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- Did you understand the context of the procedures?
- Did you find any errors in the information?
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Preface

Intended Audience

Welcome to Release R12.2 of the *Oracle Human Resources Management System Supplement (Japan)*.

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

- The principles and customary practices of your business area
- Oracle Human Resources Management Systems (HRMS)

Oracle HRMS is a major component of the Oracle E-Business Suite of applications. If you are unfamiliar with Oracle HRMS, then Oracle suggests that you attend one or more of the Oracle HRMS training classes available through Oracle University.

- 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 xii for more Oracle E-Business Suite product information.

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Structure

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- 2 Employment Agreements and Legal Compliance**
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- 4 Compensation and Benefits**
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Related Information Sources

Oracle HRMS shares business and setup information with other Oracle Applications products. Therefore, it is advised that you reference other user guides and implementation guides when you set up and use Oracle HRMS.

Guides Related to All Products

Oracle E-Business Suite User's Guide

This guide explains how to navigate, enter and query data, and run concurrent requests using the user interface (UI) of Oracle E-Business Suite. It includes information on setting preferences and customizing the UI. In addition, this guide describes accessibility features and keyboard shortcuts for Oracle E-Business Suite.

Oracle Application Framework Personalization Guide

This guide covers the design-time and run-time aspects of personalizing applications built with Oracle Application Framework.

Oracle E-Business Suite Maintenance Guide

This guide contains information about the strategies, tasks, and troubleshooting activities that can be used to help ensure an Oracle E-Business Suite system keeps running smoothly, together with a comprehensive description of the relevant tools and utilities. It also describes how to patch a system, with recommendations for optimizing typical patching operations and reducing downtime.

Oracle E-Business Suite Security Guide

This guide contains information on a comprehensive range of security-related topics, including access control, user management, function security, data security, and auditing. It also describes how Oracle E-Business Suite can be integrated into a single sign-on environment.

Oracle E-Business Suite Setup Guide

This guide contains information on system configuration tasks that are carried out either after installation or whenever there is a significant change to the system. The activities described include defining concurrent programs and managers, enabling Oracle Applications Manager features, and setting up printers and online help.

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.

Guides Related to This Product

Oracle Human Resources Management Systems Implementation Guide

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

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

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

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 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 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 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, organization chart, suitability analyzer, and performance matrices.

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 iRecruitment Implementation and User Guide

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

Oracle Learning Management Implementation Guide

Learn how to implement and configure Oracle Learning Management (OLM).

Oracle Learning Management User Guide

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

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.

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, then 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 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 that are 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 that are 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 at the payroll level. 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 calculate the commuting amount by traffic toll in the commuting allowance information function. The application uses this formula when you click Calc button on the 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 at payroll and business group level, those applied at Payroll level 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 an 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 to 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 when you generate the Separation Certificate.
12. Select whether to generate the output of the Separation Certificate for 6 months or 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 through 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 for the Salary Payment Summary E-File.

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 (Withholding Tax 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. Click the WP Fund Loc Info field of the Additional Organization Information window to open the WP Fund 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 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.

Employment Agreements and Legal Compliance

Occupational Health

Occupational Health: Medical Assessments, Disabilities and Work Incidents

Oracle HRMS enables you to record medical assessments, disability information, and work incidents for the people in your enterprise. It also enables you to link this information together. For example, if a medical assessment is required as the result of a work accident, and that assessment then diagnoses a disability in the person, you could relate these records to one another.

Note: The Medical assessments, disabilities and work incidents functionality may not be used by your localization.

Medical Assessments

The Medical Assessment window enables you to enter information about the medical assessments (consultations) provided to the people in your enterprise. For example, you can record:

- When the assessment took place, and the organization and person who performed it.
- The result of the assessment, for example, if a disability was identified.
- If the purpose of the assessment is to evaluate a particular disability, whether the person is considered fit for work.
- Any work incident that was the reason for this assessment.

A person can have multiple medical assessment records. For example, a person may have a recruitment medical and several annual medicals.

Disabilities

Using the datetracked Disabilities window, you can enter information about a person's disabilities. For example, you can record:

- The nature and severity of the disability
- The full-time equivalent that this person represents towards your enterprise's quota of disabled employees
- The details of the registration of this disability with an official organization

- Any work incident that was the cause of this disability
- The medical assessment that first identified this disability.

A person can have multiple disability records. Each disability can be linked to one work incident and to one medical assessment that diagnosed (or identified) the condition. Once a disability has been diagnosed and recorded, you can link it to multiple assessments that evaluate the disability.

Work Incidents

Oracle HRMS enables you to record work incidents, for example, accidents, that involve the people in your enterprise. Work incidents are incidents that occur:

- at work
- on the way to or from work
- in other circumstances that are defined as work-related by your enterprise.

Using the Work Incidents window, you can record:

- The details of the incident, for example, when and where it occurred.
- The health and safety official and/or representative body that were notified of the incident
- Medical details, such as any injury occurred, treatment given, and medical organizations involved
- Whether any compensation was paid
- Whether this person was absent as a result of the incident
- The job the person was doing when the incident occurred

A person can have multiple work incident records.

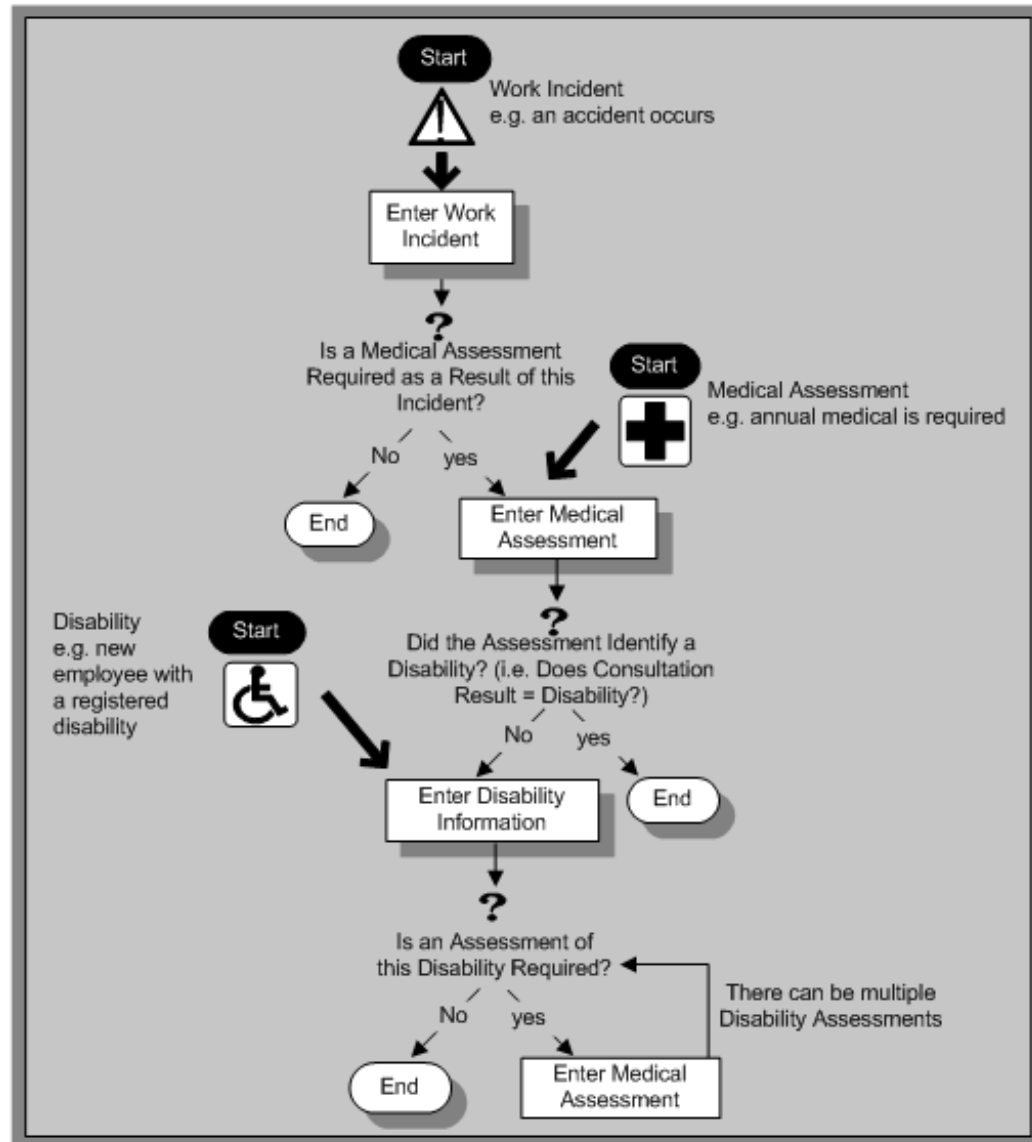
The graphic illustrates the relationship between the medical assessment, disability and work incident tasks. It shows the full process that you could follow if you wanted to record:

- A work incident that occurred
- The medical assessment that was required as a result of the work incident
- The disability record that was required as a result of a "Disability" result in the medical assessment

- The subsequent "Disability type" medical assessments that were required to evaluate the disability on a regular basis

The "Start" boxes show the points at which you can start the process, depending on the task you need to perform.

Recording a Disability



Entering Disability Information

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

You use the Disability window to enter this information.

