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- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
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- Do you need different information or graphics? If so, where, and in what format?
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Preface

Intended Audience

Welcome to Release 12.2 of the *Oracle HRMS for France Supplement*.

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

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

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

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

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

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

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Structure

- 1 **Enterprise and Workforce Management**
- 2 **Workforce Sourcing and Deployment**
- 3 **Talent Management**
- 4 **Compensation and Benefits Management**
- 5 **Implementing Oracle HRMS**
- 6 **Oracle Learning Management France**

Related Information Sources

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

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

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

Guides Related to All Products

Oracle E-Business Suite User's Guide

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

Oracle Application Framework Personalization Guide

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

Guides Related to This Product

Oracle Human Resources Management Systems Enterprise and Workforce Management Guide

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

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

Learn how to use Oracle HRMS to represent your workforce. This includes recruiting

new workers, developing their careers, managing contingent workers, and reporting on your workforce.

Oracle Human Resources Management Systems Payroll Processing Management Guide

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

Oracle Human Resources Management Systems Compensation and Benefits Management Guide

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

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

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

Oracle Human Resources Management Systems Implementation Guide

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

Oracle Human Resources Management Systems FastFormula User Guide

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

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

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

Oracle Performance Management Implementation and User Guide

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

Oracle Succession Planning Implementation and User Guide

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

Oracle Human Resources Management Systems Deploy Strategic Reporting (HRMSi)

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

Oracle Human Resources Management Systems Strategic Reporting (HRMSi) User

Guide

Learn about the workforce intelligence Discoverer workbooks.

Oracle Human Resources Management Systems Approvals Management Implementation Guide

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

Oracle Human Resources Management Systems Window Navigation and Reports Guide

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

Oracle iRecruitment Implementation and User Guide

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

Oracle Learning Management User Guide

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

Oracle Learning Management Implementation Guide

Implement Oracle Learning Management to accommodate your specific business practices.

Oracle Time and Labor Implementation and User Guide

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

Oracle Labor Distribution User Guide

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

Other Implementation Documentation

Oracle 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.

Oracle eTechnical Reference Manuals

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

Integration Repository

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

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

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

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

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

Because Oracle E-Business Suite tables are interrelated, any change you make using an Oracle E-Business Suite form can update many tables at once. But when you modify

Oracle E-Business Suite data using anything other than Oracle E-Business Suite, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle E-Business Suite.

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

Enterprise and Workforce Management

Organizations

Key Concepts for Representing Enterprises

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

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

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

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

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

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

See: Organization Classifications, page 1-4

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

Business Group

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

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

- If you use Oracle Payroll

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

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

Operating Company

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

Ultimate Legal Entity

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

Legal Entity/Employer

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

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

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

Consolidated Legal Entity

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

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

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

Organization Classifications

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

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

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

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

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

All Legislations

All legislations can use the following classifications:

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

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

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

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

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

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

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

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

US Legislation

The US legislation can use the following classifications:

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

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

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

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

UK Legislation

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

Canadian Legislation

The Canadian legislation can use the following classifications:

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

French Legislation

The French legislation can use the following classifications:

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

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

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

Dutch Legislation

The Dutch legislation can use the following classifications:

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

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

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

German Legislation

The German legislation can use the following classifications:

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

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

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

Hong Kong Legislation

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

Mexico Legislation

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

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

Saudi Legislation

The Saudi legislation can use the following classifications:

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

Hungary Legislation

The Hungary legislation can use the following classifications:

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

Spanish Legislation

The Spanish legislation can use the following classifications:

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

Korea Legislation

The Korean legislation can use the following classification:

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

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

Indian Legislation

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

The Indian legislation can use the following classifications:

- **Registered Company:** Records your company's Legal Name, Registration Number, Corporate Identity Number, Permanent Account Number (PAN) of the company and company's representative details.
- **Factory:** Records your factory's Registration Number, License Number, National Industrial Code, Production Commencement Date and factory's representative details.
- **Shops/Establishment:** Records your shops/establishment's registration number and representative details.
- **Contractor Details:** Records a contractor's details, work details, and representative details. A contractor supplies contingent workers to an enterprise and can be either an individual or an external organization.
- **ESI Organization:** Use this to define an external organization that provides Employee State Insurance (ESI) to your employees. Records your Employee State Insurance (ESI) organization's Challan Information, General Information and Representative Details. You can have multiple ESI organizations and select an employee's ESI organization in the Assignment window.
- **Provident Fund Organization:** Records your PF organization's PF challan information, PF information, and PF representative details. You can have multiple PF organizations and select an employee's PF organization in the Assignment window.
- **Professional Tax Organization:** Records your Professional Tax organization's information, Professional Tax Challan information, and Representative Details information. You can have multiple professional tax organizations and select an employee's professional tax organization in the Assignment window.
- **Income Tax Office:** Records your income tax organization's information. You can enter the location details of the income tax office. You can select the income tax organization in the GRE/Legal Entity: Income Tax Details window.
- **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 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 1-16
- For HR organization see: HR Organization, page 1-16
- For company see: Company, page 1-16
- For establishment see: Establishment, page 1-16
- For URSSAF center see: URSSAF Center, page 1-16
- For insurance provider see: Insurance Provider, page 1-16
- For pension provider see: Pension Provider, page 1-16
- For ASSEDIC center see: ASSEDIC Center, page 1-16
- For rebates see: Rebates, page 1-16
- For representative body see: Representative Body, page 1-16
- For constituency see: Constituency, page 1-16
- For bargaining association see: Bargaining Association, page 1-16
- For company cost center see: Company Cost Center, page 1-16
- For professional body information see: Professional Body Information, page 1-16
- For public sector other external organization see: Public Sector Other External Organization, page 1-16

To enter Business Group additional information:

1. Click on the organization classification for which you want to enter additional information.
2. Choose the Others button to open the Additional Organization Information window.
3. Select one of the following:
 - Business Group Information, see Entering Business Group Information, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Budget Value Defaults, see Business Groups: Entering Budget Value Defaults, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Work Day Information, see Business Groups and HR Organizations: Entering Work Day Defaults, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Benefits Defaults, see: Business Groups: Defining a Default Monthly Payroll, *Oracle HRMS Enterprise and Workforce Management Guide*
 - PTO Balance Type, see Business Groups: Selecting a PTO Balance Type, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Organization Category Information, see Business Groups: Entering PS Grouping Unit Information, page 1-25
 - Recruitment Information, see Business Groups: Entering Recruitment Information, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Public Sector Details, see Business Groups: Setting Up Public Sector Details, *Oracle HRMS Enterprise and Workforce Management Guide*
4. Repeat these steps to enter further information.

To enter HR Organization additional information:

1. Click on the organization classification for which you want to enter additional information.
2. Choose the Others button to open the Additional Organization Information window.
3. Select one of the following:
 - Reporting Information, see: Entering Reporting Information for an HR

Organization or a Company Cost Center, *Oracle HRMS Enterprise and Workforce Management Guide*

- Costing Information, see HR Organizations: Entering Costing Information, *Oracle HRMS Enterprise and Workforce Management Guide*
- Parent Organization, see HR Organizations: Entering Parent Organizations, *Oracle HRMS Enterprise and Workforce Management Guide*
- Work Day Information, see Business Groups and HR Organizations: Entering Work Day Defaults, *Oracle HRMS Enterprise and Workforce Management Guide*
- 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 company 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:
 - Cadre Life Insurance TA, see: Company: Entering Cadre Life Insurance TA, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Company Information, see: Company: Entering Company Information, page 1-26
 - Complementary Pension Tranch 2, see: Company: Entering Complementary Pension Tranch 2, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Employer Default Accrual Percentage, see: Company: Entering Default Employer Accrual Percentage, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Insurance Provider, see: Company and Establishment: Entering Insurance Provider Information, page 1-29
 - Payment Methods, see: Company and Establishment: Entering Payment Methods, *Oracle HRMS Enterprise and Workforce Management Guide*

- Payment Override Information, see Company: Entering Payment Override Information, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Pension Provider, see: Company and Establishment: Entering Pension Provider Information, page 1-29
 - Previous Information, see: Company and Establishment: Entering Previous Information, page 1-29
 - Statutory Report Information, see: Company: Entering Statutory Report Information, *Oracle HRMS Enterprise and Workforce Management Guide*
 - 2483 Report Information, see: Company: Entering 2483 Information, page 1-28
4. Repeat these steps to enter further information.

To enter establishment 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:
 - Apprenticeship Tax Information, see: Establishment: Entering Apprenticeship Tax Information, *Oracle HRMS Enterprise and Workforce Management Guide*
 - ASSEDIC Information, see: Establishment: Entering ASSEDIC Information, page 1-30
 - Collective Agreements, see: Establishment: Entering Collective Agreements , page 1-30
 - Construction Tax Information, see: Establishment: Entering Construction Tax Information, *Oracle HRMS Enterprise and Workforce Management Guide*
 - DADS Information, see: Establishment: Entering DADS Information, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Employer Accrual Percentage, see: Establishment: Entering Employer Accrual Percentage, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Establishment Information, see: Establishment: Entering Establishment Information, page 1-31

- External Organizations, see: Establishment: Entering External Organizations Information, page 1-32
- Fixed Term Contract Override Rate, see: Establishment: Entering Fixed Term Override Rate, *Oracle HRMS Enterprise and Workforce Management Guide*
- Insurance Provider, see: Company and Establishment: Entering Insurance Provider Information, page 1-29
- Payment Override Information, see Establishment: Entering Payment Override Information, *Oracle HRMS Enterprise and Workforce Management Guide*
- Payment Methods, see: Company and Establishment: Entering Payment Methods, *Oracle HRMS Enterprise and Workforce Management Guide*
- Pension Provider, see: Company and Establishment: Entering Pension Provider Information, *Oracle HRMS Enterprise and Workforce Management Guide*
- Previous Information, see: Company and Establishment: Entering Previous Information, page 1-29
- Transport Tax Information, see: Establishment: Entering Transport Tax Information, *Oracle HRMS Enterprise and Workforce Management Guide*
- Welfare Tax Information, see: Establishment: Entering Welfare Tax Information, *Oracle HRMS Enterprise and Workforce Management Guide*
- Work Accident Information, see: Establishment: Entering Work Accident Information, *Oracle HRMS Enterprise and Workforce Management Guide*
- URSSAF Information, see: Establishment: Entering URSSAF Information, *Oracle HRMS Enterprise and Workforce Management Guide*

4. Repeat these steps to enter further information.

Note: ASSEDIC, Establishment Information, Pension Providers, Salary Tax Liability, Transport Tax Liability, Work Accident Information and URSSAF are all mandatory Establishment extra information types.

To enter URSSAF center 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 URSSAF Center Information, see: URSSAF Center: Entering URSSAF Center Information, page 1-34
4. Repeat these steps to enter further information.

To enter insurance provider 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 Insurance Provider Information, see: Insurance Provider: Entering Information, page 1-33
4. Repeat these steps to enter further information.

To enter pension provider 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 Pension Provider Information, see Pension Provider: Entering Information, page 1-33
4. Repeat these steps to enter further information.

To enter ASSEDIC center 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 ASSEDIC Center Information, see: ASSEDIC Center: Entering ASSEDIC Center Information, page 1-33
4. Repeat these steps to enter further information.

To enter rebates 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:
 - Aubry I Rebate, see: *Rebates: Entering Aubry I Rebate Information, Oracle HRMS Enterprise and Workforce Management Guide*
 - Aubry II Rebate, see: *Rebates: Entering Aubry II Rebate Information, Oracle HRMS Enterprise and Workforce Management Guide*
 - Part Time Rebate, see: *Rebates: Entering Part Time Rebate Information, Oracle HRMS Enterprise and Workforce Management Guide*
 - Robien Rebate, see: *Rebates: Entering Robien Rebate Information, Oracle HRMS Enterprise and Workforce Management Guide*
 - Social Security Rebate, see: *Rebates: Entering Social Security Rebate Information, Oracle HRMS Enterprise and Workforce Management Guide*
4. Repeat these steps to enter further rebate information.

To enter representative body additional information:

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

To enter constituency additional information:

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

To enter bargaining association information:

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

To enter company cost center information:

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

To enter professional body information:

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

To enter public sector other external organization 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:
 - External Org Info, see: *Entering External Organizations Information* , page 1-34
 - Corps Applicable, see: *Entering Corps Details applicable to external organizations.*, page 1-34

4. Repeat these steps to enter further information.

Business Group: Setting Up Public Sector-type Functionality

Oracle HR enables you to set up a particular business group for Commercial or Public Sector-type functionality.

To set up public sector-type functionality:

1. In the organization window, query the Business Group if it does not already appear there. In the Organization Classifications region, select Business Group, choose the Others button, and select Public Sector Details.
2. Click in a field of the Additional Organization information window to open the Public Sector Details window.
3. In the Installed field, select Yes or No.

The default value is No, hence there is no impact on existing business groups. Select Yes if you want to use the public sector-type functionality of Oracle HR. You need to manually change this value for each business group.

4. Save your work.

Business Groups: Entering PS Grouping Unit Information

Oracle HR enables you to enter the category of the organizations. Some organizations are national, some are regional and some are at departmental level or at town level. These categories determine the rules applicable to the employee within these organizations.

To enter PS grouping unit information:

1. In the Organization window, query the business group if it does not already appear there. In the Organization Classifications region, select Business Group, choose the others button, and select PS Grouping Unit Info.
2. Click in a field of the Additional Organization Information window to open the PS Grouping Unit Info window.
3. In the Category field, select a category type, such as Health Public Sector, which covers public hospitals, Local Public Sector, which covers local civil service, and State Public Sector which covers state civil service.

Additional Information: You can extend the types of public sector

using the predefined value Other. See: Extending Types of Public Sector, page 1-35

4. Save your work.

Company: Entering Pension Providers

After you define the pension providers in the Organization window you use the Pension Providers window to enter details about the providers that supply pensions for your company.

To enter details about a pension provider:

1. Select the name of the pension provider.
2. Enter the fund number of the pension provider.
3. Enter the Declaration Due Offset.
4. Enter the Latest Contribution Offset.
5. Enter the Payment Offset.
6. Choose the account details for Payment Account 1.
7. Choose the Payment Type.
8. Indicate the Payment Limit.
9. Repeat steps 6 to 8 for Payment Accounts 2 and 3 (if applicable).
10. Save your changes.

Company: Entering Company Information

Use the Company Information window to enter details about your company. Before you do this you must:

- Define the URSSAF center in the Organization window using the URSSAF Center classification.
- Define the establishment that produces the DADS report, and the head establishment in the Organization window. These establishments should be linked to the relevant company in the Establishment Information window.

