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- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
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- 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).

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Preface

Intended Audience

Welcome to Release 12.1 of the *Oracle HRMS for Japan 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

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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 *i*Recruitment 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.

Organization Structures

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.
- **National Pension Scheme:** Records the National Pension office information. You can enter the corporate registration account number and the corporate branch

account number in the NPS Account Set Up 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 1-19

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

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

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 for Enterprise and Workforce Management Guide*
 - Budget Value Defaults, see: Business Groups: Entering Budget Value Defaults, *Oracle HRMS for Enterprise and Workforce Management Guide*
 - Work Day Information, see: Business Groups and HR Organizations: Work Day Defaults, *Oracle HRMS for Enterprise and Workforce Management Guide*
 - Benefits Defaults, see: Business Groups: Defining a Default Monthly Payroll, *Oracle HRMS for Enterprise and Workforce Management Guide*
 - PTO Balance Type, see Business Groups: Selecting a PTO Balance Type, *Oracle HRMS for Enterprise and Workforce Management Guide*
 - Recruitment Information, see: Business Groups: Entering Recruitment Information, *Oracle HRMS for Enterprise and Workforce Management Guide*
 - Payslip Information, see: Entering Payslip Information, *Oracle HRMS for Enterprise and Workforce Management Guide*
 - Self Service Preference Information, see: Entering Self-Service Preference Information, *Oracle HRMS for Enterprise and Workforce Management Guide*
 - JP Payroll Related Info: see Entering JP Payroll Related Info, page 1-23
 - Personal Number Entry Period, see: Entering Personal Number Entry Period, page 1-24
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 for Enterprise and Workforce Management Guide*
 - Costing Information, see: *HR Organizations: Entering Costing Information, Oracle HRMS for Enterprise and Workforce Management Guide*
 - Parent Organization, see: *HR Organizations: Entering Parent Organizations, Oracle HRMS for Enterprise and Workforce Management Guide*
 - Work Day Information, see: *Business Groups and HR Organizations: Entering Work Day Defaults;, Oracle HRMS for Enterprise and Workforce Management Guide*
 - Payslip Information, see *Entering Payslip Information, Oracle HRMS for Enterprise and Workforce Management Guide*
 - Self Service Preference Information, see *Entering Self-Service Preference Information, Oracle HRMS for 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 for Enterprise and Workforce Management Guide*

- Constituency information, see: Entering Constituency Information for a Representative Body, *Oracle HRMS for 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 for Enterprise and Workforce Management Guide*
 - Organization, see Entering Organization Information for Constituencies, *Oracle HRMS for Enterprise and Workforce Management Guide*
 - Organization Hierarchy, see Entering Organization Hierarchy information for Constituencies, *Oracle HRMS for Enterprise and Workforce Management Guide*
 - Grade, see Entering Grade information for Constituencies, *Oracle HRMS for Enterprise and Workforce Management Guide*
 - Bargaining Unit, see Entering Bargaining Unit information for Constituencies, *Oracle HRMS for Enterprise and Workforce Management Guide*
 - Job, see Entering Job information for Constituencies, *Oracle HRMS for Enterprise and Workforce Management Guide*
 - Collective Agreement Grade, see Entering Collective Agreement Grade information for Constituencies, *Oracle HRMS for 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 for 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 for Enterprise and Workforce Management Guide*
 - Reporting Information, see: Entering Reporting Information for an HR Organization or a Company Cost Center., *Oracle HRMS for 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 for Enterprise and Workforce Management Guide*.
4. Repeat these steps to enter further information.

To enter Extra Names 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 the Org Extra Names: see Entering Org Extra Names, page 1-25.
4. Repeat these steps to enter further information.

To enter Health Insurance Location:

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 the HI Loc Info. See Entering HI Loc Information, page 1-25.
4. Repeat these steps to enter further information.

To enter the Labor Insurance 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 the Labor Insurance Employer. See Entering Labor Insurance Employer Information, page 1-26.
4. Repeat these steps to enter further information.

To enter Organization Name Change History 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 the Organization Name Change History. See Entering Organization Name Change History, page 1-27.
4. Repeat these steps to enter further information.

To enter SWOT 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 the following:
 - Select Accident Ins Info. See Entering Accident Ins Info
 - Select Li Gip Info, see: Entering Li Gip Info, page 1-30
 - Select Li Linc Info, see: Entering Life Insurance Network Center (LINC) Information, page 1-31
 - Select Local Tax E-File, see: Entering Local Tax E-File Information, page 1-33
 - Select PRS Info, see: Entering PRS (Payment Report Summary) Information, page 1-34
 - Select Swot Info, see: Entering SWOT (Special Withholding Obligation Taxpayer) Information, page 1-28
 - Select Tax Withheld Rep Info, see: Entering Tax Withheld Rep Info, page 1-34
 - Select Wb and WI Item Info, see: Entering Wb and WI (Withholding Book and Wage Ledger) Item, page 1-35
 - Select Wb and WI Rep Info, see: Entering Wb and WI Rep (Withholding Book and Wage Ledger Report) Information, page 1-36
4. Repeat these steps to enter further information.

To enter Welfare Pension Fund Location 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 WP Fund Loc Info, see: Entering Welfare Pension Fund Location, page 1-36.
4. Repeat these steps to enter further information.

To enter Welfare Pension Location 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 WP Ins Loc Info, see: Entering Welfare Pension Location Information, page 1-37
4. Repeat these steps to enter further information

Entering the JP Payroll Related Information

If you want to enter reference type to use for Health Insurance Dependent or Income Tax Dependent or want to enter the formula for the application to use for calculating commuting allowance (Traffic Tool) or any user defined YEA formula for payroll and YEA processing, you can record it using the JP Payroll Related Information window. The application uses the information while payroll processing.

To enter JP payroll related information:

1. Query the Business Group in the Organization window, if it does not already appear there. In the Organization Classifications region, select JP Payroll Related Info, click Others, and select JP Payroll Related Info.
2. Click in the field of the Additional Organization Information window to open the JP Payroll Related Info window.
3. Select the health insurance dependent reference type. You can select whether you want to use the information if the employee has dependent or not in the Notifications of Qualification and Disqualification for health and welfare pension insurances from the values recorded in the Contact Extra information type or the values specified at the element entry level (Com_ Si_ Information). If you leave this blank, then the application uses Element Entry.
4. Select the income tax dependent reference type. This defines which dependent information is used in payroll calculations (salary, bonus, special bonus, YEA and Re-YEA) and reports (Notification of dependents and withholding tax report). Select any one of the options :
 - [Report] Extra Contact Info [Payroll] Extra Contact Info Payroll Calculations: Extra Contact Info will be used, but if Element Entry: Com_ Basic_ Dependent Exemption etc is updated then it has a priority Notification of dependents: Extra Contact Info will be used Withholding tax report: For the assignments not targeted in YEA calculations, Extra Contact Info will be used, but if Element Entry: Com_ Basic_ Dependent Exemption etc is updated then it has a priority

- [Report] Extra Contact Info [Payroll] element entry Payroll Calculations: Element Entry: Com_Basic_Dependent Exemption etc will be used Notification of dependents: Extra Contact Info will be used Withholding tax report: For the assignments not targeted in YEA calculations, Element Entry: Com_Basic_Dependent Exemption is used.
- [Report] dependent flag ([Payroll]) element entry Payroll Calculations: Element Entry: Com_Basic_Dependent Exemption etc will be used Notification of dependents: Element Entry: Com_Basic_Dependent Exemption etc will be used Withholding tax report: For the assignments not targeted in YEA calculations, Element Entry: Com_Basic_Dependent Exemption is used.

Note: This information can be set in the Payroll as well. If you set at both Payroll and Business Group, the income tax reference type of dependent relatives, applies to those set for Payroll get priority.

5. If a specific formula is available for your organization. Select the formula to use for calculating the commuting amount by traffic toll in the commuting allowance information function. The application uses this formula when you click Calc button on Traffic tools tab of Commute Information.
6. If a specific formula to be called within the YEA process by balance adjustment is available for your organization for calculating YEA adjustment, select the formula. The formula defined here is shown as a default in User Defined Formula on the parameter for the concurrent program: JP Year End Adjustment.

Note: This information can be set in the Payroll as well. If you set both Payroll and business group, applies to those set for Payroll is given priority.

7. Save your work.

Entering Personal Number Entry Period

To enter or update the personal number details, you must enter the entry start and end date of entry period at the business group level.

To enter personal number entry period:

1. In the Organization window, query the Personal Number Entry Period if it does not already appear there. In the Organization Classifications region, select Business Group, click Others, and select Personal Number Entry Period.

2. Enter the year.
3. Enter the entry start date from which employees belonging to a business group can start entering the personal number information
4. Enter the end date before which employees must have entered and submitted the personal number information
5. Enter the closing date before which employees must have corrected their personal number information. This is an optional field and can be entered only if HR Administrator enables employees to correct their personal number after entry end date.
6. Save your work.

Entering Extra Names

If you want to manage more than one name or abbreviations for your organization, use the Extra Names window to register these names. You can record up to five names for an organization.

To enter extra names:

1. In the Organization window, query the Extra Names if it does not already appear there. In the Organization Classifications region, select Extra Names, click Others, and select Extra Names.
2. Click the Extra Names field.
3. Enter upto five short names or abbreviations for an organization.
4. Save your work.

Entering HI Location Information

Use this window to record the information about the organization that collects the health insurance premiums.

This information is required for calculating health insurance premiums, generating legislative reports for insured employees.

To enter HI Location information:

1. In the Organization window, query the Health Insurance Location classification if it does not already appear there. In the Organization Classifications region, select Health Insurance Location, click Others, and select HI Loc Info.

2. Click the HI Loc Info field of the Additional Organization Information window to open the HI Loc Info window.
3. Enter the prefecture code where the organization is located.
4. Enter the corporate number assigned to your organization.
5. Enter the numbers Identifier 1 and 2 of the business operator in single-byte number and Kana.
6. Enter the location number, postal code, and address 1-3 of the business operator.
7. Specify the name of the business operator.
8. Enter the full name and the telephone number of representative.
9. Specify the name of the reporting social insurance office.
10. Select Yes if this organization is associated with the Japan Health Insurance Association.
11. Enter the Identifier 1 of the business operator in single-byte number. This is used for the e-file reporting.
12. Select the insurance rate to be used in the calculation purposes. The values of Hi Premium Rate column in T_ Hi Wp insurance Premium Rate Com_table are in LOV.
13. Save your work.

Entering Labor Insurance Employer Information

Use this window to record the information about the organization that collects the labor insurance.

This information is required for calculating employment insurance premiums, generating legislative reports for insured employees and the Finalized Insurance Premium Santei Base Wage Aggregation Table.

To enter Labor Insurance Employer information:

1. In the Organization window, query the Labor Insurance Employer classification if it does not already appear there. In the Organization Classifications region, select Labor Insurance Employer, click Others, and select LI Employer Info.
2. Click the LI Employer Info field of the Additional Organization Information window to open the LI Employer Info window.

3. Enter the corporate number assigned to your organization.
4. Enter the location number and postal code of your organization. This information is required for the CSV file for Employment Insurance.
5. Enter the business address 1-3 of the labor insurance office.
6. Specify place from where the labor insurance office is operating. Enter the location name.
7. Enter the employer details such as postal code, address 1-3, names, and telephone number.
8. Enter the public employment agency name. This information is required for the CSV file for Employment Insurance.
9. Select which business classification the employer belongs such as business general business or agriculture, construction. This will affect the calculation of employment insurance premiums. If you leave this item blank, then it is assumed as general business.
10. Select the global value the application must use to calculate the Employment Insurance Premium Rounding Rule.
11. Select whether to use the date earned or date paid values to generate the Separation Certificate.
12. Select whether to generate the Separation Certificate for 6 months or a 12 months period.
13. Save your work.

Entering the Organization Name Change History

If your organization has previously changed names, use this window to record the previous name. You require this information for reporting and taxation purposes.

To enter organization name change history details:

1. In the Organization window, query the Organization Name Change History if it does not already appear there. In the Organization Classifications region, select Organization Name Change History, click Others, and select Org Name Chg Hist.
2. Click the Org Name Chg Hist field.
3. Enter the effective start date from when the organization to use this name.

4. Enter the end date until when the organization should hold this name.
5. Enter the reason why this name was changed. This is for information purposes only and not used for any reporting.
6. Save your work.

Entering SWOT (Special Withholding Obligation Taxpayer) Information

Use this classification to define the organization as a Withholding Agent that withholds the income tax from the payment and pays it to the national tax office. A Withholding Agent must also be a Special Tax Collection Agent, that withholds the local tax (LTAX) from the payment and pays it to the local governments.

This information is required for tax payments and legislative reports to be submitted to the authorities such as the withholding tax report and Total Income Tax Withheld.

To enter SWOT information:

1. In the Organization window, query the SWOT classification if it does not already appear there. In the Organization Classifications region, select SWOT, click Others, and select Swot Info.
2. Click the Swot Info field of the Additional Organization Information window to open the Swot Info window.
3. Enter the corporate number assigned to your organization.
4. Enter the name of the organization that pays salary to employees.
5. Enter the name of the organization that pays salary to employees in Kana.
6. Enter the name of the SWOT. This can be separated to Upper line and Lower line, and up to 20 digits in single-byte Kana for each. This information is used in the Local Tax Withheld.
7. Enter the postal code and address upper, middle and lower lines.
8. Enter the phone number.
9. Specify the bank and branch codes. This information is used in the Local Tax Withheld and Salary Payment Report Summary.
10. Specify the type (1: Ordinary Account, 2: Checking Account), number, and name in single-byte Kana of the account held.
11. Enter the company code by the bank. This information is used in the Local Tax

Withheld.

12. Save your work.

Entering Accident Insurance Info

Use the Accident Insurance Info window to record information regarding the earthquake and accident insurance provider for your employees to claim insurance premium deduction in YEA process. The users are able to display the data entered here on the SSHR JP Insurance and Spouse special Deduction Form for Salary Earner.

To enter Accident Insurance information:

1. In the Organization window, query the SWOT classification if it does not already appear there. In the Organization Classifications region, select SWOT, click Others, and select Accident Ins Info.
2. Click the Accident Ins Info field of the Additional Organization Information window to open the Accident Ins Info window.2. Click the Accident Ins Info field of the Additional Organization Information window to open the Accident Ins Info window.
3. Enter the code and name of the insurance company that has contract with your employees.
4. Select the custom formula to calculate the earthquake and accident insurance annual premium amount to be used YEA. The formula registered here is run in the concurrent program: JP Insurance and Spouse special Deduction Form for Salary Earner – Archive and the results are displayed on the SSHR JP Insurance and Spouse special Deduction Form for Salary Earner as default values. The balances and elements registered below can be used in the formula. The users can select the template formula: JP_AI_PREM_CALC here.
5. Specify the balance name that hold the balance of the earthquake insurance premiums deducts from monthly salaries and bonuses.
6. Specify the elements that hold the amount to be deducted from monthly salary towards the earthquake insurance. The elements with primary classification = C_0700 Salary Deduction are in LOV.
7. Specify the elements that hold the amount to be deducted from bonus towards the earthquake insurance. The elements with primary classification = C_1300 Bonus Deduction are in LOV.
8. Specify the balance name to that hold the balance of the accident insurance premiums deducts from monthly salaries and bonuses.

9. Specify the elements that hold the monthly amount to be deducted towards accident insurance. The elements with primary classification = C_ 0700 Salary Deduction are in LOV.
10. Specify the elements that hold the amount to be deducted from bonus towards the accident insurance. The elements with primary classification = C_ 1300 Bonus Deduction are in LOV.
11. Save your work.

Entering Li Gip Info

Use the Li Gip Info (Life insurance/Group Insurance Information) window to record information regarding the group insurance policy provider for your employees to claim insurance premium deduction in YEA process. The users are able to display the data entered here on the SSHR JP Insurance and Spouse special Deduction Form for Salary Earner.

To enter Li Gip information:

1. In the Organization window, query the SWOT classification if it does not already appear there. In the Organization Classifications region, select SWOT, click Others, and select Li Gip Info.
2. Click the Li Gip field of the Additional Organization Information window to open the Li Gip Info window.
3. Enter the code and name of insurance company that provide the group insurance policy to the organization.
4. Select whether it is new or old class. For the Life and pension insurances contracted after 2012, and care and medical insurance, select New. The deductible amount in YEA is different between new and old insurances.
5. Specify the custom formula to calculate the group insurance annual premium amount to be used YEA. The formula registered here is run in the concurrent program: JP Insurance and Spouse special Deduction Form for Salary Earner – Archive and the results are displayed on the SSHR JP Insurance and Spouse special Deduction Form for Salary Earner as default values.

The balances and elements registered can be used in the formula. You can select the template formula: JP_LI_GIP_PREM.
6. Specify the balance name that hold the balance of the group life insurance premiums deducts from monthly salaries and bonuses.
7. Specify the elements that hold the amount to be deducted from monthly salary

towards the group life insurance. The elements with primary classification = C_0700 Salary Deduction are in LOV.

8. Specify the elements that hold the amount to be deducted from bonus towards the group life insurance. The elements with primary classification = C_1300 Bonus Deduction are in LOV.
9. Specify the balance name that hold the balance of the group individual pension insurance premiums deducts from monthly salaries and bonuses.
10. Specify the elements that hold the amount to be deducted from monthly salary towards the group individual pension insurance. The elements with primary classification = C_0700 Salary Deduction are in LOV.
11. Specify the elements that hold the amount to be deducted from bonus towards the group individual pension insurance. The elements with primary classification = C_1300 Bonus Deduction are in LOV.
12. Specify the balance name that hold the balance of the group care and medical insurance premiums deducts from monthly salaries and bonuses.
13. Specify the elements that hold the amount to be deducted from monthly salary towards the group care and medical insurance. The elements with primary classification = C_0700 Salary Deduction are in LOV.
14. Specify the elements that hold the amount to be deducted from bonus towards the group care and medical insurance. The elements with primary classification = C_1300 Bonus Deduction are in LOV.
15. Save your work.

Entering Life Insurance Network Center (LINC) Information

Use the Li LINC Info window to record information regarding the life insurance policy provider participated to the LINC that provide the data for your employees to claim insurance premium deduction in YEA process. The users are able to display the data entered here on the SSHR JP Insurance and Spouse special Deduction Form for Salary Earner.

To enter Li LINC information:

1. In the Organization window, query the SWOT classification if it does not already appear there. In the Organization Classifications region, select SWOT, click Others, and select Li LINC Info.
2. Click the Li LINC field of the Additional Organization Information window to open

the Li LINC Info window.

