet the qualifying conditions, you receive a warning.

Input Values

To adjust input values for the link:

1. Save your link definition and choose the Input Values button to display the Link Input Values window.

Use this window to:

- Enter a new default or change one entered at the element level
- Check the Costed box to maintain costing information for an input value.
- Change the maximum, minimum or both for an input value. Logically, the new values should be within the range you defined for the element as a whole. However the system does not enforce this.

Making Manual Element Entries

You enter compensation and basic benefits for employee assignments in the Element Entries window. If employees are assigned to a salary basis, you enter their salaries in the Salary page.

You can use the Element Entries window to make entries or to query existing entries. Use the Period field, Classification field, and Processing Types option buttons to restrict the entries you see when making inquiries.

Several Oracle HRMS features, such as Absence Management, RetroPay, and Salary Administration, create element entries automatically. You cannot update these element entries on the Element Entries window. You must update the source record (such as the absence or salary record) to change the element entry.

The Processed check box shows if Oracle Payroll has processed the entry in the current pay period. Notice that you can change an entry that has been processed. This enables you to correct entries for retro pay processing. Changing the entry does not alter the payroll run results so you can consult these for a complete record of payroll processing and payments.

See: *Setting Up RetroPay, Oracle HRMS Payroll Processing Management Guide*

Note: Your system administrator might have restricted the elements you can enter in this window by element set, classification or processing type.

To enter an element for an employee assignment:

1. If necessary, change your effective date to:
 - The correct start date for a recurring element entry
 - Any date in the correct pay period for a nonrecurring element entry

If the pay period is closed at your effective date, you cannot enter any nonrecurring elements that process in payroll runs. If a current or future pay period is closed, you cannot enter any recurring elements that process in payroll runs.

2. To reduce the list of elements to choose from, select a classification, a processing type, or both in the first region.
3. In the Element Name field, select an element.

Note: Elements this employee is eligible for by means of a standard link appear automatically.

The system displays a warning message if the employee fails to meet any qualifying conditions of age or length of service.

4. If the Costing field is enterable, you can enter cost codes, for example to indicate the cost center the employee's time should be charged to.
5. You can select a reason for an element entry you make or update. As part of your system setup, you can enter valid reasons for the Lookup Type ELE_ENTRY_REASON.
6. You can check the Override check box to create an entry that overrides all other entries of this element in the current period. You cannot create an override entry if one already exists, or if any of the entries of this element have been adjusted.
7. If you want to create a one-time entry of a recurring element, check the Additional check box.

An Additional entry is valid only for the current pay period, shown in the Effective Dates fields.

You can only check Additional if:

- The element definition allows additional entries, and
- An additional entry does not already exist for the assignment in this period, and
- The employee is assigned to a payroll

- There is a payroll period defined at your effective date
8. Choose the Entry Values button to open the Entry Values window.
 9. Enter values in the Entry Values fields. Notice that:
 - Entry to some fields may not be permitted.
 - Some fields may be required.
 - Some fields may have a list of values; others may be validated as you leave the field. You will receive a message if your entry is not a valid value.
 - Some fields may contain default values. If the default value is in quotation marks, it is a "hot default".

Important: You should consider carefully before overriding a hot default. If you override it, then any subsequent changes to the default value on the element or element link definition will *not* affect the element entry. However, you can clear your entry if you want the default value to come back into effect.

For Kuwait users only: To enter information about the elements with deduction classification, click on Further Entry Information and enter the following:

- Reference number, which is the sequence number used while setting up the deduction type
 - Authority for the deduction account
 - Select the type of deduction
 - Total deduction amount for the element
 - Start and end date for the deduction. The deduction process depends on the start and end dates that you select for the element. Oracle HRMS uses these dates for reporting purpose.
10. For a non-recurring element, optionally select a date within the current payroll period in the Date Earned field. The entry will not be processed until this date (that is, the Date Earned of the Payroll Run must be on or after this date).
 11. To enter information about a third party recipient of a payment resulting from a deduction element, use the Payee Details field. Select the name of the third party payment method set up for this payment.

12. To determine the processing sequence of multiple entries in the payroll run, enter a subpriority number in the Processing Priority field. Lower priority numbers process first.

Note: The Processing Priority field is not available to HR-only users. For more information on user types and the HR:User Type profile option, see: *User Profiles, Oracle HRMS Configuring, Reporting, and System Administration Guide*.

13. Save your work.

Leave and Absence Management

Absence Categories and Types

Oracle HRMS provides a convenient way to maintain information about the various absence types your enterprise recognizes. To facilitate reporting and analysis of employee absences, you can distinguish between *absence types* and *absence categories*. An absence category is a group of related absence types.

Some absence categories may be predefined for your legislation. The table below contains examples of absence categories and types, for illustration purposes only. You can extend the list of predefined categories and define your own absence types, as required.

Example Absence Categories and Types:

Absence Category	Absence Type
Medical Leave	Illness or Injury
	Work-related Injury
	Work-related Illness
	Medical Appointment
Family Leave	Paid Maternity/Paternity
	Unpaid Maternity/Paternity
	Dependent Care
Personal Leave	Compassionate Leave
	Personal Business
Professional Leave	Certification Classes
	Meeting Attendance

Also, to assist with absence reporting and analysis, you can provide *reasons* to select from when recording employees' time taken for an absence type. For example, if you

need information to analyze the particular family-related responsibilities that cause employees to miss work, you can define reasons for absence types as follows:

Example Absence Category, Types and Reasons:

Absence Category	Absence Type	Absence Reasons
Family Leave	Paid Maternity/Paternity	Birth of a child
		Adoption of a child
	Dependent Care	Child Care
		Elder Care
		Disabled Care

Setup of Absence Types

Setting up each absence type is essentially a two-step process. One step involves defining the type, that is, entering its name, and optionally selecting a category and reasons for it. The other step involves defining an element to associate with the type. This element serves two important purposes:

- It provides a way to *maintain a running total* of time taken for the absence type. The Absence Detail window shows the running total of absences with an end date before the effective date, and with an absence duration on record. Each absence can add to, or subtract from, the running total, depending on how you define the absence type.
- It provides a way to *restrict employee eligibility* for the absence type. The links you build for the element establish which employees are eligible to use the type.

For example, if the absence type compassionate leave is available only to full time employees, you link its element to the assignment category Full Time.

To hold a single running total of time taken for two or more absence types, you associate all the types with the same absence element. For example, your absence category Personal Leave may include two absence types you need for certain reporting purposes, Compassionate Leave and Personal Business. However, you require just one running total to be kept of employees' time taken for both types of personal leave. In this case you simply associate both absence types with the same absence element.

Note: If you want to use absence types without recording accrued totals or eligibility rules, you can define the type with no associated element.

Setting Up Absence Management

Use the following steps to set up absence management.

1. If you want to associate recurring elements with absence types, you must set up proration and retro notifications. This ensures that absences that end in the middle of a payroll period are detected and processed by the payroll run, and that retrospective changes to absences are recorded in the Retro Notifications report.

Note: Proration is available to Oracle Payroll users in selected localizations only.

To set up proration and retro notifications, you must:

- Find all the dynamically generated triggers for the table PAY_ELEMENT_ENTRIES_F in the Dynamic Trigger Definition window. (You must deselect the Insert triggering action so that all the triggers are returned by the Find.) Make sure the Generated and Enabled check boxes are checked for all the continuous calculation triggers.
- Query the Incident Register functional area in the Functional Area Maintenance window, and enter the business groups for which you want to enable proration on the Business Group tab. Optionally, you can further secure the proration functionality by selecting payrolls on the Payroll tab.
- Use the Table Event Group window to group the two events that you need to detect to prorate absences - datetracked updates to absence start date and absence end date. Select Proration for the event group type, and Payroll Period for the proration period. In the Datetracked Events region, select DateTrack Update as the update type, PAY_ELEMENT_ENTRIES_F as the table, and EFFECTIVE_START_DATE and EFFECTIVE_END_DATE as the columns.
- Use the Table Event Group window to group the datetracked events on the PAY_ELEMENT_ENTRIES_F table you want to track in the Retro Notifications report. The event group type is Retro.

See: Setting Up Proration and Retro Notifications, *Oracle HRMS Payroll Management Guide*

2. Define an absence element, with at least one input value, for each absence type. Link this element to define who is eligible.

See: Defining and Linking an Absence Element, page 5-47

Note: Omit this step if you are setting up an absence type for which you do not need to maintain a running total of time taken or

remaining, and you do not need eligibility rules.

US and Canada Payroll only: If you want to process the absence element in the payroll run, generate it using the Earnings window.

Mexico only: If you want to process the absence element in the payroll run, generate it using the Element Design Wizard.

3. Define categories of absence types as values for the Lookup Type ABSENCE_CATEGORY, and your absence reasons as values for the Lookup Type ABSENCE_REASON. In some legislations there are predefined categories and reasons.

You can select the same reason for different absence types.

See: Adding Lookup Types and Values, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

4. Define each absence type, and associate it with an absence element.

See: Defining an Absence Type, page 5-49

Note: To keep a single record of employees' time taken for two or more different absence types, you can associate the same element with several types.