To enter company information:

1. Enter the company's SIREN identification number and select its NAF activity code.

Note: The SIREN identification number is validated to ensure that it is entered in the correct format.

2. Select the URSSAF center that collects the social security contributions for the organization.
3. Select the establishment that produces the DADS report for your company.
4. Select the establishment that is the head office for your company.
5. Select the nature of the company. This information helps in identifying the type of the company, as organizations under a business group can be of different nature such as administrative, industrial, commercial, private or public.
6. Select the localization. This information helps in identifying the jurisdiction of the company such as central, national, regional, local, decentralized or deconcentrated.
7. Enter the mission. This shows the main aim of the company.
8. Enter the numeric identifier.
9. Select the organization payment method for IJSS Payment. This information is required to print the company or establishment's account number on the Absence Report (FR).

Note: The organization payment method that you specify at the establishment level overrides the payment method that you specify at the company level.

10. Select the name of the absence report (FR) signatory. This is usually the HR representative of the company.

Note: The name that you select at the establishment level overrides the name that you select at the company level.

11. Enter the location of the Absence Report (FR) signatory. This information is needed for the absence report (FR).

Note: The location of the signatory that you enter at the

establishment level overrides the name that you select at the company level.

12. Select the sickness deduction fast formula:
 - If you select `FR_SICK_DEDUCT_WORKING_DAY_FORMULA`, then Oracle Payroll calculates sickness deduction as per working days proration method.
 - If you select `FR_SICK_DEDUCT_OPEN_DAY_FORMULA`, then Oracle Payroll calculates sickness deduction as per open days proration method.

Note: You can create your own formulas for sickness deduction and set them at establishment or company information level. Ensure to prefix the formulas with `FR_SICK_DEDUCT`. The formula set at establishment level overrides the formulas set at company level. If the working day or open day value exceeds the global value, then the number of working days and open days will default to the value held by the global values `FR_WORK_DAYS` and `FR_OPEN_DAYS`.

13. Enter the payer's identification number. This is the reference number for the payment output file.
14. Save your changes.

Company: Entering 2483 Information

Use the Company 2483 Info window to enter administrative details about your company for the 2483 report.

Note: If you are an Oracle Learning Management user, then you must enter the company details for the 2483 report.

To enter 2483 information:

1. Select the tax office to which you must send the 2483 Declaration.
2. Enter the 2483 report details.
3. Select the method of calculating the average monthly headcount. This enables the application to use the employee's employment category information to include or exclude workers from the headcount.

4. Select the training plan level. If you select
 - Company, then the application uses the training plans for the company to produce the report.
 - Establishment, then the application uses training plans for all the establishments in the company to produce the report.
5. Save your work.

Company and Establishment: Entering Insurance Providers

Use the Insurance Providers window to enter details about organizations that supply insurance for your company or establishment. Before you do this you must:

- Define the insurance provider in the Organization window using the Insurance Provider classification.

To enter an insurance provider:

1. Select the name of the insurance provider.
2. Enter the fund number of the insurance provider.
3. Save your changes.

Company and Establishment: Entering Previous Information

You use the Previous Information window to record details of any previous identification numbers and locations for your organizations. If the changes have occurred during the current year then, for reporting purposes, the details in this window should be correct as of January 1st. Before you do this you must:

- Select the new location for the organization in the Organization window.
- Enter the new SIREN or SIRET identification number in the Company Information, or Establishment Information window accordingly.

To enter previous information:

1. Enter the previous SIREN or SIRET identification number for the organization.

Note: The SIREN or SIRET identification number is validated to ensure that it is entered in the correct format.

2. Select the previous location and enter the final date.
3. Save your changes.

Establishment: Entering ASSEDIC Information

After you define your ASSEDIC centre in the Organization window you use the ASSEDIC window to enter details about the ASSEDIC center. The ASSEDIC center collects indemnities for unemployed people from the employees of the establishment.

To enter ASSEDIC information:

1. Select the name of the ASSEDIC center.
2. Enter the registration number of the ASSEDIC number.
3. Enter the order number. This number is used in the contribution code for ASSEDIC contributions as required by the DUCS report.
4. Enter the Declaration Due Offset.
5. Enter the Latest Contribution Offset.
6. Enter the Payment Offset.
7. Choose the account details for Payment Account 1.
8. Choose the Payment Type.
9. Indicate the Payment Limit.
10. Repeat steps 7 to 9 for Payment Accounts 2 and 3 (if applicable).
11. Save your changes.

Establishment: Entering Collective Agreements

You use the Collective Agreements window to record the collective agreements used by an establishment. All collective agreements that are applicable to any employees within an establishment must be held at establishment level. You will be limited to the list of collective agreements entered here when you associate an employee's assignment to a collective agreement in the Assignment window. Before you do this you must:

- Define the required collective agreements using the Collective Agreements window.

To enter a collective agreement:

1. Select the name of the required collective agreement.
2. Save your changes.

Establishment: Entering Establishment Information

Before you enter establishment information you must:

- Define the company to which the establishment belongs in the Organization window using the Company classification.

To enter establishment information:

1. Select the company to which the establishment belongs and enter its SIRET identification number and NAF activity code (required).

The nature and localization of the establishment default to those set for the company, though you can override this.

Note: The SIRET identification number is validated to ensure that it is entered in the correct format.

2. Enter the monthly reference hours. This value should be the amount of hours normally worked by a full-time employee (required).
3. Enter the name of the person authorized to sign off the DADS report for the establishment.
4. Select the prud'homme employer type. This defines the category of prud'homales election in which the establishment will be eligible to vote.
5. Enter whether the establishment is an interim agency.
6. Enter whether the establishment is in a ZRR.
7. Enter whether the establishment is in the Alsace Moselle region. If you do not enter this, Oracle Payroll assumes the establishment is not in Alsace Moselle.
8. Select the nature of the establishment. This information helps in identifying the type of the establishment, as organizations under a business group can be of different nature such as administrative, industrial, commercial, private or public.
9. Select the localization. This information helps in identifying the jurisdiction of the company such as central, national, regional, local, decentralized or deconcentrated.

10. Enter the mission. This shows the main aim of the establishment.
11. Enter the numeric identifier.
12. Select the organization payment method for IJSS Payment. This information is required to print the company or establishment's account number on the Absence Report (FR).
13. Select the name of the absence report (FR) signatory. This is usually the HR representative of the establishment.
14. Enter the location of the ADS signatory. This information is needed for the absence report (FR).
15. Select the sickness deduction fast formula.
 - If you select `FR_SICK_DEDUCT_WORKING_DAY_FORMULA`, then Oracle Payroll calculates sickness deduction as per working days proration method.
 - If you select `FR_SICK_DEDUCT_OPEN_DAY_FORMULA`, then Oracle Payroll calculates sickness deduction as per open days proration method.

Note: You can create your own formulas for sickness deduction and set them at establishment or company information level. Ensure to prefix the formulas with `FR_SICK_DEDUCT`. The formula set at establishment level overrides the formulas set at the company level. If the working day or open day value exceeds the global value, then the number of working days and open days will default to the value held by the globals `FR_WORK_DAYS` and `FR_OPEN_DAYS`.
16. Select the training body name to indicate the training organization to which the employer pays the training tax.
17. Save your changes.

Establishment: Entering External Organizations Information

Oracle HR enables you to define external organizations relevant to an establishment.

To enter external organizations information:

1. In the Organization window, query the establishment for which you want to specify the Public Sector Other External Organization. In the Organization Classifications region, select Establishment, choose the Others button, and select External

Organization.

2. Click in a field of the Additional Organization Information window to open the External Organization window.
3. Select the name of the external organization associated with the establishment.
4. Save your work.

Pension Provider: Entering Information

After you define the pension group in the Organization window, you use the Pension Provider Information window to record information such as codes and types about providers for your organizations.

To enter information:

1. Enter the code and type of the provider for your organizations.
2. Enter the Pension Group for your company, if applicable (Statutory Reporting purposes).
3. Save your changes.

Insurance Provider: Entering Information

You use the Insurance Provider Information window to record information such as codes and types about providers for your organizations.

To enter information:

1. Enter the code and type of the provider for your organizations.
2. Save your changes.

ASSEDIC Center: Entering ASSEDIC Center Information

You use the ASSEDIC Center Information window to enter details about any ASSEDIC centers used by your enterprise.

To enter ASSEDIC center information:

1. Enter the name of the contact at the ASSEDIC center.
2. If an alternative social security organization is applicable instead of the ASSEDIC

center, enter the details in the GARP or Other Organization field accordingly.

3. Save your changes.

URSSAF Center: Entering URSSAF Center Information

You use the URSSAF Center Information window to enter details about any URSSAF centers used by your enterprise.

To enter URSSAF center information:

1. Enter the URSSAF center code and contact name.
2. Save your changes.

External Organization: Entering Corps Details

Oracle HR enables you to capture the Corps to which the external organization is applicable.

To enter corps details:

1. In the Organization window, query the required external organization. In the Organization Classifications region, select Public Sector Other External Organization, choose the Others button, and select Corps Applicable.
2. Click in a field of the Additional Organization Information window to open the Corps Applicable window.
3. Select the required corps. This information is optional, but necessary for schools and training bodies.
4. Save your work.

Entering External Organizations Information

Oracle HR enables you to capture details of organizations to which employees are seconded. For example, bodies conducting professional or competitive exams, and internal schools conducting training programs.

To enter external organizations information:

1. In the Organization window, query the required external organization. In the Organization Classifications region, select Public Sector Other External Organization, choose the Others button, and select External Org Info.

2. Click in a field of the Additional Organization Information window to open the External Org Info window.
3. Select the nature of the external organization. This information shows whether the organization is involved with public hospitals, local civil service, or state civil service.
4. Enter the organization's SIREN identification number.
Note: The SIREN identification number is validated to ensure that it is entered in the correct format.
5. Enter the organization's SIRET identification number.
Note: The SIRET identification number is validated to ensure that it is entered in the correct format.
6. Select the relationship this organization has with your organization. This information shows the type of work the external organization is dealing with.
7. Enter the details and title for the main contact at the external organization. This information identifies the contact person within the external organization.
8. Save your work.

Extending Types of Public Sector

Oracle HRMS enables you to extend the types of public sector using the predefined value Other for the lookup FR_PQH_ORG_CATEGORY. For example, you can define Other as French Army to maintain and process the workforce details in the French army.

Use the User Types and Statuses window.

To extend the types of public sector:

1. Select the name FR_PQH_ORG_CATEGORY from the lookups.
2. Select your business group.
3. Select Other as the system type.
4. Enter a brief description and code.
5. Click in the Further Information column to indicate whether this type allows

incomplete employment time. The incomplete employment time details enable you to enter the agreed number of work hours and the frequency of work for the workforce.

6. Save your work.

Committees

Role Extra Information Types

You can define as many Extra Information Types as you require to hold additional information about roles. There are also some predefined Extra Information Types. These are:

- French Public Sector Committee Rules - You can use this to maintain the functioning rules for the committee, which will aid the committee in conducting any meetings.
- French Public Sector Committee Election - You can use this to record information regarding committee elections, which will aid the committee to organize elections.
- French Public Sector Committee Vote Rules - You can use this to enter information regarding the committee rules for voting as well as election.
- French Public Sector Establishments and Corps - You can use this to capture the details of establishments and corps to which the committee is applicable.

Entering Committee Details

Oracle HR enables you to record details about committees and the members of the committees. You need to maintain this information, as these committees are involved in decision-making in several processes like nomination, titularisation, promotion, and automatic progression.

Use the Committees window.

To enter committee details:

1. Enter the name of the committee. This information is used to identify them in all individual or collective reports, and to take them into account in the employees' career management processes.
2. Select the type of committee to indicate with what area of work the committee is involved.

The application automatically enables this committee so that you can begin using it.

Entering further information

1. Select the level at which the committee operates, for example, National, Regional.

2. Enter the committee president's name and official title.
3. Choose the OK button.

To enter committee member details:

1. Choose the Member tabbed region.
2. Select the name of the committee member. This is mandatory information.
3. Select the type of membership the member holds. This is mandatory information and indicates the precise roles and rights of the members.
4. Enter the start and, if applicable, the end date of the person's membership.

To enter extra information about committees:

1. Choose the Extra Information tabbed region.
2. Select the required EIT provided for the committee.

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

Jobs and Positions

Statutory Situations

The statutory situation is the employment status of a civil servant in a public sector type organization. The employment status can be any of the statuses defined by law such as activity, long-term leave of absence, secondment or temporarily working in another organization. Oracle HRMS allows you to define benefits such as pension entitlements, salary payments and accrual of seniority for an employee on a statutory situation.

The Statutory Situation type helps you manage an employee's career after they join your organization. Oracle HRMS provides the statutory situation types and attributes such as type of public sector, sub type, reason, source, and location.

With these existing types and attributes, you can define statutory situations for your organization. For each statutory situation, you enter information about:

- the type of public sector such as the health, local, and state.
- the subtype, which allows you to create multiple statutory situations of the same type. For example, you can create two situations of type In Activity - one for normal activity and one for staff on loan.
- its source, location, and reason. These details help in processing many entitlements. The source and location details are useful for secondment and staff on loan as source indicates if the situation is in the present organization or out of it and location indicates if the civil servant is on an situation that is in an internal or external location of the organization.
- whether the specific statutory situation is the default situation.
- the required agreements, indicating if a statutory situation requires the agreement of the civil servant, the manager, or both the individuals to place the civil servant on the statutory situation. You also indicate if a legal document should be produced.
- reserving the position for the civil servant for the duration of the statutory situation (for example, during parental leave).
- allowing progressions to happen when the civil servant is on a particular situation and whether to extend the civil servant's probation period.
- the level of remuneration paid to an employee on the statutory situation. For example, a civil servant on military service is paid 100 percent for 30 days and does not receive any pay after 30 days.

- maximum and minimum duration. You can set different limits for first request, renewals, continuous duration or for the whole career.

After you define a statutory situation, you define the eligibility conditions for the situation. Oracle HRMS enables you to mark the most common conditions with the lowest value, because it evaluates the conditions in the ascending order. An employee must meet all the required conditions to be eligible.

If there are no required conditions, then if a civil servant satisfies at least one of the conditions they are eligible for the situation. If you use the same criteria in more than one condition, an employee only needs to satisfy one condition to be eligible.

Export and Import Statutory Situations

You can export and import statutory situation information using Web Applications Desktop Integrator (WebADI).