3. Enter the code and name of insurance company that provide the insurance data though LINC.
4. Select whether it is new or old class. For the Life and pension insurances contracted after 2012, and care and medical insurance, select New. The deductible amount in YEA is different between new and old insurances.
5. Specify the custom formula to calculate the annual premium amount to be used YEA for the data from LINC. The formula registered here is run in the concurrent program: JP Insurance and Spouse special Deduction Form for Salary Earner – Archive and the results are displayed on the SSHR JP Insurance and Spouse special Deduction Form for Salary Earner as default values. The balances and elements registered below can be used in the formula. The users can select the template formula: F_LI_LINC_PREM.
6. Specify the balance that holds the LINC data of which balance of the life insurance premiums deducts from monthly salaries and bonuses.
7. Specify the element that holds the LINC data of which amount to be deducted from monthly salary towards the life insurance. The elements with primary classification = C_0700 Salary Deduction are in LOV.
8. Specify the element that holds the LINC data of which amount to be deducted from bonus towards the life insurance. The elements with primary classification = C_1300 Bonus Deduction are in LOV.
9. Specify the balance that holds the LINC data of which balance of the individual pension insurance premiums deducts from monthly salaries and bonuses.
10. Specify the element that holds the LINC data of which amount to be deducted from monthly salary towards the individual pension insurance. The elements with primary classification = C_0700 Salary Deduction are in LOV.
11. Specify the element that holds the LINC data of which amount to be deducted from bonus towards the individual pension insurance.. The elements with primary classification = C_1300 Bonus Deduction are in LOV.
12. Specify the balance name that holds the LINC data of which balance of the group care and medical insurance premiums deducts from monthly salaries and bonuses.
13. Specify the element that holds the LINC data of which the amount to be deducted from monthly salary towards the group care and medical insurance. The elements with primary classification = C_0700 Salary Deduction are in LOV.
14. Specify the element that holds the LINC data of which the amount to be deducted

from bonus towards the group care and medical insurance. The elements with primary classification = C_ 1300 Bonus Deduction are in LOV.

15. Save your work.

Entering Local Tax E-File Information

Use the Local Tax E-File window to define the FastFormula to format the file in the Payroll (Generate Local Tax E-File) process. The e-file format for the local tax payment is different among banks. Oracle EBS Japanese localization supports the format by Sumitomo Mitsui Bank as a default, but the users are able to use the program for other banks by overwriting the formulas for formatting files in this window.

To enter local tax e-file information:

1. In the Organization window, query the SWOT classification if it does not already appear there. In the Organization Classifications region, select SWOT, click Others, and select Local Tax E-file
2. Click the Local Tax E-file field of the Additional Organization Information window to open the Local Tax E-file window.
3. Select the Formula for the header record formatter. If you leave this blank, then the application uses the Formula: FP_ Local Tax Payment File_ Header Record Formatter.
4. Select the Formula for the data record initialization. If you leave this blank, then the application uses the Formula: FP_ Local Tax Payment File_ Data Record Initialize.
5. Select the Formula for the data record details. If you leave this blank, then the application uses the Formula: FP_ Local Tax Payment File_ Data Record Detail.
6. Select the Formula for the data record formatter. If you leave this blank, then the application uses the Formula: FP_ Local Tax Payment File_ Data Record Formatter.
7. Select the Formula for the trailer record formatter. If you leave this blank, then the application uses the Formula: FP_ Local Tax Payment File_ Trailer Record Formatter.
8. Select the Formula for the end record formatter. If you leave this blank, then the application uses the Formula: FP_ Local Tax Payment File_ End Record Formatter.
9. Save your work.

Entering PRS Information

Use the PRS (Payment Report Summary) Info window to record information required in the salary Payment Report Summary report.

To enter PRS information:

1. In the Organization window, query the SWOT classification if it does not already appear there. In the Organization Classifications region, select SWOT, click Others, and select PRS Info.
2. Click the PRS Info field of the Additional Organization Information window to open the PRS Info window.
3. Enter the name of the representative and the job title.
4. Enter the name of the accounting officer.
5. Enter the name, the job title, and phone number of the contact person.
6. Enter the name and phone number of the accounting firm.
7. Select the payment method by which the salaries are paid to employees.
8. Specify the date on which the salaries must be credited.
9. Specify the nature of the business.
10. Enter the address of the bank.
11. Save your work.

Entering Tax Withheld Rep Info

Use the Tax Withheld Rep Info window to record the information required in the Withholding Tax report.

To enter Tax Withheld Rep information:

1. Query the Business Group in the Organization window, if it does not already appear there. In the Organization Classifications region, select SWOT, click Others, and select Tax Withheld Rep Info.
2. Click in the field of the Additional Organization Information window to open the Tax Withheld Rep window.

3. Select the notified tax office name and its number.
4. Enter the slip number that is allocated by the tax office.
5. Enter the MT reference number 1 and 2 allocated by the tax office which are used in Payroll Report (Create File-Tax Withheld Report).
6. Save your work.

Entering Wb and WI Item Information

Use the Wb and WI Item Information window (Withholding Book and Wage Ledger) to define the items to display on the Withholding Book and Wage Ledger report.

To enter Wb and WI Item information:

1. In the Organization window, query the SWOT classification if it does not already appear there. In the Organization Classifications region, select SWOT, click Others, and select Wb and WI Item Info.
2. Click the Wb and WI Item Info field of the Additional Organization Information window to open the Wb and WI Item Info window.
3. Select the payroll.
4. Select the category of the item to be displayed on the report. This defines to which area of the report the item will be displayed. Please note that the provided template report is able to display the following number of items. If you need to display more items, then you need to create and register the custom template.
 - Bonus Deduction: 5
 - Bonus Earning: 10
 - Salary Deduction: 5
 - Salary Earning: 10
 - Working Days Information: 10
5. Select the type whether it is an element or balance value.
6. Enter the appropriate values depending on whether you have specified an element or balance value in the previous step.
7. Enter the prompt name on the report and sequence.

8. Specify Yes or No in the NULL validation field. If you select Yes, the item will be displayed even if the value is NULL.
9. Save your work.

Entering Wb and WI Rep Information

Use the Wb and WI Rep Info (Withholding Book and Wage Ledger Report) window to record the procedure if you want to generate the Withholding Book and Wage Ledger report by custom procedure.

To enter Wb and WI Rep information:

1. In the Organization window, query the SWOT classification if it does not already appear there. In the Organization Classifications region, select SWOT, click Others, and select Wb and WI Rep Info.
2. Click the Wb and WI Rep field of the Additional Organization Information window to open the Wb and WI Rep window.
3. Enter the name of the custom procedure to generate the Withholding Book and Wage Ledger report.
4. Save your work.

Entering Welfare Pension Fund Location Information

Use the WP Fund Loc Info window to record information about the organization that collects the welfare pension fund insurance premiums.

You require this information for calculating welfare pension fund insurance premiums for insured employees.

To enter welfare pension fund location information:

1. In the Organization window, query the Welfare Pension Fund Location classification if it does not already appear there.
2. In the Organization Classifications region, select Welfare Pension Fund Location, click Others, and select WP Fund Loc Info.
3. Enter the prefecture code where the organization is located.
4. Enter the corporate number assigned to your organization.
5. Click the WP Fund Loc Info field of the Additional Organization Information

window to open the WP Fund Loc Info window.

6. Enter the Identifier of the business operator.
7. Enter the location number, postal code, and address 1-3 of the business operator.
8. Specify the name of the business operator.
9. Enter the full name and the telephone number of representative.
10. Select the insurance rate to be used in the calculation. The values of Com_Fund Premium Rate column in T_Hi Wp insurance Premium Rate table are in LOV.
11. Save your work.

Entering Welfare Pension Insurance Location Information

Use the WP Ins Loc Info window to record information about the organization that collects the welfare pension insurance premiums.

This information is required for calculating welfare pension insurance premiums, generating legislative reports for insured employees.

To enter welfare pension insurance location information:

1. In the Organization window, query the Welfare Pension Location classification if it does not already appear there.
2. In the Organization Classifications region, select Welfare Pension Location, click Others, and select WP Ins Loc Info.
3. Click the WP Ins Loc Info field of the Additional Organization Information window to open the WP Ins Loc Info window.
4. Enter the prefecture code where the organization is located.
5. Enter the corporate number assigned to your organization.
6. Enter the Identifier 1 and 2 of the business operator.
7. Enter the number, postal code, and address 1-3 of the business operator.
8. Specify the name of the business operator.
9. Enter the full name and the telephone number of representative.
10. Enter the name of the reporting social insurance office.

11. Specify whether the business operator is registered as one for all business operator.
12. Enter the Identifier 1 and 2 of the business operator. This is used for the e-file reporting.
13. Enter the name of agent if the third party agent create and submit the e-file on behalf of the business operator.
14. Select the pension type. This is optional.
15. Select which insurance rate to be used in the calculation. The values of Com_Wp Premium Rate column in T_ Hi Wp insurance Premium Rate table are in LOV.
16. Select Yes if there is the special agreement between the employer and employees on 2 Yen differences of their burden. This affects the formulae calculating the welfare pension insurance premiums in salary and bonus calculations.

People Management

People

People in a Global Enterprise

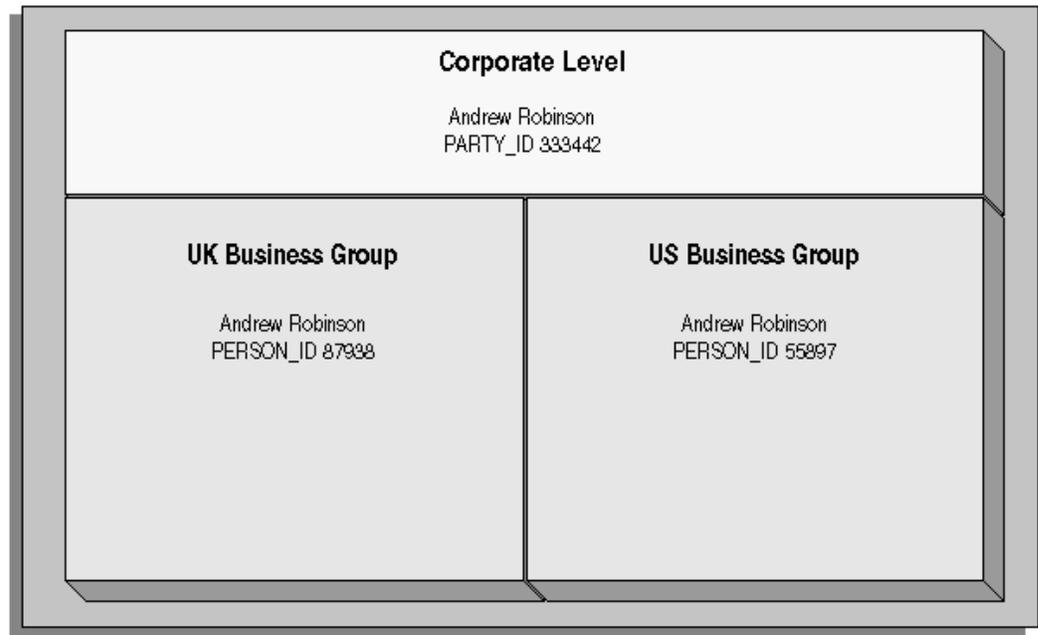
Based on a common core application for all countries, Oracle HRMS provides you with the ability to support both local and corporate requirements for global enterprises.

People who are employees, contingent workers, applicants, or contacts of other internal people are entered within a legislative or cultural context. In Oracle HRMS, this means they have a record in a business group that complies with the legislative requirements of a specific country.

From a corporate perspective, for your employees, contingent workers, and applicants you also need to view this information across business groups to enable you to set up reporting lines and relationships between people and organizations in different countries.

As part of your global enterprise, you may have international employees who transfer between business groups to work temporarily in other countries. It is likely in this instance that you will have several local records for that person in different business groups. You still however, need to be able to identify at a corporate level that these records all relate to the same person.

A Multi-Organization Person Record



Oracle HRMS provides you with a corporate level record for each of your employees, contingent workers, and applicants. This record links all the local records for a person and is available in all business groups and also to other E-Business applications.

Note: People who are entered only as contacts of other internal people do not have a corporate level record. This enables you to restrict access to a contact's information to one business group.

To create this global view of a person, Oracle HRMS is integrated with Trading Community Architecture (TCA). TCA enables you to store person information at a corporate level so that it is available across all applications in your e-business suite. TCA provides a single place in which a person can be uniquely identified as a *party*. A sub-set of the personal information entered in HRMS is automatically held at the corporate level in TCA.

Some people, for example, customers, are only held at the corporate level as parties. They can be linked to other HR people as appropriate.

Note: You must have the HR: Cross Business Group profile option set to Yes for your responsibility to create links between people in different business groups.

To ensure the records in the corporate and local levels are synchronized it is important that lookup types that relate to global person information contain exactly the same lookup codes in TCA and HRMS. For example, if you add a new code to the TITLE

lookup type, you must ensure the same code is added to the equivalent TCA lookup type. If the codes do not match identically then the field is cleared in TCA when an update is made in HRMS.

Benefits of Linked Person Records

One of the benefits of having the person records linked is that if any of the following information is updated in one business group, then it will be visible, in read-only format, in all other business groups relating to the person.

- Qualifications
- Establishments attended
- Competencies

Note: Competencies may be defined as global or local to a business group. Only global competencies are visible from within another business group. Those that are local to one business group can only be seen within the context of that business group.

In addition to this, you can enable person synchronization. This enables you to update certain information against one record and have it automatically applied to all other records relating to the person. This ensures that you have a common set of information for one person across all countries in which that person operates.

Note: To control the synchronization of your person records you use the HR: Propagate Changes profile option.

See: Person Record Synchronization, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

Duplicate Person Search

When creating a new person record, you can search for existing duplicate person records in a single or multiple business groups:

- Multiple business groups: This search uses the global name format (Global List Name). HRMS provides the HR: Cross BG Duplicate Person Check profile option to enable the duplicate person check functionality across multiple business groups. You must set the HR: Cross Business Groups and HR: Cross BG Duplicate Person Check profile options to Yes to display a list of potential duplicates across business groups.

For more information about the HR: Cross BG Duplicate Person Check user profile, see: User Profiles, *Oracle HRMS Configuring, Reporting, and System Administration*

Guide

For information about the global name format (Global List Name), see: *Person-Name Formats, Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

- Single business group: This search uses values such as, last name, first name, date of birth, or national identifier to search for duplicate records.

Validating People in Multiple Business Groups

When you create a new person record in any business group in Oracle HRMS, the application looks for matching records in all business groups and lists the records of potential duplicates. If you indicate that one of these records relates to the same person as your new record, the application automatically adds the global person reference to the new record.

When determining whether to store information at the corporate or legislative level, Oracle HRMS applies the following rules:

- Employees, applicants, and contingent workers have both corporate and legislative records.
- Ex-employees, ex-applicants, and ex-contingent workers retain both corporate and legislative records.
- People whose system person type is Other have a legislative record only.

Note: HRMS considers any person with a system person type of Other to be a contact; contacts do not have to be part of an active contact relationship in Oracle HRMS.

- Employees, applicants, contingent workers, ex-employees, ex-applicants, and ex-contingent workers who are also contacts have both corporate and legislative records.

When a contact becomes an employee, contingent worker, or applicant, the application creates a corporate-level record if one does not already exist.

Note: In this case, if you subsequently cancel (rather than terminate) the contact's employment, application, or placement, the application deletes the corporate-level record.

HRMS makes all changes to corporate-level and legislative-level records that are required as a result of person-type changes at the time the change is entered, rather than when the change comes into force.

Transferring Employees Between Business Groups

Using the Global Deployments function, HR Professionals can transfer employees permanently or temporarily between business groups. Oracle HRMS automatically creates or updates employee records in both source and destination business groups when you initiate the transfer. Similarly, when a temporary transfer ends, Oracle HRMS automatically updates records in both business groups again.

See: *Employee Transfers and Secondments, Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

Person Numbering

In Oracle HRMS, every employee, applicant, and contingent worker has a person number. If you select global person numbering, Oracle HRMS allocates numbers from a single sequence to workers of the relevant person type throughout the enterprise.

If you transfer an employee between business groups using the Global Deployments function when global employee numbering is in effect, then the transferred employee automatically retains the employee number from the source business group. In all other cases, a person who moves from one business group to another does not retain the person number from the original business group, even when global person numbering is in effect. Note, however, that you can write a formula to generate a global custom number sequence for a person type. You can handle other business needs, including the need to retain person numbers between business groups, in a person number formula.

Person Names

Oracle HRMS defines some standard formats for person names, which you can edit. You can also define your own person-name formats. For example, you can define formats for use in custom code or legislation-specific versions of the standard formats if your localization does not supply them. Person-name formats can be local or global:

- Local formats are suitable for users in a single legislation who view person names in a character set appropriate to their legislation.
- Global formats are generally suitable for users in global enterprises who prefer to view person names in a single (typically, Western) character set, so that all names, regardless of origin, have the same representation.

See: *Person-Name Formats, Oracle HRMS Workforce Sourcing, Deployment, and Talent Management 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:

Alien Income Forecast

Type of income a visa holder receives, as well as the amount and the year in which the income was received.

AU Paid Parental Leave Reference Number (Australia Only)

Information about the Paid Parental Leave reference number and the start and end dates of the paid parental leave.

Global Work Permit

Information about the work permit an employee holds.

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

Information about the visa holder's passport, such as country of issue, passport number, issue date and expiry date.

Singapore users: Do not use this EIT. You must enter passport information using the Passport tab in the Person window or your year-end reporting information may be incomplete.

Self Service Preference for Person

Information on a person's preferences for online documents such as the online payslip or online tax forms. The EIT determines whether the documents are available online or in a printed format, what template you are using for XML Publisher, the stored procedure do you want to use, and the date when you want to implement these changes.

Note: You can also enter this information at the location, business group, or HR organization level.

See: Location Extra Information Types, *Oracle HRMS Enterprise and Workforce Management Guide*

See: Entering Self-Service Preference Information, *Oracle HRMS Enterprise and Workforce Management Guide*

These information levels are arranged in a hierarchy; if you define self-service preferences at the person level, the settings will override any other settings made at the location, business group, or HR organization level. Similarly, if you define self-service preferences at the location level, the settings override any settings at the business group or HR organization level. Settings at the HR organization level will override settings at the business group level.

Email Payment Summary (Australia only)

Information whether or not the payment summary must be emailed to employees. Record the alternate E-mail address of the recipient of payment summaries. Also record the name, date of birth, and the address for the contact person.

Visa Details

Information about the visa an employee holds, such as visa type, visa number, issue date and expiry date.

Visa Payroll Details

Information about the amount of income and benefit a visa holder receives.

Visa Residency Details

Information about a visa holder's residency, such as residency status, the residency status date, the first entry date and tax residence country.

Visa Visit History

Records a visa holder's visits to a country. The EIT stores information such as the purpose of the visit, the start and end dates of the visit, and whether the visa holder was accompanied by a spouse or children.

Previous Employment Details (Mexico Only)

Records employment tracking information required for End of Year calculations

(Format 37 and DIM Attachment 1). Enter this information if the employee has worked for more than one employer in the current fiscal year.

Use the data provided by the employee's Format 37 to populate this information:

- **Employer RFC ID:** Previous employer RFC ID. When you run the Year End Archiver process, it validates the value you enter here and returns the appropriate error message if it is in the incorrect format.

Note: HRMS does not validate the format of the RFC ID you specify here. Validation takes place when you run the Year End Archiver.

- **Employer Name:** (Optional) Previous employer name.
- **Employment Start Date:** (Optional) Previous employment start date.
- **Employment End Date:** (Optional) Previous employment end date.
- **Tax Withheld (Other Employer):** Total ISR tax withheld from previous employer.
- **Creditable Subsidy (Other Employer):** Total creditable subsidy from the previous employer. Used in the calculation of Subsidy Proportion and reported in the Format 37.
- **Non-Creditable Subsidy (Other Employer):** Total non-creditable subsidy from the previous employer. Used in the calculation of Subsidy Proportion and reported in the Format 37.
- **Total Earnings (Other Employer):** Total earnings from the previous employer. Used in the Format 37 report.
- **Exempt Earnings (Other Employer):** Total exempt earnings from the previous employer. Used in the Format 37.