5. For an absence type with a decreasing balance, use BEE or the Absence Detail window to initialize the absence balances for employees eligible for the type.

If you want to make batch entries, see Making Batch Element Entries Using BEE, *Oracle HRMS Configuring, Reporting, and System Administration Guide*.

6. If you defined a recurring element, create a payroll formula that handles proration to process the element and calculate the appropriate absence duration in each pay period (taking into account the number of days or hours in a month, working and shift patterns, public holidays, and so on).

Sample Proration Formulas, *Oracle HRMS FastFormula User Guide*

7. If you want to set up the application to calculate the duration of an absence automatically, you have two options:

- Set the HR: Schedule Based Absence Calculation profile option to Yes, if you want the application to use the worker's schedule and calendar events from their primary assignment to calculate absence durations. To use this option, you must first define schedules and calendar events that are relevant to your enterprise and assign them to various levels in your work structures.

See: *Setting Up Availability , Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

- To calculate absence duration from the absence start and end dates without using the schedules and calendar events information of an employee, create a basic formula. If you want the absence duration calculation to update automatically each time you change the absence dates, you must set the profile option HR: Absence Duration Auto Overwrite to Yes.

See: *Writing Formulas to Calculate Absence Duration, Oracle HRMS FastFormula User Guide*

Defining and Linking an Absence Element

Define an absence element in the Element window.

US and Canada Payroll only: If you want to process the absence element in the payroll run, initiate it on the Earnings window instead of using the Element window.

Mexico only: If you want to process the absence element in the payroll run, initiate it with the Element Design Wizard instead of using the Element window.

Spain only: If you want to compute the social security earnings you must use the predefined elements for Sickness Details, Maternity Details, Part-time Maternity Details, Pregnancy-at-Risk Details and Adoption Details.

To define an absence element:

1. Set your effective date to a day on or before the start of the first payroll period for which you want to enter absences.
2. Enter a name for the element, and select the classification Information or Earnings.

Tip: Give the absence element and its absence type the same name, or coordinate the element name with the type name. For example, for the absence type Compassionate Leave, name the element Compassionate Leave or Compassionate Leave Absence.

3. Enter a reporting name, for display on reports.
4. If you are creating a recurring absence element, select your absence element event group in the Proration Group field. This field is only available to Oracle Payroll users in certain localizations.
5. Select the processing type.
 - Select Recurring if you want to be able to process absences that do not have an

end date and you want to apportion absence time correctly across payroll periods.

Note: You can only select Recurring if you use Oracle Payroll and the Proration functionality is enabled for your localization. (In this case, you should see the Proration Group field on the Element window)

- Select Nonrecurring if it is acceptable to record the full duration of the absence in the payroll period in which the absence starts.

6. Select the termination rule. This is normally Actual Termination.

7. Check the Multiple Entries Allowed box if you want to enable employees to have:

- (Nonrecurring) More than one instance of the absence type within a pay period.
- (Recurring) Overlapping entries of the absence.

8. If this is an absence element for a PTO accrual plan, do not select Process in Run. Uncheck this box if necessary.

If the element is recurring, ensure that the Process in Run box is checked so that the absence duration can be calculated by the payroll run.

9. If employees must be a certain age or have served for a certain number of years to be allowed this absence, enter this information in the Qualifying Conditions region.

Note: If this is an absence element for a PTO accrual plan, the plan setup relates length of service to accrued time off. Do not make an entry here for length of service.

10. Save the element, then choose the Input Values button.

11. In the Input Values window, create an input value to hold the amount of time taken. Select units of Day, Hours in HH format, or Hours in Decimal Format (to one, two, or three decimal places).

If you are defining an absence element for a PTO accrual plan, give the input value the name Hours or Days, to accord with the unit of measure of the plan. When you define the plan using the Accrual Plan window, this input value name appears in the Units field of the Absence Information region.

Important: If you select Required for an input value, you must select this input value on the Absence Attendance Type window.

Do not select Required for more than one input value.

New Zealand users only: You must also create the following input values:

- Seasonal Shutdown - for Annual Leave and Annual Leave Termination elements
 - Number of complete weeks - for the Special Leave and Protected Voluntary Service Leave elements.
12. You can define minimum and maximum days or hours that can be entered in an absence record. If you do this, select what happens if these limits are breached:
 - Select Warning for the system to warn users but allow them to breach the limits.
 - Select Error for the system to issue an error message and prevent users from saving an entry that breaches the limits.
 13. Save your work.

To link the absence element:

1. Set your effective date to a day on or before the start of the first payroll period for which you want to enter absences.
2. In the Element Link window, select the absence element you defined.
3. Select eligibility criteria for this absence element, if appropriate. If you want to make the element available to all employees, do not select any criteria.
4. Save the link. Then define the absence type associated with this absence element.
See: Defining an Absence Type, page 5-49

Defining an Absence Type

Use the Absence Attendance Type window to define an absence type and associate it with an element.

To define an absence type:

1. Enter a name and category for the absence type.

Tip: Give the absence type and its associated element the same name, or coordinate the type name with its element name. For

example, name the absence type for a PTO accrual plan Salaried Sick PTO Plan, and its associated element, Salaried Sick PTO Absence.

2. Select Allow Absence Overlaps if absences of this type can overlap other absences. If you deselect this option, the application warns you if you enter an absence that overlaps another absence of any type.
3. In the Associated Element region, select the element defined for this absence type. Select the element's input value that holds days or hours. The unit of measure for the input value appears in the Units region.
4. In the Balance region, select *Increasing* if you want each absence entry to add to a running total of time taken to date. The running total covers all absence types associated with the selected element. Select increasing balances for absence types for PTO accrual plans, and for most other absence types.

For absence types that have a set maximum amount of hours or days allowed, you may select *Decreasing*. In this case, each absence recorded reduces an initial balance to show time remaining to be taken for the type.

Note: Decreasing balances require more maintenance. You must enter an initial balance amount for each new hire eligible for the absence type, and must initialize the balance for all eligible employees at the start of each year.

5. Optionally, select reasons that are valid for entries of this type of absence.
6. Save the absence type.

Setting Up Absences

Oracle HRMS enables you to record the absence information for employees to receive the various absence benefits for sickness, maternity, pregnancy at risk, part-time maternity and adoption. This process ensures that the absence information and the related social security deductions are reported accurately on the social security contribution reports (TC-1 and TC-2).

1. You must use the predefined elements for absence such as Sickness Detail, Maternity Detail, Pregnancy-at-Risk Detail, Part-time Maternity Detail, and Adoption Details.

See: Predefined Elements, page 5-2

2. Record the absence information for an employee using the Absence window.

See: Entering Absences, *Oracle HRMS Compensation and Benefits Guide*

3. Enter the additional information for each of these absences using the Further Information field:
 - Temporary Disability Absence, page 5-52
 - Maternity Absence, page 5-53
 - Part-time Maternity Absence, page 5-54
 - Pregnancy At Risk Absence, page 5-53
 - Adoption Absence, page 5-55
4. If you want to override the benefit uplift information entered at the legal employer for an employee, you must create and attach the formula for the benefit uplift method of calculation, the daily rate formula, and the duration formula.

See: Entering Benefit Uplift Details, page 1-25

Setting Up Temporary Disability Absences

This process ensures that the social security earnings and deductions processing and reporting includes accurate information about your employee's sickness-related absences.

1. Define and link an absence element. Typically you name the element Sickness so that it corresponds with the absence type name you define next.

See: Defining and Linking an Absence Element, page 5-47

2. Define the absence type, entering the following details:
 - Absence type name is Sickness.
 - Absence category is Temporary Disability
 - Associated element is the absence element you defined previously (Sickness)
 - Units are Days
 - Balances are Increasing
 - Reasons are:
 - Non-work related disease

- Non- work related injury
- Work-related injury
- Work-related disease
- Work-related disease observation period

See: Defining an Absence Type, page 5-49

Entering Temporary Disability Absence

You use the Absence window to record the absence due to a temporary disability. You can enter additional information relating to an employees' temporary disability absence to process the benefit uplift and the sickness benefit provided by the employer.

To enter temporary disability absences:

1. Click in the Further Information field to display the Additional Absence Information window.
2. Link the absence to the previous absence, if this absence recurs within six months due to the same reason. You need not enter the linked absence if you are entering a new absence record.
3. Select Yes if you want the application to calculate the benefit amount if the employee does not have 180 days of social security contribution days.
4. Select Yes to extend the absence to 18 months.
5. Enter the override values if any, for the benefit uplift information entered at the legal employer level. The application uses these values for the employee to process the benefit uplift.
 - Override Benefit Uplift Calculation Method
 - Override Benefit Uplift Daily Rate Formula
 - Override Benefit Uplift Duration Formula

Note: You cannot override these values for an employee, if you have not defined them at the legal employer level. See: Entering Benefit Uplift Details, page 1-25.

6. Save your work.

Entering Maternity Absences

You use the Absence window to record the maternity absence for employees. You can enter additional information relating to an employees' maternity absence as required for processing the benefit uplift and the maternity benefit.