To export statutory situations, you must query the situations first. When you choose Export, Oracle HRMS creates an Excel spreadsheet with the statutory situation details.

Note: You can export only the situations which the application displays as the search results in the Search page.

While importing statutory situation details, Oracle HRMS creates an Excel spreadsheet in the format it recognizes. Ensure you enter the mandatory data such as a unique name, type of public sector, situation type and date from. You can view the valid lookup values using the Excel menu option Oracle - List of Values. You must select your business group in the spreadsheet header using the list of values and a default effective date if required. After completing the spreadsheet, use the Excel menu option Oracle - Upload to create these statutory situations in Oracle HRMS. The application validates the details and displays an error message if you have entered invalid values.

Reasons and Subtypes for Statutory Situations

You can add reasons and subtypes for statutory situations to meet your business requirements using the user extensible lookups FR_PQH_STAT_SIT_SUB_TYPE and FR_PQH_STAT_SIT_REASON. While adding reasons and subtypes to these lookups in the Application Utilities Lookups window, you must prefix the situation type code to the new subtypes and reasons you define as subtype and reason are dependent on situation type. For example, if you want to define a subtype Absence for a situation type In Activity, then you must start the Absence lookup code with IA_XXXX. Here IA_ represents situation type In Activity. The following table shows the statutory situation type name and its code:

Statutory Situation Type Name and Code

Name	Code
In Activity	IA
Secondment	SC
Parental Leave	PL
Long-term Leave of Absence	LL
Military Service	MS
Out of Scale	OS

Defining a Job

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

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

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

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

To define a job:

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

Oracle Projects.

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

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

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

4. Enter a numerical approval authority value to define an approval level for incumbents of this job. This value is used by Oracle Approvals Management to determine whether a person has sufficient authority to approve a transaction.
5. Indicate whether the job carries any additional employment rights or is a benchmark job. A benchmark job is one that can be used to represent a number of jobs in reports such as salary surveys.
6. Select a benchmark job, if required.
7. Click the Further Information field and select the INSEE PCS code and activity type for the displayed job.
8. Save the job. You can now enter further information for the job you have defined. Note that you can only enter some types of further information, such as valid grades or work choices, for jobs defined in the Default HR Job Group.
9. Choose the Evaluation button to enter evaluation information and an overall evaluation score for the job.

See: *Entering Evaluation Information, Oracle HRMS Enterprise and Workforce Management Guide*

10. Choose the Requirements button to enter job requirements, such as required qualifications or valid experience, to help you match people to roles.

See: *Entering Job and Position Requirements, Oracle HRMS Enterprise and Workforce Management Guide*

Note: You use the Competence Requirements window to enter competencies if you are following the competence approach.

11. Choose the Valid Grades button to enter the grades to which jobholders can be assigned.

See: *Entering Valid Grades for Jobs or Positions, Oracle HRMS Enterprise and*

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

See: Mapping Salary Survey Lines, *Oracle HRMS Compensation and Benefits Management Guide*

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

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

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

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

Defining a Position

You use the Position window to define positions within your organizations and to add them to position hierarchies. You can also enter the skills that position holders require and the grades to which they can be assigned. You can enter position evaluation scores, if you have set up a position evaluation system.

Note: Use the datetracked Position window if you are using any of the Oracle HRMS applications. If you do not use Oracle HRMS at your site, use the non-datetracked version of the Position window.

See: Defining a Position (non-HRMS Applications), *Oracle HRMS Enterprise and Workforce Management Guide*

Use the Position Transaction window for positions that belong to organizations that you have selected for position control.

See: Creating Organization Hierarchies, *Oracle HRMS Enterprise and Workforce Management Guide*

Position Management Check Boxes

The check boxes at the top of the window are for information purposes only. They are checked if the position belongs to an organization selected for position control. The check boxes indicate whether the position is:

- Open: unfilled
- Under Review: changes to the position definition are in process using a position transaction

- Approved Future Actions: the position or changes to it are approved for a future effective date

See: Defining a Position Using Position Transactions, *Oracle HRMS Enterprise and Workforce Management Guide*

See: Setting up Transaction Templates, *Oracle HRMS Enterprise and Workforce Management Guide*

To define a position:

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

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

2. Select the corps for the position.
3. If you are selecting the Active hiring status for the first time, enter a Start Date. This is the earliest date on which a person can be hired into this position.
4. Enter a unique name for the position in the Date Effective Name field in the Position Details tabbed region.

Note: The Name field at the top of the window displays the latest name on record for the position, irrespective of your effective date. This name is used on all other windows, such as assignment.

If there is more than one segment in the Position Name flexfield, a window opens when you enter the Name field. You must enter a unique combination of segments in this window.

5. Select the position type. The choices are:
 - Single Incumbent, meaning that only one employee is allowed to hold the position at any time
 - Shared, meaning there can be several incumbents, up to the value of the FTE field
 - Pooled (Public Sector only), meaning the position is loosely defined so rules about FTE and hours are not enforced by the system
 - None, which you can select if you do not need to record position types
6. If the position is permanent and budgeted every year, select the Permanent check

box.

7. If the position is only used in one season each year (such as a summer teacher), select the Seasonal check box. You can enter the season dates in the Seasonal Information extra information type.
8. . Select the organization and job for this position. They must have a start date on or before the start date of this position.

Note: You cannot change the organization or job once you have saved the definition.

You can set up several positions that have the same job in the same organization. Each position name must be unique.

9. If you know that the position will be transferred to another organization or job in the future, enter the proposed end dates now, for information.
10. Select a hiring status. The Start Date field indicates when the current hiring status came into effect.

See: Position Hiring Status, *Oracle HRMS Enterprise and Workforce Management Guide*

11. If the status is Frozen, you must enter a proposed end date for the status. Optionally, you can enter a proposed end date for Proposed or Active statuses, for information.
12. Select a location for the position, or leave the default, which is the location of the organization.
13. Optionally, select a status for the position.

Selecting Valid or leaving the Status field blank enables employees to be assigned to the position, provided other conditions (such as an Active hiring status) are met. If the status is Invalid or any other status defined at your site, employees cannot be assigned to the position.

Entering Hiring Information:

1. Enter the number of Full Time Equivalents to be assigned to this position. If the Position Type is Single Incumbent, FTE must be 1.0 or less.
2. You can enter the number of incumbents that are planned for the position in the Headcount field.
3. If appropriate, select a bargaining unit code for the position. 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.

4. If required, enter the earliest date at which incumbents can be hired into this position. If you have created a requisition and vacancy for this position, the earliest hire date must be within the vacancy dates.
5. Enter the date by which the position should be filled. This date must be on or after the Earliest Hire Date.
6. Use the Permit Recruiting check box to identify, for your own information, a position that is frozen but due to become active in the near future.

Note: The Permit Recruiting check box is for information purposes only.

Proposed Entry Salary:

1. Select the payroll to which the position's incumbents are normally assigned. This payroll's calendar can be used for calculations of budgeted amounts and commitments.
2. Select the salary basis to which the position's incumbents are normally assigned.
3. Select the default grade to be used to determine the entry salary of position incumbents.

Note: If you maintain information about valid grades for the position or the position's job, this grade must be one of the valid grades.

See: *Entering Valid Grades, Oracle HRMS Enterprise and Workforce Management Guide.*

4. Do **one** of the following, or leave these fields blank:
 - If the position is paid from a pay scale, select the grade step and scale rate that represent the entry level salary for this position. The system displays the value of the step on the scale rate you selected.
 - If you maintain a grade rate to hold entry salary for this position, select the appropriate grade rate. The value or range (minimum, maximum and midpoint values) for this grade rate are displayed.

Probation

1. If there is a probation period for this position, you can enter its length in the Probation region.

Overlap

1. Select the length of time a new incumbent can overlap with a leaving incumbent for transfer of skills.

Note: You can enter proposed start and end dates for particular periods of overlap using the Extra Information Types window.

Entering Work Terms

Note: The Working Hours and Normal Start and End Times default from the organization, but you can override them.

2. Enter a number in the Working Hours field, and select the corresponding period of time in the Frequency field. For example, enter 40 and select Week.
3. Enter the normal start and end times in 24 hour format. For example, for 5.30 p. m., enter 17:30.

Note: If this position operates within a shift system or has an unusual work schedule, you can record the shift pattern or days worked in the Work Choices window.

See: Entering Work Choices for a Job or Position, *Oracle HRMS Enterprise and Workforce Management Guide*

4. Select the name of a person who supervises this position. See also the Supervisor field in the Related Positions region if the position is supervised by the holder of a specified position rather than a named person.
5. Select the Replacement Required field if you want users to be warned that they should enter the name of a replacement when they enter an absence for a holder of this position. You might do this for positions where it is essential that a person is in charge at all times. See also step 32, page 1-43
6. **European users:** Select the Works Council Approval check box if the position falls under the jurisdiction of a Works Council.

Related Positions

1. Select the position held by the supervisor or manager of this position.
2. In the Relief field, you can select the position that should be held by people who cover this position when the incumbent is absent.
3. Select the position from which a successor will move to fill this position.

Extended Pay Term

1. For academic positions, if salary can be paid over a longer period than the work term (such as a 9 month appointment paid over 12 months), select the Extended Pay Permitted check box.
2. If extended pay is permitted, enter the start and end dates of the work and pay terms.

Entering Additional Details

4. If required, enter comments, a posting description for recruitment purposes, and any special confidentiality or security requirements, such as a clearance level.

Entering Public Sector Details

7. Choose the appropriate check box.

Titulaire check box identifies whether this position belongs to a Titulaire.

Functional check box identifies those positions that are not reserved for the employee within a corps, but that the employee may be placed on that once specific criteria defined for that position are met.

Accommodation check box identifies whether this position has entitlement to accommodation or not.

8. Select the Filiere.

Note: The filiere defined at the corps level is taken as default. In case multiple filieres exist, select one from the list showing all the filieres defined for the corps.

9. Enter the gross index for positions that are not linked to the corps. This information is used for deciding the pay rate.
10. Select the pension category. This information identifies the pension categories as Sedentary (A), Active (B), and High risk (C).
11. Select the scale details. This information is used to decide the pay rate.

12. Save your position.
13. If you want to add the position to one or more position hierarchies, choose the Reporting To button. Select a hierarchy and the name of the position to which this position reports.
14. Choose the Evaluation button to enter evaluation information and an overall evaluation score for the position.
See: Entering Evaluation Information, Oracle HRMS Enterprise and Workforce Management Guide
15. Choose the Valid Grades button to enter the grades to which position holders can be assigned.
See: Entering Valid Grades for Jobs or Positions, Oracle HRMS Enterprise and Workforce Management Guide
16. Choose the Others button to enter Requirements, Occupancy, Extra Information, Work Choices and Define Survey Mapping.
17. Choose Requirements to enter position requirements, such as required qualifications or valid experience, to help you match people to roles.
See: Entering Job and Position Requirements, Oracle HRMS Enterprise and Workforce Management Guide

Note: Check with your HR manager or system administrator whether this is the right window for entering position requirements. You use this window if requirements were defined using Special Information Types. Use the Competence Requirements window if you are following the competence approach.
18. Choose Occupancy to view all those people who have held a selected position or who are applying for it, and the dates of their occupancy. This information could be relevant for selecting people with the necessary skills for similar positions.
See: Viewing Position Occupancy, Oracle HRMS Enterprise and Workforce Management Guide
19. Choose Work Choices to enter work choices that can affect a person's capacity to be deployed within your enterprise (or a customer's).
See: Entering Work Choices for a Job or Position, Oracle HRMS Enterprise and Workforce Management Guide

20. Choose Define Survey Mapping to link salary survey lines to your position.

See: Mapping Salary Survey Lines, *Oracle HRMS Compensation and Benefits Management Guide*

21. Choose Extra Information to enter any additional information required by your enterprise.

See: Position Extra Information Types, *Oracle HRMS Compensation and Benefits Management Guide*

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

Collective Agreement Setup

Collective Agreements

A collective agreement is an agreement that defines the terms and conditions of employment for all employees that are covered by its terms. Agreements are typically negotiated and agreed by external bodies such as Trade Unions and Representatives of Employers.

The following sections describe the components you can use to represent the terms of a collective agreement in Oracle HRMS and to apply the correct entitlements to the primary assignments of eligible employees.

Entitlement Items

An entitlement item forms the basis for any entitlement that can be given to an employee as part of a collective agreement. For example, probation period, annual holiday, and car allowance are all entitlement items. For any entitlement you need to provide as part of a collective agreement, you must create an entitlement item.

You can create two types of entitlement item. These are:

- An entitlement item that produces a value that is written to an employee's record.
- An entitlement item that produces a value that is not written to an employee's record, but is held as part of the collective agreement results for that person. You could set up other areas of the application to reference this information if required.

For example, you could set up an item type called Paternity Leave Allowed that indicated whether an employee is eligible to take paternity leave. This would not be written to the employee's record, but could be seen in the collective agreement results for that person.

Eligibility Profiles

Use eligibility profiles to define the criteria that an employee must meet in order to receive a particular entitlement. The criteria that you can include in an eligibility profile are grouped into five factors:

- Personal Factors
- Employment Factors
- Derived Factors
- Related Coverages

- Other Factors

Each factor contains a variety of criteria from which you select one or more criteria values.

For example, if a collective agreement states that people working in California should receive an extra allowance, you could define an eligibility profile using the Employment Factor criteria of Work Location. The value for the Work Location criterion would be California, (You need to define this work location using the **Locations** window). A person must meet this criterion in order to be given the associated allowance.

Eligibility profiles can be used in benefits plans, collective agreements, or both. The information you can enter against a profile differs slightly depending on whether you have accessed this window from the total compensation or collective agreements area of the application.

In addition to the eligibility profiles you define, there is a Default profile that you can select when defining entitlement values. You can use this to define a value to apply to everyone not eligible to receive something more beneficial.

Derived Factors

As part of the criteria for an eligibility profile you can set up derived factors. These are eligibility factors that are calculated by the application and can change over time. See: *Derived Factors, Oracle HRMS Compensation and Benefits Management Guide* for more information.

Collective Agreement Details

For each collective agreement recognized by your enterprise you can record information such as a name, number, and whether it is active. You can also indicate the parties by whom it has been agreed. You set these parties up using the organization classifications Employer and Bargaining Association.

Collective Agreement Entitlement Values

For each entitlement item to be included in a collective agreement you must select which eligibility profiles to use, and enter the values that employees who satisfy the criteria receive.