Note: If you want to record that a person is registered as disabled, but you do not need to hold information about that disability, you can just

check the Registered Disabled check box on the Personal tab in the Person window.

See: Entering a New Person (People Window), page 3-7

To enter disability information:

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

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

2. Select the category of disability, for example, Severely Disabled.
3. Enter into the FTE field the full-time equivalent that this person represents towards your enterprise's quota of disabled employees. If no quota scheme exists, then leave the default value as 1.00.

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

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

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

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

deductions for the employee.

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

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

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

The list of assessments is limited to assessments that:

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

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

This field is not datetracked.

Entering Disability Registration Information:

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

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

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

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

Japanese users only: Select the confirmation method by which the disability was confirmed (by the employer).

Entering Additional Disability Information:

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

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

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

For Hungarian users only: Record if the employee is blind. The application uses this information to calculate any additional holiday or tax benefit for the employee.

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

For Korea users only: Specify the following:

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

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

For Mexican users only: Specify the following:

- Disability ID of any related disabilities

The list-of-values displays all previous disabilities for your employee.

- Number of disability days subsidized by the social security agencies
- Type of disability

Valid values are:

- General Disease
- Maternity
- Risk Incident
- Result of the disability

The Consequence field provides the following options:

- None
- Temporary Disability
- Provisional Initial Assessment
- Definitive Initial Assessment
- Death
- Relapse
- Assessment after start date
- Provisional re-assessment
- Relapse without medical discharge
- Definitive re-assessment
- Disability control

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

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

For Japanese users only: Specify the following:

You require the following information to submit the disability reports to the authorities for statutory purposes.

- Degree/Grade - select the degree if the employee is intellectually disabled and the grade if physically disabled.

- Confirmation Method - select the confirmation method by which the disability was confirmed by the employer.
- Severely Disabled - select Yes if the employee has severe physical disability or severe intellectual disability and must be counted as 2 disabled persons for reporting purposes.
- Part-time Worker - select Yes if the employee is a part-timer for reporting purposes.

The following information is required for the worker insurance report if the employee is disabled or injured as a result of work accident.

- Wa Insurance Disability Grade - select the grade for work insurance purposes.
- Insurance Injury and Sickness - select the values for the work insurance purposes.

5. Save your work.

What Next?

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

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

Maintaining Disability Information

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

Workforce Sourcing and Deployment

People

People in a Global Enterprise

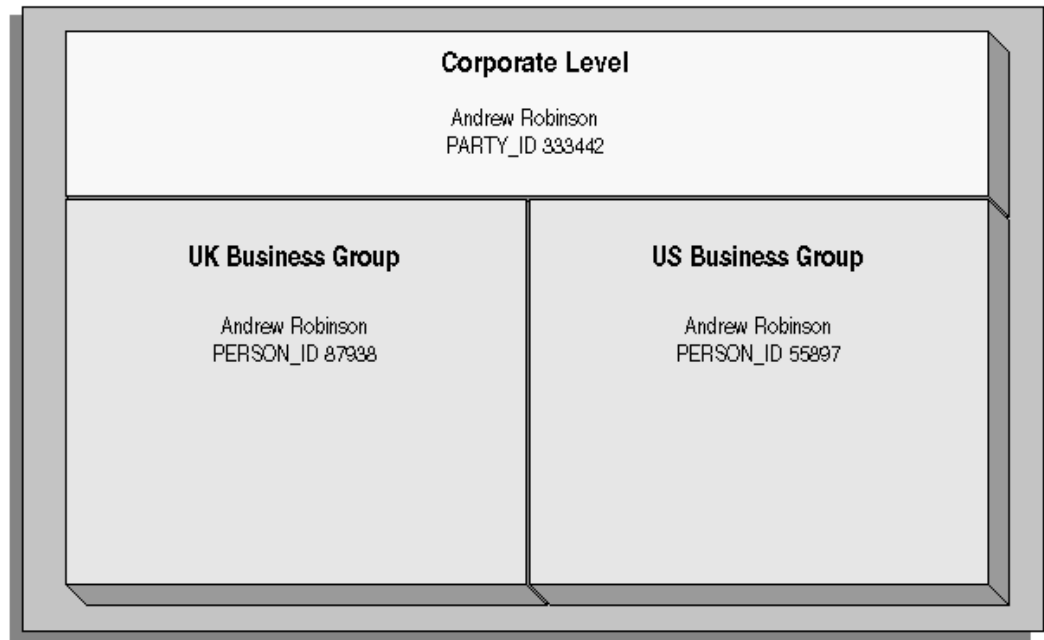
Based on a common core application for all countries, Oracle HRMS provides you with the ability to support both local and corporate requirements for global enterprises.

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*

Oracle Human Resources Information Discovery Plus Workforce Explorer Page

If Oracle Human Resources Information Discovery Plus is licensed and implemented, then you can use the Workforce Explorer page to search and view dashboard metrics

related to person data. As an HR executive, manager or as a member of senior management, you can use the Workforce Explorer page to search employees by leveraging quick search and guided navigation capabilities. HR users can analyze and interpret person data with the aid of key metrics, maps, tags, flexible charts and graphs. It also provides the ability to navigate to HR transaction pages (Talent Profile) for performing employee personnel actions.

For more information about how to set up Oracle Human Resources Information Discovery and using the Workforce Explorer Page, refer to the *Oracle Human Resources Information Discovery Plus* chapter in the *Oracle E-Business Suite Information Discovery Integration and System Administration Guide*.

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.

For Romanian users: First and last names are mandatory.

- 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 Romanian users only: Prefix is not required in Romania, so this field is not available to Romanian users.

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 Romanian users only: Suffix is not required in Romania, so this field is not available to Romanian users.

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 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.

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 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. For Finland, the PIN (Personal Identification Number) supplies the values for gender, date of birth, and age.

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.

For Romanian users only: You must select the country of birth first. If the country of birth is Romania, then the Region of Birth field displays the counties and on selecting the county, the Town of Birth displays the localities. If the country of birth is not Romania, then the Region of Birth and Town of Birth are free text fields.

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 and Romanian 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.

Romanian users can optionally specify whether the person is a resident of Romania, a non resident non European Union, or a non resident European Union.

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, Swedish, and Romanian 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. For Romania, you can optionally specify whether the person is a Romanian, European Union, or other citizen.
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 3-2

- 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.

Sending Emails for Personal Information Updates

Your system administrator can configure the application to send emails when you update personal information in the People window. Emails are sent to the email recorded in the Email field in the Office Details tab. See *Subscribing to Business Events to Send Emails, Oracle HRMS Configuring, Reporting, and System Administration Guide* for more information.

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.

Workforce Information Systems

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.

Defining Assignment Statuses (Assignment Window)

You define both primary and secondary user statuses. In the Assignment Statuses window you can define these statuses for both employee and applicant assignments.

Defining Primary User Statuses

To rename a user status:

1. Delete the contents of the User Status field and type in your preferred name.

To supply additional user statuses for a system status:

1. Insert a new record.
2. Type in your user status name.
3. If you are using iRecruitment, you can enter an external status for your applicant assignment user statuses. This status is displayed to candidates in iRecruitment. For example, you may want to create an external status of 'Interview' for applicant assignment user statuses of 'Pending Interview' and 'Interview Passed'. The candidate in iRecruitment would see the external status and the manager would see the user status names.
4. Select a Human Resource system status.
5. For employee assignment statuses, you must also select a Payroll system status. You must do this, even if you do not have Oracle Payroll. If you have Oracle Payroll, the payroll system status controls whether payroll processes the assignment in a payroll run.

Note: If you select a payroll system status of Do Not Process, payroll will still create assignment actions for assignments with this status. It is these assignment actions that will not be processed.

6. Save the new status.

Note: For each system status, you must have one default user status. The system automatically uses the default in certain situations. For example, when you create a new employee assignment, it automatically has the default user status corresponding to the system status Active Assignment. You can override this default.

When you update the assignment statuses, the application saves the changes in the PER_ASS_STATUS_TYPE_AMENDS table instead of the PER_ASSIGNMENT_STATUS_TYPES table.

You cannot delete a user status, but you can prevent its use by deactivating it. To deactivate a user status, uncheck the Active check box.

Defining Secondary Statuses

A user status associated with a system status is called a *primary* status because it determines how the system processes the assignment. You can also define *secondary* statuses not associated with a system status. You use secondary statuses for analysis and reporting, but not to control pay processing for assignments.

To create a secondary status:

1. Insert a new record.
2. Type in a user status and do not select a system status.

The Type field displays *Secondary*.

Entering an Assignment (Assignment Window)

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

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

To enter an assignment:

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

8. Select the people group and enter information defined in your people group flexfield. This is optional.

9. Select a payroll if you are paying an employee using Oracle Payroll, or if you intend to record for the employee certain types of compensation and benefits (represented on the system by *nonrecurring elements*).

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

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

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

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

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

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

You can calculate values based on a collective agreement only for an employee's primary assignment.

14. Select an assignment category, for example part-time or full-time.

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

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

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

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

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

Russia only: This field is mandatory to enable you to use them for reporting

purposes. Use only the four values available for this field. For these values, the suffix Regular refers to an assignment with an indefinite period (permanent). The suffix Temporary refers to an assignment having a limited term.