Mexico Employee Tax Signup (Mexico Only)

Some employees may decide to perform their own Format 37 reporting. In these cases, you need to mark them as exempt from annual tax adjustment processing. This EIT defines the individual employee eligibility for the Annual Tax Adjustment process.

- **Annual Tax Adjustment:** Defines if this employee is eligible for the Annual Tax Adjustment process. The default is Yes.
- **Start Date:** Start period of the employee's voluntary ineligibility.
- **End Date:** End period of the employee's voluntary ineligibility.

Employee Career Management Information

Records employee tracking information required for succession planning.

You can:

- Identify the advancement potential of an employee.
- Determine whether an employee is a key person in the enterprise.
- Identify whether an employee is at a high risk of vacating their current position.

Personal Number Card Details (Japan only)

Records the expiry date of the personal number card. You record this information from the self-service page only.

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.

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. Only the last name is required for most legislations, but some legislations require a first name too.

For UK users: The first name is a mandatory field. Ensure that the first character is an alphabet. The employee's last name is not a mandatory field, however, ensure that the first character is an alphabet.

- In the Title field, select a title such as Mrs. or Doctor.
- You can use the Prefix field to enter the first part of the person's name, such as van der. In the case of someone whose last name is van der Zee, you can sort by

the last word of the name, that is Zee. If the whole name van der Zee is entered in the Last Name field, the name is sorted under van.

For Russian users only: Prefix is not required in Russia, so this field is not available to Russian users.

For UAE users only: Prefix is recorded as additional personal information. Therefore, this field is not displayed in the Name region.

- 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.

For Russian users only: Suffix is not required in Russia, so this field is not available to Russian users.

For UAE users only: Suffix is recorded as additional personal information. Therefore, this field is not displayed in the Name region.

- **For Russian users only:** In the Genitive Last field, enter the genitive case of the person's last name. For example, Ivanovskogo is the genitive case of the last name Ivanovskii. The genitive last name is required for some statutory reports. If you do not enter the genitive last name, the application uses the nominative last name.

3. Select a gender, if required. In the US, you must choose Male, Female, or Unknown Gender. In the UK, you must enter the gender of each employee. For Poland, the PESEL you enter supplies the gender information. For Finland, the PIN (Personal Identification Number) supplies the gender information.

Note: For Norway users only: A gender value will be automatically generated based on the person's National Identity number.

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.

If you are a Finnish user and need to pay salary to a contingent worker through Oracle payroll, you need to enter the person as an employee. You then change the person as a not employed person by changing the employee status in the Additional Assignment Details window. See: *Entering Additional Assignment Details (Assignment Window), Oracle HRMS for Finland Supplement*

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 Enterprise and Workforce Management Guide*

Entering Employee Information:

Enter the following information if the person is an employee.

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 national identifier for your country. For example, enter the National Insurance number in the UK, the Social Security number in the US, the PPS Number for Ireland, the Fiscal Code in Italy, the IRD Number in New Zealand, the Social Security Code (TAJ) in Hungary, the Individual Tax Payer's Number (INN) in Russia or the ID number in South Africa.

For Japanese users: If you have entered the personal number using the self-service pages, then you can view the masked personal number. You cannot update the personal number here. This is a unique identification number and is used for taxation and social insurance purposes and for display on the withholding income tax report, notification of acquisition of insurance qualification.

If you are an Australian user, leave the National Identifier field blank.

Note: For Norway and Sweden users only: The PIN (Personal Identification Number) supplies the values for gender, date of birth, and age.

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. For Poland, the PESEL supplies the date of birth. For Finland, the PIN (Personal Identification Number) supplies the date of birth.

For UK users only: If you have not entered the NI Number, the Date of Birth is a mandatory field.

2. Enter additional birth information into the Town of Birth, Region of Birth, and Country of Birth fields.

For Hungarian, UAE, and Indian users only: Enter the place of birth instead of town of birth as this information identifies employees and appears in statutory reports.

For Belgian users only: Region of birth information is not required in Belgium, so this field is not available to Belgian users.

3. **For Russian users only:** Enter the place of birth code in the Place of Birth field. The application uses this information when generating tax and pension statutory reports. You can find this code in the document *All Russian Classification of Subjects of Administrative and Territorial Division (OKATO)*.
4. **For Finnish users only:** Enter the place of residence. The place of residence

influences the regional membership. You use the place of residence and regional membership to calculate income tax and other statutory deductions.

For Japanese users only: Enter the country of birth.

5. If the Work Telephone field is displayed, enter a work telephone number. Otherwise, use the Phone Numbers window to enter this information.
6. In the Status field, select a marital status.
7. Select a nationality.
For UAE users only: Nationality is recorded as additional personal information. Therefore, this field is not displayed in the Personal tabbed region.
8. **For Russian users only:** Enter the employee's statutory Pension Insurance Fund identifier. It is the employee's ID in the Statutory Pension Insurance Fund.
9. **For Russian and Swedish users only:** Select the person's citizenship. In Russia, you require this information for some statutory reporting to migration authorities. In Sweden, you can use this information to track persons who are not Swedish citizens, since the taxation and pension insurance schemes differ from those for Swedish citizens.
10. 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.

In the US, the Americans with Disabilities Act (ADA) Report includes employees set up as registered disabled, partially disabled, and fully disabled.

For Norway, Finnish, Danish, and Swedish users only: This field is not available.

11. **For Dutch users only:** Select Yes in the Work Abroad Exceeding One Year field, if your employee has worked abroad for more than a year.
12. **For Belgian users only:** enter the person's preferred correspondence language in the Other region.

13. 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, page 2-2

- 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.

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 e-mail 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, select 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 one or more honors or degrees (BA, MBA, or JD, for example) that the person has earned.
3. Enter the name (perhaps a nickname) by which the person prefers to be known.
4. If the person was previously known by a different name, enter the previous last name.

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. Select the type of schedule in the Availability/Schedule field; for example, the days of the week your employee works.
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:
 - In the Terminate window you enter the termination reason of deceased, but
 - You do not provide the actual termination date, and
 - You have not yet entered a date of death
6. Select the current student status, if the person is a student.
7. In the Date Last Verified field, you can enter the date the person last checked this personal information for accuracy.
8. Check the Military Service check box if the person is employed in a military service.
The value of this field can impact 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.
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 English name information:

1. Choose the English Name tabbed region.
2. Enter the employee's first and last names.

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.

Important: For UAE users only, also enter the father, grandfather, and family name.
 - 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.
 4. **For Japanese users only:** You can view the masked personal number of the employee's dependent if the number has been entered using the self service pages.

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, *Oracle HRMS Enterprise and Workforce Management Guide*

For Japanese users only

- Record if the contact is subject to social insurance and income tax.
 - Specify the sequence to display the dependent names in some statutory reports.
 - Indicate if the contact is the head of the household. You require this information to calculate the income tax.
 - Select Yes if the contact is subject to income amount adjustment deduction. You report this information in the Japan, Withholding Tax Report of Earned Income report.
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, page 2-15

What Next?

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

Statutory Reporting

Statutory Reporting

The following topics provide the reports containing employee detail information for reporting purposes.

Running the Japan, Roster of Workers / Employee Ledger - Archive

You can use the Japan, Roster of Workers / Employee Ledger - Archive to archive the employee detail information for reporting purposes.

Run the Japan, Roster of Workers / Employee Ledger – Archive from the Submit Requests window.

To run the Japan, Roster of Workers / Employee Ledger - Archive:

1. In the Name field, select the report name. Then select the Parameters field to open the Parameters window.
2. Enter the effective date for the archive. This is a mandatory field.
3. Specify if you want to include all organization under the specified organization.
4. Specify the organization to report. If you do not select any organization, the report displays for all organizations. This is optional.
5. Specify the location which you want to report. This is optional.
6. Specify Yes if you want to include terminated employees in the report. This is a mandatory field.
7. Specify the termination dates from and until when you want to include terminated employees.
8. Specify an assignment set if you want to restrict the archive to a particular set. This is optional.
9. Click OK and then Submit.

Running the Japan, Roster of Workers

You run the Japan, Roster of Workers report when required for the reporting purpose. This report includes the items required under the Labor Standard Act in Japan.

Run the Japan, Roster of Workers report from the Submit Requests window.

To run the Japan, Roster of Workers:

1. In the Name field, select the report name. Then select the Parameters field to open the Parameters window.
2. Select the year for which you want to run the report.
3. The Payroll Process field gets enabled for you to select the payroll process for the year selected.
4. Specify if you want to include all organization under the specified organization.
5. Specify the organization to report. If you do not select any organization, the report displays for all organizations. This is optional.
6. Select a location to generate the report for a particular place.
7. Select if you want to display the list of terminated employees within the report.
8. You can specify the dates for which to report the employees.
9. You can also specify an assignment set to generate the report for those employees in that set.
10. You can sort on employee name, employee number, or organization. If no sort order is specified, the employee number is used for sorting.
11. Click Ok and then Submit.

Running the Japan, Employee Ledger Report

You can use the Japan, Employee Ledger Report to generate the employee details report for various purposes.

Run the Japan, Employee Ledger report from the Submit Requests window.

To run the Japan, Employee Ledger Report:

1. In the Name field, select the report name. Then select the Parameters field to open the Parameters window.
2. Select the year for which you want to run the ledger report.
3. The Payroll Process field gets enabled for you to select the payroll process for the year selected.

4. Specify if you want to include all organization under the specified organization.
5. Specify the organization to report. If you do not select any organization, the report displays for all organizations. This is optional.
6. Select a location to generate the report for a particular location to which an employee belongs.
7. Select if you want to display the list of terminated employees within the report.
8. You can specify the From and To termination dates to report the employees.
9. You can also specify an assignment set to generate the report for those employees in that set.
10. You can sort on employee name, employee number, or organization. If no sort order is specified, the employee number is used for sorting.
11. Click Ok and then Submit.

Workforce Information Management

Assignment Extra Information Types

To hold information about the assignments, you can define as many Extra Information Types as you require. To enable the application to validate the data you enter, use the YEA window rather than the EIT window to enter data in the YEA-related EITs.

To access the predefined EITs, you must link them to your responsibility.

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

You can use the following predefined assignment EITs:

To enter information in the extra information types, see: *Entering Extra Information Type, Oracle HRMS Configuring, Reporting, and System Administration Guide*

- JP Ass Ai Info - use this EIT to specify the accident insurance information to record information regarding the earthquake and accident insurance provider for your employees to claim insurance premium deduction in YEA process
- JP Ass Cmi Info - use this EIT to specify the care and medical insurance information to record information regarding the care and medical insurance provider for your employees to claim insurance premium deduction in YEA process
- JP Ass Lig Info - use this EIT to specify the life insurance information to record information regarding the general life insurance provider for your employees to claim insurance premium deduction in YEA process. It should be specified if it's through Group Insurance Policy or Life Insurance Network Centre.
- JP Ass Lip Info - use this EIT to specify the life insurance information to record information regarding the individual pension insurance provider for your employees to claim insurance premium deduction in YEA process. It should be specified if it's through Group Insurance Policy or Life Insurance Network Centre.
- Personal Number Info – use this EIT to specify the entry start and end date of entry period at the assignment level, overriding the information at business group and HR organization levels.

Entering Social Insurance and Income Tax Information

Use the SI, Income Tax window to enter statutory insurance and tax information for individual employees. Oracle Payroll uses this information to calculate the statutory deduction payments that an employee and employer must contribute.

To enter SI General information:

1. Query your employee in the People window, and navigate to the Assignment window.
2. Click SI Income Tax.
3. Click the SI General tab.
4. In the Social Insurance General section, select the health insurance organization.
5. Enter the insurance card number.
6. Select the Welfare Pension Organization Name.
7. Enter the Pension Control Number and Basic Pension Number. This is a 10-digit number.
8. Enter the Welfare Pension Fund Employer organization name.
9. Enter the pensioner number.
10. If the employee has a dependent, then select the DependentExist check box. The application uses this information for the reports such as Payroll Report (Notification of Qualification for Health Ins/Welfare Pension Ins) and Payroll Report (Notification of Disqualification for Health Ins/Welfare Pension Ins).

Note: This element is used in the report only if you select Element Entry in Health Insurance Dependent Reference Type in JP Payroll Related Info for the business group.

11. Select the SI Type from the list of social insurance insured type.
12. Select the Qualification Type to verify the type and reason of insured.
13. If the employee is a part timer from social insurance perspective, then select the Part-timerFlag check box.
14. If the employee is a part time worker who works less than three-fourth time of the day from a social insurance perspective, then select the Short Time Worker (<3/4>) check box.

Note: In the Effective Date From and Effective Date To fields, the application fills the effective dates through which employee deduct the taxes/premiums. The dates cover the entire tax year period to

ensure that when the payroll is run for an employee's assignment, the application uses this income tax and social insurance information to avoid any inconsistent payroll calculations.

15. In the Labor Insurance (Li) General information region, select the unemployment insurance type. You can select from the options Insured Employee, Insured Executive-level employee, or if aged.
16. Select the Labor Insurance Employer Organization name.
17. Enter the unemployment insurance number. This number is either 10-digit or 11-digit number.
18. In the Wa section, select the Worker Compensation Insurance type. The options are Regular, Exclusive or Temporary.
19. Select the Labor insurance employer organization name.

Note: In the Effective Date From and Effective Date To fields, the application fills the effective dates through which employee deduct the taxes or premiums. The dates cover the entire tax year period to ensure that when the payroll is run for an employee's assignment, the application uses this income tax and social insurance information to avoid any inconsistent payroll calculations.

20. In the Care Insurance section, select the Care Ins Exclude check box, if the employee is not the insured of Care Insurance regardless whether aged between 40 and 64 years old.
21. If the employee is not the insured, then enter the reason, the start date, and the end date.

Note: In the Effective Date From and Effective Date To fields, the application fills the effective dates through which employee deduct the taxes/premiums. The dates cover the entire tax year period to ensure that when the payroll is run for an employee's assignment, the application uses this income tax and social insurance information to avoid any inconsistent payroll calculations.

To enter the SI Qualified information:

1. Select the SI Qualified tab.

2. In the Health Insurance Qualification Information section, enter the Qualified date when the employee becomes the insured of health insurance.
3. Enter the Disqualified date and select the Disqualified reason when the employee loses the insured status because of death or others.
4. Enter the number of insurance cards that have been collected by the employer in the Insurance Card Attached field when the employee loses the insured status.
5. Enter the number of the insurance cards that have not been collected by the employer in the Card Return Not Possible field when the employee loses the insured status.
6. In the Welfare Pension Insurance Qualification Information section, enter the Qualified date when the employee becomes the insured of welfare pension insurance.
7. Enter the Disqualified date and select the Disqualified reason when the employee loses the insured status. The options include 70 years old, death, or any other reason.
8. In the Welfare Pension Fund Qualification Information section, enter the Qualified date and select the Qualified reason when the employee becomes a member of welfare pension fund. You can select the reasons from the values set up in the lookup JP_WPF_QUALIFIED_STATUS.
9. Enter the Disqualified date and select the Disqualified reason when the employee loses the member status. You can select the reasons from the values set up in the lookup JP_WPF_DISQUALIFIED_STATUS.

To enter the SI Qualified2 information:

1. Select the SI Qualified2 tab.
2. In the Employment Insurance Qualification Information1 section, enter the Qualified date and select the Qualified reason when the employee becomes the insured of employment insurance because of newly employed, re (re-employed) or the category change.
3. Enter the Disqualified Date and select the Disqualified Reason when the employee loses the insured status. The options include being fired by employer, or due to voluntary termination, or the category has been changed, or others.
4. Select the Separation Notice Delivery check box if the employee requests the Separation Certificate Report to be submitted when the employee loses the insured status.

5. Select the Foreigner check box if the employee is a foreigner from the unemployment insurance perspective. If the employee is a foreigner, then select the fields in steps 6-9.
6. Select the nationality and region to which the employee belongs.
7. Select the residential status and period of stay of the employee.
8. Select the Existence of permission for non-qualified activities check box if the employee has permission to carry out these activities.
9. Select the Dispatch or Contract Working Class check box if the employee is Dispatch or Contract Working Class from the unemployment insurance reporting perspective.
10. In the Employment Insurance Qualification Information2 section, enter the reason why the employee has become insured, whether due to new employment or change from day laborer or others.
11. Select the method of payment of salary whether daily, hourly, weekly, monthly, or others.
12. Specify the wage unit per thousand yen.
13. Enter the details regarding the employment type, kind of work, and job-placement.
14. Enter the fixed working hours the employee works per week.
15. Select the Existence of contract term check box if the employee is on a contract.
16. If the employee is on a contract, then specify the contract start and end dates.
17. Select the Existence of renewal stipulation of contract check box, if there exists the renewal stipulation of the contract.
18. Select the Existence of vacancy filling plan check box if there is a replacement recruitment plan when the employee is disqualified. This information is required for the Disqualification report.

To enter the SI Reporting information:

1. Select the SI Reporting tab.
2. In the SI Reporting Information section, you can select or enter information for the SI Reports. You can record this information on the Com_Si_ Reporting Form element:

- Reason for No Reporting Residential Address - Select the Reason for No Reporting Residential Address if the reporting residential address cannot be displayed.
 - Remarks for No Reporting Residential Address - Enter the details in the Remarks for No Reporting Residential Address field if the reason is Others.
 - Multiple location worker
 - Continuous Rehired
 - Only Notification of Over 70 Age Employee
 - Over 70 Age Employee
3. In the Santei Remarks Column, select the following:
- Target Months for 70 years-old
 - Select the following check boxes, if applicable
 - Hired in Mid-Month
 - Leave of Absence
 - Annual Average
4. Enter the effective date.

Note: In the Effective Date From and Effective Date To fields, the application fills the effective dates through which employee deduct the premiums. The dates cover the entire tax year period to ensure that when the payroll is run for an employee's assignment, the application uses this income tax information to avoid any inconsistent payroll calculations.

To enter the SI Salary information:

1. Select the SI Sal tab.
2. If the health insurance premiums should be processed in salary for the employee, select the Calculate HI Premium in Salary check box.
3. You can override the system calculated values by entering the new values regarding health insurance premiums, including care insurance premiums.

- Override Employee
 - Override Employer Care Insurance
 - Override Employee Care Insurance
 - Override Employer
4. If the employee is the specific insured of care insurance, select Special Applicable CI Prem Calc check box. If this is selected, the system calculates the care insurance premiums regardless of the age.
 5. In the Quota of Termination Month, enter the values if you want to override the system calculated values when the employee is terminated at the end of the month.
 6. If the welfare pension insurance premiums should be processed in salary for the employee, select the Calculate WP Premium in Salary checkbox.
 7. Enter the new values regarding welfare pension insurance premiums to override the system calculated values in the following fields:
 - Override Employee
 - Override Employer
 8. If the welfare pension fund premiums should be processed in salary for the employee, select the Calculate WPF Premium in WP Salary checkbox.
 9. Enter the new values regarding welfare pension fund premiums if you want to override the system calculated values in the following fields:
 - Override Employee
 - Override Employer
 10. In the Quota of Termination Month, enter the values if you want to override the system calculated values when the employee terminates at the end of the month.