For some example setups of entitlements see: *Example Entitlement Setups, Oracle HRMS Enterprise and Workforce Management Guide*

Evaluation and Application of Collective Agreement Entitlement Values

To indicate which people are covered by the terms of a collective agreement you select the agreement as part of their primary assignment.

Note: You can select collective agreements as part of other assignments, but the evaluate and apply processes only calculate values for the primary assignment.

Once this has been done the application has to calculate what values the employee is eligible for and apply them to their record. How this is done depends on the settings of the following user profiles:

- HR:Auto Apply Entitlements
- HR:Auto Evaluate Entitlements

If the HR:Auto Evaluate Entitlements profile is set to Yes, then the values that an employee is entitled to are calculated as soon as the collective agreement is saved to their assignment. If it is set to No then you must run the evaluation process manually from the **Collective Agreement Results** window.

Note: If the HR:Auto Evaluate Entitlements profile is set to No, then the apply process will not run automatically, even if the HR:Auto Apply Entitlements is set to Yes

If the HR:Auto Apply Entitlements is set to Yes, then the values calculated for a person during the evaluation process are automatically applied to an employee's record. For any entitlements where the employee is entitled to more than one value but the application cannot determine which is most beneficial to the employee, you have to make a choice manually. If it is set to No you have to select and apply all values manually in the Collective Agreement Results window.

There is also a concurrent process called Collective Agreement Entitlement Evaluation that you can run from the Submit Request window to evaluate and apply an employee's entitlement values.

Setting Up Collective Agreement Entitlement Items

Oracle HR enables you to set up the collective agreement entitlement items. You need to set these up before you grant an employee a specific entitlement. You can assign employees to the accommodation, awards and decorations entitlements.

Use the User Types and Statuses window, which opens on choosing the Shared Types menu option.

To set up entitlement items:

1. Select the name FR_PQH_ENTITLEMENT_SETUP from the lookups.
2. Select your Business Group.

3. Select the option for which you want to set up the entitlement items.
4. Enter a brief description about the entitlement option you have chosen.
5. Select the entitlement item using the Further Information column.
6. Save your work.

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.

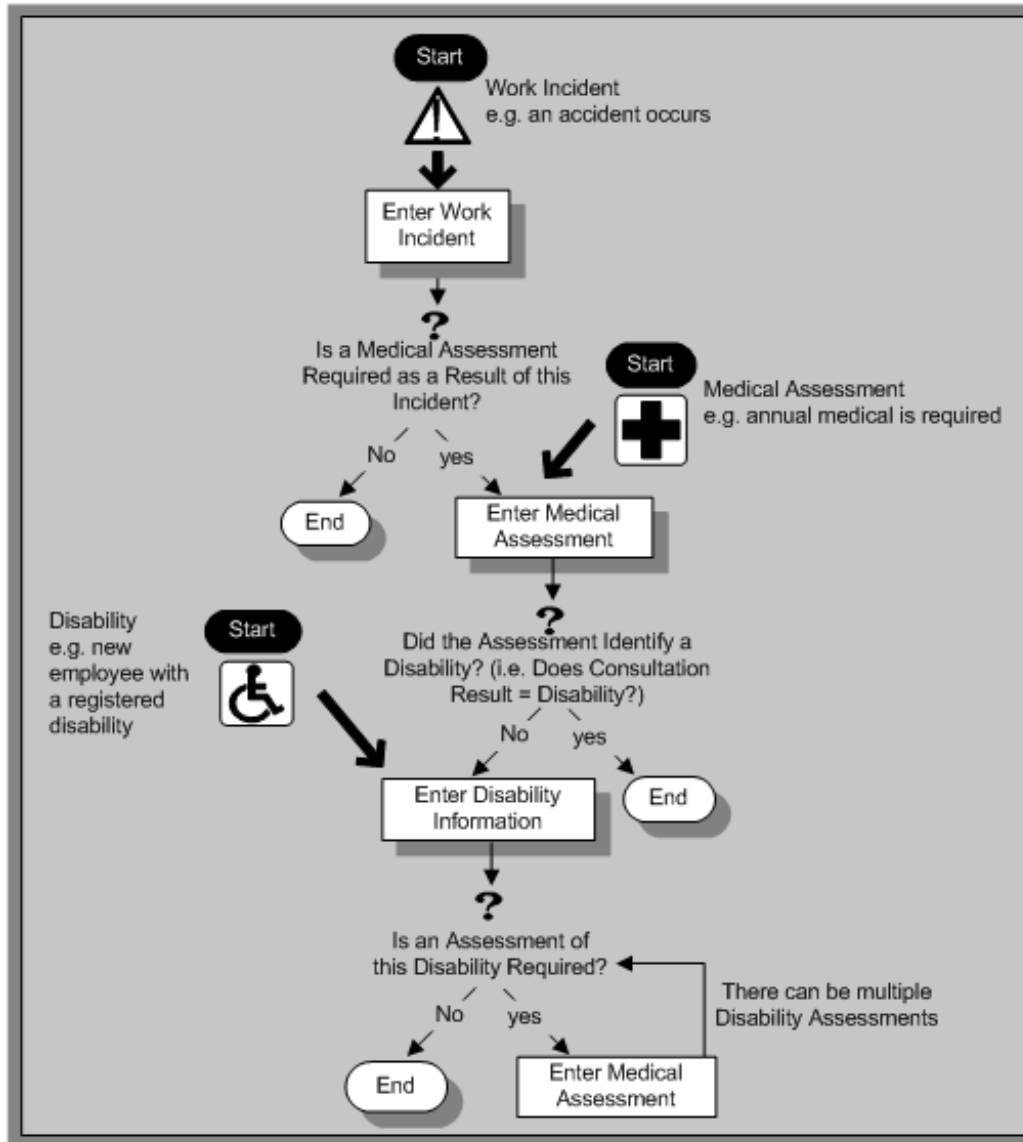
The graphic illustrates the relationship between the medical assessment, disability and work incident tasks. It shows the full process that you could follow if you wanted to record:

- 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 Work Incident Information

You use the Work Incidents window to enter information about the work incident in which a person was involved.

To enter work incident information:

1. Enter information about the incident:

- Enter a unique reference number for this incident.
- Enter the date on which the incident occurred.
- If the incident occurred over time, enter the date on which the incident was identified or reported.
- Select the type of incident that occurred.
- Enter the time at which the incident occurred, if known.
- Check the check box if the incident occurred over a period of time. For example, check this box if the incident was a gas leak.
- Select the circumstances of the incident in the Activity field. For example, you can specify if the incident occurred en route to work.
- Enter the date on which the incident was reported.
- Enter the reference number for a related work incident. The list is limited to incidents that involved this person and that occurred on or before the date of this incident.

Incident Description

1. Choose the Incident Description tab.
2. Enter more detail about the incident:
 - Select the main cause of the incident in the Hazard field.
 - Enter the location of this incident, for example, if the incident occurred in the workplace, identify the room and building.
 - Enter a further description of the incident, if required.

Incident Reporting

1. Choose the Incident Reporting tab.
2. Enter the reporting details:
 - Select the name of the person who reported this incident. You can only select a person who is on the system and who is in the same Business Group.
 - Select the method used to report this incident, for example, a voicemail.

- Enter the date and time when the incident was reported. This cannot be earlier than the date and time recorded for the incident.

Note: You must select the name of the person who reported this incident before you can enter the date and time.

- Enter the organization to whom the incident was reported, for example, the local fire station or police.
- Enter contact details for anyone who witnessed the incident.

Official Notifications

1. Choose the Official Notifications tab.
2. Enter the official notification details:
 - Select the name of your organization's health and safety representative and enter the date on which they were notified of the incident
 - Describe any remedial action that was taken (or is planned) as a result of this incident.
 - Select the organization and person that are the representative body for this person and enter the date on which they were notified of the incident

Note: You must select the representative body organization before you can enter the person and reporting date.

See: *Entering Representative Body Information, Oracle HRMS Enterprise and Workforce Management Guide*

Medical Details

1. Choose the Medical Details tab.
2. Enter any medical details:
 - Select the type of injury and/or disease caused by the incident.
 - Enter any further description of the injury or disease.

- Check the box if the person received medical attention as a result of this incident. Then enter the name of the physician and/or the contact details for the hospital that was consulted or that provided treatment.

Note: If treatment was provided by an internal organization or person, for example, an occupational health organization or a first-aid officer, enter the details into the Hospital Details field.

Other Information

1. Choose the Other tab.
2. Enter other information about this incident:
 - If compensation was awarded for this incident, enter the amount. Then select the currency for the compensation amount. The Business Group's currency is shown as the default.

Note: If you enter a compensation amount, the Currency field cannot be left blank.

- Enter the date on which the compensation was given.
- Enter the job the person was doing at the time of the incident. The list is limited to jobs with effective start dates before the incident and effective end dates, if any, after the incident.

See: Defining a Job, page 1-41

Note: If the person was involved in this incident prior to joining your enterprise, leave the Job field blank.

- Check the Resulted in Absence? check box if the person was absent from work as a result of this incident.
3. Enter further information about this work incident in the

Further Information field if it has been set up by your Oracle localization team.

Entering Work Incident Sickness Details

1. Click in the Further Information field to display the Further Work Incident Information window.
2. Select the classification for payroll. This information is used to calculate social security benefits as well as legal and collectively agreed guarantees made for a sickness absence.
3. Enter the date on which the social security office notifies the employer. This date is useful when a reclassification of the work incident happens. It is needed to start the retro-pay process.
4. Enter the date on which social security office reclassifies the work incident.
5. Select the name of the internal witness.
6. Enter the details of police reporting. You can enter the representative name, police station, and the date reported.
7. Enter details of third party; in case a third party is involved in the work incident. This information is required if a private medical insurance is taken out for the employee.
8. Select Yes if other persons were injured in the work incident. Select No if there were no other victims in the work incident. This information is required for the Work Accident Report.
9. Save your work.

What Next?

If a medical assessment is required as a result of this incident, you can choose the Medical Assessment button to open the Medical Assessment window and to enter the details of the assessment. If you enter a medical assessment in this way, its type is Occupational Assessment and it is automatically linked to this incident.

Entering Medical Assessments

Use the Medical Assessments window to record information about the medical examinations performed for the people in your enterprise.

To enter a medical assessment:

1. Enter the date on which the medical assessment was held.
2. Select the type of assessment, for example, Annual Medical Assessment.
 - If you opened the Medical Assessment window via the Disability window, the assessment type is Disability and cannot be changed.
 - If you opened the Medical Assessment window via the Work Incidents window, the assessment type is Occupational Assessment and cannot be changed.

3. Select the result of the assessment.

Note: If the assessment type is Disability Assessment, you can only select Unfit for Work or Fit for Work. You cannot select a Disability result for a Disability Assessment.

4. Select the name of the examiner and the name of the organization that performed the assessment.

If the organization is not listed, create the organization and select the Medical Service Provider classification.

See: Entering Organizations, page 1-14

See: Entering Organization Classifications, *Oracle HRMS Enterprise and Workforce Management Guide*

5. Enter the date on which the next assessment is planned.
6. Select the work incident to which this assessment is related, if any. After you choose an incident, the date on which it occurred is automatically displayed.

You can only link an assessment to an incident if the assessment type is Occupational Assessment.

Note: If you have saved the assessment date, the list of incidents is limited to those that occurred before the assessment date. Otherwise, all incidents for that person are listed.

To enter a work incident for this person, see *Entering Work Incidents*, page 1-58.

7. Enter a description of the assessment.

Entering Further Medical Assessment Information:

1. Click in the Further Information field to display the Further Medical Assessment Information window.
2. Enter the name of the Medical Service provider.

Note: You can enter the provider information either in the Service Provider field or the Medical Service field in the Further Medical Assessment Information DDF.

3. Enter the location details of the medical service provider.
4. Save your work.

What Next?

If, as a result of this assessment, a disability was identified, you can enter the details of that disability and link it to this assessment.

See: *Entering Disability Information*, page 1-64

Note: Once a medical assessment is referenced in a disability record, you cannot change its result from 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 2-4

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.
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.
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, page 1-63.

This field is not datetracked.

Entering Disability Registration Information

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

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

See: Creating an Organization, page 1-14.

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

Entering Additional Disability Information

1. Choose the Other tabbed region to enter additional details about this disability.
2. Enter a description of the disability.
3. Enter information about the work restrictions that the employee is subject to as a result of their disability.

Entering Further Disability Information

1. Click in the Further Information field to display the Further Disability Information window.

2. Select the Disability Class, which would indicate if the invalidity is equivalent to either civil or military category.
3. Select the previous employer COTOREP type of applicable.

Note: The codes in the list of values refer to sheltered industry as AP, work assistance center as CAT, homework distribution center as CDTD, medical-professional institute as IMPRO and professional training center as CFP.

4. Save your work.

What Next?

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

See: Entering Medical Assessments, page 1-63

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.

Upgrading Existing Disability, Medical Assessments and Work Incidents Data

From release 11.5.7 per D, Oracle HRMS enables you to record details of disability, medical assessment and work accidents information using the Disability, Medical Assessments and Work Incidents windows respectively. You should run the French Data Upgrade process to transfer your existing data to the new format.

To successfully migrate your existing data to the new format, you need to complete several tasks.

To upgrade existing data:

1. Manually add the values currently held in the existing lookups to the new lookups, as per the following tables, before running the data upgrade process. This is required to run the upgrade process smoothly; otherwise the process will report error where any lookup codes have not been migrated.

Note: Define the new lookup without an effective date or have the effective date before the start date of any employee, on which the process is to be run. Oracle HRMS moves the predefined French lookups to the new lookups types; you need to move the lookup codes that you have entered.

For Work Incidents:

Existing Lookup	New Lookup
FR_WORK_ACCIDENT_RESULT	INCIDENT_TYPE
FR_WORK_ACCIDENT_TYPE	AT_WORK_FLAG
FR_ILLNESS_TYPE	DISEASE_TYPE
FR_WORK_ACCIDENT_CODE	HAZARD_TYPE

For Medical Assessment:

Existing Lookup	New Lookup
FR_MEDICAL_EXAMINATION_T YPE	CONSULTATION_TYPE
FR_MEDICAL_RESULT	CONSULTATION_RESULT

For Disabilities:

Existing Lookup	New Lookup
FR_COTOREP_CODE	DISABILITY_CATEGORY

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

2. Ensure that there is no user defined descriptive flexfield context or segments relating to Work Incidents, Medical Assessment and Disabilities set as required on

the Value Sets window before running the upgrade process.