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

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

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

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

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

See: Entering Additional Assignment Details, page 3-23

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

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

Entering Additional Assignment Details (Assignment Window)

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

Note: For countries other than the US or UK, your Oracle localization team may have created additional fields in a tabbed region to hold legislatively required additional information.

To enter salary information for an employee:

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

1. Choose the Salary Information tabbed region.
2. Select a salary basis for the employee.

3. You can also enter the frequency of salary and performance reviews.

Note: When you change salary basis for an assignment, the application end dates the existing proposal and creates a new salary proposal. The new proposal updates the salary element entry automatically. When you remove a salary basis from an assignment, the application end dates the existing salary element entry, enabling you to manually create a new salary element entry effective from the date of the salary basis change.

For more information about salary administration, see: *Salary Administration, Oracle HRMS Compensation and Benefits Management Guide*

To enter supplier information for a contingent worker:

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

If you are not using Oracle Services Procurement:

1. Choose the Supplier tabbed region.
2. Select the names of the supplier and the supplier site for the contingent worker.
- 3.

If you are using Oracle Services Procurement:

1. Choose the **Supplier** tabbed region.
2. Select a purchase order number for this assignment.
3. If only one purchase order line exists, it appears in the Purchase Order Line field. Otherwise, select a purchase order line. Note that the Purchase Order Line field is enabled only when you select a purchase order.
4. Information from the purchase order appears automatically in the **Supplier Name** and **Supplier Site** fields. If the purchase order line includes a job value, it replaces any value in the Job field.
- 5.

To enter supervisor information for an employee or contingent worker:

1. Choose the Supervisor tabbed region.
2. Select the name and number of the worker's personal supervisor. If you use

assignment-based supervisor hierarchies, select the supervisor's assignment number.

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

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

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

To enter probation period and notice information for an employee:

The probation period defaults from the employee's position.

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

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

To enter schedule information for a person, you can:

- Set up extensive availability information such as, shifts, schedules, and calendar events using integrated features from HRMS and Common Application Components (CAC).

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

- Set up holiday calendars, shifts, and work plans in OTL.

See: *Time Management Structures, Oracle Time and Labor Implementation and User Guide*

Alternatively, you can enter basic schedule information in various areas of Oracle HRMS, such as here in the Assignment window.

Important: The application does not use the schedule information that you can enter here to determine a worker's availability. This is for information purposes only.

The decision for which method to set up is based on knowledge of which applications use which information.

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

1. Choose the Standard Conditions tabbed region.
2. Amend the standard work day information for your employee or contingent worker assignment, if required.
3. This step is for employees only. For benefit administration, enter whether the assignment is hourly or salaried. If you are in the US, benefits are often based on whether a person is paid hourly or receives a salary.

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

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

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

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

See: Changing Primary Assignments, page 3-46

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

To enter special ceiling information for an employee:

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

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

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

1. Choose the Project Information tabbed region.

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

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

To enter grade ladder information for an employee:

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

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

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

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

legally recognized collective negotiating organization.

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

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

To enter employment terms for an employee:

1. Choose the Employment Terms tabbed region.
2. Select the contract to be referenced by the assignment. The list of contracts is limited to those entered for the employee that have start dates on or before the assignment start date.

Note: If you are a German public sector user, selecting a contract defaults some values, for example pay grade, from the contract into the assignment. If you want to amend these values you must change them on the contract as you cannot update them in this window.

3. Select the agreement grade structure for the collective agreement. A window shows the grade factors for that grade structure.
4. Enter values for the grade factors. Or, choose the Combinations button and enter search criteria for one or more grade factors to display the reference grades that meet those criteria.

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

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

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 name of the health insurance employer organization.
5. Enter the insurance card number.
6. Select the name of the welfare pension employer organization
7. Enter the pension control number and the basic pension number. This is a 10-digit number.
8. Select the name of the welfare pension fund employer organization.
9. Enter the pensioner number.
10. If the employee has a dependent, then select the Dependent Exist check box. The application uses this information for the reports such as Payroll Report (For Si FD Report - Notification of Qualification.) and Payroll Report (For Si FD Report - Notification of Disqualification.)

Note: The 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 the social insurance perspective, then select the Part-timer Flag 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 type of unemployment insurance. The options are Insured Employee, Insured Executive-level employee, or if aged.
16. Select the name of the labor insurance employer organization.
17. Enter the unemployment insurance number. This is 10-digit or 11-digit number.
18. In the Wa section, select the type of worker compensation insurance. The options are Regular, Exclusive, or Temporary.
19. Select the name of the labor insurance employer organization.

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 Exclude section, select the Care Ins Exclude check box, if the employee is not insured for care insurance irrespective of age between 40 and 64 years old.
21. If the employee is not insured, then select 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. In the Insurance Card Attached field, enter the number of insurance cards that have been collected by the employer when the employee loses the insured status.
5. In the Card Return Not Possible field, enter the number of the insurance cards that have not been collected by the employer 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 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 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 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 is insured for employment insurance. The options are Newly, Re (reemployed), and 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 or 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 belongs to the Dispatch or Contract Working Class from the unemployment insurance reporting perspective.
10. Enter the residential card number if the employee is a foreign worker. This information is required for employment insurance purposes.
11. 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.
12. Select the method of payment of salary. The options are daily, hourly, weekly, monthly, or others.
13. Specify the wage unit per thousand yen.
14. Enter the details of the employment type, kind of work, and job-placement.
15. Enter the fixed working hours the employee works per week.
16. Select the Existence of contract term check box if the employee is on a contract.
17. If the employee is on a contract, then specify the contract start date and end date.
18. Select the Existence of renewal stipulation of contract check box, if there exists the renewal stipulation of the contract.
19. 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 this option 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, then 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, then select the Calculate WP Premium in Salary check box.
 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 the salary for the employee, then select the Calculate WPF Premium in WP Salary check box.
 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 is terminated 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 in the 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. 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
 9. 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.

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 those 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 or
- 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, then 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 or
- 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 is from the Standard Monthly Remuneration Table.
4. Enter the Previous standard monthly remuneration. The value is from 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 the 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 if you want to include or exclude employees for 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, then 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 check box 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. 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. For more information, see Entering JP Payroll Related Information.

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 following 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. 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 etc section, enter the Resident Start Year Month Date, Applied Class, and Loan Year End Balance for each deductible housing loan the employee

has. These values 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 in 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.

Entering Additional Employment Information (Multiple windows)

Just as you can record additional information about people, such as their addresses, contacts, and skills, you can also record additional information associated with each employee assignment. The main items of information are as follows:

1. You can propose or approve a salary change in the Salary Administration window.
See: Entering Salary for a New Employee (or One Assigned to a New Salary Basis), *Oracle HRMS Compensation and Benefits Management Guide*
2. You can make entries to the earnings, deductions, benefits and other elements the employee is eligible for, using the Element Entries window.

Mexico only: You must standard link the following elements for all Mexican employees:

- Employer State Tax
- Integrated Daily Wage
- Mexico Tax
- Social Security Quota

See: Defining Element Links, *Oracle HRMS Compensation and Benefits Management Guide*

To confirm they are attached to the assignments, or to add them manually, see: Making Manual Element Entries, *Oracle HRMS Compensation and Benefits Management Guide*

3. If you use a pay scale and progression point system, you can place the assignment on a pay scale using the Grade Step Placement window.

See: Placing an Employee on a Grade Step, *Oracle HRMS Enterprise and Workforce Management Guide*

4. You can select the cost centers or accounts to which the costs of the assignment should be allocated, using the Costing window.

See: Data Costed at the Organization and Assignment Levels, *Oracle HRMS Enterprise and Workforce Management Guide*

5. You can use the Assignment Budget Values window to specify the value of the assignment in terms of headcount, full time equivalent (FTE), or any other budgets you have defined.

See: Budgeting Overview, *Oracle HRMS Enterprise and Workforce Management Guide*

6. For employees who have assignments to payrolls, you can select the methods by which the employee wants to receive pay for this assignment in the Personal Payment Method window.

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

7. You can enter secondary assignment statuses for analysis and reporting, if these have been defined on your system.

See: Entering Secondary Assignment Statuses, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

8. You can enter extra information about your employee's assignment using the Extra Assignment Information window.

See: Enter Extra Information, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

9. You can enter previous employment information for your employee's using the Previous Employment window.

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

Changing Primary Assignments

Over time, a secondary assignment may need to be elevated to a primary assignment. Most enterprises have requirements to show this history of changes in an employee record. You can change assignments from secondary to primary in the Hiring Applicants window or the Managing Employees window.

This process creates two historical records: one showing a secondary assignment that ended, say, on 20 October, and the other showing that the primary assignment started as one set of components and then changed to another set (those of the secondary assignment) on 21 October.

To change a primary assignment:

1. Set an effective date for the change of primary assignment.
2. Find the person using the Data Organizer or the Find window.
3. Select the person in the Data Organizer and select one of their assignments.
4. Choose the Actions button.
5. Select Make Primary Assignment and choose Next.

The system automatically changes the previous primary assignment from primary to secondary. Query the assignment details to see the changes, or use the Assignment History window to view the employee's assignments. DateTrack History also shows the changes made to assignments.

For more information about DateTrack see: *Viewing the History of Datetracked Information, Oracle HRMS Enterprise and Workforce Management Guide* and *Managing Change Over Time, Oracle HRMS Enterprise and Workforce Management Guide*

6. **Mexico only:** If the change in assignments involves a change of GREs, you must specify a Social Security Leaving Reason in the Social Security Affiliation tabbed region.