To enter maternity absence:

1. Click in the Further Information field to display the Additional Absence Information window.
2. Enter the expected and the actual date of birth.
3. If the child was stillborn, enter the date.
4. Enter the number of children born, the employee may be eligible for statutory earnings depending on the number of children born.
5. Select Yes if you want the application to calculate the benefit amount if the employee does not have 180 days of social security contribution days.
6. Enter the override values if any, for the benefit uplift information entered at the legal employer level. The application uses these override values to calculate the benefit uplift for the employee.
 - Override Benefit Uplift Calculation Method
 - Override Benefit Uplift Daily Rate Formula
 - Override Benefit Uplift Duration Formula

Note: You cannot override these values for an employee, if you have not defined them at the legal employer level. See: Entering Benefit Uplift Details, page 1-25.

7. Save your work.

Entering Pregnancy At Risk Absence

You use the Absence window to record the pregnancy at risk absence for employees. You can enter additional information relating to an employees' pregnancy at risk maternity absence to process the benefit uplift and the pregnancy at risk maternity benefits.

To enter pregnancy at risk absence:

1. Click in the Further Information field to display the Additional Absence Information window.
2. Enter the expected date of birth.
3. Select Yes to enable the application to calculate the benefit amount if the employee does not have 180 days of social security contribution days.
4. Enter the override values if any, for the benefit uplift information entered at the legal employer level. The application uses these override values to calculate the benefit uplift for the employee.
 - Override Benefit Uplift Calculation Method
 - Override Benefit Uplift Daily Rate Formula
 - Override Benefit Uplift Duration Formula

Note: You cannot override these values for an employee, if you have not defined them at the legal employer level. See: Entering Benefit Uplift Details, page 1-25..

5. Save your work.

Entering Part-time Maternity Absence

You can use the Absence window to record the part-time maternity absence for employees. You can enter additional information relating to an employees' part-time maternity absence. This information is required for processing the benefit uplift and the part-time maternity benefit provided to employees.

You must record a minimum of six weeks of maternity leave for the employee before you enter the part-time maternity leave.

To enter part-time maternity absence:

1. Click in the Further Information field to display the Additional Absence Information window.
2. Enter the expected and the actual date of birth.
3. Enter a percentage of the working time. For example, enter 60 if the employee works for 60% of the normal working time.

4. Select Yes if you want the application to calculate the benefit amount if the employee does not have 180 days of social security contribution days.
5. Enter the override values if any, for the benefit uplift information entered at the legal employer level. The application uses these override values to calculate the benefit uplift for the employee.
 - Override Benefit Uplift Calculation Method
 - Override Benefit Uplift Daily Rate Formula
 - Override Benefit Uplift Duration Formula

Note: You cannot override these values for an employee, if you have not defined them at the legal employer level. See: Entering Benefit Uplift Details, page 1-25.

6. Save your work.

Entering Adoption Absence

You can use the Absence window to record the adoption absence for employees. You can enter additional information relating to an employees' adoption absence. This information is required for processing the benefit uplift and the adoption benefit.

To enter adoption absence:

1. Click in the Further Information field to display the Additional Absence Information window.
2. Enter the number of children adopted.
3. Select Yes to enable the application to calculate the benefit amount if the employee does not have 180 days of social security contribution days.
4. Enter the override values if any, for the benefit uplift information entered at the legal employer level. The application uses these override values to calculate the benefit uplift for the employee.
 - Override Benefit Uplift Calculation Method
 - Override Benefit Uplift Daily Rate Formula
 - Override Benefit Uplift Duration Formula

Note: You cannot override these values for an employee, if you have not defined them at the legal employer level. See: *Entering Benefit Uplift Details*, page 1-25.

5. Save your work.

Additional Element Setup for Payroll

Proration

Oracle HRMS enables you to calculate proportionate earnings amounts whenever payroll-relevant data is changed during a payroll period, for example, if an employee joins or leaves the company during a payroll period or if an employee's pay grade changes during a payroll period. Oracle HRMS performs a proration calculation to ensure that the employees' earnings are calculated correctly after taking account of these changes.

If you want to prorate an earnings element, such as basic salary, assign an event group to it. An event group is a collection of proration points that share similar characteristics. You can create an event group to group together all proration points that affect an employee's salary, for example. This event group could contain proration points such as salary increases, assignment changes, and pay rate changes.

You then process the element using a formula that handles proration. You can either use a payroll formula that handles proration, or create a separate proration formula that runs after the main payroll formula only in payroll periods when a proration event occurs.

See: *Sample Payroll Formulas Enabled for Proration (UK)*, *Oracle HRMS FastFormula User Guide*, *Sample Proration Formula*, *Oracle HRMS FastFormula User Guide*, and *Writing Proration Formulas*, *Oracle HRMS FastFormula User Guide*

When you define the event group, you select the events that will activate proration calculation, such as:

- An employee joining or leaving the enterprise
- Changes to pay grades or grade rates
- Changes to pay scales and progression points
- Changes to hourly or annual pay rates
- Changes to working hours
- Changes to allowances or deductions

Note: The proration unit can be periods, days, or hours. Proration can be applied to a monetary, time-based, or numeric amount.

Historic Rates

Historic rates is a function that retrieves a datetracked money value and recalculates it according to different time-dimensions (converting a daily wage to hourly). Historic rates is primarily for use in FastFormulas. You can use it to determine employee payments at the rate that existed when the work was done, rather than at the current rate. For example: If you pay your employees in arrears, you can calculate the value of the arrears payment.

Historic rates apply to notional rates only and not to actual rates

Example

An employee may earn \$50 an hour. Assuming a 40 hour work week, their notional rate would be \$2000 a week. However, that employee might have only worked 10 hours during a particular week. Therefore, their actual rate for that week would be \$500.

Historic rates are the values of a specific element or combination of elements, based on a specified time dimension, at a specified date. You can vary the rate according to different factors, such as:

- Full Time Equivalent (FTE)
- A percentage of another rate

Rate Type Information

For most rate calculations, a single element provides the pay rate. However, some rate calculations are the sum of multiple elements. For example: A holiday rate could be basic pay (held as a progression point) plus shift allowance (an input value) plus bonus (a global value). A rate type is a grouping of elements that comprise a single pay rate.

Different rate types can use the same element. For example: A rate type for holiday and another for sickness can both use the same basic pay element.

Use the Historic Rate - Rate Type element EIT to store the rate type name and description against each element. You create additional rate types by adding values to the lookup type PQP_RATE_TYPE.

Element and Contract Attribution

To calculate pay using historic rates, use the GET_HISTORIC_RATE function in your payroll formula. This function returns the rate. The parameters for the function are:

- The element, or group of elements (a rate type)
- The time dimension (such as hourly)
- The effective date

For sample formulas using this function, see: Sample Rates History Formula, *Oracle HRMS FastFormula User Guide*

The function uses attribution at two levels to calculate the correct values:

- Element
- Contract

Note: The Contract level is available only if your localization has enabled it.

Element Attribution Information

Use the Historic Rate - Element Attribution (an element EIT) to store the following information against each element that has a historic rate:

- Time dimension (hourly, daily, and so on)
- Pay source value (input value, grade rate, and so on)
- Name of the pay source
- Full Time Equivalent indicator
- Service history
- Assignment association
- Rate adjustment options

Example

For example, assume an assignment has an element entry for a Salary element and the element has the following attribution:

Time dimension = Hourly, Source = Grade Rate, Qualifier = Grade Rate 1

The function can retrieve the salary from Grade Rate 1 at any time and convert the time dimension from hours to annual or another dimension.

If you store rates for this payment using more than one grade rate or scale rate, you can use wildcards to enable you to select the latest value in the Qualifier field. For example: If the rate for salary can be held in Sal Scale Rate 1 or Sal Scale Rate 2, you can make the wildcard entry Sal Scale Rate % in the Qualifier field. The historic rates function then retrieves the value with the latest effective date.

Contract Table

The Contract Table is available only to those localizations that have enabled it. The structure of this table is defined by the localization. The user must specify the values.

Mexico only: This table is defined and maintained by the localization. It is not available to users.

Use the PQP_CONTRACT_TYPES predefined user-defined table to store the following information about your employee contract details:

Value	Definition
Annual Hours	Number of contract annual hours. Use this figure in the conversion of the derived rate to an output time dimension of "H" (Hourly Rate). Also use Annual Hours as a required figure when calculating Full Time Equivalent (FTE).
Days Divisor	Number of contract days in a year. This divisor is normally 365. Use it in the conversion of the derived rate to an output time dimension of "D" (Daily Rate).
Period Divisor	Number of periods per year used to calculate an output time dimension of "P" (Periodic Rate). Use a divisor that corresponds to the working hours shown on the Assignment window. For example: Weekly working hours have 52 as the Period Divisor. Also use Period Divisor as a required figure when calculating Full Time Equivalent (FTE).
Weekly Payroll Divisor	Number of periods per year, such as 52. Use the weekly payroll divisor to convert a periodic value into an annual value when <i>Periodic - Payroll Frequency</i> is the time dimension for the element, and the payroll is weekly or bi-weekly.
Monthly Payroll Divisor	Number of periods per year, such as 12. You use the monthly payroll divisor to convert a periodic value into an annual value when you select <i>Periodic - Payroll Frequency</i> as the time dimension for the element and the employee has a payroll frequency of Calendar Month, Lunar Month, Bi-Month, Quarter, Semi-Year, or Year.