See: *User Definable Descriptive Flexfields, Oracle HRMS Configuring, Reporting, and System Administration Guide*

3. Run the data upgrade process.

See: *Running the French Data Upgrade Process, page 1-69*

4. Check the log file created by the data upgrade process and manually correct any errors.
5. Remove the French Medical Examination, French Disability Details, and French Work Accident Person Extra Information types after the data has been successfully upgraded.

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

Running the French Data Upgrade Process

If your application is on Family Pack D or a previous version, you need to run the upgrade process to transfer some of your existing information to the new format. If you are upgrading from Family Pack C, then you only need to run this process to update your employment leaving reasons. You can transfer your existing data to the new format by running the French Data Upgrade process. After you run the upgrade process, you address any issues that appear on the log file. You also need to remove the Information Security Types as they become obsolete after the Upgrade process.

The Upgrade process makes certain changes to the existing leaving reasons that are part of the termination details, medical examination, disabilities and work incidents records. These changes are in the fields which are mandatory in the present format and which were not mandatory and hence could be left blank in the now obsolete French Medical Examination, French Disabilities Details and the French Work Accident EITs. The changes are:

For medical examination records:

- In the Type field, a default value of Unknown appears for upgraded records, which had no value entered in the Type of Medical Examination field in the now obsolete EIT.
- In the Date field, a default date of 01-JAN-0001 appears for the upgraded records.
- In the Next Consultation Date field, no value appears for the upgraded records if this date is not after the consultation date in the original record.

For disability details:

- In the Category field, a default value of Unknown appears for upgraded records,

which had no value entered in the COTOREP Category in the now obsolete EIT.

- In the Status field, a default value of Active appears for upgraded records, as there is no corresponding field in the now obsolete EIT.
- In the FTE field, a default value of 1.00 appears for the upgraded records, as there is no corresponding field in the now obsolete EIT.
- Oracle HRMS converts the old disability data to date tracked data after the upgrade process. For the upgraded records, the effective start and end dates are calculated based on the persons start and end dates and the start and end dates stored in the French disability record.
- In the Reason field, for the upgraded records, the value Occupational Incident appears if the field Due to Work Accident in the now obsolete EIT was set to Yes. Otherwise this field appears without any value.

For work incidents:

- In the Incident Reference field, Oracle HRMS adds a prefix of FR for the upgraded records
- In the Incident Date field, a default date of 01-JAN-0001 appears for the upgraded records.
- In the Incident Type field, for the upgraded records, a value of Unknown appears by default where this information is not available in the existing records
- In the Activity field, a default value of At Work appears for the upgraded records. You can manually change the default information if it is not acceptable to you.
- In the Official Notification tabbed region, for Representative Body information, the Date Notified is set to the incident date if the Declaration to Social Security in the now obsolete French Work Accident EIT was set to Yes.
- In the Injury and/or Disease field for upgraded records, the information entered in Type of Illness in the now obsolete EIT appears.
- For upgraded records, the information entered in Rate of Incapacity appears in the Description of Injury or Disease field. If it was left blank for the existing record, then it remains so after up-gradation.
- For upgraded records, the Resulted in Absence check box appears checked if the existing record had Yes selected in the Absence Incurred field in the now obsolete EIT. It appears unchecked if the existing record had No selected in this field.

For leaving reason:

- The upgrade process maps the existing French specific leaving reasons held in

FR_ENDING_REASON lookup type, which are recorded as part of the termination process, to the core leaving reasons.

Note: The following FR_ENDING_REASON lookup values are not mapped by default, as they are strictly speaking assignment ending reasons rather than termination reasons. You need to manually map them if required.

FR_ENDING_REASON

CHANGE_COMPANY

CHANGE_ESTABLISHMENT

CHANGE_OF_JOB

NATIONAL_SERVICE

OTHER

REPLACEMENT

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

- You need to run the upgrade process repeatedly from the Submit Request window for each business group affected as this upgrade processes a single business group at a time.

You run the process from the Submit Request window.

To run the French data upgrade process:

1. Select the French Data Upgrade Process in the Request Name field.
2. Select the type of upgrade you want to run in the Parameters window.

Note: The list of values will only show the relevant process (medical examination, disabilities, work accident or termination) if there are records that require upgrade.

3. Choose the Submit button.

Statutory Employee Reporting

Statutory Reports Overview

Employers are required to produce a number of reports relating to their enterprise. These reports can then be submitted to government bodies. Oracle Human Resources for France enables you to maintain the information needed to produce the following reports:

- **Declaration Unique d'Embauche** - this report has to be delivered to an establishment's local URSSAF center when a person is about to become a new employee in that establishment
- **Declaration Mensuelle Obligatoire des Mouvements de Main d'Oeuvre** - this is a mandatory report that must be produced by each establishment every month. It lists the people who have joined and left the establishment during that time.
- **Declaration Annuelle Obligatoire D'emploi des Travailleurs Handicapes, de Mutilés de Guerre et Assimilés** - this is a mandatory report that all establishments with more than 20 employees must submit each year. It contains details about the number of people employed by the establishment who are disabled.
- **Bilan Social** - this is a statutory report that lists a large number of HR and Payroll related indicators in order to provide a summary of many aspects affecting a company or establishment's human resources in a year.
- **Statutory Monthly/Quarterly Report (DUCS)** - this is a statutory report that reports a set of contributions payable by both employees and employer. Each of these contributions is payable to one of four bodies:
 - URSSAF (social contributions)
 - ASSEDIC (unemployment contributions)
 - AGIRC (cadre pension contributions)
 - ARRCO (pension contributions)You can produce monthly and quarterly reports which show how much is due to the bodies including a breakdown of the payments by contribution code.
- **Prud'hommale (Workers Election) Declaration** - this is a statutory declaration that all establishments have to file in order to enable their employees to take part in the Industrial Tribunal elections.

- **DIF Statement** - this is a statutory statement that establishments give to their employees to inform them about their training absence entitlement for the year.

As a training administrator, you can produce the statements in either PDF or RTF format. You can print the statement using the sample DIF Statement template, or change the layout while you generate the statement.

Declaration Annuelle Obligatoire D'emploi des Travailleurs Handicapes, de Mutiles de Guerre et Assimiles (D2)

All establishments with more than 20 employees have a legal obligation to ensure that six percent of their total headcount are people who have a handicap or are disabled.

The Declaration Annuelle Obligatoire D'emploi des Travailleurs Handicapes, de Mutiles de Guerre et Assimiles, or D2 as it is commonly known, is a mandatory report that all establishments with more than 20 employees must submit each year. Oracle HR for France provides a report that details all the information required to complete three of the four sections of the D2.

Note: The information required to complete section 3 of the D2 is not held in Oracle HR for France.

Prerequisites for the D2

The following fields must be populated for the report to run successfully:

- Establishment Name (Organization window)
- SIRET Number (Establishment Information window)
- NAF Code (Establishment Information window)
- Establishment Address - Line 1 (Organization window)
- Establishment Address - Line 2 (Organization window)
- City (Organization window)
- Post Code (Organization window)
- Employment Category (Assignment window)

You must also ensure that the `TEMPLATE_CONTRACT_PRORATED` formula is suitable for your establishment. If it is not then you must create your own version of the formula and call it `USER_CONTRACT_PRORATED`. See: MMO and D2 FastFormulas, page 1-77

If you are using the supplied TEMPLATE_CONTRACT_PRORATED formula you should ensure that where the employee is part-time either a full-time equivalent value is entered for the assignment in the Assignment Budget Values window, or enter the relevant work hours at the establishment, assignment, or position level. Also, if the Employment Category field is not entered and no full-time equivalent value is set, then it is assumed that the full-time equivalent value is 0.5.

Important: If you have made any changes to the FR_PCS_CODE or EMP_CAT Lookups, or the person types, you must ensure that the new values are included in the FR_D2_PARTICULAR, FR_D2_CATEGORY or INCLUDE_D2 columns of the relevant user defined table. See: User Defined Tables, page 1-78

Declaration Mensuelle Obligatoire des Mouvements de Main d'Oeuvre

The Declaration Mensuelle Obligatoire des Mouvements de Main d'Oeuvre is a mandatory report that must be produced by each establishment every month. It lists the people who have joined and left the establishment during a specified period of time. It also includes details about the person, for example, social security number, employee category and their reason for joining or leaving.

Prerequisites for the Declaration Mensuelle Obligatoire des Mouvements de Main d'Oeuvre

In addition to the mandatory fields that must be entered when creating a person (Last Name, Nationality, Sex) the following fields must be populated for the report to run successfully:

- NAF Code (Establishment Information window)
- SIRET Number (Establishment Information window)
- Establishment Address - Line 1 (Organization window)
- Establishment Address - Line 2 (Organization window)
- Establishment Post Code (Organization window)
- Establishment Town (Organization window)
- Employee First Name (Organization window)
- Employee Date Of Birth (Organization window)
- Employee Category (FR Statutory Info in the Assignment window)

- Establishment Associated to the Employee Assignment (Employment Terms in the Assignment window)
- If applicable, Starting or Leaving Reason at the Assignment Level (FR Statutory Information) or at the Period of Service Level (Further Information)
- Hire Date (People window)
- If applicable, Termination Date (Terminate window)

You must also ensure that the TEMPLATE_MMO_REASON formula is suitable for your establishment. If it is not then you must create your own version of the formula and call it USER_MMO_REASON. See: MMO and D2 FastFormulas, page 1-77

Important: If you have made any changes to the FR_ENDING_REASON, FR_STARTING_REASON, or NATIONALITY Lookups, or the person types, you must ensure that the new values are included in the MMO_ENDING_REASON, MMO_STARTING_REASON, MMO_NATIONALITY, INCLUDE_MMO_HEADCOUNT, or INCLUDE_MMO_TEMPORARY column in the relevant user defined table. See: User Defined Tables, page 1-78

Declaration Unique d'Embauche

The Declaration Unique d'Embauche is a report that has to be delivered to an establishment's local URSSAF center when a person is about to become a new employee in that establishment.

The report includes information about the person to be hired including, contract details, working conditions, and qualifications. You can either run the report for a specific person or a whole establishment.

The Pre Hire Report process produces an electronic file in the OUTPUT directory that includes all the required information for the Declaration Unique d'Embauche. This can be emailed to the local URSSAF center.

Note: In order to email the electronic file to your URSSAF center you require a password in order to encrypt the file. Contact your local URSSAF center for further information.

Prerequisites for the Declaration Unique d'Embauche

The following fields must be populated for the report to run successfully:

- URSSAF Code (Header field)(URSSAF window)
- NAF Code (Establishment Information window)
- SIRET Number (Establishment Information window)
- Establishment Address - Line 1 (Organization window)
- Establishment Address - Line 2 (Organization window)
- Establishment Post Code (Organization window)
- Establishment Town (Organization window)
- Applicant's First Name (People window)
- Applicant's Date Of Birth (People window)
- Applicant's Country Of Birth (People window)
- Applicant's Nationality (People window)
- Hire Date (People window)
- Nationality (People window)
- Normal Start Time (Assignment window)
- The Hiring Declaration Extra Information Type Fields

If a header field is incorrect then processing will stop completely and nothing will be produced in the OUTPUT directory. If a detail field is incorrect then only that particular record will not be processed, other records which are valid will be written to the OUTPUT directory. The name of the applicant and the invalid field will be in the error log.

Important: If you have made any changes to QUALIFYING_UNITS, FREQUENCY, or NATIONALITY Lookups, or the person types, you must run the "Seed French Data" process. This process creates columns in the user defined table with the same name as the lookup.

You must then ensure that the new values are included in the DUE_UNITS_IN_DAYS, DUE_FREQUENCY_IN_WEEKS, DUE_NATIONALITY, or INCLUDE_DUE column in the relevant user defined table. See: User Defined Tables, page 1-78

For example, when the "Seed French Data" process is run, it creates a User Defined Table named FREQUENCY with a column named

DUE_FREQUENCY_IN_WEEKS. The rows in the table are created with the lookup codes in the FREQUENCY lookup. You must populate this table with the ratio of the unit of Frequency to a Week. For instance:

Frequency	Meaning	DUE_FREQUENCY_IN_WEEKS
W	Week	1
M	Month	52/12
Y	Year	52

The Declaration Unique d'Embauche uses this data to convert the assignment hours into a Weekly Frequency.

Prud'hommale (Workers Election) Declaration

Oracle HR enables you to generate the Prud'hommale (Workers Election) Declaration. This is a statutory declaration that all French companies have to file to enable their employees to take part in the Industrial Tribunal elections. The declaration shows basic company/establishment and employee details. Oracle HR creates this declaration as a flat file, on magnetic tape.

You can generate this declaration using a concurrent process named Workers Election Process (France). This process automatically outputs the results to the standard concurrent output directory. The process also creates a log file containing the contents of the output file and any error or warning messages. This enables you to verify the information included in the flat file, before being sent to the Authorities.

MMO and D2 FastFormulas

The D2 and the Declaration Mensuelle Obligatoire des Mouvements de Main d'Oeuvre use Oracle FastFormula to define formulas that control some of the data that is retrieved. If the supplied formulas do not meet the requirements of you enterprise you must create new formulas in the Formula window.

See: *Oracle FastFormula User's Guide*

TEMPLATE_MMO_REASON Formula

The TEMPLATE_MMO_REASON formula is used by the Declaration Mensuelle Obligatoire des Mouvements de Main d'Oeuvre to retrieve the START_REASON and

END_REASON. This formula assumes that when a person is hired or terminated the start and end reasons will be entered in the PERIOD_OF_SERVICE table, whilst changes in establishment due to transfers, or suspended assignments becoming active will have start and end reasons entered in the ASSIGNMENT table. If your enterprise records starting and leaving reasons differently then you must copy and amend the formula. The new formula must be given the name USER_MMO_REASON.

TEMPLATE_CONTRACT_PRORATED Formula

The TEMPLATE_CONTRACT_PRORATED formula is used to calculate the various headcounts required by the D2 report. For each given block (the link between assignment and contract) the formula determines what fraction of a one year full-time employment it represents.

The formula will return different values depending on the inputs. For example, if CONTRACT_TYPE is apprenticeship, the value returned will be 0. If EMPLOYMENT_CATEGORY is full-time and CONTRACT_CATEGORY is permanent, the value returned will be 1. All other cases require a more complicated calculation which is performed by the formula, prorating part-time assignments etc.