Ending an Assignment (Assignment Window)

An employee must always have one active assignment. If an employee has multiple assignments you can end any of their individual assignments by selecting an assignment status of End or Terminate in the Assignment window as long as at least one assignment remains active. If you want to end all employee assignments at the same time you use the Termination window. An employee does not become an ex-employee until you have terminated their last assignment.

The following information explains how to use the Assignment window to end multiple assignments.

To end one of several assignments:

1. Query the assignment you want to end.
2. Set your effective date to the actual termination date for the assignment.
3. Update the assignment status to End or Terminate Process Assignment (or the equivalent user status on your system) in the Status field:
 - Use *TerminateProcess Assignment* (with a Payroll system status of *Process*) if further pay processing of the assignment is required after the date the assignment ends. This leaves the assignment's final processing date open so that further processing can occur.

It is often best to use this status, so that you can process any necessary adjustments to the final pay for the assignment.

- Use *End* (with a Payroll system status of *Do Not Process*) if all pay processing for the assignment is finished. This makes your effective date the assignment's *final processing date*, after which no further processing for the assignment can occur.

The End status is not recorded on the assignment. It causes the assignment to end as of the effective date of entry of this status.

Note: To temporarily prevent pay processing for this assignment, use the status *Terminate Assignment* (with a Payroll system status of *Do Not Process*). When no further processing is required and you are ready to set a final processing date, update the status to *End*.

4. **Mexico only:** Specify a Social Security Leaving Reason in the Social Security Affiliation tabbed region. The Social Security Affiliation reports require this information.

Entering Contact Information

Contact Information Overview

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

Entering People as Contacts

You enter people as contact records to identify:

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

Entering Contact Information

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

Entering Contact Extra Information

The Contact Extra Information function enables you to enter and maintain additional contact information. Statutory regulations often require that employees and workers provide specific information on dependents and beneficiaries for health insurance and income tax purposes and the application enables you to store this information using Extra Information Types (EITs).

To enter contact extra information:

1. Navigate to the **People** window.
2. Click **SI Income Tax** to open the **Social Insurance and Income Tax Dependent Information** window.
3. When you have selected the dependent or beneficiary, the application displays the

available EITs for the dependent or beneficiary. You can create one EIT for each of the following groups:

- Health Insurance Law - Create one of the following information types
 - Health Insurance Dependent - dependent (non-spouse) information for health insurance and pension purposes. The information includes occupation, income, and qualification information.
 - Health Insurance Spouse - information about a spouse for health insurance and pension purposes. The information includes pension number, qualification information, occupation, income, nationality, and disqualification information, if applicable.
- Income Tax Law - Create one of the following information types:
 - Income Tax Dependent - dependent information is required if income tax is deducted from the main income earner. The information includes occupation, income, and disability information, if applicable. Record the following details:
 - Select if the aged parent lives or does not live with the employee.
 - Select the occupation of the dependent.
 - Enter the estimated annual income for tax purposes.
 - In the **Date Transferred** field, enter the date when there is a change to the status of aged parents.
 - Enter a reason for the change in status.
 - Select the status of the disabled contact or if the contact lives with the employee.
 - Enter the details of the disability.
 - Select **Yes** if the dependent is a nonresident.
 - Select nonresident type.
 - Specify the amount if the employee pays for the expenses for the dependent who is a nonresident.
 - Select **Yes** if the spouse or the dependent receives a termination allowance in a year. Otherwise select **No**.
 - Enter the annual estimated income excluding termination income for

local tax purposes.

- Income Tax Dependent on Other Employee - dependent information is required if income tax is deducted from an alternative income earner. The information includes occupation, transfer details, and relationship details.
- Income Tax Dependent on Other Payroll - dependent information is required for deduction of income tax from a secondary income earner. The information includes employer details, income, and transfer details.

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, page 3-51

Running the Japan, Roster of Workers, page 3-52

Running the Japan, Employee Ledger Report, page 3-52

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.

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

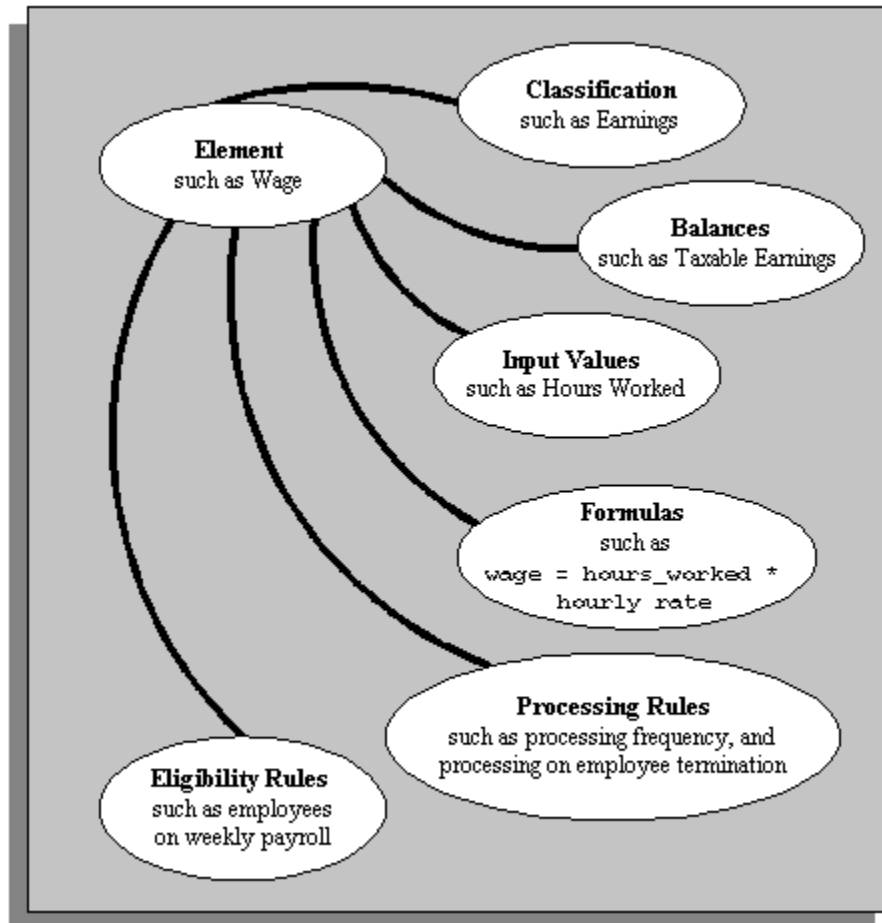
In certain legislations, including North America and the UK, Oracle Payroll users can initiate earnings and deductions, and the system generates the elements you require, along with balances, balance feeds, and formulas. The method of initiating earnings and deductions depends on your localization. Typically 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 4-6
- The processing priority range, default priority, and cost type for each classification, page 4-9
- A list of the predefined secondary classifications within each primary classification, page 4-11

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 Special Bonus (Non Resident)
C_ 1700 Special Bonus Social Insurance etc	Small Company Mutual Aid Prem for Special 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
	(None)	N/A
	(None)	N/A
	(None)	N/A
	(None)	N/A
	(None)	N/A

Predefined Elements

The following table lists the predefined elements that are specific to Oracle HRMS for

Japan.

Element Name	Description
Initial_ Bonus 1	Bonus 1 on Balance Initialization
Initial_ Bonus 2	Bonus 2 on Balance Initialization
Initial_ Bonus 3	Bonus 3 on Balance Initialization
Initial_ Common 1	Common 1 on Balance Initialization
Initial_ Common 2	Common 2 on Balance Initialization
Initial_ Common 3	Common 3 on Balance Initialization
Initial_ Payment 1	Payment 1 on Balance Initialization
Initial_ Salary 1	Salary 1 on Balance Initialization
Initial_ Salary 2	Salary 2 on Balance Initialization
Initial_ Santei Geppen 1	Santei Geppen 1 on Balance Initialization
Initial_ Sp Bon 1	Special bonus 1 on Balance Initialization
Initial_ Termination 1	Termination 1 on Balance Initialization
Initial_ Yea 1	Year end adjustment 1 on Balance Initialization
Initial_ Yea 2	Year end adjustment 2 on Balance Initialization
Bon_ Hi_ Adjustment Information	Adjustment Information of Health Insurance Premium on Bonus
Bon_ Wp_ Adjustment Information	Adjustment Information of Welfare Pension Insurance Premium on Bonus
Com_ Ci_ Information of Exclusion from Application	Determination Information for Calculation of Care Insurance
Com_ Ei_ Qualification Information	Qualification Information of Employment Insurance