When you have entered the required information to the PQP_CONTRACT_TYPES table, you can also add the following:

Value	Definition
Overtime Annual Hours	Number of annual hours used to calculate an output time dimension of "O" (Overtime Hourly Rate).
Annual Term Time Hours	Calculates the adjustment value for the derived rate. If you enter a value for this column, and for the Annual Hours column, this adjusts the derived rate by a factor of Annual Term time Hours divided by Annual Hours.
Employment History Factor	<p>Value the function uses to adjust the historic rate for length of service. There are five bands within this category. For each of band you can define the following:</p> <ul style="list-style-type: none"> • Service History Band Lower Limit: Minimum number of years service required to qualify for this adjustment factor. • Service History Band Upper Limit: Maximum number of years applicable for this adjustment factor. • Service History Band Adjustment Factor (%): Percentage factor by which the function increments the derived rate. <p>The historic rates function uses this information about each contract type to convert values held for one time dimension to another dimension. For example: If a rate is held hourly and needs to be returned as a daily rate, the function calculates an annual value by multiplying the rate by Annual Hours, then divides this by the Days Divisor.</p>

Time Dimensions

Time dimensions are closely tied to contracts. If you have a time dimension, you must use contract types. If you are doing a conversion between two time dimensions, you must refer to a contract.

You define source time dimensions in the PQP_TIME_DIMENSIONS extensible lookup

type. Whenever you add a new dimension to this lookup, you must also make a corresponding entry in the PQP_TIME_DIMENSION_FACTORS lookup type. This corresponding entry ensures that your output time dimensions map correctly to the annualization factor in the PQP_CONTRACT_TYPE user table.

PQP_TIME_DIMENSIONS

Code	Meaning	Description
A	Annual	Annual
D	Daily	Daily
H	Hourly	Hourly
P	Periodic	Periodic
PAY	Periodic - Payroll Frequency	Periodic - Payroll Frequency

PQP_TIME_DIMENSION_FACTORS

Code	Meaning	Description
A	Reserved Per Annum Frequency	Annual
D	DAYS DIVISOR	Daily
H	ANNUAL HOURS	Hourly
O	ANNUAL OVERTIME	Overtime Hourly
P	PERIOD DIVISOR	Periodic - Contract Period
PAY	Reserved Pay Period Frequency	Periodic - Pay Period Frequency.

The GET_HISTORIC_RATE function converts the element rate into an annual rate before converting to the given output time dimension. Therefore, not all output time dimensions need a corresponding source time dimension. For example, you can retrieve the overtime hourly rate (time dimension "O") without defining a rate with a source frequency of Overtime Hourly.

Net-to-Gross Processing of Earnings

You can define a bonus or other payment, which is a fixed net amount, using Net-to-Gross Processing. Oracle Payroll calculates the gross amount needed to meet the net pay. You define which taxes and other deductions the employer is willing to pay by selecting the balances that can be used in the net-to-gross processing.

The following formulas are used in net-to-gross processing:

- **DEFAULT_GROSSUP**

This iterative formula calculates the amount that the employer must pay in addition to the desired net amount.

- **CALC_GROSSUP_PAY_VALUE**

This formula adds the additional amount returned by the iterative formula to the desired net amount to return the payment amount. Create a formula result rule to return this payment amount as a direct result to the element's pay value.

Net-to-gross elements always process separately, after you process the main payroll.

For details of how to set up a net-to-gross element, see *Setting Up Elements for Net-to-Gross Processing, Oracle HRMS Compensation and Benefits Management Guide*

Balances for Net-to-Gross Processing

When you define the element for net-to-gross processing, you select which balances to exclude from the gross-up calculations. The employer pays all deductions *except* the ones you exclude.

Processing for Net-to-Gross Calculation

The formulas for net-to-gross processing do the following:

- The iterative formula takes as input the desired net amount (Amount input value), the amount by which net can diverge from the desired amount (To Within input value), and the method of calculation (Method input value).
- In the first run the formula sets the lower gross limit to the desired net amount, and the higher gross limit to twice the desired amount. Then it runs a function to provide the first guess of the gross. The formula returns three values--low gross, high gross, and additional amount--to the element's input values.
- The element's payroll formula runs (CALC_GROSSUP_PAY_VALUE). It adds the additional amount to the desired amount to create the gross and returns this value

to the element's pay value for the payroll run to process.

- In the next iteration, the iterative formula compares the additional amount to the total value of the balances that are available for grossup for this element entry. The additional amount must not differ from this balance total by more than the amount you specified in *To Within* field.
 - If the additional amount equals the balance total, then the iterative processing ends.
 - If the additional amount is above or below the balance total by an acceptable margin, then the processing ends and the formula returns the remainder (additional amount - balance) to the element's Remainder input value.
 - Otherwise, the formula runs the function to generate a better estimate for gross, using the remainder to determine by how much to change the guess. The formula checks the results in another iteration.

Contractual Earnings and Deductions

Oracle Payroll enables you to record and report the contractual earnings of employees. You can use the predefined primary and secondary classifications and balances to record these contractual earnings.

- Base Salary
- Seniority
- Extra Pay
- Overtime
- Other Complements

Oracle HRMS supports the following contractual deductions in Spain:

- Advance Payment
- Union Deductions
- Court Orders such as child support, spouse alimony
- Company Loans
- Pension Contribution

You can use the predefined primary and secondary classifications and balances to record these contractual deductions.

See: Survey of Classifications, page 5-17and Predefined Elements., page 5-2

Advance Payment

Employees can receive advance payments and can repay the employers as a post tax deduction. You can use the Advance Pay process to pay employees in advance for holidays. Oracle HRMS provides predefined elements/input values, predefined formulas to pay employees in advance. See: Predefined Elements, page 5-2

Union Deductions

Oracle HRMS provides predefined classification for processing union deductions. You can setup elements of the predefined classification Voluntary Deduction and define the amount for deduction.

See: Survey of Classification, page 5-17

Court Orders/Wage Attachments

Wage Attachments encompass a number of court ordered deductions. The court order determines the actual deduction amount and anything in excess of the minimum wage is subject to recovery. Oracle HRMS provides the predefined elements to process these deductions.

See: Court Orders Overview, page 5-90and Setting Up Court Orders, page 5-92

Company Loans

Oracle HRMS provides a loan management system and to process the company loans for employees. Oracle HRMS provides the predefined elements to process these deductions.

See: Benefits in Kind Overview, page 5-69

Partially Exempt Earnings Overview

Oracle HRMS supports the processing of certain earnings of the pay that are exempt from social security and tax deductions up to the statutory limit. Any amount paid over this limit is subject to social security and tax. These partially exempt earnings include :

- Meal Allowance
- Transportation Allowance
- Mileage Allowance

The statutory limit or the exemption ceiling is set in one of the following ways:

- Units x Price
- Percent of the current minimum wage

The meal and transportation allowances use the unit x price model as the base for

partial exemption. The allowances for tools and machinery, work wear and protective gear use the minimum wage as the base for partial exemption. A certain percentage of the statutory minimum wage is exempted from social security and tax deductions.

You can create your own elements with a primary classification of Partial Exempt Elements and attach the element to the predefined formula ES_CALC_PARTIALLY_EXEMPT_WAGE. This feeds the predefined indirect element Other Non-Recurring Partial Exempt Allowance. This predefined indirect element feeds the corresponding social security and tax balance.

Meal Allowance

Employees are eligible to receive the meal allowance depending on the place where the meal was taken in relation to a normal working area. Use the predefined element Meal Allowance to calculate the meal allowance for an employee. The following table lists the input values for the element Meal Allowance.

Meal Allowance:

Field	Description
Pay Value	Input value to hold the meal allowance amount. The predefined formula Meal Allowance feeds the value.
Allowance Rate Type	Select this value from the predefined lookup ES_ALLOWANCE_RATE_TYPES. This is mandatory.
Amount	Input value to hold the amount paid. This is mandatory.
Days	Input value to hold the number of days the allowance covers. This is mandatory.
Override Rate	An optional value to hold the rate used to override the rate value defined in Global.
Date of Claim	An optional value to hold the date when this allowance is claimed.
Exempt Amount	A predefined value to hold the amount exempt from tax and social security. The predefined formula feeds the value.

Field	Description
SSable Amount	A predefined value to hold the amount subject to social security. The predefined formula feeds the value.
Taxable Amount	A predefined value to hold the amount subject to tax. The predefined formula feeds the value.

Transportation Allowance

Employees can receive a transportation allowance in either one of the following ways:

- They receive a fixed monthly amount as a transportation allowance regardless of their actual travel or when they use the fuel card for their business related trips.
- They receive an amount as mileage allowance by processing the actual business travel claims using the existing statutory rates.

Use the predefined element Transportation Allowance to calculate the allowance an employee receives for transport purposes. The following table lists the input values for the element Transportation Allowance.