Note: In the Effective Date From and Effective Date To fields, the application fills the effective dates through which employee deduct the premiums. The dates cover the entire tax year period to ensure that when the payroll is run for an employee's assignment, the application uses this income tax information to avoid any inconsistent payroll calculations.

Note: If the values are entered, then the health insurance premiums of the termination month are processed even if Social Insurance Premium Collection Type is equal to Not Levy Premiums for Termination Month or Null for the payroll. The health insurance premiums of the termination month are not processed if the employee is terminated not in the end of the month.

11. If the labor insurance (LI) premium should be processed in the salary of the employee, then select the Calculate LI Premium in Salary check box.
12. Enter the new values in the Override Employee field, to override the system calculated values.

The application does not use the age to calculate labor insurance premium. If the employee should be exempt from LI premiums, then you must:

- enter 0 to Override Employee or
- not select the Calculate LI Premium in Salary check box or
- enter the value in the Effective Date To field

Note: In the Effective Date From and Effective Date To fields, the application fills the effective dates through which employee deduct the premiums. The dates cover the entire tax year period to ensure that when the payroll is run for an employee's assignment, the application uses this income tax information to avoid any inconsistent payroll calculations.

To enter the SI Bonus information:

1. Select the SI Bonus tab.
2. If the health insurance premiums should be processed in bonus and special bonus for the employee, then select the Calculate HI Premium in Bonus and Special Bonus check box.
3. Enter the new values regarding health insurance premiums, including care insurance premiums if you want to override the system calculated values in the following fields:
 - Override Employee
 - Override Employer Care Insurance

- Override Employee Care Insurance
 - Override Employer
4. If the employee is the specific insured of care insurance, then select Special Applicable CI Prem Calc check box. If selected, then the application calculates the care insurance premiums regardless of the age.
 5. If the welfare pension insurance premiums should be processed in bonus and special bonus for the employee, then select the Calculate WP Premium in Bonus and Special Bonus check box.
 6. Enter the new values regarding welfare pension insurance premiums to override the system calculated values in the following fields:
 - Override Employee
 - Override Employer
 7. If the welfare pension fund premiums should be processed in bonus for the employee, select the Welfare Pension Fund Insurance (Bonus) Processing check box.
 8. You can override the system calculated values by entering the new values regarding welfare pension fund premiums.
 - Override Employee
 - Override Employer
 9. If the welfare pension insurance premiums should be processed in bonus and special bonus for the employee, select the Calculate WP Premium in Bonus and Special Bonus check box.

Note: In the Effective Date From and Effective Date To fields, the application fills the effective dates through which employee deduct the premiums. The dates cover the entire tax year period to ensure that when the payroll is run for an employee's assignment, the application uses this income tax information to avoid any inconsistent payroll calculations.

Note: If the values are entered, then the health insurance premiums of the termination month are processed even if Social Insurance Premium Collection Type is equal to Not Levy Premiums for Termination Month or Null for the Payroll. The health insurance premiums of the termination month are not processed if the

employee terminates not at the end of the month.

10. Enter the new values regarding welfare pension insurance premiums if you want to override the system calculated values in the following fields:

- Override Employee
- Override Employer

11. Enter the new values regarding welfare pension fund premiums if you want to override the system calculated values in the following fields:

- Override Employee
- Override Employer

12. If the labor insurance premium should be processed in bonus for the employee, select the Calculate LI Premium in Bonus check box.

Enter the new values in the Override Employee field if you want to override the system calculated values.

The application does not use the age to calculate labor insurance premium. So if the employee should be exempt from LI premiums, then you must:

- enter 0 in the Override Employee field
- not select the Calculate LI Premium in Salary check box or
- enter a value in the Effective Date To field

13. If the labor insurance premium should be processed in special bonus for the employee, select the Calculate LI Premium in Special Bonus check box.

Enter the new values in the Override Employee field to override the system calculated values.

The application does not use the age to calculate labor insurance premium. So if the employee should be exempt from LI premiums, then you must:

- enter 0 in the Override Employee field
- not select the Calculate LI Premium in Salary check box or
- enter a value in the Effective Date To field

Note: In the Effective Date From and Effective Date To fields, the

application fills the effective dates through which employee deduct the premiums. The dates cover the entire tax year period to ensure that when the payroll is run for an employee's assignment, the application uses this income tax information to avoid any inconsistent payroll calculations.

To enter the SI Comp information:

1. Select the SI Comp tab.
2. In the Health Insurance Standard Monthly Remuneration, enter the Start month of current standard monthly remuneration in YYYYMM format.
3. Enter the Current standard monthly remuneration. The value needs to be the one in the Standard Monthly Remuneration Table.
4. Enter the Previous standard monthly remuneration. The value needs to be the one in the Standard Monthly Remuneration Table.
5. Select the standard monthly remuneration Calculating Method. The options are Geppen, Ikukai, Santei, or Other. If you enter new values when the employee becomes the insured, the option Other is selected.
6. Enter Simple Average or Adjusted Average amount that is the base of standard monthly remuneration in the current and previous Monthly Earning subject to Health Insurance.
7. In the Welfare Pension Standard Monthly Remuneration, enter the Start month of current standard monthly remuneration in YYYYMM format.
8. Enter the Current standard monthly remuneration. The value is from the Standard Monthly Remuneration Table.
9. Enter the Previous standard monthly remuneration. The value is from the Standard Monthly Remuneration Table.
10. Select the standard monthly remuneration Calculating Method. The options are Geppen, Ikukai, Santei or Other. If you enter new values when the employee becomes the insured, then Other is selected.
11. Enter Simple Average or Adjusted Average amount that is the base of standard monthly remuneration in the current and previous Monthly Earning subject to Health Insurance.

Note: In the Effective Date From and Effective Date To fields, the application fills the effective dates through which employee deduct the premiums. The dates cover the entire tax year period to ensure that when the payroll is run for an employee's assignment, the application uses this income tax information to avoid any inconsistent payroll calculations.

To enter the ITax General:

1. Select the ITax General tab.
2. In the Income Tax region, select the Income tax calculation type, such as Ko, Otsu Hei, and Daily or Monthly.
3. Select the Tax payer organization name.
4. Select whether to include or exclude YEA calculations. The system automatically excludes employees with the earning Exceeding Limited Amount Subject to Year End Adjustment, no earnings or the tax calculation type not Ko, or if they are non residents. If the employee should be excluded for other reasons, select Exclusive. No entry means Inclusive Person.
5. Select if the employee is a non resident.
6. Enter the Tax Grace Proportion in the ItaxRate for Special Postpone. If the grace proportion is 25%, enter 0.25.
7. Select the Foreigner check box if the employee is a foreigner.

Note: In the Effective Date From and Effective Date To fields, the application fills the effective dates through which employee deduct the premiums. The dates cover the entire tax year period to ensure that when the payroll is run for an employee's assignment, the application uses this income tax information to avoid any inconsistent payroll calculations.

8. In the Non Resident region, enter the non resident start date when the employee becomes a non resident from an income tax perspective. If this date does not match the value with NonResident checkbox in the Income Tax region, then this date has a priority.
9. Enter the resident start date when the employee becomes a Japanese resident from an income tax perspective.

10. In the Dependent Information, specify if the employee is any of the following:

- Disable
- Spouse Type
- Single Parent/Widow
- Disable Spouse
- Working Student
- Aged

You can also enter or update the applicable information on dependents here. You require this information for tax exemption purposes.

- Deductible Dependents: a number of deductible dependents, except for the Deductible Spouse
- Number of aged dependents
- Number of aged parents living with the employee
- Number of young dependents
- Number of disabled dependents
- Number of special disabled dependents
- Number of special disabled dependents living with the employee
- Dependents under the age of 16

The dependent information is used in the payroll calculation or reports if Element Entry is selected in JP Payroll Related Information for the Business Group or Payroll.

See: Entering JP Payroll Related Information., page 1-23

Note: In the Effective Date From and Effective Date To fields, the application fills the effective dates through which employee deduct the premiums. The dates cover the entire tax year period to ensure that when the payroll is run for an employee's assignment, the application uses this income tax information to avoid any inconsistent payroll calculations.

To enter the ITax YEA information:

1. Select the ITax YEA tab.
2. You can also enter or update the applicable information on insurance premiums here. In the Insurance Premium Exemption, enter the applicable values for the following fields. The application uses this information for calculating the deductible amount on insurance premiums in the year end process.
 - Life Insurance Premium
 - Personal Pension Premium
 - General Life Insurance Premium after 2012
 - Care medical insurance premium after 2012
 - Individual Pension Insurance After 2012
 - Long Term Damage Insurance Premium
 - Short Term Damage Insurance Premium
 - Earthquake Insurance Premium
 - Prepaid Social Insurance Premium
 - UCHI in Kanji National Pension Insurance Premium
 - Small Company Mutual Aid Premium
3. In the Adjustment Information section, enter each amount you want to adjust to the balances:
 - Adjustment annual taxable amount
 - Adjustment social insurance premium
 - Adjustment small company mutual aid premium
 - Adjustment annual income tax
4. In the Income Amount Adjustment Deduction section, select if the employee is eligible for the income amount adjustment deduction. Select the applicable check boxes:
 - Employee is a person with a special disability

- Same living spouse is a person with a special disability
- Dependents are persons with special disabilities
- Dependents are under the age of 23

To enter ITax YEA2 information:

1. Select the ITax YEA2 tab.
2. In the Spouse Exemption Form section, enter the information required for the JP Year End Adjustment and Japan, Spouse Exemption Form for Salary Earner. The application overrides the information entered in the Year_ Spouse Exemption
3. Enter the annual income of the spouse.
4. Select the judgement class of the spouse from the list of values.
5. Select the Non Resident Spouse check box if the spouse is subject to Spouse Exemption or Spouse Special Exemption Enter the following fields if applicable:
 - The fact of unify living
 - Additional Salary Incomings if the salary is not of KO class
 - Total Income Adding Amount – include all other incomes such as dividends and retirement income

To enter the Housing Loan information:

1. Select the Housing Loan tab.
2. In the Special Deduction amount for Housing Loan etc section, enter the exemption amount. This is required for year end adjustment calculation.

Note: In the Effective Date From and Effective Date To fields, the application fills the effective dates through which employee deduct the premiums. The dates cover the entire tax year period to ensure that when the payroll is run for an employee's assignment, the application uses this income tax information to avoid any inconsistent payroll calculations.

3. Enter the Dwelling Start Date.
4. In the Housing Loan section, enter the Resident Start Year Month Date, Applied Class, and Loan Year End Balance for each deductible housing loan the employee

has. These are required for the YEA reporting.

The number of record will be displayed in the Count field.

Note: In the Effective Date From and Effective Date To fields, the application fills the effective dates through which employee deduct the premiums. The dates cover the entire tax year period to ensure that when the payroll is run for an employee's assignment, the application uses this income tax information to avoid any inconsistent payroll calculations.

To enter the Local Tax Term information:

1. Select the Local Tax Term tab.
2. Select the Calculate Local Tax in Salary check box if you want to deduct the local tax amount in salary.
3. Select the district code to which you pay the local taxes. The code needs to be registered in the Special SWOT Numbers master.
4. Select the start month of the year for paying the local tax. This is usually June.
5. Select the end month of the year for paying the local tax. This is usually May in the next year.
6. Enter the local tax amount for the initial month (usually June) and usual months (usually July to May next year).
7. Enter the local tax personal account number for information purposes. This number is required for some of legislative reports EBS does not support.
8. Select the Ordinary Collecting Class check box to display on the Salary Payment e-file.
9. Enter the month (between 1 and 12) in which the tax amount was changed in the Change Month field for information purposes. You can record this information on the Com_ Local Tax_ Information element for Local Tax Data file.
10. Enter a reason for the tax change in the Description field for information purposes. You record this information on the Com_ Local Tax_ Information element for Local Tax Data file.
11. In the Termination General region, select the Separation Pay Deduction Notice Submit check box if you received the Notification for Termination Income Deduction from the employee. If not selected, the specified income tax rate, not the

table, will be used in the tax calculation for the termination allowance.

12. Select the value in the Paid by salary, bonus or separation pay field from which payment the remaining local tax of the year should be deducted.

Note: In the Effective Date From and Effective Date To fields, the application fills the effective dates through which employee deduct the premiums. The dates cover the entire tax year period to ensure that when the payroll is run for an employee's assignment, the application uses this income tax information to avoid any inconsistent payroll calculations.

13. In the Termination Local Tax region, select the district code to which you pay the local tax for the termination allowance, if the code is different from the one used in salary. If not selected, the code used in salary will be used. The code needs to be registered in the Special Swot Numbers master.
14. Enter the local taxes to be paid to the town and prefecture, if required. If entered, then those amounts have a higher priority and are used in the termination allowance calculation process. If not entered, then application calculates based on the tax rate table.

Compensation and Benefits

Elements

Elements: Building Blocks of Pay and Benefits

With Oracle HRMS, you define a working model of your own *types* of compensation and benefits and the policies or business rules that govern the allocation of these to your employees. You define these types as elements. Elements are the building blocks of pay and benefits, both for HR analysis and payroll processing.

Example

Elements can represent:

- Earnings, such as salary, wages, and bonuses
- Benefits, such as employee stock purchase and pension plans
- Absences from work
- Non-payroll payments, such as expense reimbursements
- Tangible items distributed to employees, such as tools, uniforms, mobile phones, or computers
- Voluntary and involuntary deductions, as well as pre-tax and tax deductions
- Employer taxes and other employer liabilities

There is no limit to the number of elements you can define, and all your definitions are datetracked.

How Are Elements Created?

Some elements are supplied predefined with Oracle HRMS, some are available in template libraries, others are generated by the system when you define certain types of compensation and benefits, and the remainder you can define using the Element window to best meet the needs of your own enterprise.

Predefined Elements

The predefined elements are specific to your localization. They typically include deductions for tax and wage attachments. They may also include standard earnings, such as salary. You should not make any changes to these predefined elements.

Template Elements

Using the Configuration Workbench, you can select many earnings and deductions from a template library for your country and industry. Your selected earnings and deductions form a template set that you can load into your business group. The

template set includes the elements and the balances, balance feeds, and formulas required for payroll processing. You can configure any of these definitions to match your specific requirements.

Generated Elements

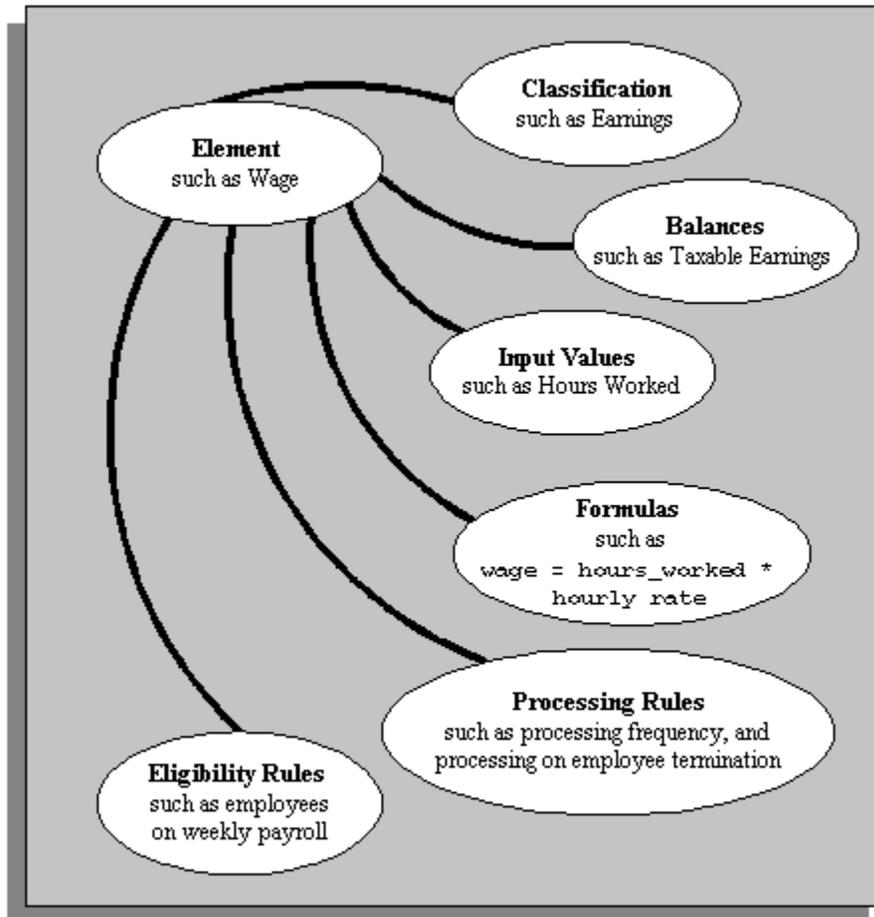
In certain legislations, including North America and the UK, Oracle Payroll users can initiate earnings and deductions, and the system generates the elements you require, along with balances, balance feeds, and formulas. The method of initiating earnings and deductions depends on your localization. Typically you use the Element Design Wizard, Earnings and Deductions windows, or other template windows for specific earnings and deduction types. The processing options you select in the wizard or window determine the rules embedded in the generated elements and formulas. As with template elements, you can configure generated elements and formulas to match any special requirements.

Also, when you create PTO Accrual Plans, the system generates elements for you.

Introduction to Element Definition

The following diagram illustrates the items that you can define or select to control the entry and processing of any earning, deduction, basic benefit, or payment.

Compensation Definition



To take a simplified example, you could define an element called Wage, for hourly paid employees. You classify it in the predefined classification Earnings, which determines when it is processed in the payroll run and what payroll balances it feeds.

You specify one input value, Hours Worked, which must be entered in each pay period. (If necessary, you can define up to 15 input values, with fixed values, defaults, or validation.)

You associate a formula with the element, to calculate the wage for the pay period. A simple formula might be hours worked (from the input value) multiplied by hourly rate (which might, for example, be entered in the Grade Rate window).

You define who is eligible for the element by linking it to components of the employee assignment, such as grade, payroll, salary basis, or organization. In this example, the wage element is available to all employees on the weekly payroll.

You can define other processing rules, such as a termination rule. For example, you might specify that the employees' entry of the wage element should not close down on their termination date but remain open for processing of final pay.

Element Classifications and Processing Sequence

Elements are grouped into primary classifications, such as Earnings and Voluntary Deductions. In a human resources department, you can use the primary classifications to identify groups of elements for information and analysis purposes. In a payroll department, the classifications control processing, including the sequence in which elements are processed and the balances they feed.

Oracle HRMS provides you with these primary classifications and some balances, mainly to reflect tax legislation. They are designed to meet the legislative requirements of your country, so you cannot change them. You can create additional balances to be fed by any of the primary classifications.

Processing Sequence in the Payroll Run

An element's primary classification provides a default processing priority for the element in payroll runs. Lower priority numbers process first.

Most classifications also have a priority range. When you define an element in these classifications, you can overwrite its default processing priority with another number from the range. This is useful if you need to establish the order in which the element processes with respect to other elements in the classification.

Sometimes you must prioritize the processing of certain element entries for an individual employee. For example, you may need to determine the precise order in which deductions taken for wage attachments process for an employee. You can enter a subpriority number for element entries in the Entry Values window.