Element Name	Description
Com_Fund_ Qualification Information	Qualification Information of Welfare Pension Fund
Com_Hi_ Qualification Information	Qualification Information of Health Insurance
Com_Hi_ Qualification Information2	Qualification Information (Health Insurance)
Com_Hi_ Standard Monthly Remuneration	Monthly Remuneration Information of Health Insurance
Com_Income Tax_ 1999 Salary Special Adj Deduction_ Info	Information for Income Tax Special Adjustment Deduction in 1999
Com_Income Tax_ Information	Information of Tax Table, Year End Adjustment Subject Class etc on Income Tax
Com_Li_ Information	Location Information of Labor Insurance
Com_Local Tax_ Information	Collection Information of Local Tax
Com_Non Resident_ Information	Information for Non Resident
Com_Separation Certificate	Information of Separation Certificate
Com_Separation Certificate_ Separation Reason	Separation Reason Information of Separation Certificate
Com_Separation Certificate_ Wage Payment Status etc	Payment Information of Separation Certificate
Com_Si_ At Qualified_ Compensation	Monthly Remuneration Information of Social Insurance at Qualified
Com_Si_ Information	Location Information of Social Insurance
Com_Si_ Notification of Nonworking Dependent	Information for Health Insurance Notification of Nonworking Dependent
Com_Si_ Pension Book Symbol Number etc	Information of Pension Book of Social Insurance

Element Name	Description
Com_ Si_ Reporting Form	Information of Reporting Form Output of Social Insurance
Com_ Termination Information	File of Declaration about Receipt of Termination Income, Information about Lump Sum Collection of Local Tax
Com_ Wp_ Qualification Information	Qualification Information of Welfare Pension Insurance
Com_ Wp_ Standard Monthly Remuneration	Monthly Remuneration Information of Welfare Pension Insurance
Gep_ Adjustment Information	Adjustment Information of Remuneration Amount on Unscheduled Revision
Gep_ Notification of Geppen_ Remarks Column	Remarks Column Information for Notification of Geppen
Ikukai_ Adjustment Information	Adjustment Information of Remuneration Amount for Unscheduled Revision after Child-Care Leave
Ikukai_ Notification of Geppen_ Remarks Column	Remarks Column Information for Notification of Geppen at the end of Child-Care Leave
San_ Adjustment Information	Adjustment Information of Remuneration Amount on Scheduled Revision
San_ Adjustment Information_ Before 31 Mar 2003	Adjustment Information of Remuneration Amount on Scheduled Revision before 31 Mar 2003
San_ Notification of Santei_ Remarks Column	Remarks Column Information for Notification of Santei
Term_ Basic_ Specific Executive	Specific Executive Termination Allowance Information
Term_ Withholding Tax Report	Withholding Tax Report Information on Termination Payment
Year_ Adjustment Information	Adjustment Information of Income Tax on Year End Adjustment

Element Name	Description
Year_ Dependent Exemption Form	Dependent Exemption Form Information on Year End Adjustment
Year_ Housing Loan etc_ Information	Housing Loan etc Information on Year End Adjustment
Year_ Insurance Premium Exemption_ Declaration	Declaration Finalized Content Information of Insurance Premium Exemption Declaration and Spouse Special Exemption Declaration
Year_ Insurance Premium and Spouse Sp Exemption	Adjustment Information of Insurance Premium and Spouse Special Exemption Amount on Year End Adjustment
Year_ Previous Employment Information	Previous Employment Information on Year End Adjustment
Year_ Special Deduction for Housing Acquisition etc	Housing Debt Loan etc Special Exemption on Year End Adjustment
Year_ Withholding Tax Report	Withholding Tax Report Information on Year End Adjustment
Sal_ Commutation Information_ Private Transportation	Commutation Information about Usage of Public Private Transportation (Auto Car etc)
Sal_ Commutation Information_ Public Transportation	Commutation Information about Utilization of Public Transportation (Train etc)
Sal_ Basic_ Commutation Allowance	Calculation of Commutation Allowance on Salary
Sal_ Result_ CMA_ Amount subject to Ei Monthly Adjustment	Commutation Allowance on Salary (Amount subject to Employment Insurance by Month)
Sal_ Result_ CMA_ Si Fixed Wage	Commutation Allowance on Salary (Social Insurance Fixed Wage)
Sal_ Result_ CMA_ Amount subject to Si_ In Money	Commutation Allowance on Salary subject to Social Insurance
Sal_ Result_ CMA_ Amt subject to Si_ In Money_ Negative Adj	Subtract Adjustment of Commutation Allowance on Salary subject to Social Insurance

Element Name	Description
Sal_ Result_ CMA_ Non Resident Taxable Amount	Assessable Commutation Allowance on Salary (Non Resident)
Sal_ Result_ CMA_ Non Taxable Amount	Non Assessable Commutation Allowance on Salary
Sal_ Result_ CMA_ Taxable Amount	Assessable Commutation Allowance on Salary
Sal_ Result_ CMA_ Amount subject to Si_ In Kind	Commutation Allowance of Earning in Kind on Salary subject to Social Insurance
Sal_ Result_ CMA_ Amount subject to Si_ In Kind_ Negative Adj	Subtract Adjustment of Commutation Allowance of Earning in Kind on Salary subject to Social Insurance
Sal_ Result_ CMA_ Non Resident Taxable Amount in Kind	Assessable Commutation Allowance of Earning in Kind on Salary (Non Resident)
Sal_ Result_ CMA_ Non Taxable Amount in Kind	Non Assessable Commutation Allowance of Earning in Kind on Salary
Sal_ Result_ CMA_ Taxable Amount in Kind	Assessable Commutation Allowance of Earning in Kind on Salary
Sal_ Basic_ Hi_ Insurance Premium	Calculation of Health Insurance Premium on Salary
Sal_ Result_ Hi_ Insured	Health Insurance Premium on Salary (Insured Burden)
Sal_ Result_ Ci_ Insured	Care Insurance Premium on Salary (Insured Burden)
Sal_ Result_ Hi_ Insured_ Termination Month	Termination Month Health Insurance Premium on Salary (Insured Burden)
Sal_ Result_ Ci_ Insured_ Termination Month	Termination Month Care Insurance Premium on Salary (Insured Burden)
Sal_ Basic_ Wp_ Insurance Premium	Calculation of Welfare Pension Insurance Premium on Salary
Sal_ Result_ Wp_ Insured	Welfare Pension Insurance Premium on Salary (Insured Burden)

Element Name	Description
Sal_Result_Fund_Insured	Welfare Pension Fund Insurance Premium on Salary (Insured Burden)
Sal_Result_Wp_Insured_Termination Month	Termination Month Welfare Pension Insurance Premium on Salary (Insured Burden)
Sal_Result_Fund_Insured_Termination Month	Termination Month Welfare Pension Fund Insurance Premium on Salary (Insured Burden)
Sal_Basic_Ei_Insurance Premium	Calculation of Employment Insurance Premium on Salary
Sal_Result_Ei_Insured	Employment Insurance Premium on Salary (Insured Burden)
Sal_Result_Hi_Insured_Non Resident	Health Insurance Premium not subject to Year End Adjustment on Salary (Non Resident)
Sal_Result_Ci_Insured_Non Resident	Care Insurance Premium on Salary not subject to Year End Adjustment (Non Resident)
Sal_Result_Hi_Insured_Non Resident_Termination Month	Termination Month Health Insurance Premium on Salary not subject to Year End Adjustment (Non Resident)
Sal_Result_Ci_Insured_Non Resident_Termination Month	Termination Month Care Insurance Premium on Salary not subject to Year End Adjustment (Non Resident)
Sal_Result_Wp_Insured_Non Resident	Welfare Pension Insurance Premium on Salary not subject to Year End Adjustment (Non Resident)
Sal_Result_Fund_Insured_Non Resident	Welfare Pension Fund Insurance Premium on Salary not subject to Year End Adjustment (Non Resident)
Sal_Result_Wp_Insured_Non Resident_Termination Month	Termination Month Welfare Pension Insurance Premium on Salary not subject to Year End Adjustment (Non Resident)
Sal_Result_Fund_Insured_Non Resident_Termination Month	Termination Month Welfare Pension Fund Insurance Premium on Salary not subject to Year End Adjustment (Non Resident)

Element Name	Description
Sal_ Result_ Ei_ Insured_ Non Resident	Employment Insurance Premium on Salary not subject to Year End Adjustment (Non Resident)
Sal_ Result_ Hi_ Rounding Error	Health Insurance Premium Rounding Error on Salary
Com_ Basic_ Local Tax_ Lump Sum Collection	Calculation of Lump Sum Collection Local Tax
Sal_ Basic_ Income Tax	Calculation of Income Tax on Salary
Sal_ Income Tax_ Non Resident	Income Tax on Salary (Non Resident)
Sal_ Local Tax	Local Tax on Salary
Sal_ Result_ Income Tax	Income Tax on Salary
Sal_ Result_ Local Tax_ Lump Sum Collection	Lump Sum Collecting Local Tax on Salary
Sal_ Income Tax_ 1999 Salary Special Adjustment Deduction	Income Tax Special Adjustment Deduction in 1999 on Salary
Bon_ Basic_ Hi_ Insurance Premium	Calculation of Health Insurance Premium on Bonus
Bon_ Result_ Hi_ Insured	Health Insurance Premium on Bonus (Insured Burden)
Bon_ Result_ Ci_ Insured	Care Insurance Premium on Bonus (Insured Burden)
Bon_ Result_ Hi_ Standard Bonus Amount	Standard Bonus Amount on Bonus subject to Health Insurance
Bon_ Basic_ Wp_ Insurance Premium	Calculation of Welfare Pension Insurance Premium on Bonus
Bon_ Result_ Wp_ Insured	Welfare Pension Insurance Premium on Bonus (Insured Burden)
Bon_ Result_ Fund_ Insured	Welfare Pension Fund Insurance Premium on Bonus (Insured Burden)