Transportation Allowance:

Field	Description
Pay Value	Input value to hold the transportation amount paid. The predefined formula Transportation Allowance feeds the value.
Vehicle Type	Select this value from the predefined lookup PQP_VEHICLE_OWNERSHIP_TYPE. This is mandatory.
Claim Start Date	An optional value to hold the date from when this allowance is applicable.
Claim End Date	An optional value to hold the date till when this allowance is applicable.
Claimed Kilometers	A mandatory value to hold the kilometers claimed.

Field	Description
Regular Amount	An optional value to hold the fixed amount paid per month.
Fuel Card Taxable Value	An optional value to hold the taxable value of fuel card per month.
Override Rate	An optional value to hold the rate to override the transportation rate value defined within Global.
Exempt Amount	A predefined value to hold the mileage amount exempt from tax and social security. The predefined formula feeds the value.
SSable Amount	A predefined value to hold the mileage amount subject to social security. The predefined formula feeds the value.
Taxable Amount	A predefined value to hold the mileage amount subject to tax. The predefined formula feeds the value.

Use the predefined element Mileage Allowance to calculate the allowance using the existing statutory rates. The following table lists the input values for the element Mileage Allowance.

Mileage Allowance:

Entry	Description
Pay Value	Input value to hold the mileage amount paid. A predefined formula feeds the value.
Vehicle Type	Select this value from the predefined lookup PQP_VEHICLE_OWNERSHIP_TYPE. This is mandatory.
Claim Start Date	An optional value to hold the date from when this allowance is applicable.

Entry	Description
Claim End Date	An optional value to hold the date till when this allowance is applicable.
Claimed Kilometers	An optional value to hold the kilometers claimed.
Regular Amount	An optional value to hold fixed amount paid per month.
Override Rate	An optional value to hold the rate to override the transportation rate value stored as Global.
Exempt Amount	A predefined value to hold the mileage amount exempt from tax and social security. The predefined formula feeds this value.
SSable Amount	A predefined value to hold the mileage amount subject to social security. The predefined formula feeds this value.
Taxable Amount	A predefined value to hold the mileage amount subject to tax. The predefined formula feeds this value.

Benefits in Kind Overview

Oracle HRMS provides the predefined elements to enable you to process the following benefits in kind:

- Company Housing
- Company Vehicle
- Company Loan
- Other Payments in Kind

Oracle HRMS enables you to derive or accept a declared value for notional pay provided to an employee for company housing, company vehicle, company loan and process the relevant contributions for tax, using the calculation methods recommended by the Tax Authority.

For other payments in kind, Oracle HRMS accepts a declared taxable value and

depending on whether the benefit is a one off or ongoing:

- Recurring - The processing of the taxable value spreads across the entire pay period when employees receive benefit.
- Non recurring - The processing of the taxable value takes place within the period when the employee receives benefit.

Taxable Component of Benefit in Kind

Oracle HRMS calculates the taxable component for certain benefits in kind as follows:

Company Housing

A percentage of the expense that the employer incurs on providing accommodation is subject to tax. The taxable value can be a percentage of the estimated value or the real estate value. Use the predefined element Company Housing to calculate the taxable Benefit in Kind component of the company housing provided to employees. The application uses the estimated value and if the estimated value is not available, it uses the real estate value to determine the company housing value.

The following table lists the input values for the element Company Housing:

Input Value	Description
Pay Value	Input value to hold the Benefit in Kind component of company housing amount. The predefined formula feeds the value.
Estimated Value	Input value to hold the value determined by tax authority or "valor catastral".
Real Estate Value	Input value to hold the real estate tax value.
Percentage	Input value to hold the percentage rate.
Override Amount	An optional input value to hold the override the values computed by the predefined formula.
Start Date	Input value to hold the start date from when this company housing amount is applicable.
End Date	Input value to hold the end date.

Company Vehicle

A percentage of the acquisition cost or the annual usage cost of the vehicle is subject to

tax. Oracle Payroll provides predefined element Company Vehicle to calculate the taxable Benefit in Kind component of the company vehicle provided to employees. The application uses the acquisition cost and if the acquisition cost is not available, it uses the annual usage cost value to determine the company vehicle value.

Input Value	Description
Pay Value	Input value to hold the Benefit in Kind Company Vehicle amount. The predefined formula feeds the value.
Vehicle Ownership	Select the value from the predefined lookup ES_BIK_VEHICLE_OWNERSHIP. This is mandatory.
Acquisition Cost	<p>Input value to hold the acquisition cost of the vehicle.</p> <p>Note: If the vehicle ownership type is Employee Buy Option, you must enter the ownership transfer value in the Acquisition Cost field.</p>
Annual Usage Cost	Input value to hold the annual usage cost rate of the vehicle.
Percentage	Input value to hold the percentage.
Override Amount	Input value to hold the value that overrides the computed value by the predefined formula.
Start Date	Input value to hold the start date.
End Date	Input value to hold the end date.

Company Loan

The taxable value of the company loan is the difference between loan rate given by the company and the available market value. Oracle HRMS provides the predefined element Company Housing to process the company loan deduction and the benefit in kind computation. The following table lists the input values for the Company Housing element.

Input Value	Description
Pay Value	Input value to hold the benefit in kind component of the company loan. The predefined company loan formula feeds the value.
Loan Type	Select the value from the predefined lookup ES_LOAN_TYPES. This is mandatory.
Purpose	Input value to hold the purpose of loan from the predefined lookup ES_LOAN_PURPOSE.
Amount Issued	Input value to hold the employee's total loan amount.
Issue Date	Input value to hold the date the loan was issued.
Loan Rate	Input value to hold the rate of interest for the loan.
Override Reference Rate	Input value to hold the market rate of interest if the rate is different from the global rate. This is optional.
Repayment Start Date	Input value to hold the start date for loan repayment.
Repayment Frequency	Select the value to hold the repayment frequency for the installment amount from the predefined look up ES_LOAN_PERIOD_TYPE. This is mandatory
Installment Amount	Input value to hold the installment amount for loan.

Input Value	Description
Repayment End Date	Input value to hold the end date for loan repayment. Note: Enter the repayment amount if you have not entered any installment amount. The predefined formula computes the installment amount based on the repayment end date.
Interest Calculation Frequency	Input value to hold the interest calculation frequency for the loan.
Override Amount	An optional value to hold the override amount for loan installment.

Other Payments in Kind

For Other Payments in Kind, Oracle HRMS accepts a declared taxable value, pending on whether the benefit one off or ongoing.

Input Value	Description
Pay Value	Input value to hold the benefit in kind component of the taxable value. The predefined formula feeds the value.
Amount	Input value to hold the benefit in kind amount. This is mandatory.
Benefit Type	Select the value from the predefined extensible lookup ES_OTHER_BENEFIT_TYPES.

Setting Up Historic Rates

Follow these steps to set up the Historic Rates function.

To set up Historic Rates:

1. You (or your system administrator) register the following element EITs with your

responsibility:

- PQP_ELEMENT_ATTRIBUTION
- PQP_RATE_TYPE

See: Setting Up Extra Information Types Against a Responsibility, *Oracle HRMS Configuring, Reporting and System Administrators Guide*

2. Create additional rate types by adding values to the lookup type PQP_RATE_TYPE.
3. Set up elements to represent the payments used in your enterprise.

Enter the following attribution:

- Classification of earnings
- Recurring processing type
- Final close on termination

Note: To use proration with historic rates, choose actual termination.

- Process each period

To use a formula calling a version of the historic rates function requiring date parameters, give each element an Input Value that has the same name as the formula input.

4. Enter extra information using the Historic Rate - Rate Types and Historic Rate - Element Attribution EITs for all elements with historic values.

See: Historic Rates Extra Information Types, *Oracle HRMS Compensation and Benefits Management Guide*

5. Define element links for all the elements.
6. If your localization has enabled the Contracts Table:
 1. Enter contract information in the pre-configured user-defined table PQP_CONTRACT_TYPES.
 2. Add one row for each new contract type you want to set up.

If you hold rates on input values and use the Period Divisor on the Contract Types table to convert the period value to an annual value (such as, Time Dimension = Periodic on the Element Attribution Information for your elements), you must create at least one contract type for each payroll frequency.

For example: You must assign employees on a weekly payroll to a separate contract type from employees on a monthly payroll. This requirement does not apply if you select the *Periodic - Payroll Frequency* time dimension, which uses the weekly or monthly payroll divisor held on the Contract Types table to convert period values to annual.

See: *Entering Contract Types, Oracle HRMS Workforce Sourcing, Deployment and Talent Management Guide*

3. Assign people to contract types by selecting contract type and start date in the Extra Details of Service window.

7. To make your rates subject to FTE, enter Working Hours and Frequency in the Assignment window.

See: *Setting Up FTE, Oracle HRMS Workforce Sourcing, Deployment and Talent Management Guide*

8. Write the payroll formula to derive the rate from the information you have set up (using the RATES_HISTORY function).

See: *Sample Rates History Formula, Oracle HRMS FastFormula User Guide*

9. In the Formula Result Rules window, associate each payroll formula with an element.

1. Create a Standard processing rule.
2. In the Formula Results region, select the Amount formula result as a direct result returning a pay value for the element.
3. Select the Message result as a message type delivering a fatal error.