Canada only: Processing sequence for wage attachments is not determined by subpriority. Instead you can specify Attachment Priority and Prorate Rules in the Further Information field on the Entry Values window.

Secondary Classifications

You can define secondary classifications to feed your own user defined balances. These secondary classifications are subsets of the primary classifications. In some legislations, secondary classifications have been predefined. As with primary classifications, you cannot remove or change any predefined secondary classifications, and you cannot disable any of the predefined balance feeds created for them.

Note: Secondary classifications are not used in the United States, Canada, or Singapore versions of Oracle Payroll at this time.

Mexican implementations use classifications and sub-classifications.

Categories - for US and Canadian Classifications

Most US and Canadian classifications are subdivided into several categories. Categories further define an element's purpose, and can help to determine applicable processing or tax rules. You can define additional categories.

Costing

On the Costing tab of the Element Classifications window, you can view whether elements of this classification are Costable and Distributable. If the classification is Costable, you can select any costing option for elements when you define the element links. If the classification is Distributable, you can create a distribution set from elements of this classification over which you can distribute costs (such as overheads).

You can also view the cost type for elements in the classification, that is, whether they debit or credit the accounts they feed.

Frequency Rules

On the Frequency Rules tab of the Element Classifications window, you can view whether you can define frequency rules for elements of this classification. The payroll run uses a frequency rule to determine in which pay periods it processes a recurring element. On this tab you can also see which date the payroll run uses, by default, to assess frequency rules in your localization. You can select a different date when you define a frequency rule.

Survey of the Classifications

The survey of the classifications identifies:

- The function of elements within each primary classification, page 3-6
- The processing priority range, default priority, and cost type for each classification, page 3-9
- A list of the predefined secondary classifications within each primary classification, page 3-11

Primary Element Classifications

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

Classification	Meaning
C_ 0100 Basic Information	Basic Information
C_ 0200 Salary Information	Information for Salary
C_ 0300 Salary Earning	Earning in Money for Salary
C_ 0400 Salary Earning in Kind	Earning in Kind for Salary
C_ 0500 Salary Social Insurance etc	Pre Tax Deduction of Social Ins etc for Salary (Non Resident)
C_ 0550 Salary Social Insurance etc Non Resident	Pre Tax Deduction of Social Ins etc for Salary (Non Resident)
C_ 0600 Salary Middle Process Information	Middle Process Information for Salary
C_ 0700 Salary Deduction	Deduction for Salary
C_ 0800 Bonus Information	Information for Bonus
C_ 0900 Bonus Earning	Earning in Money for Bonus
C_ 1000 Bonus Earning in Kind	Earning in Kind for Bonus
C_ 1100 Bonus Social Insurance etc	Pre Tax Deduction of Social Ins etc for Bonus (Resident)
C_ 1150 Bonus Social Insurance etc Non Resident	Pre Tax Deduction of Social Ins etc for Bonus (Non Resident)
C_ 1200 Bonus Middle Process Information	Middle Process Information for Bonus Deduction for Bonus
C_ 1300 Bonus Deduction	Information for Special Bonus
C_ 1400 Special Bonus Information	Earning in Money for Special Bonus
C_ 1500 Special Bonus Earning	Earning in Kind for Special Bonus

Classification	Meaning
C_ 1600 Special Bonus Earning in Kind	Pre Tax Ded of Social Ins etc for Spcl Bonus (Non Resident)
C_ 1700 Special Bonus Social Insurance etc	Small Company Mutual Aid Prem for Spcl Bonus (Non Resident)
C_ 1750 Special Bonus Social Insurance etc Non Resident	Middle Process Information for Special Bonus
C_ 1800 Special Bonus Middle Process Information	Deduction for Special Bonus
C_ 1900 Special Bonus Deduction	Information for Year End Adjustment
C_ 2000 Year End Adjustment Information	Item for Year End Adjustment
C_ 2100 Year End Adjustment	Information for Termination Payment
C_ 2200 Termination Payment Information	Earning in Money for Termination Payment
C_ 2300 Termination Payment Earning	Earning in Kind Item for Termination Payment
C_ 2400 Termination Payment Earning in Kind	Pre Tax Deduction for Termination Payment
C_ 2500 Termination Payment Pre Tax Deduction	Pre Tax Deduction for Termination Payment
C_ 2600 Termination Payment Middle Process Information	Middle Process Information for Termination Payment
C_ 2700 Termination Payment Deduction	Deduction for Termination Payment
C_ 2800 Santei	Item for Santei
C_ 2900 Geppen	Item for Geppen
C_ 3000 Employer Burden Charge	Employer Burden Item

Primary Classification Processing Properties and Cost Types

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

Primary Classification	Priority Range	Default Priority	Cost Type
C_ 0100 Basic Information	1000-1900	1500	Debit
C_ 0200 Salary Information	2000-2900	2500	Debit
C_ 0300 Salary Earning	3000-3900	3500	Debit
C_ 0400 Salary Earning in Kind	4000-4900	4500	Debit
C_ 0500 Salary Social Insurance etc	5000- 5400	5200	Credit
C_ 0550 Salary Social Insurance etc Non Resident	5500-5900	5700	Credit
C_ 0600 Salary Middle Process Information	6000-6900	6500	Debit
C_ 0700 Salary Deduction	7000-7900	7500	Credit
C_ 0800 Bonus Information	8000-8900	8500	Debit
C_ 0900 Bonus Earning	9000-9900	9500	Debit
C_ 1000 Bonus Earning in Kind	10000-10900	10500	Debit
C_ 1100 Bonus Social Insurance etc	11000-11400	11200	Credit

Primary Classification	Priority Range	Default Priority	Cost Type
C_ 1150 Bonus Social Insurance etc Non Resident	11500-11900	11700	Credit
C_ 1200 Bonus Middle Process Information	12000-12900	12500	Debit
C_ 1300 Bonus Deduction	13000-13900	13500	Credit
C_ 1400 Special Bonus Information	114000-14900	14500	Debit
C_ 1500 Special Bonus Earning	15000-15900	15500	Debit
C_ 1600 Special Bonus Earning in Kind	16000-16900	16500	Debit
C_ 1700 Special Bonus Social Insurance etc	17000-17400	17200	Credit
C_ 1750 Special Bonus Social Insurance etc Non Resident	17500-17900	17700	Credit
C_ 1800 Special Bonus Middle Process Information	18000-18900	18500	Debit
C_ 1900 Special Bonus Deduction	19000-19900	19500	Credit
C_ 2000 Year End Adjustment Information	20000-20900	20500	Debit

Primary Classification	Priority Range	Default Priority	Cost Type
C_ 2100 Year End Adjustment	21000-21900	21500	Credit
C_ 2200 Termination Payment Information	22000-22900	22500	Debit
C_ 2300 Termination Payment Earning	23000-23900	23500	Debit
C_ 2400 Termination Payment Earning in Kind	24000-24900	24500	Debit
C_ 2500 Termination Payment Pre Tax Deduction	25000-25900	25500	Credit
C_ 2600 Termination Payment Middle Process Information	26000-26900	26500	Debit
C_ 2700 Termination Payment Deduction	27000-27900	27500	Credit
C_ 2800 Santei	28000-28900	28500	Debit
C_ 2900 Geppen	29000-29900	29500	Debit
C_ 3000 Employer Burden Charge	30000-30900	30500	Debit

Predefined Secondary Element Classifications

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

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

Primary Classification	Secondary Classifications	Default
Balance Initialization	None	N/A
C_ 0100 Basic Information	(None)	N/A
C_ 0200 Salary Information	(None)	N/A
C_ 0300 Salary Earning	C_ 0301 Salary Earning Taxable	Yes
	C_ 0302 Salary Earning Subject to Social Insurance	Yes
	C_ 0303 Salary Earning Subject to Wa Insurance	Yes
	C_ 0304 Salary Earning Subject to Employment Insurance	Yes
	C_ 0305 Salary Earning Non Resident Taxable	No
C_ 0400 Salary Earning in Kind	C_ 0401 Salary in Kind Taxable	No
	C_ 0402 Salary in Kind Subject to Social Insurance	No
	C_ 0403 Salary in Kind Subject to Wa Insurance	No
	C_ 0404 Salary in Kind Subject to Employment Insurance	No
	C_ 0405 Salary in Kind Non Resident Taxable	No
C_ 0500 Salary Social Insurance etc	C_ 0501 Salary Si Health Insurance Premium	No

Primary Classification	Secondary Classifications	Default
	C_ 0502 Salary Si Welfare Pension Insurance Premium	No
	C_ 0503 Salary Si Welfare Pension Fund Insurance Premium	No
	C_ 0504 Salary Si Employment Insurance Premium	No
	C_ 0505 Salary Si Small Company Mutual Aid Premium	No
C_ 0550 Salary Social Insurance etc Non Resident	C_ 0551 Salary Si Non Resident Health Insurance Premium	No
	C_ 0552 Salary Si Non Resident Welfare Pension Ins Premium	No
	C_ 0553 Salary Si Non Resident Welfare Pension Fund Ins Prem	No
	C_ 0554 Salary Si Non Resident Employment Insurance Premium	No
	C_ 0555 Salary Si Non Resident Small Co Mutual Aid Premium	No
C_ 0600 Salary Middle Process Information	(None)	N/A
C_ 0700 Salary Deduction	(None)	N/A
C_ 0800 Bonus Information	(None)	N/A

Primary Classification	Secondary Classifications	Default
C_ 0900 Bonus Earning	C_ 0901 Bonus Earning Taxable	Yes
	C_ 0902 Bonus Earning Subject to Social Insurance	Yes
	C_ 0903 Bonus Earning Subject to Wa Insurance	Yes
	C_ 0904 Bonus Earning Subject to Employment Insurance	Yes
	C_ 0905 Bonus Earning Non Resident Taxable	No
C_ 1000 Bonus Earning in Kind	C_ 1001 Bonus in Kind Taxable	Yes
	C_ 1002 Bonus in Kind Subject to Social Insurance	Yes
	C_ 1003 Bonus in Kind Subject to Wa Insurance	Yes
	C_ 1004 Bonus in Kind Subject to Employment Insurance	Yes
	C_ 1005 Bonus in Kind Non Resident Taxable	No
C_ 1100 Bonus Social Insurance etc	C_ 1101 Bonus Si Health Insurance Premium	No
	C_ 1102 Bonus Si Welfare Pension Insurance Premium	No
	C_ 1103 Bonus Si Employment Insurance Premium	No

Primary Classification	Secondary Classifications	Default
	C_ 1104 Bonus Si Small Company Mutual Aid Premium	No
	C_ 1105 Bonus Si Welfare Pension Fund Insurance Premium	No
C_ 1150 Bonus Social Insurance etc Non Resident	C_ 1151 Bonus Si Non Resident Health Insurance Premium	No
	C_ 1152 Bonus Si Non Resident Welfare Pension Ins Premium	No
	C_ 1153 Bonus Si Non Resident Employment Insurance Premium	No
	C_ 1154 Bonus Si Non Resident Small Co Mutual Aid Premium	No
	C_ 1155 Bonus Si Non Resident Welfare Pension Fund Ins Prem	No
	(None)	N/A
	(None)	N/A
	(None)	N/A
	C_ 1501 Sp Bon Earning Taxable	Yes
	C_ 1502 Sp Bon Earning Subject to Social Insurance	Yes
	C_ 1503 Sp Bon Earning Subject to Wa Insurance	Yes

Primary Classification	Secondary Classifications	Default
	C_ 1504 Sp Bon Earning Subject to Employment Insurance	Yes
	C_ 1505 Sp Bon Earning Non Resident Taxable	No
	C_ 1601 Sp Bon in Kind Taxable	Yes
	C_ 1602 Sp Bon in Kind Subject to Social Insurance	Yes
	C_ 1603 Sp Bon in Kind Subject to Wa Insurance	Yes
	C_ 1604 Sp Bon in Kind Subject to Employment Insurance	Yes
	C_ 1605 Sp Bon in Kind Non Resident Taxable	No
	C_ 1701 Sp Bon Si Employment Insurance Premium	Yes
	C_ 1702 Sp Bon Si Small Company Mutual Aid Premium	No
	C_ 1751 Sp Bon Si Non Resident Employment Insurance Premium	No
	C_ 1752 Sp Bon Si Non Resident Small Co Mutual Aid Premium	No
	(None)	N/A
	(None)	N/A

Primary Classification	Secondary Classifications	Default
	(None)	N/A
	C_ 2101 Year End Adjustment Over and Short Tax Amount	No
	(None)	N/A
	C_ 2301 Termination Earning Taxable	Yes
	C_ 2302 Termination Earning Non Resident Taxable	No
	C_ 2303 Termination Payment Earning Specific Executive	No
	C_ 2401 Termination in Kind Taxable	Yes
	C_ 2402 Termination in Kind Non Resident Taxable	No
	C_ 2403 Termination Payment Earning in Kind Specific Exec	No
	(None)	N/A

Payroll Management

Payrolls Overview

Using Oracle HRMS, you can set up payrolls to pay all your employees accurately and at the correct time.

Payrolls in Oracle HRMS

A payroll is a set of employees whose pay you process with a single frequency, for example, weekly or monthly. You can define as many payrolls as you require to meet the pay policies of your enterprise. You put an employee on a payroll by making an assignment to the payroll.

You can also assign employees to other employee groups: for example, groups to indicate membership of a union or employment based sports club.

Key Concepts

To enable you to set up payrolls correctly, you need to understand these key concepts:

- Consolidation sets, *Oracle HRMS Payroll Processing Management Guide*
- Assignment sets, *Oracle HRMS Payroll Processing Management Guide*
- Element sets and distribution sets, *Oracle HRMS Compensation and Benefits Management Guide*

Reporting on Payrolls

See Reports and Processes in Oracle HRMS, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Defining a Payroll

Use the Payroll window to define a payroll, including its calendar and valid payment methods.

To define a new payroll:

1. Set your effective date to a date early enough to handle any historical information you want to enter. Your effective date must be on or before the first period start date of the payroll calendar.
2. Enter the payroll's name and select its period type from the list.
3. Enter the end date of the payroll's first period, and the number of years for which the system should initially generate the payroll's calendar. You can increase this number later to generate additional years.

Note: Be aware that some processes require the calendar to extend into the future. For example, the PTO Carry Over process requires payroll periods extending to the end of the new accrual term.

When you enter the First Period End Date, make sure that the corresponding start date of the first period is after the start date of the payroll.

4. In the Date Offset region, you can change the zero default to a negative or positive number of days before or after the period end date. For example, for a semi-monthly payroll, the Cut Off date can be 3 days before the period end date (-3), while the Scheduled Run and Check dates can be 5 and 7 days after this date, respectively. You can also set the Payslip offset to determine when employees can view payslip information.
 - The Check Date, sometimes called Pay Date, is the date of constructive receipt of pay, on which paychecks become negotiable.
 - The Scheduled Run Date is the date scheduled for the Regular run of this payroll each period.
 - The Cut Off date, included for your reference, is the final date for entering or changing payroll information before a run.
 - A payslip offset, reckoned from the completion date for your payroll processes is always a positive number to enable you to prevent employees from viewing payslips before the official payment date. For example, if the payroll processes complete on 15th May, and employees do not receive payment until 20th May, you can enter an offset of 5 to align the payslip date to the payment date.

Note: Australia, China, Hong Kong, India, Japan, Korea, Singapore, and New Zealand users: You can set the payslip offset to determine when employees can view their payslip information.

These offsets are the defaults for the calendar. You can manually make date changes in the calendar (such as when an offset date falls on a weekend or holiday, by choosing Period Dates).

5. Select a default payment method for employees who have no valid personal payment method. You cannot select a method using magnetic tape because this requires information about employees' bank accounts.
6. Select a default consolidation set for this payroll. One consolidation set is created automatically when you define your Business Group. Oracle Payroll users can create other consolidation sets for payroll processing.
7. In the Costing region, you can enter information about the ledger and suspense account holding costing information for this payroll.

The information you enter here depends on the setup of your Cost Allocation key flexfield.

See: Setup of the Cost Allocation Key Flexfield, *Oracle HRMS Enterprise and Workforce Management Guide*

8. Check the Negative Payment Allowed check box if you want the PrePayments process to include negative payments. If you leave the box unchecked, the PrePayments process ignores negative payments.
9. Check the Multiple Assignment check box if you want an employee to receive a single payment, for multiple assignments carried out within your organization. However, if a PrePayments process, which runs prior to your effective processing date, already exists you cannot go back and change the Multiple Assignment check box. This box is only visible if the functionality is enabled for your localization.

Note: If you check the Multiple Assignment check box, make sure it remains checked throughout your payroll processing. Oracle Payroll reports in error if some of your payroll processes support multiple assignment processing and others do not.

10. If you are an Oracle Payroll user, enter the Statutory Information field to open the Statutory Information window.

Your Oracle localization team may have created fields in this window.

Note: The Statutory Information field is not visible if your HR:User Type profile option is set to HR User.

11. If the Payslip Modeler is enabled for your localization, then you can set locking period for payslip modeling. This restricts users from making updates to payroll information while modeling their payslip during a mock payroll run during the specified period.
12. Specify the number of days prior to and after a specified date when can you make changes for modeling the payslips.

You can specify the Availability Rules whether to disable the functionality days after the period start and days prior to the End date or enable the functionality between the days from start and before the period end date.

Note: You cannot make any changes beyond the days specified here for payslip modeling.

13. **For Korea users only:** Click in the Further Payroll Information field and specify the exemption amounts.

By default, the application uses the TRUNC function for tax calculations. Specify Yes if you want the application to use ROUND function instead of TRUNC function for tax calculations.

Specify if you want to adjust the amounts for standard tax breaks.

Specify if you want to enable reprioritization of pension related amounts as the last priority within the calculation category.

For Japan users only:

Click in the Further Payroll Information field and specify the following information

- income tax dependent reference type
- social insurance premium collection type
- user defined year end adjustment formula
- Hi Wp Monthly Remuneration Synchronous
- Geppen Santei Process Date (MMDD)
- Print Personal Number

14. Save your work.

15. Choose the Period Dates button to view the calendar generated for your payroll. In the Period Dates window:
 - You can view the default offset dates for every period, and you can manually override any of these dates in any record.
 - You can change the payroll's default *Open* status in any period to *Closed* to prevent further element entries. You can also reopen the period if necessary.

Important: Use this feature with caution. When you perform certain important tasks in Oracle HRMS, the system may automatically create or delete element entries. These tasks include hiring and terminating people, and updating assignments. You cannot change any element entries that span a closed payroll period, and so you may be prevented from performing these tasks.

16. Choose the Valid Payment Methods button to add valid payment methods for this payroll.

In the Valid Payment Methods window, the default payment method for the payroll appears automatically. You can add other methods. First set your effective date to the date you want the method to become valid.

Note: An employee assigned to this payroll can have any number of personal payment methods chosen from those you enter here for the payroll.

See: Entering Payment Methods for an Employee Assignment in *Oracle HRMS Workforce, Sourcing, Deployment, and Talent Management Guide*

Defining a Payment Method

Use the Organizational Payment Method window to define payment methods for your enterprise.