Element Name	Description
Bon_ Result_ Wp_ Standard Bonus Amount	Standard Bonus Amount on Bonus subject to Welfare Pension Insurance
Bon_ Basic_ Ei_ Insurance Premium	Calculation of Employment Insurance Premium on Bonus
Bon_ Result_ Ei_ Insured	Employment Insurance Premium on Bonus (Insured Burden)
Bon_ Result_ Hi_ Insured_ Non Resident	Health Insurance Premium not subject to Year End Adjustment on Bonus (Non Resident)
Bon_ Result_ Ci_ Insured_ Non Resident	Care Insurance Premium not subject to Year End Adjustment on Bonus (Non Resident)
Bon_ Result_ Wp_ Insured_ Non Resident	Welfare Pension Insurance Premium on Bonus not subject to Year End Adjustment (Non Resident)
Bon_ Result_ Fund_ Insured_ Non Resident	Welfare Pension Fund Insurance Premium not subject to Year End Adjustment on Bonus (Non Resident)
Bon_ Result_ Ei_ Insured_ Non Resident	Employment Insurance Premium on Bonus not subject to Year End Adjustment (Non Resident)
Bon_ Result_ Hi_ Subject to Add Up_ In Money	Health Insurance Premium Accumulation on Bonus
Bon_ Result_ Hi_ Subject to Add Up_ In Kind	Health Insurance Premium of Earning in Kind Accumulation on Bonus
Bon_ Result_ Hi_ Subject to Add Up_ Ins Premium_ Insured	Health Insurance Premium Accumulation on Bonus (Insured Burden)
Bon_ Result_ Hi_ Subject to Add Up_ Ins Premium_ Employer	Health Insurance Premium Accumulation on Bonus (Employer Burden)
Bon_ Result_ Ci_ Subject to Add Up_ Ins Premium_ Insured	Care Insurance Premium Accumulation on Bonus (Insured Burden)
Bon_ Result_ Ci_ Subject to Add Up_ Ins Premium_ Employer	Care Insurance Premium Accumulation on Bonus (Employer Burden)

Element Name	Description
Bon_ Result_ Hi_ Rounding Error	Health Insurance Premium Rounding Error on Bonus
Bon_ Result_ Hi_ Subject to Add Up_ Standard Bonus Amount	Standard Bonus Amount Accumulation on Bonus subject to Health Insurance
Bon_ Result_ Wp_ Subject to Add Up_ In Money	Welfare Pension Insurance Premium Accumulation on Bonus
Bon_ Result_ Wp_ Subject to Add Up_ In Kind	Welfare Pension Insurance Premium of Earning in Kind on Bonus
Bon_ Result_ Wp_ Subject to Add Up_ Ins Premium_ Insured	Welfare Pension Insurance Premium Accumulation on Bonus (Insured Burden)
Bon_ Result_ Wp_ Subject to Add Up_ Ins Premium_ Employer	Welfare Pension Insurance Premium Accumulation on Bonus (Employer Burden)
Bon_ Result_ Fund_ Subject to Add Up_ Ins Premium_ Insured	Welfare Pension Fund Insurance Premium Accumulation on Bonus (Insured Burden)
Bon_ Result_ Fund_ Subject to Add Up_ Ins Premium_ Employer	Welfare Pension Fund Insurance Premium Accumulation on Bonus (Employer Burden)
Bon_ Basic_ Income Tax	Calculation of Income Tax on Bonus
Bon_ Income Tax_ Non Resident	Income Tax on Bonus (Non Resident)
Bon_ Result_ Income Tax	Income Tax on Bonus
Bon_ Result_ Local Tax_ Lump Sum Collection	Lump Sum Collecting Local Tax on Bonus
Bon_ Income Tax_ 1999 Salary Special Adjustment Deduction	Income Tax Special Adjustment Deduction in 1999 on Bonus
Sp Bon_ Basic_ Ei_ Insurance Premium	Calculation of Employment Insurance Premium on Special Bonus
Sp Bon_ Result_ Ei_ Insured	Employment Insurance Premium on Special Bonus (Insured Burden)

Element Name	Description
Sp Bon_ Result_ Ei_ Insured_ Non Resident	Employment Insurance Premium on Special Bonus not subject to Year End Adjustment (Non Resident)
Sp Bon_ Basic_ Income Tax	Calculation of Income Tax on Special Bonus
Sp Bon_ Income Tax_ Non Resident	Income Tax on Special Bonus (Non Resident)
Sp Bon_ Result_ Income Tax	Income Tax on Special Bonus
Sp Bon_ Income Tax_ 1999 Salary Special Adjustment Deduction	Income Tax Special Adjustment Deduction in 1999 on Special Bonus
Year_ Annual Tax Amount_ Override	Annual Tax Amount on Year End Adjustment (Override)
Year_ Basic_ Amount after Salary Income Deduction	Calculation of Amount after Salary Income Deduction on Year End Adjustment
Year_ Result_ Amount after Salary Income Deduction	Amount after Salary Income Deduction on Year End Adjustment
Com_ Basic_ Dependent Exemption etc	Calculation of Basic Exemption, Spouse Exemption, Dependent Exemption on Year End Adjustment
Year_ Basic_ Insurance Premium and Spouse Sp Exemption	Calculation of Insurance Premium and Spouse Special Exemption Amount on Year End Adjustment
Com_ Ei_ Qualification Notice_ Info	Element to record the change in name and the reason in the Qualification Notice (If the current name is different from the name on the insurance certificate)
Com_ Ei_ Disqualification Notice_ Info	Element to record the change in the name and the reason in the Disqualification Notice
Com_ Ei_ Relocation Notice_ Info	Element to display the remarks 1 – 5 in the Relocation Notice

Element Name	Description
Year_Income Amount Adjustment Deduction_Information	<p>Element to hold the requirements for Income amount adjustment deduction.</p> <p>This element has the following four input values:</p> <ul style="list-style-type: none"> • 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
Year_Other_Information	Element to record if employee does not have the submission of Basis Exemption Form
Year_Result_amount after Salary Income Deduction	Element to hold the amount after salary income deduction
Year_Result_Dependent Exemption Class etc	Element to hold the dependent exemption class amount
Year_Result_Dependent Exemption etc	Element to hold the dependent exemption amount.
Year_Result_Dependent Exemption Class etc	Dependent Exemption Class etc Information on Year End Adjustment
Year_Result_Dependent Exemption etc	Dependent Exemption etc on Year End Adjustment.
Year_Result_Insurance Premium and Spouse Sp Exemption	Insurance Premium and Spouse Special Exemption on Year End Adjustment
Year_Result_Insurance Premium and Spouse Sp Exemption2	Insurance Premium and Spouse Special Exemption on Year End Adjustment
Year_Annual Tax Amount	Annual Tax Amount on Year End Adjustment
Year_Basic_Net Annual Tax Amount	Calculation of Net Annual Tax Amount on Year End Adjustment

Element Name	Description
Year_ Result_ Net Annual Tax Amount	Net Annual Tax Amount on Year End Adjustment
Year_ Over and Short Tax Amount	Over and Short Tax Amount on Year End Adjustment
ReYear_ Liquidation Amount	Liquidation Amount on Re-year End Adjustment
Term_ Basic_ Income Deduction Amount	Calculation of Lump Sum Collecting Local Tax on Termination Payment
Term_ Result_ Income Deduction Amount	Income Deduction on Termination Payment
Term_ Basic_ Local Tax_ Special Collecting	Calculation of Special Collecting Local Tax on Termination Payment
Term_ Income Tax	Income Tax on Termination Payment
Term_ Result_ Local Tax_ Lump Sum Collection	Lump Sum Collecting Local Tax on Termination Payment
Term_ Result_ Local Tax_ Special Collecting	Special Collecting Local Tax on Termination Payment
San_ Basic_ Monthly Remuneration	Calculation of Standard Monthly Remuneration on Scheduled Revision
San_ Result	Monthly remuneration etc on Scheduled Revision
San_ Result_ Before 31 Mar 2003	Scheduled Revision Result before 31 Mar 2003
San_ Result_ Geppen Projected Month	Unscheduled Revision Projected Month Result on Scheduled Revision
San_ Result_ Remarks Column	Remarks Column Result for Notification of Santei
Gep_ Result_ Fixed Wage	Fixed Wage Result on Unscheduled Revision
Gep_ Basic_ Monthly Remuneration	Calculation of Standard Monthly Remuneration on Unscheduled Revision

Element Name	Description
Gep_ Result	Monthly Remuneration etc on Unscheduled Revision
Ikukai_ Basic_ Monthly Remuneration	Calculation of Standard Monthly Remuneration on Unscheduled Revision after Child-Care Leave
Ikukai_ Result	Monthly Remuneration etc on Unscheduled Revision after Child-Care Leave
Sal_ Result_ Hi_ Employer	Health Insurance Premium on Salary (Employer Burden)
Sal_ Result_ Ci_ Employer	Care Insurance Premium on Salary (Employer Burden)
Sal_ Result_ Hi_ Employer_ Termination Month	Termination Month Health Insurance Premium on Salary (Employer Burden)
Sal_ Result_ Ci_ Employer_ Termination Month	Termination Month Care Insurance Premium on Salary (Employer Burden)
Sal_ Result_ Wp_ Employer	Welfare Pension Insurance Premium on Salary (Employer Burden)
Sal_ Result_ Fund_ Employer	Welfare Pension Fund Insurance Premium on Salary (Employer Burden)
Sal_ Result_ Wp_ Employer_ Termination Month	Termination Month Welfare Pension Insurance Premium on Salary (Employer Burden)
Sal_ Result_ Fund_ Employer_ Termination Month	Termination Month Welfare Pension Fund Insurance Premium on Salary (Employer Burden)
Bon_ Result_ Hi_ Employer	Health Insurance Premium on Bonus (Employer Burden)
Bon_ Result_ Ci_ Employer	Care Insurance Premium on Bonus (Employer Burden)
Bon_ Result_ Wp_ Employer	Welfare Pension Insurance Premium on Bonus (Employer Burden)
Bon_ Result_ Fund_ Employer	Welfare Pension Fund Insurance Premium on Bonus (Employer Burden)

Element Name	Description
Year_ Dependent Exemption Form2	Holds the status if the employee is a single parent or widow for local tax purposes.