Setting Up Benefit in Kind Information

Oracle HRMS supports the calculation of the monetary value of the benefits in kind and enables you to compute the taxable amount. The benefit in kind amount is displayed on the pay slip and statement of earnings.

Oracle HRMS provides elements and input values and formulas to record benefit in kind. You must do the following to set up the Benefit in Kind processing:

1. You can link the following predefined elements for Benefit in Kind to your payroll.
 - Company Housing
 - Company Vehicle

- Company Loans
- Other Payments such as Tuition and Residency

See: Defining Element Links, page 5-36

2. Extend the benefit type for the Other Payments in Kind element with values if required. See: Adding Lookup Types and Values, *Oracle HRMS Configuring, Reporting, and System Administration Guide*
3. If you want to override the Benefit in Kind element value and/or Contractual Earnings value for a Benefit in Kind element linked to the assignment for the period, then you must enter the sum of Benefit in Kind taxable value and Contractual Earnings value in the Tax window for the application to calculate the values correctly.

Balances

Payroll Balances

Balances show the positive or negative accumulation of particular values over periods of time. They are fed either by the direct run results (that is, Pay Values) of elements processed in the payroll run, or by input values. For example, in North American installations, the input value Hours of the element Time Entry Wages feeds the balance Regular Hours Worked.

Balance Dimensions and Levels

Balances exist for various time *dimensions*, such as current run, period to date, month, quarter to date, and year to date.

Balances also exist at different *levels*, such as assignment level or person level. Balances for individual employee assignments are at the assignment level (in North America, they can be at the assignment level within a GRE). If your enterprise permits employees to hold more than one assignment at the same time, you can hold balances at the person level. For example, a person level Gross Earnings balance is the sum of an employee's assignment level Gross Earnings balances.

Choosing Elements To Feed a Balance

You can select elements to feed a balance in three ways:

- Select a primary classification. The run results of all elements in the classification feed the balance. However, you must have an input value of Pay Value if you want to create a feed between an element and a balance.
- Select a secondary classification. You choose which elements from a primary classification (such as Earnings) are to feed the balance by giving these elements a secondary classification. Again it is the run results of the elements that feed the balance.

Note: Secondary classifications are not used in the North American versions of Oracle Payroll at this time.

- Select an individual element. You can select either the run result or an input value to feed the balance. The input value must have the same unit of measure (such as hours or number) as the balance.

You can choose any number of classifications or any number of elements to feed a balance. However you cannot use a mixture of classifications and individual elements

to feed a balance. When you select an element or classification as a balance feed, you specify whether the run results (or input values) should add to or subtract from the balance.

Startup and User Defined Balances

The balances and balance feeds for the elements supplied with Oracle Payroll are present in the system when you receive it. For North American users, when you initiate earnings types, deductions and other items that process in the payroll run, the system generates the appropriate balances and balance feeds together with the necessary elements.

You can define any additional balances your enterprise requires. For example, you may require a Pensionable Earnings balance for a pension plan your enterprise offers employees.

Legislative Balance Initialization

This topic supplements the technical essay entitled *Balances in Oracle Payroll, Oracle HRMS Implementation Guide*. Specifically, it covers the predefined balance initialization elements with input values, balances that require initialization, and supported dimensions, that Oracle HRMS uses in the balance initialization procedure.

The following table lists the predefined balance initialization elements with input values and balances:

Element	Input	Balance Initialized
Setup Pension Contribution	Pensionable Earnings	Pensionable Earnings
Setup Pension Contribution	Employee Pension Contribution	Employee Pension Contribution
Setup Pension Contribution	Employer Pension Contribution	Employer Pension Contribution
Setup Regular Tax	Taxable Earnings	Subject to Tax
Setup Regular Tax	Regular Tax Withheld	Regular Tax Withheld
Setup Non IA and Non ID Social Security	Non IA and Non ID SS Earnings	Subject to Non IA and Non ID Social Security
Setup Non IA and Non ID Social Security	Temporary Disability Base	Non IA/ID Temporary Disability Contribution Base

Element	Input	Balance Initialized
Setup Non IA and Non ID Social Security	PU Employee Base	Non IA/ID Partial Unemployment Employee Contribution Base
Setup Non IA and Non ID Social Security	PU INEM Contribution Base	Non IA/ID Partial Unemployment INEM Contribution Base
Setup Non IA and Non ID Social Security	Maternity Benefit Base	Non IA/ID Maternity Benefit Contribution Base
Setup Non IA and Non ID Social Security	Active Without Pay Base	Non IA/ID Active Without Pay Contribution Base
Setup Non IA and Non ID Social Security	Total Contribution Base	Non IA/ID Total Contribution Base
Setup Non IA and Non ID Social Security	Employee Contribution	Non IA/ID Employees Contribution Base
Setup Non IA and Non ID Social Security	Employer Contribution	Non IA/ID Employers Contribution Base
Setup IA and ID Social Security	IA and ID SS Earnings	Subject to IA/ID Social Security
Setup IA and ID Social Security	Temporary Disability Base	IA /ID Temporary Disability Contribution Base
Setup IA and ID Social Security	PU Employee Base	IA /ID Partial Unemployment Employee Contribution Base
Setup IA and ID Social Security	PU INEM Base	IA /ID Partial Unemployment INEM Contribution Base
Setup IA and ID Social Security	Maternity Benefit Base	IA/ID Maternity Benefit Contribution Base
Setup IA and ID Social Security	Active Without Pay Base	IA/ID Active Without Pay Contribution Base

Element	Input	Balance Initialized
Setup IA and ID Social Security	Total Contribution Base	IA/ID Total Contribution Base
Setup IA and ID Social Security	Temporary Disability Amount	IA/ID Temporary Disability Contribution
Setup IA and ID Social Security	DDS Amount	IA/ID Death, Permanent Disability, Spouse Survival Contribution
Setup Wage Maintenance Fund Social Security	Total Contribution Base	Wage Maintenance Fund Total Contribution Base
Setup Wage Maintenance Fund Social Security	Employer Contribution Amount	Wage Maintenance Fund Employers Contribution
Setup Occupational Training Social Security	Total Contribution Base	Occupational Training Total Contribution Base
Setup Occupational Training Social Security	Employee Contribution Amount	Occupational Training Employees Contribution
Setup Occupational Training Social Security	Employer Contribution Amount	Occupational Training Employers Contribution
Setup Unemployment Social Security	Total Contribution Base	Unemployment Total Contribution Base
Setup Unemployment Social Security	Employee Contribution Amount	Unemployment Employees Contribution
Setup Unemployment Social Security	Employer Contribution Amount	Unemployment Employers Contribution
Setup Overtime Social Security	Structural SS Earnings	Structural Overtime Social Security
Setup Overtime Social Security	Employee Contribution Amount	Structural Overtime Employees Contribution
Setup Overtime Social Security	Employer Contribution Amount	Structural Overtime Employers Contribution

Element	Input	Balance Initialized
Setup Overtime Social Security	Non-structural SS Earnings	Non-structural Overtime Social Security
Setup Social Security Time Unit	Social Security Hours	Social Security Hours
Setup Social Security Time Unit	Social Security Days	Social Security Days
Setup Social Security Rebate	Employee SS Rebates with Deduction Key Context	Social Security Employee Rebates
Setup Social Security Rebate	Employer SS Rebates	Social Security Employer Rebates
Setup Social Security Rebate	Contribution Increment	Contribution Increment
Setup Partial Exemption	Non IA and Non ID SS Earnings	Subject To Non-IA/ID Social Security Partial Exemption
Setup Partial Exemption	IA and ID SS Earnings	Subject To IA/ID Social Security Partial Exemption
Setup Partial Exemption	Taxable Earnings	Subject To Tax Partial Exemption
Setup Partial Exemption	Meal Allowance Paid	Meal Allowance Paid
Setup Partial Exemption	Meal Allowance Exempt	Meal Allowance Exempt
Setup Partial Exemption	Meal Allowance SSable	Meal Allowance SSable
Setup Partial Exemption	Meal Allowance Taxable	Meal Allowance Taxable
Setup Partial Exemption	Mileage Allowance Paid	Mileage Allowance Paid
Setup Partial Exemption	Mileage Allowance Exempt	Mileage Allowance Exempt
Setup Partial Exemption	Mileage Allowance SSable	Mileage Allowance SSable
Setup Partial Exemption	Mileage Allowance Taxable	Mileage Allowance Taxable

Element	Input	Balance Initialized
Setup Partial Exemption	Transport Allowance Paid	Transportation Allowance Paid
Setup Partial Exemption	Transport Allowance Exempt	Transportation Allowance Exempt
Setup Partial Exemption	Transport Allowance SSable	Transportation Allowance SSable
Setup Partial Exemption	Transport Allowance Taxable	Transportation Allowance Taxable
Setup Benefits in Kind	Benefits in Kind Taxable Pay	Benefits in Kind Taxable Pay
Setup Benefits in Kind	Benefits in Kind Tax	Benefits in Kind Tax
Setup Sickness Benefit	Withheld Days	Sickness Benefit Withheld Days
Setup Sickness Benefit	Days at Lower Rate	Sickness Benefit Days at Lower Rate
Setup Sickness Benefit	Days at Higher Rate	Sickness Benefit Days at Higher Rate
Setup Sickness Benefit	Total Days	Sickness Benefit Total Days
Setup Sickness Benefit	Benefit Amount	Sickness Benefit Amount
Setup Sickness Benefit	Uplift Amount	Sickness Benefit Uplift Amount
Setup Sickness Benefit	Adjustment Amount	Sickness Earnings Adjustment Amount
Setup Partial Unemployment Benefit	Days at Lower Rate	Partial Unemployment Benefit Days at Lower Rate
Setup Partial Unemployment Benefit	Days at Higher Rate	Partial Unemployment Benefit Days at Higher Rate