The result is then added to RUNNING_TOTAL and returned as NEW_TOTAL. The inputs and database items used by this formula are detailed in the formula itself. If your enterprise requires the headcount to be calculated in a different way, you must copy and amend the formula. The new formula must be given the name USER_CONTRACT_PRORATED.

User Defined Tables

During implementation, a number of user defined tables are set up that are used by particular reports. The following table lists the user defined tables and describes how they are used.

Note: For descriptions of user defined tables used by the Bilan Social Report process, see: User Defined Tables Used by the Bilan Social, page 1-162

Field	Lookup	Description
EMP_CAT	FR_D2_CATEGORY	<p>This is used to define the employment categories as full-time, part-time, or unknown, and is used in the D2 report.</p> <p>This table, column and values will be delivered as part of a post-install step.</p>
FR_D2_RATES	VALUE	<p>This is a legislative table defined for all FR business groups. It contains legally defined rates used in the D2 report. This table, column and values are delivered and may not be amended.</p>
FR_ENDING_REASON	MMO_ENDING_CATEGORY	<p>This is used to map the values in the FR_ENDING_REASON Lookup onto the codes required by the Declaration Mensuelle Obligatoire des Mouvements de Main d'Oeuvre.</p> <p>This table, column and values will be delivered as part of a post-install step.</p>

Field	Lookup	Description
FR_LEGISLATIVE_RATES	VALUE	This is a legislative table defined for all FR business groups. It contains legally defined rates used in the D2 report. This table, column and values are delivered and may not be amended.
FR_PCS_CODE	FR_D2_PARTICULAR	This is used to define the jobs that should be excluded when calculating the headcount for the D2 report. This table, column and values will be delivered as part of a post-install step.
FR_STARTING_REASON	MMO_STARTING_CATEGORY	This is used to map the values in the FR_STARTING_REASON Lookup onto the codes required by the Declaration Mensuelle Obligatoire des Mouvements de Main d'Oeuvre. This table, column and values will be delivered as part of a post-install step.

Field	Lookup	Description
FR_USER_PERSON_TY PE	INCLUDE_DUE	This is used to determine which person types should be included in the headcount for the Declaration Unique d'Embauche. The person types that should be included in the count must contain a Y in the INCLUDE_DUE column. This table and column will be delivered as part of a post-install step, however, the column values must be entered manually.
FR_USER_PERSON_TY PE	INCLUDE_D2	This is used to determine which person types should be included in the D2 processing. The person types that should be included in the processing must contain a Y in the INCLUDE_D2 column. This table and column will be delivered as part of a post-install step, however, the column values must be entered manually.

Field	Lookup	Description
FR_USER_PERSON_TY PE	INCLUDE_MMO_HEA DCOUNT	This is used to determine which person types should be included in the headcount for the Declaration Mensuelle Obligatoire des Mouvements de Main d'Oeuvre. The person types that should be included in the count must contain a Y in the INCLUDE_MMO_HEA DCOUNT column. This table and column will be delivered as part of a post-install step, however, the column values must be entered manually.
FR_USER_PERSON_TY PE	INCLUDE_MMO_TEM PORARY	This is used to determine which person types should be included in the headcount of temporary employees for the Declaration Mensuelle Obligatoire des Mouvements de Main d'Oeuvre. The person types that should be included in the count must contain a Y in the INCLUDE_MMO_TEM PORARY column. This table and column will be delivered as part of a post-install step, however, the column values must be entered manually.

Field	Lookup	Description
NATIONALITY	DUE_NATIONALITY	<p>This is used to map the values in the NATIONALITY Lookup onto the codes required by the Declaration Unique d'Embauche.</p> <p>All nationalities that are considered to be French by this report should have a value of FR. All nationalities that are considered to be from the European Union by this report should have a value of EU. All nationalities that do not have a value entered are considered to be from the Another Nationality by this report.</p> <p>This table and column will be delivered as part of a post-install step, however, the column values must be entered manually.</p>

Field	Lookup	Description
NATIONALITY	MMO_NATIONALITY	<p>This is used to map the values in the NATIONALITY Lookup onto the codes required by the Declaration Mensuelle Obligatoire des Mouvements de Main d'Oeuvre. These are:</p> <p>All nationalities that are considered to be French by this report should have a value of FR. All nationalities that are considered to be from the European Union by this report should have a value of EU. All nationalities that do not have a value entered are considered to be from the Another Nationality by this report.</p> <p>This table and column will be delivered as part of a post-install step, however, the column values must be entered manually.</p>

Personnel Registry Report Template Tags

Oracle HRMS enables you to customize the reports to display the details that meet your business and legislative requirements. The application provides you a predefined report template RUP_TEMPLATE.rtf. You can use this template as it is or create your template by adding or removing the tags listed in the table. The predefined template does not have all the tags listed in the following table.

While creating your template, ensure the following:

- If you choose to enter a report label without using the available tag names, then this

report label must have a corresponding data source in the FR_RUP_XML_REPORT lookup or HR tables. See: Additional Implementation Steps for French Legislations, page 5-1

Caution: Oracle HRMS recommends that you do not change the data source.

- While adding tags in the template, use the correct tags for each section in the template. For example, add tag <?CP_FIRST_NAME?> in the Header Section in your template.

The template tags appear as Label name or Label value in the report. For example, the tag <?CP_FIRST_NAME?> appears as the label First Name in the report and the tag <?FIRST_NAME?> displays the first name such as John.

The following table lists the tags that appear as labels in the report, their meaning, and whether the tag displays as a Label name or Label value in the report.

Tag Name	Meaning	Label Name/Label Value
<i>Header Section</i>		
<?ESTAB_ADDRESS_LINE1?>	Address line 1	Label value
<?ESTAB_SMALL_TOWN?>	Small town	Label value
<?ESTAB_POSTAL_CODE?>	Postal code	Label value
<?ESTAB_CITY?>	City	Label value
<?ESTAB_ID?>	Establishment ID	Label value
<?ESTABLISHMENT_NAME?>	Establishment name	Label value
<?SIRET_NUMBER?>	SIRET number	Label value
<?CF_ESTAB_ADDRESS?>	It combines the address line 1, small town, postal code, city, and displays the first 60 characters	Label value
<?CP_LAST_NAME?>	Last Name	Label name

Tag Name	Meaning	Label Name/Label Value
<?CP_FIRST_NAME?>	First Name	Label name
<?CP_ADDRESS?>	Address	Label name
<?CP_AUTHORISATION?>	Authorization	Label name
<?CP_DATE_START?>	Start Date	Label name
<?CP_DOB?>	Date of Birth	Label name
<?CP_DATE_END?>	End Date	Label name
<?CP_GENDER?>	Gender	Label name
<?CP_ID_NO?>	ID Number - this refers to the person ID number	Label name
<?CP_JOB?>	Job	Label name
<?CP_NATIONALITY?>	Nationality	Label name
<?CP_POST_CITY?>	Postal Code, City	Label name
<?CP_QUALIFICATION?>	Qualification	Label name
<?CP_TYPE?>	Type, Name, and Address	Label name
<?CP_VISA_TYPE?>	Visa Type, Expiry	Label name
<?CP_YOUNG_EMP_SPECIFIC_CONT?>	Young Employees, Specific Contracts	Label name
<?CP_COMPANY?>	Company	Label name
<?CP_ESTAB?>	Establishment	Label name
<?CP_SIREN_NUMBER?>	SIREN	Label name
<?CP_SIRET_NUMBER?>	SIRET	Label name

Tag Name	Meaning	Label Name/Label Value
<?CF_OBTAIN_PROMPTS?>	Formula that obtains the Label names for all the heading tags	Label value
<?CP_HR_ORGANIZATION_NAME?>	HR Organization Name	Label name
<?CP_COMP_NAME?>	Company name	Label value
<?CP_COMP_SIREN?>	SIREN number	Label value
<?CP_COMP_ADDRESS?>	Company address	Label value
<?CP_HR_ORG_NAME?>	HR organization name	Label value
<?CP_HR_ORG_ADDRESS?>	HR organization address	Label value
<?CF_OBTAIN_COMP_HR_INFO?>	Formula that obtains the company and HR organization details	Label value
<?CP_REPORT_DATE_PROMPT?>	Report Date	Label name
<i>Assignment Details Section</i>		
<?ESTABLISHMENT_ID?>	Establishment ID	Label value
<?ASSIGNMENT_ID?>	Assignment ID	Label value
<?EFFECTIVE_START_DATE?>	Effective start date – displayed in report	Label value
<?EFFECTIVE_END_DATE?>	Effective end date	Label value
<i>Employee Record Section</i>		
<?JOB_ID?>	Job ID – obtains the job name	Label value

Tag Name	Meaning	Label Name/Label Value
<?JOB_DEFINITION_ID?	Job definition ID – obtains the job name	Label value
<?APPLICATION_ID?>	Application ID – obtains the employee's grade	Label value
<?CURRENT_EMP_OR_APL_F LAG?>	Current employee or applicant flag – checks whether a person is an employee or applicant	Label value
<?ASS_ESTAB_ID?>	Establishment ID	Label value
<?HIRING_DATE?>	Date on which a person is hired	Label value
<?GROUPING_EMPLOYER_NAME?>	Grouping Employer ID	Label value
? CONTRACT_START_DATE?	Contract start date	Label value
<?CONTRACT_TYPE?	Contract type	Label value
<?CONTRACT_CATEGORY?>	Indicates whether the contract is for a fixed term or permanent	Label value
<?PERSON_ID?>	Person ID	Label value
<?ASS_ID?>	Assignment ID	Label value
<?START_DATE?>	Start date	Label value
<?END_DATE?>	End date	Label value
<?FIRST_NAME?>	First name	Label value
<?LAST_NAME?>	Last name	Label value

Tag Name	Meaning	Label Name/Label Value
<?SMALL_TOWN?>	Address line 1 and small town name	Label value
<?CITY?>	Postal code and city name	Label value
<?SS_NUMBER?>	National identifier number	Label value
<?NATIONALITY?>	Nationality code	Label value
<?DATE_OF_BIRTH?>	Date of birth	Label value
<?SEX?>	Sex	Label value
<?JOB_NAME?>	Job name – not displayed in report	Label value
<?CAGR_ID_FLEX_NUM?>	Obtains the employee's grade	Label value
<?CAGR_GRADE_DEF_ID?>	Obtains the employee's grade	Label value
<?CF_GRADES?>	Qualification	Label value
<?CF_DOC_TYPE?>	Visa type and expiry date	Label value
<?CP_DOC_NUMBER? >	Document number	Label value
<?CF_TEMP_AGENCY?>	<p>Holds the young workers contract code</p> <ul style="list-style-type: none"> • Apprenticeship – APPT • Adaptation – ADAPT • Qualification – Qualif • Professionalisation – PROF • Orientation – ORIENT • Part Time – TP 	Label value

Tag Name	Meaning	Label Name/Label Value
<?CF_TEMP_DISP?>	Holds the values CDD for fixed term (terminated in current contract category or current contract category is not permanent), I for Temporary and M for Grouping Employer's name	Label value
<?CP_TEMP_NAME?>	Holds either Temporary Agency name or Grouping Employer's name	Label value
<?CP_EMPS_GROUP_NAME?>	Holds the Grouping Employer's or Temporary Agency's address details	Label value
<?CF_TERMN_DATE?>	Termination date	Label value
<?CP_ATD?>	Actual termination date	Label value
<?CF_NATIONALITY_MEANING?>	Expansion of the nationality code, such as FR refers to France	Label value
<?CF_EFFECTIVE_END_DATE?>	Effective end date – displayed in report	Label value
<?CF_JOB_NAME?>	Appropriate job name – displayed in report	Label value
<?CP_DOC_NAME_EMP?>	Holds the various work certificate names	Label value
<?CP_YOUNG_EMPLOYEES_EMP?>	Holds the young workers' contract types	Label value
<?CP_TEMP_DISP_EMP?>	Holds the list of specific contracts	Label value

Tag Name	Meaning	Label Name/Label Value
<?CF_DISPLAY_START_DATE?>	Start date – displays date in the dd/mm/yy format	Label value
<?CP_DISPLAY_DATE_OF_BIRTH?>	Date of birth – displays date in the dd/mm/yy format	Label value
<?CP_DISPLAY_END_DATE?>	End date – displays date in the dd/mm/yy format	Label value
<?CP_DISPLAY_HIRING_DATE?>	Hiring date – displays date in the dd/mm/yy format	Label value
<?CP_DISPLAY_TERMN_DATE?>	Termination date – displays date in the dd/mm/yy format	Label value
<i>Report Parameter Section</i>		
<?CF_BUSINESS_GROUP?>	Business Group ID	Label value
<?CF_LEGISLATION_CODE?>	Legislation code	Label value
<?CF_CURRENCY_FORMAT_MASK?>	Currency format mask	Label value
<?CP_DOC_NAMES?>	Holds the various work certificate names	Label value
<?CP_TEMP_DISP?>	Holds the list of specific contracts	Label value
<?CP_YOUNG_WORKERS?>	Holds the young workers' contract types	Label value
<?P_REPORT_DATE?>	Report date	Label value
<?CP_DOC_TYPE?>	Document Type	Label name

Tag Name	Meaning	Label Name/Label Value
<?CP_SPECIFIC_CONT?>	Specific Contracts	Label name
<?CP_TITLE?>	Personnel Register Report	Label name
<?CP_YOUNG_EMP?>	Young Employees	Label name
<?CP_AS_AT?>	As At -- indicates as at a given date	Label name
<?CP_BUSINESS_GROUP_ID?>	Business Group ID – parameter value	Label value
<?CP_COMPANY_ID?>	Company ID – parameter value	Label value - Entered while running the report
<?CP_CONC_REQUEST_ID?>	Concurrent Request ID – parameter value	Label value
<?CP_ESTABLISHMENT_ID?>	Establishment ID – parameter value	Label value - Entered while running the report
<?CP_HR_ORGANIZATION_ID?>	HR Organization ID – parameter value	Label value - Entered while running the report
<?CP_RUP_INCLUDE?>	RUP Include – parameter value	Label value - Entered while running the report
<?CP_REPORT_DATE?>	Report Date – displayed in the basic template	Label value - Entered while running the report

Training Access Individual Report Template Tags

Oracle HRMS enables you to customize the reports to display the details that meet your business and legislative requirements. The application provides you a predefined report template BIAF2005.rtf. You can use this template as it is or create your template by adding or removing the tags listed in the table. The predefined template does not have all the tags listed in the following table.

While creating your template, if you choose to enter a report label without using the available tag names, then this report label must have a corresponding data source in the BIAF_LOOKUP_CODE lookup or HR tables. See: Additional Implementation Steps for

Caution: Oracle HRMS recommends that you do not change the data source.