Payroll Payment and Distributions Overview

Payroll Payment and Distributions Overview

Using Oracle HRMS you can define payment methods for your enterprise and define any rules for validating or processing the distribution of pay.

Payroll Payment and Distributions in Oracle HRMS

You provide for payment and distribution by defining payment methods for your enterprise and then specifying which of these organizational payment methods are valid for the payrolls that you create. This enables you to set up a flexible pattern of payment in which you can pay individual employees by a single payment method, or by a combination of valid payment methods.

Key Concepts

To enable you to set up payment and distributions correctly, you need to understand these key concepts:

- Payment methods for your enterprise, page 5-4
- Cash Management and Oracle Payroll, *Oracle HRMS Payroll Processing Management Guide*

Reporting on Payroll Payment and Distributions

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

Payroll Payment and Distributions

You can use Oracle Payroll to calculate the payments and distributions for all your

employees

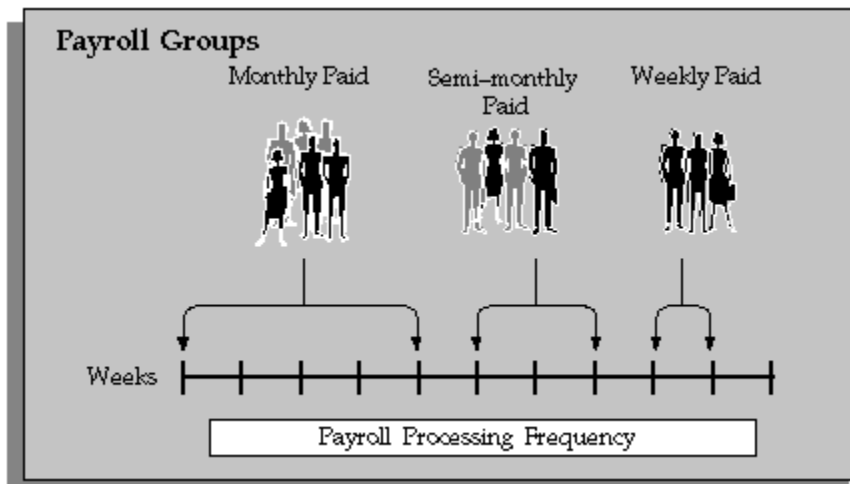
Can you verify that payments have been made?

Yes. Oracle Payroll is fully integrated with Oracle Cash Management. This enables you to use Oracle Cash Management to verify that payments have been cashed. Reconciliation can be applied to payroll checks/cheques and third party checks/cheques. You can identify which checks/cheques have been cleared and the date on which they were cleared. You can also view a reconciliation report which shows if voided checks/cheques appear to have been cashed.

Can Oracle Payroll handle different pay frequencies?

Yes--you can set up different pay frequencies, for example weekly or monthly, so that you can pay different sets of employees at different intervals. Each payroll can only have a single pay frequency and you must set up at least one payroll for each pay frequency that you define.

Multiple payrolls in a Business Group



Note: Semi-monthly is not a valid frequency for UK payroll users.

Can you group employees according to payroll categories in your organization?

You can assign people to any work structure such as an employment category or a particular location. You can also define a special grouping for your organization. For example, you can create a group to indicate membership of a union.

Can you set up a payroll to process multiple assignments for an employee?

Yes. If the Multiple Assignment Prepayments has been enabled for your localization, you will see the Multiple Assignment check box on the Payroll window. The process is activated by selecting the Multiple Assignment check box.

Do you have flexible control over payment methods?

You can define a payroll to include different types of payment method - for example, payment by bank transfer, payment by check/cheque, and so on. When you process the payroll you can then pay the set of employees for that payroll in any of the following ways:

- All employees receive payment by a single default payment method for their payroll.
- Employees receive payment by a combination of the payment methods that you have defined for their payroll.
- Individual employees receive payment that can be distributed between the defined payment methods in proportions different from those applying to other employees belonging to the same payroll.

Can you model your payslip?

Yes, you can model your payslip, if the Payslip Modeling functionality is enabled for your localization. Contact your system administrator to check if it is available for your localization.

Employees and payroll administrators can model a paycheck/payslip by running a mock payroll run.

Payment and Distributions

Payment Methods for Your Enterprise

You can define as many payment methods as you require for your enterprise. When you create a payroll, you can select which of these methods are valid for employees assigned to that payroll. You select one method as the default method for the payroll. To choose the payment methods for an individual employee, use the Personal Payment Method window. If you do not enter any personal payment methods, the employee is paid by the default method for the payroll.

Payment Methods and Payment Types

Any payment method that you define must belong to one of the payment method types that your enterprise supports. The most common payment method types are:

- Direct Deposit
- Check/Cheque
- Cash

Your particular enterprise may support a different range of types. Additionally, there can be local variations within each type. For example, the direct deposit type is NACHA in the U.S., BACS in the U.K. and BECS in Australia.

However, in all enterprises you can define multiple payment methods for the same payment method type.

You can also define payment methods for third party payments, such as court-ordered wage attachments. Third party payments are always made by cheque/check, so methods for these payments must have the type Cheque (Check).

Valid Payment Methods

A valid payment method is a payment method that:

- Belongs to one of the payment method types approved in your enterprise

For example, payments by cash are not allowed in some enterprises.

- Is an accepted local variation for your enterprise

For example, U.S. direct deposit payments can be made only by NACHA transfer and not by BACS

Payment Method Types: Required Information

When you define a payment method, always include the required information for the payment method type:

Payment Method Type	Required Information
Check/Cheque	<p>Source bank account name and number.</p> <p>The source account is the account from which your enterprise makes the payment.</p> <p>The payee account details are only known to the payee. You do not record them in Oracle Payroll.</p>
Direct Deposit	<p>Source and destination account details.</p> <p>The destination account is the payee account.</p> <p>Because payments transfer directly to a named account, Oracle Payroll can make direct deposits only if you supply source and destination account details.</p>
Cash	<p>Coinage analysis.</p> <p>If your enterprise makes cash payments, you use the coinage analysis to specify the denominations of notes and coins in which employees receive payment.</p>

Payment Methods and Employees

Each employee must have at least one valid payment method, but you can also use multiple payment methods for an individual employee.

Payment Methods and Source Bank Accounts

When you pay employees from separate source accounts, each source account must have a separate payment method. You cannot share a payment method across several different source bank accounts. However, you can create multiple payment methods for the same source bank account.

Payment Methods: Summary

Observe these guidelines when defining your payment methods:

- Each payroll must have at least one valid payment method.
- Each payroll must have a default payment method.
- Each employee must have at least one valid payment method.
- Each source account must have at least one valid payment method.

Your sequence for defining payment methods and attaching them to a payroll is:

1. Define your organizational payment methods.
See: Defining a Payment Method, page 5-6
2. Link your organizational payment methods to a payroll.
See: Defining a Payroll, *Oracle HRMS Payroll Processing 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.

The error account is a general ledger account that acts as a temporary account until the error is discovered or the unknown transaction is identified. This error account holds all of the discrepancies until you find them. You use this account when the proper account cannot be determined at the time the transaction is recorded.

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.

Map the Payee organization to make third party payments

16. Click the Payees button.

17. The Payees button is enabled only when the following conditions are met:

- The Third Party Prepayments functionality has been enabled for your legislation.

- The profile option PAY: Use Third Party PrePayments Rollup is set to Yes using the System Profile Values window for all Payment Methods with Third Party Payment check box selected. See *User Profiles, Oracle HRMS Configuring, Reporting, and System Administration Guide* for more information.
18. In the Payee Organization window, enter any number of Third Party Payee Organization with different bank account details.
 19. You can specify the payment period on which the payment becomes eligible to be paid, in Payment Period field, thus deferring the payments from each period until the payments are paid.
 20. When you enter an organization with multiple bank accounts, enter the Overriding Balance to distinguish the amounts to be paid into each account.

Enter further information for the payment method

21. 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.

22. **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.