Element	Input	Balance Initialized
Setup Partial Unemployment Benefit	Total Days	Partial Unemployment Benefit Total Days
Setup Partial Unemployment Benefit	Benefit Amount	Partial Unemployment Benefit Amount
Setup Partial Unemployment Benefit	Uplift Amount	Partial Unemployment Benefit Uplift Amount
Setup Partial Unemployment Benefit	Earnings Adjustment Amount	Partial Unemployment Earnings Adjustment Amount
Setup Maternity Benefit	Total Days	Maternity Benefit Total Days
Setup Maternity Benefit	Benefit Amount	Maternity Benefit Amount
Setup Maternity Benefit	Uplift Amount	Maternity Benefit Uplift Amount
Setup Maternity Benefit	Earnings Adjustment Amount	Maternity Earnings Adjustment Amount
Setup Adoption Benefit	Total Days	Adoption Benefit Total Days
Setup Adoption Benefit	Benefit Amount	Adoption Benefit Amount
Setup Adoption Benefit	Uplift Amount	Adoption Benefit Uplift Amount
Setup Adoption Benefit	Earnings Adjustment Amount	Adoption Earnings Adjustment Amount
Setup Pregnancy-at-Risk Benefit	Total Days	Pregnancy-at-Risk Benefit Total Days
Setup Pregnancy-at-Risk Benefit	Benefit Amount	Pregnancy-at-Risk Benefit Amount
Setup Pregnancy-at-Risk Benefit	Uplift Amount	Pregnancy-at-Risk Benefit Uplift Amount

Element	Input	Balance Initialized
Setup Pregnancy-at-Risk Benefit	Earnings Adjustment Amount	Pregnancy-at-Risk Earnings Adjustment Amount
Setup Part-time Maternity Benefit	Total Days	Part-time Maternity Benefit Total Days
Setup Part-time Maternity Benefit	Benefit Amount	Part-time Maternity Benefit Amount
Setup Part-time Maternity Benefit	Uplift Amount	Part-time Maternity Benefit Uplift Amount
Setup Part-time Maternity Benefit	Earnings Adjustment Amount	Part-time Maternity Earnings Adjustment Amount
Setup Court Order	Attachable Earnings	Attachable Earnings
Setup Court Order	Child Support Deduction	Child Support Deduction
Setup Court Order	Spouse Alimony Deduction	Spouse Alimony Deduction
Setup Court Order	Other Court Order Deductions	Other Court Order Deductions
Setup Pay	Gross Pay	Gross Pay
Setup Pay	Earnings Adjustment Base	Earnings Adjustment Base
Setup Pay	Extra Pay Base	Extra Pay Base
Setup Pay	Extra Pay Accrual	Extra Pay Accrual
Setup Pay	Benefit Uplift Base	Benefit Uplift Base

Balance Dimensions

The following dimensions are predefined for Spain. You can create additional dimensions at the assignment level, if you require them.

Payments Dimension

This dimension which aggregates results from payroll runs that have been picked up in a particular pre-payments run.

_PAYMENTS	for a set of payroll runs.
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Assignment Level Balance Dimensions

These statutory dimensions are usually associated with predefined balances for summing balance feeds for single assignments and are held for reporting purposes.

_ASG_TU_ITD	since the start of the month to date for the assignment within the tax unit (Legal Employer).
_ASG_TU_PTD	since the start of the processing period to date for the assignment within the tax unit (Legal Employer).
_ASG_TU_MONTH	since the start of the calendar month to date for the assignment within the tax unit (Legal Employer).
_ASG_TU_QTD	since the start of the calendar quarter to date for the assignment within the tax unit (Legal Employer).
_ASG_TU_YTD	since the start of the calendar year to date for the assignment within the tax unit (Legal Employer).
_ASG_TU_TQTD	since the start of the tax quarter to date for the assignment within the tax unit (Legal Employer).
_ASG_TU_TYTD	since the start of the tax year to date for the assignment within the tax unit (Legal Employer).

_ASG_TU_FQTD	since the start of the fiscal quarter to date for the assignment within the tax unit (Legal Employer).
_ASG_TU_FYTD	since the start of the fiscal year to date for the assignment within the tax unit (Legal Employer).
_ASG_PKEY_YTD	since the start of the year to date for the assignment with a Payment Key.
_ASG_PKEY_PTD	since the start of the processing period to date for the assignment with a Payment Key.
_ASG_PKEY_QTD	since the start of the quarter to date for the assignment with a Payment Key.
_ASG_DKEY_YTD	since the start of the year to date for the assignment with a Deduction Key.
_ASG_DKEY_PTD	since the start of the processing period to date for the assignment with a Deduction Key.
_ASG_DKEY_QTD	since the start of the quarter to date for the assignment with a Deduction Key.
_ASG_ECODE_YTD	since the start of the year to date for the assignment with an Epigraph Code.
_ASG_ECODE_PTD	since the start of the processing period to date for the assignment with an Epigraph Code.
_ASG_ECODE_QTD	since the start of the quarter to date for the assignment with an Epigraph Code.
_ASG_RUN	during one payroll run for an assignment.
_ASG_ITD	since the start of assignment .
_ASG_PTD	for payroll processing period for an assignment.
_ASG_MONTH	since the start of the assignment calendar month to date.

_ASG_QTD	since the start of the assignment calendar quarter to date.
_ASG_YTD	since the start of payroll processing year for an assignment.
_ASG_FQTD	since the start of the assignment fiscal quarter to date.
_ASG_FYTD	since the start of the assignment fiscal year to date.
_ASG_TQTD	since the start of the assignment tax quarter to date.
_ASG_TYTD	since the start of the assignment tax year to date.

Person Level Balance Dimensions

These statutory dimensions are usually associated with predefined balances for summing balance feeds for an employee's multiple assignments.

_PER_TU_ITD	since the start of the month to date for a person within the tax unit (Legal Employer).
_PER_TU_PTD	since the start of the processing period to date for a person within the tax unit (Legal Employer).
_PER_TU_MONTH	since the start of the month to date for the person within the tax unit (Legal Employer).
_PER_TU_QTD	since the start of the calendar quarter to date for the person within the tax unit (Legal Employer).
_PER_TU_YTD	since the start of the calendar year to date for the person within the tax unit (Legal Employer).

_PER_TU_TQTD	since the start of the statutory quarter to date for the assignment within the tax unit (Legal Employer).
_PER_TU_TYTD	since the start of the statutory year to date within the tax unit (Legal Employer).
_PER_TU_FQTD	since the start of the fiscal quarter to date for the person within the tax unit (Legal Employer).
_PER_TU_FYTD	since the start of the fiscal year to date for the person within the tax unit (Legal Employer).
_PER_ITD	since the start for a person.
_PER_PTD	since the start of the person processing period to date.
_PER_MONTH	since the start of the person calendar month to date.
_PER_QTD	since the start of the person calendar quarter to date.
_PER_YTD	since the start of the person calendar year to date.
_PER_FQTD	since the start of the person fiscal quarter to date.
_PER_FYTD	since the start of the person fiscal year to date.
_PER_RUN	during one payroll run for a person.
_PER_TQTD	since the start of the person tax quarter to date.
_PER_TYTD	since the start of the person tax year to date.

Uploading Initial Balances

Setting initial values for balances is an essential task for new customers migrating from

other systems.

Such balances typically consist of both legislative and customer defined balances. For example, a legislative balance could be the amount of tax deducted for each employee during the tax year. A customer defined balance could be the number of vacation days taken by each employee during the calendar year.

The correct initial setting of these balances is essential for subsequent processing to be valid.

The Initial Balance Upload process allows the specification and loading of initial balances into the system. System implementers use this process once only, on migration. After that, balance maintenance is carried out automatically by Oracle Payroll.

To load initial balances into Oracle Payroll:

1. Define an element and input value for the initial balance feed. Select the classification Balance Initialization for this element.

2. Set up initial balance values in the tables

PAY_BALANCE_BATCH_HEADERS

PAY_BALANCE_BATCH_LINES

For more information, see the technical essay: Balances in Oracle Payroll, *Oracle HRMS Implementation Guide*.

3. In the Submit Requests window, select Initial Balance Upload.

4. Run one or more of the four modes as appropriate:

Validate: checks the details in the batch to be uploaded

Transfer: creates the balances in the batch

Undo transfer: reverses the effects of a transfer

Purge: removes the batch from the batch tables

5. Select the batch to be processed.

6. Choose the Submit button.

7. Continue to run the process for as many modes as you require.

Court Orders

Court Orders Overview

Oracle HRMS provides predefined elements to process the various court order deductions to meet the statutory requirements. These include:

- Child Support
- Spouse Alimony
- Other Court Order Deductions such as Tax Debt and Social Security Debt

Child Support

The following table lists the input values for the predefined element Child Support.