From this window, you:

- Supply the name and starting date of your payment method.
- Enter the details of the source bank account from which your enterprise makes the payment.
- Specify the General Ledger (GL) accounts that hold reconciliation and error details for the payment method.
- Handle costing for the payment method. For example, you can specify whether to

transfer the costs to GL and whether costing applies to cleared payments only, uncleared payments only, or a combination of cleared and uncleared payments.

- Confirm that your source bank account in Oracle Payroll is the same bank account that Oracle Cash Management uses to clear your payments. This confirmation assures you that you are operating with a single consistent bank account rather than with duplicate accounts that introduce accounting errors.

To define a payment method:

Supply a name and start date for your payment method

1. Set your effective date so that it reflects the date when you want to begin using this payment method.
2. Enter a name for the payment method, and select the payment method type.
For a third-party payment method, always select the type Check/Cheque. The default currency for your business group appears automatically.
3. If an alternative currency exists for your payment method, select it.
4. If your payment method controls payments to a third party such as a benefits carrier or garnishment receiver, check the Third Party Payment box.

Enter the source bank details for your payment method

5. Navigate to the Source Bank tab. The Country for your source bank account appears automatically.
6. Enter the Bank Details field to open the Bank Details window. Enter information about the account from which your enterprise intends to make payments.

If you are using Cash Management, include the following information:

- Account Name
- Account Type
- Account Number
- Bank Name: If this already exists, enter the name exactly as it appears in Accounts Payable.
- Bank Branch: If this already exists, enter the name exactly as it appears in Accounts Payable.

Italy Users: You can enter the Bank Name, Bank Location, Account Number, and Account Name. The IBAN Account displays by default.

Ensure that you enter any additional bank details that are specific to your enterprise. For example, bank details for U.S. payment methods always require a transit code. The transit code, or transit routing number is the nine-digit number that identifies the financial institution. If the transit code is incorrect, the funds will not be posted to the account.

South Africa Users: Enter the account holder's name and indicate whether the account holder relationship is joint, own, or third party.

Belgium, Denmark, Finland, France, Germany, Hungary, Ireland, the Netherlands, Norway, Poland, Russia, Spain, and Sweden users: Enter the Bank Identifier Code (BIC) and International Bank Account Number (IBAN) in the Bank Identifier Code and the IBAN Number fields, respectively. Note that you must enter at least one of the account numbers, that is, either the International Bank Account Number (IBAN) or the Account Number. If you enter the Account Number, then the Bank Code and Branch Code fields are mandatory.

Warning: Always review the account setup for Oracle Accounts Payable before you define the account in Oracle Payroll. The details for your Payroll account must exactly match the account details in Accounts Payable. Otherwise, Accounts Payable creates an extra account with marginally different details. This duplicate account introduces errors when you reconcile payments between Payroll and Accounts Payable.

Specify what type of payments to cost for this payment method

7. Navigate to the Costing tab. Each check box indicates a particular type of payment. Check the boxes for each type of payment that you want to cost. When you subsequently run the Costing of Payment process, it costs each type of payment as you have indicated. The entries that you make for an individual check box can imply automatic checking of related boxes. Your choices are:
 - **Cost Payment:** Check this box to specify that you want to cost only uncleared payments for this payment method.
 - **Cost Cleared Payment:** Check this box to specify that you want to cost only cleared payments for this payment method. If you check this box, the Cost Payment box is also checked by default.
 - **Cost Cleared Voided Payment only:** Check this box to specify that you want to cost any voided payments that have also been cleared by Oracle Cash Management. If you check this box, the Cost Payment and Cost Cleared Payment boxes are also checked by default.
 - **Exclude External/Manual Payment:** Check this box to exclude any external/manual payments from costing. This exclusion is useful if you are

using this payment method as a dummy payment method to cancel a previous payment, or if you are making a payment by cash. If you check this box, the Cost Payment box is also checked by default.

- **Transfer to GL:** Check this box to specify that costed payments should transfer to General Ledger. If you check this box, the Cost Payment box is also checked by default.

Specify the GL accounts for this payment method

8. Navigate to the General Ledger tab.
9. Select Ledger to indicate the ledger to use if you intend to reconcile payments using Oracle Cash Management.
10. Select the GL Control Account.
11. Select GL Cash Account to indicate which cash account to use for the reconciliation of payments.

The entry for Description appears automatically by default, depending on what you enter in the GL Cash Account details.

12. Select the Cash Clearing Account.
13. Select the Error Account.

When you first specify the GL accounts for a bank account, these then become the default GL accounts for any other payment methods that use the same bank account. The defaults apply for all new payment methods using the bank account. They also apply retrospectively for any existing payment methods that were already using the same account. However, you can override these defaults by entering your preferred GL accounts on the General Ledger tab.

At this point, check that your Payroll setup and Cash Management setup are fully integrated.

Confirm that you can reconcile payments in Cash Management

14. Navigate to the Cash Management tab. You cannot change the information on this tab, but you can confirm that your GL accounts are correct.
15. To confirm that Oracle Cash Management is operating with the same source bank account that you are using in Oracle Payroll, view the check box. If the box is checked, then Oracle Cash Management holds the bank account for this payment method, and you can reconcile payments knowing that you are using an identical account in Payroll, and in Cash Management.

However, if the box is not checked, this indicates that Oracle Cash Management

does not hold the details for your Payroll account. This may indicate that duplicate accounts exist and you should exercise caution when you reconcile your payments.

Enter further information for the payment method

16. Enter further information to determine how to process this payment method. Click in the Further Information field to see the range of further information for your enterprise. **For Japan users only:** Enter the company code and company name. Select the delimiter type for the Direct Deposit file.
17. **For Norway users only:** Enter values for the following fields to define the payment method level. (The same payment type supports the ISO20022 and older Telepay process).

Field	Description
Initiating Party Name	Enter the name of the known party.
Sender ID	Enter the initiating party ID. This unique organization identification is assigned by an institution using an identification scheme. Typically, this is the customer-ID in the debtor bank based on the <i>Brønnøysundregistrene</i> and their Central Coordinating Register of Legal Entities, or other identification arranged with the bank.
Scheme Name	Enter the code for the identification scheme as published in an external list. The options are BANK and CUST: <ul style="list-style-type: none">• BANK: Debtor/creditor relates to a sub-level agreement under the main agreement (a bilateral agreement between a customer and a bank) regarding a special service or subsidiaries or divisions. When the scheme name is BANK, the Sender ID should have a Customer Service ID assigned by the bank.• CUST: Debtor/creditor relates to the main-agreement with the financial institution. When the scheme name is CUST, the sender ID should be the organization number of the initiating party.

Field	Description
Batch Booking	<p data-bbox="792 310 1360 436">Indicate whether [the requestor] has requested a single entry per individual transaction or a batch entry for the sum of the amounts of all transactions within the group of a message. The options are:</p> <ul data-bbox="792 457 1360 590" style="list-style-type: none"> <li data-bbox="792 457 1162 489">• No: Single Booking requested. <li data-bbox="792 527 1360 590">• Yes: Batch Booking requested. This default value is Yes. <p data-bbox="792 632 1360 695">Note: The Yes and No values are reflected in XML as true and false.</p>
Service Level Code	<p data-bbox="792 789 1360 915">The service level code specifies a pre-agreed upon service or level of service between the parties as published in an external service level code list. Select one of the following options:</p> <ul data-bbox="792 936 1360 1276" style="list-style-type: none"> <li data-bbox="792 936 1305 999">• NURG (Non-urgent Payment): Select as the default. <li data-bbox="792 1041 1321 1104">• SDVA (Same Day Value): Intercompany only (not for salaries). <li data-bbox="792 1146 1214 1178">• SEPA (Single Euro Payments Area) <li data-bbox="792 1209 1360 1272">• URGP (Urgent Payment): Only suppliers (SUPP) but not for salaries.

Field	Description
Payment File Format	<p>This field indicates which supported payment file format and process are in use. The supported processes are Telepay and ISO 20022.</p> <ul style="list-style-type: none"> • Telepay: Indicates that the older file format and process, the Norwegian Payment Process, are in use. This is the default value if the field is blank. If this value is set, and you run the newer ISO20022 process, then an error occurs. • ISO20022: Indicates that the ISO 20022 file format and process are in use. If this value is set and you run the older Telepay process, the following error message appears: <i>Bank file format processed is not according to specified set up on Payment method.</i> <p>Note: If you see this message, you must roll back the error process before running the new process.</p>
Payment Identification ID	The payment identification ID is a reference assigned by a sending party to identify the payment information block within a message.
Payment Method	<p>Select one of the following values to specify the payment type to use for transferring the funds:</p> <ul style="list-style-type: none"> • CHK: Cheque • TRF: Credit Transfer. This default value is TRF.
Debtor Name	Enter the name of the debtor party.
Debtor ID	The debtor ID is a unique identifier assigned to a debtor organization by an institution using an identification scheme.

Setting Up the Direct Deposit File Process

1. Enter the company information and Delimiter type in Organization Payment Methods window.

See: Defining a Payment Method

2. Run a payroll run (Salary, Bonus, Special Bonus or Retirement Money)

See: Running the Payroll Run (Salary) Process, page 5-2

Running the Payroll Run (Bonus) Process, page 5-3

Running the Payroll Run (Special Bonus process), page 5-4

Running the Payroll Run (Retirement Money) Process, page 5-5

3. Run the pre-payments.

See: Running the Pre-Payments Process, *Oracle HRMS Payroll Processing Management Guide*

4. Run the Pre-Process to Generate Direct Deposit File process.

See: Running the Pre-Process to Generate Direct Deposit File, page 8-4

5. Run Generate Direct Deposit File process.

See: Running the Generate Direct Deposit File process, page 8-5

Payroll Statutory Deductions and Reporting

Payroll Statutory Deductions and Reporting Overview

Oracle Payroll enables you to calculate an employer's tax liability and deduct the appropriate sums from employee earnings. You can calculate employer and employee tax liabilities for all the taxes and statutory deductions that are applicable to your country. For example, this includes employer liability for state taxes such as State Unemployment Insurance and employee liability for federal, state and local taxes in the US, PAYE and NIC in the UK, PAYE and PRSI in Ireland, Social Security, Unemployment and Complementary Pension in France, Standard and Special tax and Social Insurance in the Netherlands, and so on.

In each instance, Oracle Payroll enables you to enter details of the tax liability and process it at regular intervals.

Reporting on Payroll Statutory Deductions

See: Reports and Processes in Oracle HRMS, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Running the Japan, Create Payroll Data for use in Reporting Form

You run this process to create payroll data for reporting purposes.

You run the Japan, Create Payroll Data for use in Reporting Form process from the Submit Requests window.

To run the Japan, Create Payroll Data for use in Reporting Form process:

1. In the Name field, select Japan, Create Payroll Data for use in Reporting Form. The Parameters window opens.
2. Enter the start date from when you want to create the payroll data.

3. The current system date appears by default as the end date.
4. Select the payroll to create data for only those employees who belong to the selected payroll.
5. The consolidation set appears automatically for the selected payroll.
6. Select the assignment set for which you want to create the payroll data.
7. Click OK and then Submit.

Running the Payroll Run (Salary) Process

You run this process when you want to make regular monthly earnings payments to employees.

You run this process in the Submit Requests window.

To run the Payroll Run (Salary) Process:

1. In the Name field, select Payroll Run (Salary). The Parameters window opens.
2. Select the payroll for which you want to run this process.
3. The consolidation set, payroll period and pay day appear by default for the selected payroll.
4. Optionally select an assignment set.
5. Select the action parameter group. If you define the action parameter group in the Profile Option HR: Action Parameter Group Name, it displays as default value. By grouping action parameter, you can set the required parameter and optimal values for each concurrent program, and as a result, for fine performance tuning.
6. Select the Employment Insurance Rate Effective Date when required. This option enables you to define the effective date for the employment insurance rate when it should not be as of process date. For example, for the payroll the monthly salary gets paid for previous month, the application refers to the rate process date in April YYYY for monthly salary for March paid in April YYYY. However, if there are new rate changes effective from 04/01/YYYY, the rate before change may want to be referred because it's the monthly salary for March. In such case the users would define the date before 03/31/20x1.
7. Select the Dependents Effective Date when required. This option enables you to define the effective date for the dependent information when it should not be the Date Earned. For example, for the payroll the monthly salary gets paid for previous month, the application refers to the dependent information as of 12/31/20x1 for

monthly salary for December paid in January YYYY. However, if there are new legislative changes effective from 01/01/20x2, the information after 01/01/20x2 should be referred because the payment date is in January 20x2. In such case, you would define the date after 01/01/20x2..

Note: This option works only when [Report] Extra Contact Info [Payroll] Extra Contact Info is selected for the income tax dependent reference type in Business Group or Payroll.

Running the Payroll Run (Bonus) Process

Run this process while making bonus payments to your employees.

You run the Payroll Run (Bonus) process from the Submit Requests window.

To run the Payroll Run (Bonus) Process:

1. Select the payroll.
2. The consolidation set appears automatically for the selected payroll.
3. Select the target date when you want to process the bonus payments. The application uses the Target date for Database items in Formulas, Formula process rule - Database items of Assignment set if ASSIGNMENT_SET_DATE = 'D' in PAY_ACTION_PARAMETERS
4. Select the pay date when you want to pay employees. The application uses the Payment date Global values, Balance values and tables in formula. This application uses the date as of Payment Date.
5. Select an assignment set if you want to restrict running the bonus payroll to a particular assignment set.
6. Select an action parameter group. If you define the action parameter group in the Profile Option HR: Action Parameter Group name, it is displayed as default value. By grouping action parameter, you can set the required parameter and optimal values for each concurrent program, for fine performance tuning.
7. The computation period displays automatically as 6. You can change a number 1-12 when required. This defines which income tax rate table (bonus or monthly salary) will be used in the calculation.
8. Select the Employment Insurance Rate Effective Date when required. This option allows the users to define the effective date for the employment insurance rate when it should not be as of process date.

9. Select the Dependents Effective Date when required. This option allows the users to define the effective date for the dependent information when it should not be the Date Earned.

Note: This option works only when [Report] Extra Contact Info [Payroll] Extra Contact Info is selected for the income tax dependent reference type in Business Group or Payroll.

10. Specify Yes or NO if SI – Summarize Bonus is paid in the same month. If you select yes, the health insurance premium amount, welfare pension insurance premium amount and max limit amount of the standard bonus are calculated and validated based on the total amount of bonuses in the month. If you select no, then those are calculated and validated based on the individual bonus, even though they get paid multiple bonuses in the month.
11. Click OK and then Submit.

Running the Payroll Run (Special Bonus process)

You run the Special Bonus process when an employee receives bonus more than four times in a year.

You run the Payroll Run (Special Bonus) process from the Submit Requests window.

To run the Payroll Run (Special Bonus) Process:

1. In the Name field, select Payroll Run (Special Bonus). The Parameters window opens.
2. Select the payroll for which you want to run this process.
3. The consolidation set appears by default for the selected payroll.
4. The target date and pay day display the current system date. You can change if required.
5. Select the assignment set.
6. Select the action parameter group. If you define the action parameter group in the Profile Option HR: Action Parameter Group Name, it displays as default value. By grouping action parameter, you can set the required parameter and optimal values for each concurrent program, and as a result, for fine performance tuning.
7. The computation periods display a value of 12 by default. You can change a number 1-12 when required. This defines which income tax rate table (bonus or monthly salary) will be used in the calculation.

8. Select the Employment Insurance Rate Effective Date when required. This option allows the users to define the effective date for the employment insurance rate when it should not be as of process date.
9. Select the Dependents Effective Date when required. This option allows the users to define the effective date for the dependent information when it should not be the Date Earned.

This option works only when [Report] Extra Contact Info [Payroll] Extra Contact Info is selected for the income tax dependent reference type in Business Group or Payroll
10. Click OK and then Submit.

Running the Payroll Run (Retirement Money) Process

You run this process to pay the retirement money to employees retiring from your organization.

You run this process from the Submit Requests window.

To run the Payroll Run (Retirement Money) process:

1. In the Name field, select Payroll Run (Retirement Money). The Parameters window opens.
2. Select the payroll for which you want to run this process.
3. The consolidation set appears by default for the selected payroll.
4. The system date appears by default in the target date field.
5. The system date appears by default in the pay day field.
6. Select the assignment set.
7. Select the action parameter group. If you define the action parameter group in the Profile Option HR: Action Parameter Group Name, it displays as default value. By grouping action parameter, you can set the required parameter and optimal values for each concurrent program, and as a result, for fine performance tuning.
8. Click OK and then Submit.

Running the Withholding Income Tax Report for Termination Income

Run the Withholding Income Tax Report for Termination Income for employers to issue to employees when termination money is paid on termination.

You run the Japan, Withholding Income Tax for Termination Income from the Submit Requests window.

To run the Japan, Withholding Income Tax Report for Termination Income:

1. In the Name field, select Japan, Withholding Income Tax Report for Termination Income.
2. Click in the Parameters field to open the Parameters window.
3. Enter the specific year for which you have run the archive.
4. Specify the withholding agent.
5. You can sort by employee number or district code. This is a mandatory. The default is Employee Number.
6. Enter the termination dates from and until when you want to publish the report for terminated employees.
7. Select the assignment set to restrict the report for a particular set.
8. Click OK and then Submit.

Running the Japan, Withholding Tax Report Generation Process

The Japan, Withholding Tax Report Generation process is a pre-process of YEA reports, including the withholding income tax report. In this process all the required YEA data is archived.

You run the Japan, Withholding Tax Report Generation process from the Submit Requests window.

To run the Japan, Withholding Tax Report Generation:

1. In the Name field, select Japan, Withholding Tax Report Generation.
2. The Parameters window opens.
3. In the Run Japan, Create Payroll Data for use in Reporting Form field, select Yes to run Japan, Create Payroll Data for use in Reporting Form. Select No if Japan, Create Payroll Data for use in Reporting Form has already been done.
4. The current system date appears by default in the Subject Date field. You can change the date for when you want to run the report.
5. Select the payroll and the withholding agent.

6. Select to archive terminated employees.
7. Enter the termination dates, if Archive Terminated People is Yes.
8. Select Yes if you want to re-archive the data. The default is No.

If you select Yes, then archive data will be created or re-created for all the assignments, even for the assignments for which the Japan, Withholding Tax Report Generation has been run before and the archive data already exists.

If you select No, then archive data will be created only for the assignments that have no archived data yet, and no updates for the assignments for which the Japan, Withholding Tax Report Generation has been already done and archive data already exists.

Note: If Re-archive is No, then the existing data will be saved regardless of this value.
9. Select if you want to inherit the archive data for Description. If you select Yes, then User Description under Description for use in Reporting Form section and User Description (Kanji) under Description for use in Magnetic File section you entered on SSHR Japan, Withholding Tax Report will be saved. The default is Yes.
10. Select the open period status. If you select Open in the Open Period Status, then enter the start and end dates for the open period to enable you to view and make updates to the employee information. The default is Closed.
11. Select the assignment set to run the report for a particular group of employees.
12. If the Japan, Create Payroll Data for use in Reporting Form is Yes, then enter the start and end dates to create payroll data.
13. If the Japan, Create Payroll Data for use in Reporting Form is Yes, then select the consolidation set.
14. Click OK and then Submit.

Running the Japan, Withholding Tax Report Generation (Standalone)

You can use the Japan, Withholding Tax Report Generation (Standalone) process to archive the tax withheld amounts.