The template tags appear as Label name or Label value in the report. For example, the tag <?LN?> appears as the label Last Name in the report and the tag <?last_name?> displays the last name such as Smith.

The following table lists the tags that appear as labels in the report, their meaning, and whether the tag displays as a Label name or Label value in the report.

Tag Name	Meaning	Label Name/Label Value
<?ADP?>	Road number (employee address)	Label value
<?ADP2?>	Complement (employee address)	Label value
<?ADP3?>	Other (employee address)	Label value
<?ADP4?>	INSEE code (employee address)	Label value
<?ADP5?>	Small town (employee address)	Label value
<?ADP6?>	Postal code (employee address)	Label value
<?ADP7?>	City (employee address)	Label value
<?ADP8?>	Department (employee address)	Label value
<?ADP9?>	Country (employee address)	Label value
<?ADP10?>	Telephone (employee address)	Label value
<?ADP11?>	Fax (employee address)	Label value

Tag Name	Meaning	Label Name/Label Value
<?ADP12?>	Telephone 3 (employee address)	Label value
<?siret?>	SIRET number	Label value
<?ape?>	NAF code	Label value
<?establishment_headcount?>	Establishment headcount	Label value
<?tax_paid_to?>	Training body name to which tax is paid	Label value
<?establishment_name?>	Establishment name	Label value
<?ADE1?>	Road number (establishment address)	Label value
<?ADE2?>	Complement (establishment address)	Label value
<?ADE3?>	Other (establishment address)	Label value
<?ADE4?>	INSEE code (establishment address)	Label value
<?ADE5?>	Small Town (establishment address)	Label value
<?ADE6?>	Postal code (establishment address)	Label value
<?ADE7?>	City (establishment address)	Label value
<?ADE8?>	Department (establishment address)	Label value
<?ADE9?>	Country (establishment address)	Label value
<?ADE10?>	Telephone (establishment address)	Label value

Tag Name	Meaning	Label Name/Label Value
<?ADE11?>	Fax (establishment address)	Label value
<?ADE12?>	Telephone 3 (establishment address)	Label value
<?ADT1?>	Road number (training body address)	Label value
<?ADT2?>	Complement (training body address)	Label value
<?ADT3?>	Other (training body address)	Label value
<?ADT4?>	INSEE code (training body address)	Label value
<?ADT5?>	Small town (training body address)	Label value
<?ADT6?>	Postal code (training body address)	Label value
<?ADT7?>	City (training body address)	Label value
<?ADT8?>	Department (training body address)	Label value
<?ADT9?>	Country (training body address)	Label value
<?ADT10?>	Telephone (training body address)	Label value
<?ADT11?>	Fax (training body address)	Label value
<?ADT12?>	Telephone 3 (training body address)	Label value
<?employee_number?>	Employee number	Label value
<?last_name?>	Last name	Label value

Tag Name	Meaning	Label Name/Label Value
<?first_name?>	First name	Label value
<?full_name?>	Full name	Label value
<?maiden?>	Maiden name	Label value
<?date_of_birth?>	Date of birth	Label value
<?national_identifier?>	National identifier	Label value
<?original_date_of_hire?>	First contract start date	Label value
<?contract_start_date?>	Current contract start date	Label value
<?contract_end_date?>	Current contract end date	Label value
<?proposed_end_date?>	Proposed end date of contract	Label value
<?duration?>	Duration of the current contract	Label value
<?Unit?>	Unit of the current contract	Label value
<?EME?>	Employee	Label name
<?ADR?>	Address	Label name
<?ADT?>	Training Body Address	Label name
<?AOE?>	Establishment Address	Label name
<?APN?>	APE Number	Label name
<?BDT?>	Birth Date	Label name
<?BIAF?>	Training Access Individual Report	Label name
<?CSEAL?>	Company Seal	Label name

Tag Name	Meaning	Label Name/Label Value
<?DEC1?>	I, the undersigned,	Label name
<?DEC2?>	whose function is	Label name
<?DEC3?>	certify that above mentioned information is true	Label name
<?DUR?>	Duration	Label name
<?EDT?>	Current Contract End Date	Label name
<?EH?>	Establishment Headcount	Label name
<?EMR?>	Employer	Label name
<?FCN?>	Fixed Term Contract	Label name
<?FHD?>	First Fixed Term Contract Start Date	Label name
<?FMM?>	Full Name	Label name
<?FN?>	First Name	Label name
<?LN?>	Last Name	Label name
<?MNM?>	Maiden	Label name
<?NOE?>	Establishment Name	Label name
<?PEDT?>	Proposed End Date	Label name
<?SDT?>	Current Contract Start Date	Label name
<?SIGN?>	Signature	Label name
<?SN?>	SIRET Number	Label name

Tag Name	Meaning	Label Name/Label Value
<?SSN?>	Social Security Number	Label name
<?TTP?>	OPCA	Label name
<?UN?>	Unit	Label name

DIF Statement Template Tags

Oracle HRMS enables you to print the DIF statement in the predefined layout or configure the statement to display your own details to meet business requirements. The application provides you with a predefined DIF statement template, DIF_stmt_tmpl.rtf. You can use this template as it is or create your template by adding, renaming, or removing the tags listed in the table. See: Additional Implementation Steps for French Legislations, page 5-1

The template tags appear as Label name or Label value in the statement. For example, use the tag <?EE_NAME?> to display the label Employee Name. If you want the label value for employee name to look like Thierry Henri in the statement, then use the tag <?emp_hdr_full_name?>.

The following table lists the tags that appear as labels in the statement, their meaning, and whether the tag displays as a Label name or Label value in the statement.

Tag Name	Meaning	Label Name/Label Value
<?DIF_STMT?>	DIF Statement	Label name
<?ER?>	Employer	Label name
<?EE?>	Employee	Label name
<?NAME?>	Name:	Label name
<?SIRET?>	SIRET Number:	Label name
<?ESTAB_NAME?>	Establishment Name:	Label name
<?ESTAB_ADD?>	Establishment Address:	Label name

Tag Name	Meaning	Label Name/Label Value
<?COMP_NAME?>	Company Name:	Label name
<?COMP_ADD?>	Company Address:	Label name
<?EE_ADD?>	Address:	Label name
<?EE_NUM?>	Employee Number:	Label name
<?HIRE_DATE?>	Hire Date:	Label name
<?ADJ_DATE?>	Adjusted Service Date:	Label name
<?TERM_DATE?>	Actual Termination Date:	Label name
COLL_AGGR	Collective Agreement:	Label name
ASG_CATG	Assignment Category:	Label name
CTR_INFO	Contract Information	Label name
<?CTR_TYPE?>	Contract Type:	Label name
<?CTR_CATG?>	Contract Category:	Label name
<?CTR_WKG_HRS?>	Contractual Working Hours:	Label name
<?COLL_AGGR?>	Start Date:	Label name
<?ASG_CATG?>	End Date:	Label name
<?ACC_INFO?>	Accrual Information	Label name
<?ACC_PLAN?>	Plan Name:	Label name
<?EE_ENROL_ST?>	Enrollment Start Date:	Label name
<?EE_ENROL_END?>	Enrollment End Date:	Label name
<?STMT_PERIOD?>	Statement Period	Label name

Tag Name	Meaning	Label Name/Label Value
<?FROM?>	From:	Label name
<?TO?>	To:	Label name
<?DIF_ACC?>	DIF Accrual	Label name
<?CO?>	Carry Over	Label name
<?ACC?>	Accrual	Label name
<?ACC_REPEAT?>	Accruals	Label name
<?TOTAL?>	Total	Label name
<?DT_FROM?>	Date From	Label name
<?DT_TO?>	Date To	Label name
<?WKG_HRS?>	Working Hours	Label name
<?DIF_TAKEN?>	DIF Taken	Label name
<?ST_DATE?>	Start Date	Label name
<?END_DATE?>	End Date	Label name
<?ABS_DUR?>	Absence Duration	Label name
<?TR_LV_CATG?>	Training leave category	Label name
<?CRS_NAME?>	Course Name	Label name
<?TRG_PROV?>	Training Provider	Label name
<?TRG_TYPE?>	Type of training	Label name
<?TRG_REF?>	Training Reference	Label name
<?LEG_CATG?>	Legal Category	Label name

Tag Name	Meaning	Label Name/Label Value
<?HRS_OUT_WKG?>	Hours outside working time	Label name
<?PROJ_ABS?>	Projected (Y/N)	Label name
<?HRS?>	Hours	Label name
<?DIF_ADJ?>	DIF Adjustments	Label name
<?ADJUST?>	Adjustments	Label name
<?ELE_NAME?>	Element Name	Label name
<?IMP_BAL?>	Impact on Balance (Add/Subtract)	Label name
<?BAL?>	Balance	Label name
<?er_hdr_estab_name?>	Establishment name	Label value
<?er_hdr_estab_addr_compl? >	Establishment address - complement	Label value
<?er_hdr_estab_addr_nstreet? >	Establishment address - number and street	Label value
<?er_hdr_estab_addr_town?>	Establishment address - small town	Label value
<?er_hdr_estab_addr_zip?>	Establishment address - zip code	Label value
<? er_hdr_estab_addr_towncity? >	Establishment address - town or city	Label value
<?er_hdr_estab_country?>	Establishment address - country	Label value
<?er_hdr_comp_name?>	Company name	Label value

Tag Name	Meaning	Label Name/Label Value
<?er_hdr_comp_addr_compl?>	Company address - complement	Label value
<?er_hdr_comp_addr_nstreet?>	Company address - number and street	Label value
<?er_hdr_comp_addr_town?>	address - small town	Label value
<?er_hdr_comp_addr_zip?>	Company address - zip code	Label value
<?er_hdr_comp_addr_towncity?>	Company address - town or city	Label value
<?er_hdr_comp_country?>	Company address - country	Label value
<?er_hdr_estab_siret?>	SIRET number	Label value
<?emp_hdr_full_name?>	Employee full name	Label value
<?emp_hdr_empnum?>	Employee number	Label value
<?emp_hdr_addr_compl?>	Employee address - complement	Label value
<?emp_hdr_addr_nstreet?>	Employee address - number and street	Label value
<?emp_hdr_addr_town?>	Employee address - small town	Label value
<?emp_hdr_addr_zip?>	Employee address - zip code	Label value
<?emp_hdr_addr_towncity?>	Employee address - town or city	Label value
<?emp_hdr_country?>	Employee address - country	Label value
<?emp_hdr_hiredate?>	Date of hire	Label value
<?emp_hdr_adj_svc_date?>	Adjusted Service Date	Label value

Tag Name	Meaning	Label Name/Label Value
<?emp_hdr_term_date?>	Actual Termination Date	Label value
<?emp_hdr_coll_aggr?>	Collective agreement	Label value
<?emp_hdr_asg_catg?>	Assignment category	Label value
<?ctr_hdr_start?>	Contract start date	Label value
<?ctr_hdr_end?>	Contract end date	Label value
<?ctr_hdr_type?>	Contract type	Label value
<?ctr_hdr_category?>	Contract category	Label value
<?ctr_hdr_hours?>	Contract working hours	Label value
<?statement_start_date?>	Statement start date	Label value
<?statement_end_date?>	Statement end date	Label value
<?co_date_to?>	Carryover to date	Label value
<?co_hours?>	Carryover hours	Label value
<?acc_date_from?>	Accrual date from	Label value
<?acc_date_to?>	Accrual date to	Label value
<?acc_wkg_hrs?>	Accrual working hours	Label value
<?acc_hours?>	Accrual hours	Label value
<?total_dif_acc?>	Total DIF accrual	Label value
<?abs_start_date?>	Absence start date	Label value
<?abs_end_date?>	Absence end date	Label value
<?abs_duration?>	Absence duration	Label value

Tag Name	Meaning	Label Name/Label Value
<?abs_trg_catg?>	Training category	Label value
<?abs_course_name?>	Course name	Label value
<?abs_trg_prov?>	Training provider	Label value
<?abs_trg_type?>	Training type	Label value
<?abs_trg_ref?>	Training reference	Label value
<?abs_leg_catg?>	Legal category	Label value
<?abs_out_wkg_hrs?>	Hours outside working hours	Label value
<?abs_proj_yn?>	Projected absence (y/n)	Label value
<?total_dif_abs?>	Total absence hours	Label value
<?adj_element?>	Adjustment element	Label value
<?adj_start?>	Adjustment element entry start date	Label value
<?adj_end?>	Adjustment element entry end date	Label value
<?adj_hours?>	Adjustment hours	Label value
<?adj_add_or_subtract?>	Impact on Balance (Add/Subtract)	Label value
<?dif_bal_hrs?>	DIF balance hours	Label value

Running the D2 Report (Declaration Annuelle Obligatoire D'emploi des Travailleurs Handicapes, de Mutiles de Guerre et Assimiles)

Run reports in the Submit Requests window.

To run the D2 report:

1. Select French D2 Report in the Request Name field.
2. Select the establishment for which the report is to be generated, and enter the required year.
3. Enter the year that the establishment was first required to produce the D2 report in the Year First Obligation field. Choose OK.
4. Choose the Submit button.

You can now view and print the report from the Requests window.

Running the Mouvements de Main d'Oeuvre Report

Run reports in the Submit Requests window.

To run the Mouvements de Main d'Oeuvre report:

1. Select HRMS - Mouvements de Main d'Oeuvre Report in the Request Name field
2. Select the establishment and enter the period for which you want to produce the report.
3. Select whether you want to include suspended assignments in the report.
4. Enter the session date. The report will be produced using the data as it was on this date. Choose OK
5. Choose the Submit button.

You can now view and print the report from the Requests window.

Running the Pre Hire Report (Declaration Unique d'Embauche)

The Pre Hire Report process produces an electronic file in the OUTPUT directory that includes all the required information for the Declaration Unique d'Embauche. This can be emailed to the local URSSAF center.

Run reports in the Submit Requests window.

To run the Pre Hire Report process:

1. Select Pre Hire Report in the Request Name field
2. Select the establishment or person for which you want to run the process.

3. Enter details about a contact if required.
4. Indicate whether the person should be included on the initial DADS report.
5. Indicate whether this person is the first recruit for the establishment.
6. Indicate whether the receipts from the URSSAF center should be returned in one batch, or whether there should be an individual file for each record processed.
7. Select the method by which the URSSAF center should return the receipts.
8. Choose the Submit button.