Field	Description
Scheme Name	<p>Enter the code for the identification scheme as published in an external list. The options are BANK and CUST:</p> <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.
Batch Booking	<p>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 style="list-style-type: none"> • No: Single Booking requested. • Yes: Batch Booking requested. This default value is Yes. <p>Note: The Yes and No values are reflected in XML as true and false.</p>

Field	Description
Service Level Code	<p>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 style="list-style-type: none"> • NURG (Non-urgent Payment): Select as the default. • SDVA (Same Day Value): Intercompany only (not for salaries). • SEPA (Single Euro Payments Area) • URG (Urgent Payment): Only suppliers (SUPP) but not for salaries.
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	<p>The payment identification ID is a reference assigned by a sending party to identify the payment information block within a message.</p>

Field	Description
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 6-3

Running the Payroll Run (Bonus) Process, page 6-4

Running the Payroll Run (Special Bonus process), page 6-5

Running the Payroll Run (Retirement Money) Process, page 6-6

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 6-31

5. Run Generate Direct Deposit File process.

See: Running the Generate Direct Deposit File process, page 6-32

Payroll Management

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, PRSI and USC 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*

Payroll Statutory Deductions and Reporting

Oracle Payroll allows you to process tax and insurance deductions for employers and employees, and helps you comply with the legislative requirements applying to your organization.

Is Oracle Payroll flexible enough to calculate different legislative taxes?

Yes. Oracle Payroll supports many country specific models of taxation, including the local, federal and state tax requirements of organizations operating in the US.

Is the entry of tax details flexible enough to meet my organizational needs?

Yes. You can calculate taxes for different types of employer to represent the diversity of your organization. You can also make retrospective adjustments to allow for overpayments and underpayments.

Is Oracle Payroll capable of processing the latest taxation updates?

Yes. The details of taxation policy and social security entitlements are constantly changing, but Oracle Payroll is always promptly updated so that your processing includes the most recent updates.

Can Oracle Payroll transmit PAYE information electronically? (UK only)

Yes. EDI allows two-way electronic transmission of documents between the Inland Revenue and employers. Oracle UK Payroll has developed a specified formatted file that, if used in conjunction with third party software, can be transmitted electronically to the Inland Revenue.

Can you record P11D details and submit an annual return? (UK Only)

You can use Oracle HR to update your records throughout the year to show all the Class 1A National Insurance contributions for which your organization is liable. You can make this information available to employees so that they can preview their NI liabilities. You can then generate a report to view the final details and you can submit the complete and validated records to the Inland Revenue to comply with all reporting requirements.

Payroll Statutory Deductions and Reporting

Payroll Statutory Deductions and Reporting

Oracle HRMS for Japan calculates monthly salaries, bonuses, Geppen/Santei, Year-End-Adjustment, Re-Year-End-Adjustment and Termination/Retirement in line with Japanese Legislative requirements.

Oracle HRMS for Japan supports the submission of a number of reports for Social Insurance and Tax to the respective insurance and Tax Offices.

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 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. 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 which you want to generate the payslip. The application generates the payslip for the data for which PrePayment process is completed and within the specified End Date.
3. Select to generate the payslip for the selected payroll.
4. The consolidation set appears automatically for the selected payroll.
5. Enter the payment date to be displayed on the payslip. It appears by default depending on the end date entered.
6. Enter a label for the payslip for identification purposes. If you leave this blank, the

element set name as of the effective date (Payment Date defined in Payroll Run) will be used for the label.

7. 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 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.

Year End Processing

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.

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, 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 can use the Japan, Withholding Tax Report Generation process to generate the list of employees for whom the tax has been withheld during the year.

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 value in the Japan, Create Payroll Data for use in Reporting Form field is Yes, then enter the start and end dates to create payroll data.
12. If the value in the Japan, Create Payroll Data for use in Reporting Form field is Yes, then select the consolidation set.
13. Click OK and then Submit.

Running the Japan, Salary Payment Report E-file

You run this process to generating the salary payment report for resident employees to the each local tax office in e-file.

The Salary Payment Report is used for reporting annual salary payment information to the municipality where the employee's residence is located. The generated e-file complies with the standard format established by the Ministry of General Affairs and Communication.

The data will be stored in \$APPLPTMP directory, and the PDF file for confirmation also be generated.

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 where you want to generate the report. If the parameter is set, only taxable employee belongs to the specified municipal code will be targeted. If the parameter is Null, all taxable employees will be targeted. You can also specify the target municipal codes by maintaining the Special SWOT numbers master.
5. Select the assignment set of the municipality when required.
6. Select Yes in the File Split field to split the output file by municipality (one file for a municipality). If No is selected, one file for all municipalities are created, or multiple files only 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 option as 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 the Terminated People Output All option as Yes, then the Salary Payment Report e-file displays all terminated employees even with earning amount of the year less than 300,000 yen.
8. In the Creation Class field, from the list of values, select the creation class to indicate where the e-file has to be submitted, whether to the tax office or to the local government or to both. The default is Both.
9. Click OK and then Submit.

Running the Japan, Transfer Local Tax Information to BEE Process

You run the Japan, Transfer Local Tax Information to BEE process to upload the data from the csv file to the element Com_ Local Tax_ Information. You run the Japan, Transfer Local Tax Information to BEE from the Submit Requests window.

To run the Japan, Transfer Local Tax Information to BEE Process:

1. In the Name field, Japan, Transfer Local Tax Information to BEE. Then click the Parameters field to open the Parameters window.

2. Select the year or month to run this process.
3. Select Yes to reject the transfer if there are any future changes.
4. Select the option to correct, update or insert the record in the Date Effective Changes field.
5. Select Yes to purge the data after the transfer is complete.
6. Select Yes to create an entry if it does not exist.
7. Select the special withholding agent.
8. Select the municipal code.
9. Select the assignment set.
10. If you have not specified the file name in the SWOT window, and the File Split is specified as Yes in this window, the file name is assumed to be <municipality code><SpecialWithholdingAgentNumber>ltax .csv. If the File Split is specified ltax.csv.
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 click 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 the archive mode - New, Recreate, Add, or Amendment. 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 has been previously archived.
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.

Setting up of the Japan, Employment Ins E-File

The Japan, Employment Ins E-File for e-Gov generates 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, page 4-17
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 Look 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 6-19
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 Process

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

1. In the Request Name field, select **Japan, Employment Ins E-File for e-Gov** process.
2. In the **Parameters** window, select the following options:
3. Select the type of notice from the list of values. The options are Qualification notice, Disqualification notice, and Relocation notice.
4. In the **Target Date From** field, select a date. This date depends on the type of notice selected in the previous step.
 - 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 date is from when the employee is no longer qualified for employment insurance.
 - If you have selected Relocation Notice, then this date is when the employee relocated to a different employer.
5. In the **Target Date To** field. select a date to report the data.
6. Select the labor insurance employer. If you have selected **Relocation Notice**, then select the employer to where the employee relocated.
7. 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.
8. Select the location of the welfare pension office to display the Welfare Pension Category Mark.
9. Select Yes if you require an XML report.
10. Click OK and then Submit.

Social Insurance Processes and Reporting

Social Insurance Reporting

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

You must 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 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 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 media 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 or employees who have reached 70 or 75 years. Employees who are 70 years of age are disqualified for welfare pension insurance and 75 years for health insurance.

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 media 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 media 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 media 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 media 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.

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 set of employees.
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 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 and 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.

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

Ireland Users Only: Use the Payroll Submission Archive and Payroll Submission 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. Click OK, then Submit.

Other Definitions

Entering Special Withholding Agent Information

Use the Special Withholding Agent Information window to record the local government code the Special Withholding Agent (employer) use. You can use this window to manage the file names and municipality codes to be used for the Salary Payment Report and receiving local tax data in e-file.

To enter Special Withholding Agent Information:

1. Navigate to Other Definitions > Master > Special SWOT Numbers.
2. Select the Special Withholding Information Agent.
3. Select the code of the municipality. The name appears automatically.
4. Select the code of the municipality where the Salary Payment Report must be submitted in case where the municipality code and the code where the Salary Payment Report is submitted are different. The name appears automatically.
5. Enter the special withholding agent number by the municipality.
6. Specify the filename of the e-file output. If not specified here, and if you specify the File Split as Yes in the parameter of Japan, Salary Payment Report e-File, the file name will be 315dat <municipality code> <concurrent Request ID>.txt. If not specified here, and if you specify the File Split as No in the parameter of Japan, Salary Payment Report e-File, the file name will be 315dat <concurrent Request ID>.txt.
7. Select the Exclusion checkbox if you want to exclude this municipality from the Salary Payment Report e-file.
8. Select the code of the municipality in case where the municipality code and the

code where the local tax is paid are different. This code is used to validate and import the local tax data for each assignment. The name appears automatically.

9. Specify the file name of the e-file input. If not specified here, and the File Split is specified as Yes in the parameter of Japan, Transfer Local Tax Information to BEE, the file name is assumed to be ltax <municipality code> <SpecialWithholdingAgentNumber>.csv. If not specified here, and the File Split is specified as No in the parameter of Japan, Transfer Local Tax Information to BEE, the file name is assumed to be ltax.csv.
10. Select the Exclusion checkbox if you want to exclude this municipality from the transfer.
11. Save your work.

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 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 receive and view withholding ITAX report.

Employees in Japan are required to submit their Certificate of Withholding Income Tax to the National Tax Agency (NTA) at the end of the calendar year. From this form, users can view and print the withholding ITAX report.

The Withholding ITAX Report for Payroll Manager form enables payroll managers to view and update the comment column of withholding ITAX report. From this form, the payroll manager can define the open and close dates for which changes can be made, view results, and update the comments column.

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

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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