Note: The difference between Japan, Withholding Tax Report Generation report (Standalone) and Japan, Withholding Tax Report Generation report is that, Japan, Withholding Tax Report Generation

runs Japan, Create Payroll Data for use in Reporting Form in the concurrent process, but not in Japan, Withholding Tax Report Generation report (Standalone). To run Japan, Withholding Tax Report Generation report (Standalone), you have to run Japan, Create Payroll Data for use in Reporting Form process prior to running this process.

You run the Japan, Withholding Tax Report Generation Report (Standalone) from the Submit Requests window.

To run the Japan, Withholding Tax Report Generation report (Standalone)

:

1. In the Name field, select Japan, Withholding Tax Report Generation (Report (Standalone)). The Parameters window opens.
2. The current system date appears by default in the Subject Date.
3. Select the payroll.
4. Select the withholding agent.
5. Select if you want to archive terminated employees. The default is Yes.
6. Enter the termination dates, if Archive Terminated People is Yes..
7. Select if you want to re-archive the data. The default is No.

If you select Yes, then archive data will be created or re-created for all the assignments, even for the assignments for which the Japan, Withholding Tax Report Generation has been run before and the archive data already exists.

If you select No, then archive data will be created only for the assignments that have no archived data yet, and no updates for the assignments for which the Japan, Withholding Tax Report Generation has been already done and archive data already exists.

Note: If Re-archive is No, then the existing data will be saved regardless of this value.

8. Select if you want to inherit the archive data. The default is Yes.
Select if you want to inherit the archive data for Description. If you select Yes, then User Description under Description for use in Reporting Form section and User Description (Kanji) under Description for use in Magnetic File section you entered on SSHR Japan, Withholding Tax Report will be saved. The default is Yes.
9. Select the open period status. If you select Open in the Open Period Status, then

enter the start and end dates for the open period to enable you to view and make updates to the employee information. The default is Closed.

10. If you select Open in the Open Period Status field, then enter the start and end dates for the open period. If the period is Open, then you can update the information. If the period is Closed, then you can only review the information.
11. If the Japan, Create Payroll Data for use in Reporting Form is Yes, then enter the start and end dates to create payroll data.
12. If the Japan, Create Payroll Data for use in Reporting Form is Yes, then select the consolidation set.
13. Click OK and then Submit.

Running the Japan, Withholding Tax Report of Earned Income

Run the Japan, Withholding Tax Report for Earned Income process to report the money paid to employees. You run the Japan, Withholding Tax for Earned Income from the Submit Requests window.

To run the Japan, Withholding Tax Report of Earned Income:

1. In the Name field, select Japan, Withholding Tax Report for Earned Income. The Parameters window opens.
2. Enter the year to run the report.
3. Enter a withholding agent.
4. You can sort by employee number or by district code. This is mandatory.
5. Select Yes to report only the employee's income details to the tax office.
6. Select Yes to report the income details of the terminated employees.
7. Enter the termination dates from when you want to process this report.
8. Select the specific employees to restrict the report.
9. Select an assignment set to restrict the report for a particular set of employees.
10. Select an output type.
11. Select the chunk size.
12. Select Yes to display the assignment number in the report. The default is No.

13. Select Yes to Print with Era Code before Era Change. The default is No.
14. Click OK and then Submit.

Running the Withholding Income Tax Report for Termination Income – Archive

Run the Japan, Withholding Income Tax for Termination Income Archive process to archive the payment details of the termination money paid to employees.

You run the Japan, Withholding Income Tax for Termination Income - Archive from the Submit Requests window.

To run the Japan, Withholding Income Tax Report for Termination Income – Archive process:

1. In the Name field, select Japan, Withholding Income Tax Report for Termination Income - Archive. The Parameters window opens.
2. Select No if you've already performed Run Japan, Create Payroll Date for use in Reporting Form for the current results of termination money data in the Run Japan, Create Payroll Date for use in Reporting Form field. The default is Yes so as to submit the JP Pre-Tax Archiver process prior to archiving process.
3. Enter the effective date for running the archive the details of the employees who must be paid termination money within the specified year.
4. Select Yes, if you have previously the archived data and want to delete it and re-archive. The default is No.
5. Specify a withholding agent.
6. Specify a payroll.
7. Enter the Termination date from and to for which you want to archive
8. Select an assignment set, if you want to restrict the archive for a particular assignment set.
9. Enter the start and end dates for the pre-archive process. This is enabled when you set the Run Japan, Create Payroll Date for use in Reporting Form to Yes.
10. Enter the consolidation set for the pre-archive process. This is enabled when you set the Run Japan, Create Payroll Date for use in Reporting Form to Yes.
11. Click OK and then Submit.

Running the Japan, Withholding Book and Wage Ledger – Archive

You can use the Japan, Withholding Book and Wage Ledger - Archive to archive the monthly salary, bonus payment, and year-end adjustment information for reporting purposes. indow.

Run the Japan, Withholding Book and Wage Ledger – Archive from the Submit Requests window.

To run the Japan, Withholding Book and Wage Ledger – Archive:

1. In the Name field, select the report name. Then select the Parameters field to open the Parameters window.
2. Enter the date for the archive. YYYY/MM is used for archiving the data. This is a mandatory field.
3. Specify the special withholding agent. This is a mandatory field.
4. Select New, Recreate, Add, or Amendment as the archive mode. This is a mandatory field.
 - New, Recreate: Create or recreate the data from January to specified month of the year.
 - Add: Add the data after the already archived month to specified month.
 - Amendment: Correct the data of specified month, which is already archived before.
5. Specify payroll group for archiving. This is optional.
6. Specify an assignment set if you want to restrict the archive to a particular set. This is optional.
7. Click OK and then Submit.

Running the Japan, Withholding Book and Wage Ledger

You can use the Japan, Withholding Book and Wage Ledger to report the monthly salary, bonus payment, and year-end adjustment information of the year for reporting purposes.

Run the Japan, Withholding Book and Wage Ledger from the Submit Requests window.

To run the Japan, Withholding Book and Wage Ledger Report:

1. In the Name field, select the report name. Then select the Parameters field to open the Parameters window.
2. Enter the date for the reporting year. This is a mandatory field.
3. Specify the special withholding agent for reporting. This is a mandatory field.
4. Specify payroll group for reporting. This is optional.
5. Specify the location which you want to report. This is optional.
6. Specify if you want to include all organization under the specified organization.
7. Specify the organization to report. If you do not select any organization, the report displays for all organizations. This is optional.
8. Specify Yes if you want to include terminated employees in the report. This is a mandatory field.
9. Specify the termination dates from and until when you want to include terminated employees.
10. Specify an assignment set if you want to restrict the report for a particular set. This is optional.
11. Specify the preferable sort order. If no sort order is specified, the employee number is used for sorting.
12. Click OK and Submit.

Running the Separation Certificate – Archive Process

Run the Separation Certificate – Archive process to archive the details of the terminated employees. Employers issue the Separation Certificate to terminated employees on their request for submitting to the employment insurance office.

You run the Japan, Separation Certificate Archive process from the Submit Request window.

To run the Japan, Separation Certificate - Archive:

1. In the Name field, select the report name. Then select the Parameters field to open the Parameters window.
2. Enter the effective date for running the archive.

3. Specify the employment insurance office where the employee is registered.
4. Enter the Termination dates from and until when which you want to published the report. This is a mandatory and defaults to the Effective Date.
5. Enter an assignment set if you want to restrict the archive to a specific set of assignments.
6. Click OK and then Submit.

Running the Japan, Separation Certificate Report

Run the Separation Certificate to issue to employees insured under Employment Insurance for claiming unemployment insurance when they leave their job.

Run the Japan, Separation Certificate from the Submit Requests window.

To run the Japan, Separation Certificate Report:

1. In the Name field, select the report name. Then select the Parameters field to open the Parameters window.
2. Enter the specific year and month in which you have run the archive. The report picks data from the year start till the Subject Year Month entered.
3. Select a Payroll ID from the list of values of archives and publish the report. The list of values depends on the specified Subject year and month.
4. You can sort by Employee Number, Termination date. Default is Employee Number.
5. Specify an assignment set if you want to restrict the report for a particular assignment set.
6. Click OK and then Submit.

Running the JP Payslip Generation – Self Service Process

You run this process for generating the payslip for self service users.

You run the JP Payslip Generation – Self Service process from the Submit Requests window.

To run the JP Payslip Generation - Self Service process:

1. In the Name field, select JP Payslip Generation – Self Service Process. The Parameters window opens.

2. Enter the start date and end date for when you want to generate the payslip.
3. Select to generate the payslip for the selected payroll.
4. The consolidation set appears automatically for the selected payroll.
5. The payment date appears by default depending on the end date entered.
6. Enter a label for the payslip for identification purposes.
7. Click OK and then Submit.

Running the Payroll Report (Check List for Geppen at Child-Care Leave/Maternity Leave End)

If you want to report the result of the Payroll Run (Geppen at Child-Care Leave End/Maternity Leave End) process, you run the Payroll Report (Check List for Geppen at Child-Care Leave End/Maternity Leave End) for such employees.

Note: EBS does not comply with the Nihon Horei format of the Notification of Geppen after Child-Care Leave/ Notification of Geppen after Maternity Leave, but the Notification of Geppen.

You run the Payroll Report (Check List for Geppen at ChildCare Leave End/Maternity Leave End) from the Submit Requests window.

To run the Payroll Report (Check List for Geppen at Child-Care Leave End/Maternity Leave End) Process:

1. In the Name field, select Payroll Report (Check List for Geppen at Child-Care Leave End/Maternity Leave End). The Parameters window opens.
2. Select the payroll.
3. Select the consolidation set.
4. Select the applying month. The applied date appears by default. This means from which monthly salary the result should be applied.
5. Select the effective dates.
6. Enter the location.
7. Select where you want to submit the details.
8. Select the Output Flag. The default is to include all assignments. You can select to

exclude or include assignments in the report.

9. Select the reported date. The default is current date.
10. Select the employees for whom you want to run the report.
11. Click OK and then Submit.

6

Year End Processing

YEA Processing

Year End Adjustment and Re-Year End Adjustment Overview

Oracle Payroll for Japan allows you to process year end adjustments for your employees before submitting tax information to the taxation office.

The fiscal year for Japan runs from January 1 and December 31 each year. You must submit income tax returns to the taxation office between February 16 and March 15 of the following year.

Year End Adjustment

The Year End Adjustment (YEA) process usually takes place in the last payroll run for the calendar and fiscal year, to make any necessary adjustments to the provisional tax deductions from an employees' earnings. You can require adjustments if an employee's details have changed - for example, the number of dependants has changed, or their insurance premium details have changed.

If you have deducted too much from an employee, the employee may receive a refund. If you have deducted too little, the employee may have to pay more tax.

Re-Year End Adjustment

Re-YEA enables you to run an additional YEA for employees up to the end of January of the following fiscal/calendar year. You run this process for employees who have had changes in their circumstances after December 31, but before the lodgement of their income tax returns to the taxation office.

Processing YEA and Re-YEA

Oracle Payroll provides two ways to process year end adjustments:

1. By payroll run - prevents reprocessing of YEA information. For this reason, you may choose to use Re-YEA to reprocess any changed information, after your initial YEA process.
2. By balance adjustment - allows you to run the processes retrospectively, and enables you to run the YEA and Re-YEA process for the previous calendar/fiscal year.

See: Running the YEA and Re-YEA Processes, page 6-3

Running the Japan, Qualification Notice for Unemployment Ins E-file

You can use the Japan, Qualification Notice for Unemployment Ins E-File to report employees newly insured under Employment Insurance to the Labor Insurance office.

You run the Japan, Qualification Notice for Unemployment Ins E-file from the Submit Requests window.

To run the Japan, Qualification Notice for Unemployment Ins E-file:

1. In the Name field, select Japan, Qualification Notice for Unemployment Ins E-file. The Parameters window opens.
2. In the Target Date From and Target Date To fields, the current date appears by default.
3. Select the organization for which you want to run the report.
4. Click OK and then Submit.

Running the YEA and Re-YEA Processes

You run the YEA and Re-YEA processes at the end of the fiscal year and before submitting your employees' income tax information to the taxation office.

You must run PrePayments before running the YEA or Re-YEA processes. Typically you run Re-YEA after you complete the normal YEA process, and establish that there are additional changes required to an employee's earnings and withholding tax information.

You run the YEA and Re-YEA processes from the Submit Request window:

To run the YEA and Re-YEA Processes:

1. In the Name field, select Payroll Run (Year End Adjustment). Enter the Parameters field to open the Parameters window.
2. Choose the payroll.
3. Enter a target date for the process as the date you will run the process.
4. Enter a process date. This is the date the process will be run.
5. Optionally choose an Assignment Set.
6. Select the Action Parameter Group.

7. Optionally enter an effective date for dependent information, when required. This option enables you to define the effective date for the dependent information when it should not be the Processed Date.

Note: You can enter only when [Report] Extra Contact Info [Payroll] Extra Contact Info is selected for the income tax dependent reference type in Business Group or Payroll.

Note: The input values of Com_Basic_Dependent Exemption Element Entry always have priority.

8. Click Ok and Submit. .

Running the Year End Adjustment Process

You run this process for the year-end adjustment or re-year-end adjustment by using Balance Adjustment.

You run the YEA process from the Submit Requests window.

To run the Year End Adjustment process:

1. In the Name field, select JP Year End Adjustment. The Parameters window opens.
2. Select the payroll to process the report for only those employees who belong to the selected payroll.
3. The consolidation set appears automatically for the selected payroll.
4. Select the date on which you want to process. The system date appears by default.
5. Select the assignment set, if you want to restrict the YEA process to specific assignments.
6. Select the element type to which element the result should be returned. If you run for YEA then select Year_Over and Short Tax Amount. If you run for Re-YEA then select ReYear_Liquidation Amount.
7. Select if this adjusted amount is costed.
8. Enter the dependents effective date when required. This option allows the users to define the effective date for the dependent information when it should not be the Processed Date.

Note: This option works only when [Report] Extra Contact Info [Payroll] Extra Contact Info is selected for the income tax dependent reference type in Business Group or Payroll.

9. Specify Yes or No whether to include nonresident employees in the YEA process. If you select No, non-resident employees are automatically excluded from the process.
10. Select the formula that your organization uses to perform the YEA calculations.
11. Click OK and then Submit.

Running the Japan, Salary Payment Report e-file

You run this process for terminated employees if their earning amount of the year is less or greater than 300,000 yen.

You run the Japan, Salary Payment Report e-file process from the Submit Requests window.

To run the Japan, Salary Payment Report e-file process:

1. In the Name field, select Japan, Salary Payment Report e-file. The Parameters window opens.
2. The current year appears by default as the subject year for which you want run the report.
3. Select the organization which acts as the Special Withholding Agent.
4. Select the municipal code of the district where you pay the local taxes.
5. The assignment set appears automatically for the selected municipality.
6. Select Yes in the File Split field to split the output file if the report contains more than 100 municipalities or if the size of the file is over 4MB.
7. If you select Terminated People Output All to No/NULL, then the Salary Payment report e-file only displays terminated employees with earning amount of the year more than 300,000 yen.

If you select Terminated People Output All to Yes, the Salary Payment Report e-file displays all terminated employees even with earning amount of the year less than 300,000 yen.

8. From the list of values, select the creation class to indicate where the e-file has to be

submitted, whether to the tax office, to the local government, or to both. The Creation Class is Both by default.

9. Click OK and then Submit.

Running the Payroll Run (Santei) Process

You run the Santei process to define the standard remuneration (grade) of the year (October - September). This process determines the social insurance premiums to be deducted for a next year. This is calculated based on the salaries of April, May and June.

Note: If you run the Geppen process for the same period, you should run the Geppen process first.

To run the Payroll Run (Santei) process:

1. In the Name field, select Payroll Run (Santei). The Parameters window opens.
2. Select the payroll.
3. The consolidation set and processed date appears by default for the selected payroll. The processed date need to be between 1st June and 30th September.
4. Optionally select an assignment set.
5. Select the action parameter group. If you define the action parameter group in the Profile Option HR: Action Parameter Group Name, it displays as default value. By grouping action parameter, you can set the required parameter and optimal values for each concurrent program, and as a result, for fine performance tuning.
6. Specify Yes or No if the application needs to discriminate the Geppen targeted employees. If you select Yes, the application will discriminate the employees who will be targeted in the Geppen process for July, August, and September.
7. Click OK and then Submit.

Running the Payroll Run (Geppen)

You run the Geppen process when an employee's fixed wage is changed, or if there are wage structure changes.

You run the Payroll Run (Geppen) process from the Submit Requests window.

To run the Payroll Run (Geppen) process:

1. In the Name field, select Payroll Run (Geppen). The Parameters window opens.
2. Select the payroll for which you want to run this process.
3. The consolidation set appears automatically for the selected payroll.
4. Select the applying month and process date.
5. Select the assignment set, if you want to restrict the payroll process to specific assignments.
6. Select the action parameter group. If you define the action parameter group in the Profile Option HR: Action Parameter Group Name, it displays as default value. By grouping action parameter, you can set the required parameter and optimal values for each concurrent program, and as a result, for fine performance tuning.
7. Click OK and then Submit.

Running the Payroll Run (Geppen at Child-Care Leave End/Maternity Leave End) Process

If you want to process payroll for employees who returned to work after their child care leave, you run the Payroll Run (Geppen at Child-Care Leave End/Maternity Leave End) for such employees.

You run the Payroll Run (Geppen at Child-Care Leave End/Maternity Leave End) from the Submit Requests window.

To run the Payroll Run (Geppen at Child-Care Leave End/Maternity Leave End) Process:

1. In the Name field, select Payroll Run (Geppen at Child-Care Leave End/Maternity Leave End). The Parameters window opens.
2. Select the payroll.
3. The consolidation set appears by default.
4. Select the applying month. The applied date appears by default. This means from which monthly salary the result should be applied.
5. Select the process date.
6. Select an assignment set if you want to restrict the payroll run for specific assignment sets.

7. Select the action parameter group. If you define the action parameter group in the Profile Option HR: Action Parameter Group Name, it displays as default value. By grouping action parameter, you can set the required parameter and optimal values for each concurrent program, and as a result, for fine performance tuning.
8. Click OK and then Submit.

Setting up of the Japan, Employment Ins E-File

You set up the Japan, Employment Ins E-File for e-Gov to generate a CSV file and summary report that is compliant with the specification for the notifications for e-Gov published by the Japan Pension Service. The e-file supports three notifications. These are the Qualification Notice, the Disqualification Notice, and the Relocation Notice.

The Japan, Employment Ins E-File can hold up to 1000 records per file. When you run the Japan, Employment Ins E-File, it automatically runs the child concurrent programs - Employment Ins E-File for e-Gov and the Payroll Report (Summary Report for Employment Ins for e-Gov) for every 1000 records.