Input Value	Description
Pay Value	Input value to hold the deduction amount calculated using the predefined formula.
Amount	Input value to hold the amount to be deducted.
Period Type	Select the value from the lookup ES_COURT_ORDER_PERIOD_TYPES.
Start Date	Input value to hold the date from when the court order is applicable.
End Date	Input value to hold the date till when the court order is applicable.
Reference	Input value to hold the court order reference.
Issuing Court	Input value to hold the court details.
Override Amount	Input value to hold the override value for the calculated value.

Spouse Alimony

The following table lists the input values for the predefined element Spouse Alimony:

Input Value	Description
Pay Value	Input value to hold the deduction amount calculated using the predefined formula.
Amount	Input value to hold the amount to be deducted.
Period Type	Select from the predefined lookup ES_COURT_ORDER_PERIOD_TYPES.
Start Date	Input value to hold the date from when the court order is applicable.
End Date	Input value to hold the date till when the court order is applicable., if this is set then the deduction will be made up until this date. Otherwise, if this is not set then the deduction continues indefinitely
Reference	Input value to hold the court order reference.
Issuing Court	Input value to hold the court details.
Override Amount	Input value to hold the value that overrides the calculated value.

Other Court Order Deductions

The following table lists the input values for the predefined element Other Court Order Deductions:

Input Value	Description
Pay Value	Input value to hold the deduction amount calculated using the predefined formula.
Court Order Type	Select from the user extensible lookup ES_OTHER_COURT_ORDER_TYPES.
Amount	Input value to hold the amount to be deducted.

Input Value	Description
Period Type	Select the value from the predefined lookup ES_COURT_ORDER_PERIOD_TYPES.
Start Date	Input value to hold the date from when the court order is applicable.
End Date	Input value to hold the date till when the court order is applicable. End date of court order, if this is set then the deduction will be made up until this date. Otherwise, if this is not set then the deduction continues indefinitely
Reference	Input value to hold the court order reference.
Issuing Court	Input value to hold the court details.
Override Amount	Input value to hold the value that overrides the computed pay value.

Setting Up Court Orders

Oracle HRMS provides predefined elements and formulas to process court order deductions.

To set up court orders:

1. Link the following elements to your payroll.
 - Spouse Alimony
 - Child Support
 - Other Court Order Deductions

See: Defining Element Links, page 5-36

6

FastFormula

Benefit Uplift

Benefit Uplift Formulas for Spain

Oracle HRMS enables you to override the benefit uplift amount for an employee set at the legal employer level while recording the employee's absence. You can use Oracle FastFormula to create the Benefit Uplift Daily Rate and the Benefit Uplift Duration Formula to calculate the amount based on employee's gross pay. See:Oracle FastFormula, *Oracle HRMS FastFormula Guide*

Benefit Uplift Daily Rate Formula

Use the Benefit Uplift Daily Rate formula to calculate the benefit uplift amount for an employee depending on the daily rate of the gross pay. This formula returns a percentage rate of the gross pay applicable to the absence and the number of days paid at that percentage. For example, you can have an employer paying 100% of Gross Pay for the first 90 days of sickness and at 60% for 270 days. You attach this formula at the legal employer level to enable the application to calculate the benefit amount.

The formula must return the following value:

Return GROSS_PAY_PER_DAY

Benefit Uplift Duration Formula

Use the Benefit Duration formula to calculate the benefit uplift amount for an employee depending on the daily rate of gross pay. The formula returns the number of days paid at the percentage. This formula considers the absence start and end dates for an employee.

The formula must return the following values:

Return RATE1, VALUE1, RATE2, VALUE2, RATE3, VALUE3, RATE4, VALUE4, RATE5, VALUE5, RATE6, VALUE6, RATE7, VALUE7, RATE8, VALUE8, RATE9, VALUE9, RATE10, VALUE10

Additional Implementation Steps

Additional Implementation Steps for Spain

If you are implementing Oracle HRMS for Spain you must also complete the following additional implementation steps.

Please see the implementation section in *Implementing Oracle HRMS* for all other implementation steps that are not specific to Spain.

Additional Implementation Steps

Step 1: Set Up Spanish Organizations

You must set up your organizations in a specific order to meet your business and reporting requirements.

See: Setting Up Spanish Organizations, page 1-23

Step 2: Set Up Contract Key Relationship

You must set up the ES_CONTRACT_KEY_RELATION table to map the relationship between the contract key, status, type, subtype, and start reason.

See: Setting Up User Tables, Columns and Rows, *Oracle HRMS Configuring, Reporting, and System Administration Guide* and Setting Up the Contract Key Relation User Table, page 4-32

Step 3: Set Up Termination Reasons

You must link your termination reason to the social security reasons for terminating employees.

See: Linking Termination Reasons to Social Security Reasons, page 4-39

Step 4: Set Up Professional Category and Contribution Group *Required Step*

You must link the professional category to contribution groups to determine the monthly minimum and maximum social security contributions for employees.

See: Linking Professional Categories to Contribution Group, page 4-29

Step 5: Set Up Shift Patterns

Set up work patterns to record shift details for your employees. See: Setting Up Shift and Shift Patterns, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

Step 6: Set Up Statutory Reports

Before you can run the RED System : New Hires, Leavers, and Contract Changes Report and the Company Certificate Report, you must set up these reports to run the report generator and then run the data lock process.

See: Setting Up Statutory Reports, page 4-57

Step 7: Set Up Tax and Social Security Information

You must define the following element links for recording the tax information accurately.

- Tax Details
- Tax Withholding Rates Overrides

You must define the following element links for recording the social security information accurately.

- Social Security Details
- Multiple Employment Details

You define the links in the Element Links window

1. Select Tax Details in the Element Name field
2. Select an effective date that is prior to the system date, for example, 01 Jan 2001.
3. Save your work.
4. Repeat the above steps for the Tax Withholding Rates Overrides, Social Security Details, Multiple Employment Details.

Step 8: Set Up Absence Information *Required Step*

You must set up the absence information to report the absences and the social security deductions accurately on the social security contribution reports (TC-1 and TC-2).

See: Setting Up Absences, page 5-50

Step 9: Set Up Temporary Disability Absence Type

You must set up the Temporary Disability absence type to record the sickness leave.
See: Setting Up Temporary Disability Absences, page 5-51

Step 10: Set Up Historic Rates *Required Step*

You must set up Historic Rates if you want the option of calculating payments from the rates applicable when the work was done, rather than the later rates in effect at the time of calculation.

The Tax Withholding Rate process uses Historic Rates to calculate the Contractual Earnings. You must create a Rate Type called Contractual Earnings in the lookup, and attach this rate type to all elements that should be included in the employee's contractual earnings.

See: Setting Up Historic Rates, page 5-73

Step 11: Set Up Net-to-Gross Information *Optional Step*

You need to set up net-to-gross information to process net-to-gross calculations.

See: Setting Up Net-to-Gross Calculation, *Oracle HRMS Compensation and Benefits Management Guide*

Step 12: Set Up Set Up Events for Proration and RetroPay *Optional Step*

You need to set up the proration and RetroPay information to make pro-rata payments and backdated payments

See: Setting Up Proration or Retro-Notification, *Oracle HRMS Compensation and Benefits Management Guide*

Step 13: Set Up Benefits in Kind Information *Optional Step*

You need to set up benefits in kind information to capture and calculate the applicable benefit information.

See: Setting Up Benefits in Kind, page 5-75

Step 14: Set Up Court Order Information *Optional Step*

To calculate court order deductions you need to set up the court order information.

See: Setting Up Court Orders, page 5-92

Step 15: Set Up Statutory Information *Required Step*

You must set up your statutory information to process the tax and social security deductions.

See: Setting Up Statutory Information, page 4-57

Step 16: Set Up Partially Exempt Earnings Information *Optional Step*

To process the partially exempt earnings, you must set up the partially exempt element information.

See: Setting Up Partially Exempt Earnings, *Oracle HRMS Payroll Processing Management Guide*

Step 17: Set Up Tax Withholding Rate Information *Optional Step*

To compute the tax withholding rate you must set up the personal and economic information.

See: Setting Up Tax Withholding Information, *Oracle HRMS Payroll Processing Management Guide*

Step 18: Set Up Statement of Earnings *Optional Step*

You need to set up the online statement of earnings before you can see the values correctly.

See: Setting Up The Statement of Earnings, *Oracle HRMS Payroll Processing Management Guide*

Step 19: Set Up RetroPay *Optional Step*

You need to set up the RetroPay information to process backdated payments and corrections.

See: Setting Up Retro-Notification and RetroPay, *Oracle HRMS Payroll Processing Management Guide*

Step 20: Set Up Advance Pay *Optional Step*

You must set up the advance pay information to enable users to process the advance payments to employees.

See: Setting Up Advance Pay for Individual Assignments, *Oracle HRMS Payroll Processing Management Guide*

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