Before you run the Japan, Employment Ins E-File for e-Gov to produce a csv file, you must set up the following:

1. Enter the labor insurance employer information.
See: Entering the Labor Insurance Employer Information, page 1-26
2. Add the applicable element depending on the insurance e-file you want to generate.
See: Predefined Elements
3. Ensure that the lookup types JP_NATIONALITY and JP_RESIDENTIAL_STATUS are set up. If you do not setup these values, then you cannot select the values in the Nationality/Region and Residential Status fields in the Employment Insurance Qualification Information1 region on the SI Qualified2 tab.
See: Adding Lookup Types and Values, *Oracle HRMS Configuring, Reporting, and System Administration Guide*
4. Run the Japan, Employment Ins E-File for e-Gov process.
See: Running the Japan, Employment Ins E-File for e-Gov, page 6-9
5. After you generate the reports you must change the file name manually as indicated to validate the generated CSV File using the Data Check Program for Employment Insurance provided by the Japan Pension Service:
 - Qualification Notice: 10101-shutoku.csv
 - Disqualification Notice: 10191-soshitsu.csv

- Relocation Notice: 10106-tenkin.csv

Running the Japan, Employment Ins E-File for e-Gov

You run the Japan, Employment Ins E-File for e-Gov to generate a CSV file and summary report that is compliant with the specification for the notifications for e-Gov published by the Japan Pension Service. The e-file supports three notifications. These are the Qualification Notice, the Disqualification Notice, and the Relocation Notice.

When you run the Japan, Employment Ins E-File, it automatically runs the child concurrent programs - Employment Ins E-File for e-Gov and the Payroll Report (Summary Report for Employment Ins for e-Gov) for every 1000 records.

You run the report from the Submit Requests window.

To run the Japan, Employment Ins E-File for e-Gov:

1. Select the Japan, Employment Ins E-File for e-Gov in the Name.
2. Select the type of notice from the list of values. The options are Qualification notice, Disqualification notice, or Relocation notice.
3. Select a date in the Target Date From field. This date differs depending on the type of notice that you select:
 - If you have selected Qualification notice as the type of notice, then this date is from when the employee is qualified for employment insurance.
 - If you have selected Disqualification notice, then this is the date from when the employee is no longer qualified for employment insurance.
 - If you have selected Relocation notice, then this is the date when the employee relocated to a different employer.
4. Select a date in the Target Date To field till when you want to report the data.
5. Enter the labor insurance employer. If you have selected Relocation Notice, then select the employer at the relocated destination.
6. Enter a FD Serial number between 1 and 999 to display as Item#3 FD Serial Number of FD Media record in the generated CSV file. The latest file number submitted to the e-Gov is incremented by 1.
7. Select the location of the welfare pension office to display the Welfare Pension Category Mark.
8. Click OK and then Submit.

Social Insurance Processes and Reporting

Running the Payroll Report (For Si FD Report) Request Set

You run the Payroll Report (For Si FD Report) using the Submit Request Set to generate the following reports as .csv files for each notification. The files comply with the Japan Pension service.

- Payroll Report (For Si FD Report - Header.)
- Payroll Report (For Si FD Report - Notification of Qualification.)
- Payroll Report (For Si FD Report - Notification of Disqualification.)
- Payroll Report (For Si FD Report - Notification Change Address.)
- Payroll Report (For Si FD Report - Notification of Santei.)
- Payroll Report (For Si FD Report - Notification of Geppen.)
- Payroll Report (For Si FD Report - Notification of Bonus Payment.)

You must first run the Payroll Report (For Si FD Report - Header.) before you run any of the processes. This generates the header information. Each of these reports must be run independently.

Running the Payroll Report (For Si FD Report - Header.)

Payroll Report (For Si FD Report - Header.) is mandatory file that contains the header information.

You run the Payroll Report (For Si FD Report - Header.) from the Submit Request Set window.

To run the Payroll Report (For Si FD Report - Header.):

1. In the Name field, select Payroll Report (For Si FD Report - Header). The Parameters window opens.
2. Enter the creation date.
3. Select the location for which you want to run this process.
4. Select if you want to submit the reports to the Health Insurance, the Welfare Pension Insurance, or both.
5. Enter media serial number.
6. Enter the file name.
7. Select the maximum file size.
8. Click OK and then Submit.

Running the Payroll Report (For Si FD Report - Notification of Qualification.)

You run the Payroll Report (For Si FD Report - Notification of Qualification.) for new employees who have enrolled in social insurance.

You run the Payroll Report (For Si FD Report - Notification of Qualification.) from the Submit Request Set window.

To run the Payroll Report (For Si FD Report - Notification of Qualification.):

1. In the Name field, select Payroll Report (For Si FD Report - Notification of Qualification.). The Parameters window opens.
2. In the Record Flag field , select Yes if you want to include this report in the file. The default is No.
3. Enter the creation date. This is the date defined in the Header that will be displayed in the Notification of Qualification.
4. Enter the dates from when you want to generate the report in the Qualification Date (From) and Qualification Date (To) fields.
5. The location defined in Header is displayed.
6. The value you entered in Submit to field defined in the Header is displayed.

7. In the Output Flag field, select how you want to generate the report. The default is Output All. To exclude assignments from the file, select the option Exclude Output Separately. To include assignments into the file, select the option Only Output Separately.
8. The FD Serial Number defined in the Header is displayed.
9. The file name defined in the Header is displayed in the File Name field.
10. The file size defined in Header is displayed.
11. Click OK and then Submit.

Running the Payroll Report (For Si FD Report - Notification of Disqualification.)

You run the Payroll Report (For Si FD Report - Notification of Disqualification.) to send notification to social insurance about terminated employees.

You run the Payroll Report (For Si FD Report - Notification of Disqualification.) from the Submit Request Set window.

To run the Payroll Report (For Si FD Report - Notification of Disqualification.):

1. In the Name field, select Payroll Report (For Si FD Report - Notification of Disqualification.). The Parameters window opens.
2. In the Record Flag field , select Yes if you want to include this report in the file. The default is No.
3. Enter the creation date. This is the date defined in the Header that will be displayed in the notification.
4. Enter the dates you for which you want to generate the report in the Disqualification Date (From) and Disqualification Date (To) fields.
5. The location defined in Header is displayed.
6. The value you entered in Submit to field defined in the Header is displayed.
7. In the Output Flag field, select how you want to generate the report. The default is Output All. To exclude assignments from the file, select the option Exclude Output Separately. To include assignments into the file, select the option Only Output Separately.
8. The FD Serial Number defined in the Header is displayed.

9. The file name defined in the Header is displayed in the File Name field.
10. The file size defined in Header is displayed.
11. Click OK and then Submit.

Running the Payroll Report (For Si FD Report - Notification Change Address.)

You run the Payroll Report (For Si FD Report - Notification Change Address.) to send notification to social insurance when there is a change in address.

You run the Payroll Report (For Si FD Report - Notification Change Address.) from the Submit Request Set window.

To run the Payroll Report (For Si FD Report - Notification Change Address.):

1. In the Name field, select Payroll Report (For Si FD Report - Notification Change Address.). The Parameters window opens.
2. In the Record Flag field , select Yes if you want to include this report in the file. The default is No.
3. Enter the creation date. This is the date defined in the Header that will be displayed in the notification
4. Enter the dates from when you want to generate the report in the Address Change Date (From) and Address Change Date (To) fields.
5. The location defined in the Header is displayed.
6. The value you entered in Submit to field defined in the Header is displayed.
7. In the Output Flag field, select how you want to generate the report. The default is Output All. To exclude assignments from the file, select the option Exclude Output Separately. To include assignments into the file, select the option Only Output Separately.
8. The FD Serial Number defined in the Header is displayed.
9. The file name defined in the Header is displayed in the File Name field.
10. The file size defined in Header is displayed.
11. Click OK and then Submit.

Running the Payroll Report (For Si FD Report - Notification of Santei.)

You run the Payroll Report (For Si FD Report - Notification of Santei.) to send the results of Santei process

You run the Payroll Report (For Si FD Report - Notification of Santei.) from the Submit Request Set window.

To run the Payroll Report (For Si FD Report - Notification of Santei.):

1. In the Name field, select Payroll Report (For Si FD Report - Notification of Santei.). The Parameters window opens.
2. In the Record Flag field , select Yes if you want to include this report in the file. The default is No.
3. Enter the creation date. This is the date defined in the Header that will be displayed in the notification.
4. In the Applied Year/Month field, enter the year or month for which you want to generate the report.
5. Enter the effective dates for which you want to generate the report.
6. The location defined in Header is displayed.
7. The value you entered in Submit to field defined in the Header is displayed.
8. In the Output Flag field, select how you want to generate the report. The default is Output All. To exclude assignments from the file, select the option Exclude Output Separately. To include assignments into the file, select the option Only Output Separately.
9. The FD Serial Number defined in the Header is displayed.
10. The file name defined in the Header is displayed in the File Name field.
11. The file size defined in Header is displayed.
12. Click OK and then Submit.

Running the Payroll Report (For Si FD Report - Notification of Geppen.)

You run the Payroll Report (For Si FD Report - Notification of Geppen.) to send results of the Geppen process.

You run the Payroll Report (For Si FD Report - Notification of Geppen.) from the

Submit Request Set window.

To run the Payroll Report (For Si FD Report - Notification of Geppen.):

1. In the Name field, select Payroll Report (For Si FD Report - Notification of Geppen.). The Parameters window opens.
2. In the Record Flag field, select Yes if you want to include this report in the file. The default is No.
3. Enter the creation date. This is the date defined in the Header that will be displayed in the notification.
4. In the Applied Year/Month field, enter year or month for which you want to generate the report.
5. Enter the effective dates for which you want to generate the report.
6. The location defined in Header is displayed.
7. The value you entered in Submit to field defined in the Header is displayed.
8. In the Output Flag field, select how you want to generate the report. The default is Output All. To exclude assignments from the file, select the option Exclude Output Separately. To include assignments into the file, select the option Only Output Separately.
9. The FD serial number defined in the Header is displayed.
10. The file name defined in the Header is displayed in the File Name field.
11. The file size defined in Header is displayed.
12. Click OK and then Submit.

Running the Payroll Report (For Si FD Report - Notification of Bonus Payment.)

You run the Payroll Report (For Si FD Report - Notification of Bonus Payment.) to send the notification of bonus payments made to employees.

You run the Payroll Report (For Si FD Report - Notification of Bonus Payment.) from the Submit Request Set window.

To run the Payroll Report (For Si FD Report - Notification of Bonus Payment.):

1. In the Name field, select Payroll Report (For Si FD Report - Notification of Bonus Payment.). The Parameters window opens.
2. In the Record Flag field, select Yes if you want to include this report in the file. The default is No.
3. Enter the creation date. This is the date defined in the Header that will be displayed in the notification.
4. Enter the payment year or payment month for which you want to generate the report.
5. In the Bonus Process (Latest) field, enter the date you want to process bonus payments.
6. The location defined in Header is displayed.
7. The value entered in Submit to field defined in the Header is displayed.
8. In the Output Flag field, select how you want to generate the report. The default is Output All. To exclude assignments from the file, select the option Exclude Output Separately. To include assignments into the file, select the option Only Output Separately.
9. The FD serial number defined in the Header is displayed.
10. The file name defined in the Header is displayed.
11. The file size defined in Header is displayed.
12. Click OK and then Submit.

Payroll Processing and Analysis

Post Processing for a Payroll

Post-Processing for a Payroll

PrePayments Process

Within Oracle Payroll the PrePayments process enables you to select a payment method to pay your employees. You can distribute employee pay over more than one method using either a percentage or monetary split.

You can override the PrePayments process. For example, suppose you have run the normal payroll run and made payments via one payment method. You then have to run supplementary payments for some employees and pay them by a different payment method. The PrePayments process, having distributed the regular payments over the payment methods entered, allocates the supplementary payments to the override method.

Payroll Submission Archive and Payroll Submission Report

Use these reports to submit payroll information to Revenue. You can generate these reports based on prepayments. This is a two-step process and includes archiving and reporting. Archiving enables you to archive the payroll details and the payroll submission report process enables you to generate the report based on the archived details.

Cheque/Check Writer Process

Run the Cheque/Check Writer process to determine the generation of cheques/checks for a specified payroll and consolidation set over a specified time period.

You can generate contiguous serial numbers for cheque/check printing, and you can use this feature to account for cheque/check stationery used during the cheque/check printing process. If you do this, you also need to take into account the cheques/checks you use to carry out the alignment of your printer.

A sample cheque/check report is supplied with the Cheque/Check Writer process. You can customize this report, or add your own cheque/check style to meet your enterprise requirements.

Oracle Payroll provides automatic cheque/check numbering for the Check Writer process. You can keep track of cheque/check numbers when you process multiple cheques/checks per day.

Note: Your System Administrator can enable the HR: Default

Check/Cheque Number Method profile which enables you to use the automatic check/cheque numbering process.

See User Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Void Cheque/Check Payments Process

Run the Void Cheque/Check Payments process when you want to void cheques/checks you have issued using Oracle Cheque/Check Writer. You may want to do this if there is a printing error or if the cheques/checks you print are afterwards lost. The process cancels the cheques/checks issued, records details of the cancellation, and enables you to give a reason for cancelling.

Check Writer - Override Payment Date Process

When you reissue a check after voiding it using the Void Check Payments process, the Check Writer process prints the check with the original Payment Date by default. Using the Override Check Date feature, you can replace the original check date with a check date of your choice. For reporting purposes, the Payment Register Report captures the replacement date from the reprinted check.

External/Manual Payments Process

Use the External/Manual Payments window to record cash or cheque/check payments to employees from external sources or petty cash. The window enables you to record details of each payment.

Data Locks for Payroll Processes

Data locking is a mechanism that enables you to protect your data from unwanted updates. For example: If you are running a monthly report at the end of each month, the data contained in the report has to remain unchanged for as long as the report exists. If you want to change this data, you must first rollback the report.

Data Locks: Automatic or User Selectable

Automatic

Some payroll processes automatically lock your data and you do not need to take any additional action to apply a lock. For example, whenever you run the prepayments process, your data is automatically locked against update while the prepayments process completes.

User Selectable

Some payroll processes do not apply a lock automatically, but do provide you with the option of selecting a process to apply a lock. Where this is the case, the lock process can usually be selected from the Submit Requests window for your legislation.

For example, if you are using Oracle Payroll for Ireland you can select the P30 Data Lock process which specifies a date at which you want to lock the P30 monthly report before generating the report output. By applying the data lock you also maintains the lock date as a historical record so that you can be confident that subsequent monthly reports start from the correct point.

Data Locks: Rollbacks Can Override Them

You should also be aware that some payroll post-processes can override any data locks that you have established. Oracle Payroll does not provide validation to prevent this, since it is a legitimate action that you may need to perform. For this reason we recommend that you should always refer to the individual topics in Oracle Applications Help before attempting to work with user selectable data locks.

Running the PreProcess to Direct Deposit File

Run this report prior to running the Generate Direct Deposit File.

To run the PreProcess to Direct Deposit File:

1. In the Name field, select PreProcess to Direct Deposit File.
2. In the Parameters window, select the payroll.
3. The consolidation set appears by default for the selected payroll. Leave the Payroll Name field blank if you want to output payments from all payrolls in the consolidation set.
4. Enter the start and end dates. Ensure that the End Date in Prepayment process is between Start Date and End Date. The account information is as of End Date in Prepayment process will be referred.
5. Select the payment method.
6. Enter a date on which you want to make the direct transfer to employee's account. This is the day before payment is made to the employee accounts and must be a banking day. If not a banking day, enter the date of the last banking day before payment day.
7. Click OK and then Submit.

Running the Generate Direct Deposit Report

Run this report to produce an electronic payment file for all employees. You must run prepayments before running this process.

You run the Generate Direct Deposit Report from the Submit Request window.

To run the Generate Direct Deposit report:

1. In the Name field, select Generate Direct Deposit Report. Enter the Parameters field to open the Parameters window.
2. Select the target process from the list of values.
3. Select the transaction type for the direct deposit file you are generating.
 - Select All Deposit to generate a SOFURI formatted file.
 - Select KYUFURI to generate a salary direct deposit file.
 - Select SHOFURI to generate a bonus direct deposit file.
4. Choose the character set for the generated transfer file.
5. Optionally enter a name for the direct deposit file.
6. Max File Size: Max File Size defined in Header is displayed

HR Information Systems

Using Self Service Pages

Commutation Allowance (Japan)

The Commutation Allowance form enables you to enter, view and print information about a worker's commutation or travel allowance information.

Employees in Japan are entitled to allowances for transportation or commuting methods to and from work. The Commutation Allowance form provides allowance information about public transportation, and traffic tools - which encompass other methods of traveling to and from work.

From this form, users can add, update, delete and view future actions for each allowance.

Withholding ITAX (Japan)

The Withholding ITAX Report for Employee form enables you to enter and view information about a worker's withholding ITAX information.

Employees in Japan are required to submit their Certificate of Withholding Income Tax to the National Tax Agency (NTA) at the end of the financial year. From this form, users can add, update, delete and view ITAX information.

The Withholding ITAX Report for Payroll Manager form enables payroll managers to enter, view and update information about a worker's withholding ITAX information. From this form, the payroll manager can define the open and close dates for which changes can be made, view results, and update a worker's information.

Function Names

This module can be accessed from the following function:

- JP Tax Withheld Report: Payroll Manager

See: *Defining Menus for SSHR, Oracle HRMS Deploying SSHR Capability*

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable Flexfields

Not applicable

Configurable Profile Options

Not applicable

Personal Number (Japan)

The Personal Number module enables employees to enter and view their personal number and for their dependents using their self-service responsibility. An employee can enter/update Personal Number details and dependents within the entry period start and end dates. When employee leave the organization, the Personal Number details of self and dependents must be updated as 999999999999 and card expiry details with blank. For dependent, HR users update the Personal Number of dependent with 999999999999 after the retention period of records is completed. After the entry period end/closing date, employees can no longer enter/update the Personal Number details. Once entered, they can view only the number with first 8 digits are masked (XXXX-XXXX-1234 format)

HR and Payroll representatives can search, view, and update the Personal Number details of employees and dependents.

They can search, view and update the list of dependents whose Personal Number is missing.

Menu and Function Names

This module can be accessed from the following functions:

- JP Personal Number : Employee
- JP Personal Number : Payroll Representative - JP Personal Number : Search Employee and JP Personal Number : Search Dependent
- JP Personal Number: Human Resources Representative - JP Personal Number : Search Employee and JP Personal Number : Search Dependent

See: Defining Menus for SSHR, *Oracle HRMS Deploying SSHR Capability*

Human Resource Representative

An HR representative can enter the entry period dates at business group, HR organization or assignment levels to enable users to enter the Personal Number. HR representative can enter or update the Personal Number details of all self service and non self service employees within the start date and end dates of entry periods. After the entry period end or closing date, they can no longer enter or update the Personal Number details.

HR representative can also update the start and end dates of entry period for any assignment whenever required. This will give access to the employee to update the Personal Number details even after end or closing dates at business group or organization levels.

Besides entering the details, an HR representative can access Employee Search page to search and enter or update the Personal Number details. Additionally, they can access Dependent Search page to find dependents whose Personal Number is missing and can enter the Personal Number details of dependents.

HR representative can view both the masked and full personal number to check whether the number is correct or not. The option Display Personal Number has the values:

- Based on Entry Periods
- Always Display Full Personal Number
- Always Display Masked Personal Number

Payroll Representative

Payroll representative can view the masked Personal Number details of employee and their dependents. Payroll representative can only check if number is entered or not which is required for processing the payroll. The payroll professional can notify the employee to update the information if it is not entered. Payroll representative can access the Dependent Search page and view the list of dependents whose personal number is not entered.

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable Flexfields

Not applicable

Configurable Profile Options

Not applicable

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