Running the Prud'hommale (Workers Election) Process

The Prud'hommale (Workers Election) process creates a statutory declaration in the form of a flat file. It also creates a log file reporting the errors in the flat file and a readable output file. Before you copy the flat file to the magnetic tape or disk for submission to the authorities, you need to fix the errors.

You run the process from the Submit Requests window.

To run the Prud'hommale (workers election) process:

1. Select Workers Election Process (France) in the Request Name field.
2. Select the company and a reporting establishment in the Parameters window.

Note: If you do not select the establishment in the Establishment field, the process will run for all the establishments in your company. In case you want the process to run for a specific establishment, then select the required establishment.

3. Enter the date on which the report is to be run.

Note: The Prud'hommale (Workers Election) Declaration is due for submission by April of the year before the elections take place.

4. Choose the Submit button.

Creating the Prud'hommale (Workers Election) Declaration

Oracle HR enables you to create the Prud'hommale (Workers Election) Declaration. You need to complete several tasks before you create the final declaration and submit it to

the authorities.

To create Workers Election Declaration:

1. Enter information regarding the employee's electoral college and the place where the employee will vote. Use the French Workers Election Person Extra information type to record these details.

Note: You need to enter this information only if it differs from the default settings.

See: Entering Additional Person Information, page 2-9

2. Run the Workers Election Process (France) concurrent process.

See: Running the Workers Election Process (France), page 1-106

3. Review the log file for errors and warnings.
4. Fix the errors in the Output file

Note: The Output file is created regardless of whether there are errors or warnings listed in the log file.

5. Copy the output file to disk or magnetic tape and rename as PRUD2002.
6. Send disk or magnetic tape to authorities.

Generating the DIF Statement

Oracle HRMS enables you to generate the DIF Statement and provide employees with a printed statement. The statement informs employees of their DIF training absence entitlement. In the statement, employees can view the hours they can spend in training as absences for the year.

Use the Submit Request window.

To run the DIF Statement:

1. Select DIF Statement in the name field.
2. Click in the Parameters field to display the Parameters window, if it does not automatically open.
3. Select the establishment to include all employees in the specific establishment in the statement.

4. Select the DIF accrual plan to derive the hours that employees can spend in training as absences for the year.

Note: Ensure you link the accrual plan to the FR_DIF_TRAINING_INFORMATION DIF element or a user-defined element that has DIF Absence: Information or DIF Absence: Absence secondary classifications. See: Recording Training Absences, page 4-118

5. Enter the period for which you want to generate the statement.
6. Optionally, select the employee to generate the statement for a single employee.
7. Select the order in which you want to sort the employees to generate the statement for all employees in the establishment.
8. Select the template name. You can select the sample template DIF_stmt_tmpl.rtf to generate the statement in the predefined layout or your template to display the details that meet your requirements. See: Additional Implementation Steps for French Legislations, page 5-1
9. Click OK.
10. Click Submit.

Customizing XML Reports

Oracle HRMS enables you to customize the details displayed on the XML version of the legislative reports. In case you do not want to customize these reports, you can select the predefined report template while running the report from the Submit Request window. However, if you choose to customize the report template, you must complete several tasks before you run the report.

You customize the XML version of the legislative report using Oracle XML Publisher. To customize the report, you can do one of the following:

- Create your report template.
- Modify the predefined report template.

1. Create a new rich text format template.

Using the predefined report template as a sample, create a new report template and save it as a rich text format file. See: Overview of Creating an RTF Template in the Oracle XML Publisher User's Guide.

2. Create a new template definition.

Using the predefined template definition as a sample, create a new template definition in the Template Manager for your template design file. When you create the template definition in the Template Manager, you register and upload your template design files.

See: Creating the Template in the Oracle XML Publisher User's Guide

3. Run the report. You can now select your template while running the report.
4. Modify the predefined template.

You can modify the predefined template by adding new fields to display the required details in the legislative report. You can add as new fields the values that are available in the lookup created for the report and HR or pay tables such as PER_ALL_PEOPLE_F, PER_CONTRACTS_F, but not mapped with the predefined report template. You must not add new fields that have no data source in either the report specific lookup or HR/pay tables.

See: Overview of Creating an RTF Template in the Oracle XML Publisher User's Guide

5. Modify the predefined report template definition. You can modify the predefined template definition to add your new rich text format template and update the general definitions of a template.

Note: Ensure to upload the modified rtf template if you have updated it and saved it with the same name as the predefined rtf template.

See: Viewing and Updating a Template in the Oracle XML Publisher User's Guide.

6. Run the legislative report from the Submit Request window.

Running the Personnel Registry Report

Oracle HRMS enables you to generate the mandatory Personnel Registry report to submit to the Work Inspector, or Urssaf Inspector, or Workers' Representatives.

Use the Submit Request window.

To run the Personnel Registry report:

1. Select the French RUP report in the name field.
2. Click in the Parameters field to display the Parameters window, if it does not automatically open.
3. Select the required company in your business group to include employees and

contingent workers in the specific company in the report.

4. Optionally, select the establishment in the specific company and the HR organization for the establishment.

Note: You select the HR organization for the establishment in case the HR organization is not in the same location as the establishment and you require a separate Personnel Registry report for the specific HR organization. The Personnel Registry report then includes employees in both the establishment and HR organization.

5. Select All to include the current employees, contingent workers, and employees who have worked in the establishment since its creation. Otherwise select Up to 5 years to exclude employees who terminated 5 years before the report date.
6. Enter the report date to list the employees and contingent workers up to this date.
7. Select the report template to generate the report in the required format. You can select the predefined report template RUP_TEMPLATE.rtf or the template that you created. See: Additional Implementation Steps for French Legislations, page 5-1
8. Click OK
9. Click Submit.

Running the Training Access Individual Report

Oracle HRMS enables you to generate the Training Access Individual (BIAF) report to provide employee details to an employee who is on a fixed-term contract and is leaving the organization.

Use the Submit Request window.

To run the Training Access Individual report:

1. Select the BIAF XML Report in the name field.
2. Click in the Parameters field to display the Parameters window, if it does not automatically open.
3. Select Assignment Set to generate the report for the employees with a fixed-term contract and whose assignments are part of the assignment set. Otherwise, select Employee Number to generate the report for individual employees.
4. Enter the effective date to indicate the date when you run the report.

5. If you have selected the Assignment Set option, then select the appropriate assignment set. If you have selected the Employee Number option, then select the required employee number.
6. Select the template name. You can select the predefined template BIAF.rtf to generate the report in the predefined format. To generate the customized report, select the template you have created.

See: Additional Implementation Steps for French Legislations, page 5-1

7. Click OK
8. Click Submit.

Bilan Social

Bilan Social

The Bilan Social is a statutory report that lists a large number of HR and Payroll related indicators in order to provide a summary of many aspects affecting a company or establishment's human resources in a year.

The Bilan Social data is gathered by running the Bilan Social Report process. The data that this process retrieves is controlled by information entered in the Parameters window when submitting the process. One of these parameters is the *template*. This groups together all the calculations that are to be executed in a single run of the process. Once the template is constructed you can use it as many times as you require, for example, you could use the same template successive years.

Prerequisites of the Bilan Social

In order to use the Bilan Social correctly you must have Oracle Discoverer version 3.1.36.06 or later installed.

Components of the Bilan Social - Item Types

Calculations that are run by the Bilan Social Report process are defined in *item types*. The columns COUNT_CLAUSE1, COUNT_CLAUSE2 and WHERE_CLAUSE in HR_SUMMARY_ITEM_TYPE are used to build the basic SQL statement which will derive the summary data for a particular item.

The SQL statement is constructed as follows:

```
FR_00000860select COUNT_CLAUSE1
```

```
FR_00000861, COUNT_CLAUSE2
```

```
FR_00000862WHERE_CLAUSE
```

Note: The WHERE_CLAUSE line above, refers to the Where Clause as detailed in Components of the Bilan Social - Where Clause, page 1-156

You can select one or more *key types* to apply to a particular item type. See later in this section for a description of Key Types. In this case the basic SQL statement is modified to be constructed as follows:

```
FR_00000863select COUNT_CLAUSE1 col_value1
```

```
FR_00000864, COUNT_CLAUSE2 col_value2
```



```

FR_00000865,      KEY_CLAUSE1      col_KEY_NAME1

FR_00000866,      KEY_CLAUSE2      col_KEY_NAME2

FR_00000867WHERE_CLAUSE

FR_00000868group by KEY_CLAUSE1

FR_00000869,      KEY_CLAUSE2

```

Item Type Design

The item types delivered as part of the Bilan Social are described below.

1. Occupation

1: TOTAL_HEADCOUNT

Description	Counts the distinct people who have an employee assignment in a particular company or establishment on the 31/12 in the run year. The set of people that are processed can be further restricted based on their person type. The set of assignments that are processed can be further restricted based on whether they are primary assignments and also on the assignment status. The details of the employee category, gender, age band, seniority band, nationality and collectively agreed grade are derived from the latest occurrence of this data in the run year, that is, from the person and assignment records that span the end of year.
Count Clause	count (distinct p.person_id)
Valid Restrictions	User Person Type, Primary Flag, Assignment Status Type
Valid Key Types	Employee Category, Gender, Age, Seniority, Nationality, CAGR

2: PERMANENT_HEADCOUNT

Description	Count of all employees who had an employee assignment throughout the year which also meets the other optional requirements identified using the restrictions (User Person Type, Primary Flag, Assignment Status Type, Contract Type, Contract Category, Employment Category). Note, the definition of 'Permanent Employee' should either be based on contract attributes or employment category. If an assignment is found which exists at the end of the run year but which does not meet all the restriction requirements, or which does not have a contract, throughout the run year it will not be counted. The details of the employee category, gender, age band, seniority band, nationality and collectively agreed grade are derived from the latest occurrence of this data in the run year, that is, from the person and assignment records that span the end of year.
Count Clause	count(distinct p.person_id)
Valid Restrictions	User Person Type, Assignment Status Type, Contract Type, Contract Category, Employment Category
Valid Key Types	Employee Category, Gender, Age, Nationality

3: FIXED_TERM_HEADCOUNT

Description	Count of the distinct people who are fixed term employees on 31/12. Note, the definition of 'Fixed Term Employee' should either be based on contract attributes or employment category. The details of the employee category, gender, age band, seniority band, nationality and collectively agreed grade are derived from the latest occurrence of this data in the run year, that is, from the person and assignment records that span the end of year.
-------------	---

Count Clause	count (distinct p.person_id)
Valid Restrictions	User Person Type Primary Flag Assignment Status Type Contract Type Contract Category Employment Category
Valid Key Types	Employee Category, Gender, Age, Nationality

4: MONTHLY_HEADCOUNT

Description	Count of the number of distinct people who have an employee assignment in the company or establishment on the last day of each month in the year. The details of the employee category and are derived from the latest occurrence of this data each month, that is, from the person and assignment records that span the end of each month. The month is returned in a numeric format i.e. Jan=01, Feb=02 etc.
Count Clause	count(*)
Valid Restrictions	User Person Type, Primary Flag, Assignment Status Type, Contract Type, Contract Category, Employment Category
Valid Key Types	Month, Employee Category, Gender

5: MONTHLY_TEMPORARY

Description	Count of the number of distinct people who have an employee assignment in the company or establishment on the last day of each month in the year. The details of the employee category are derived from the latest occurrence of this data each month, that is, from the person and assignment records that span the end of each month. The month is returned in a numeric format i.e. Jan=01, Feb=02 etc. The user person type or employment category restrictions should be used to determine which people are considered to be 'temporary' employees.
Count Clause	count(distinct(p.person_id))
Valid Restrictions	User Person Type, Primary Flag, Assignment Status Type, Employment Category
Valid Key Types	Month

6: MONTHLY_STUDENT

Description	Count of the number of distinct people who have an employee assignment in the company or establishment on the last day of each month in the year. The details of the employee category and are derived from the latest occurrence of this data each month, that is, from the person and assignment records that span the end of each month. The month is returned in a numeric format i.e. Jan=01, Feb=02 etc. The user person type employment category or contract type restrictions should be used to determine which people are considered to be 'student' employees.
Count Clause	count(*)
Valid Restrictions	User Person Type, Primary Flag, Assignment Status Type, Contract Type, Contract Category, Employment Category

Valid Key Types	Month
-----------------	-------

7: MONTHLY_EXTERNAL

Description	Count of the number of distinct people who have an employee assignment in the company or establishment on the last day of each month in the year. The details of the employee category and are derived from the latest occurrence of this data each month, that is, from the person and assignment records that span the end of each month. The month is returned in a numeric format i.e. Jan=01, Feb=02 etc The user person type employment category or contract type restrictions should be used to determine which people are considered to be 'external' employees.
-------------	--

Count Clause	count(*)
--------------	----------

Valid Restrictions	User Person Type
	Primary Flag
	Assignment Status Type
	Contract Type
	Contract Category
	Employment Category

Valid Key Types	Month
-----------------	-------

9: TEMPORARY_DURATION

Description	The number and length in calendar days of employees periods of service that have ended during the report year. Only assignments that have ended during the year are included in the calculation. The user person type or employment category restrictions should be used to determine which people are considered to be `temporary` employees.
Count Clause	sum(pos.actual_termination_date - pos.date_start +1)count(*)
Valid Restrictions	User Person Type, Primary Flag, Assignment Status Type, Employment Category
Valid Key Types	Age, Employee Category, Gender

10: NEW_HIRE

Description	The number of employees who have joined the company or establishment either as a brand new employee or from an establishment that is outside of the reporting company (or the reporting establishments parent company if reporting at establishment level). The restrictions can be used to determine the particular set of employees to be counted. The key information is derived from the latest person and assignment records in the year that meet the restriction criteria. Note, this only processes primary assignments. A new hire is considered to have taken place if there is a primary assignment in the company when there had previously been none.
Count Clause	count (distinct (p.person_id))
Valid Restrictions	User Person Type, Assignment Status Type, Contract Type, Contract Category, Employment Category

Valid Key Types	Employee Category, Contract Category, Age Less Than 25, Seasonal Worker
-----------------	---

11: DEPARTURE

Description	The number of employees who have left the company or establishment and who are either no longer an employee or have moved to an establishment which is outside of the reporting company (or the reporting establishments parent company if reporting at establishment level). The restrictions can be used to determine the particular set of employees to be counted. The key information is derived from the latest person and assignment records in the year that meet the restriction criteria. Note, this only processes primary assignments. A departure is considered to have taken place if there is no primary assignment remaining in the company.
Count Clause	count(distinct(p.person_id))
Valid Restrictions	User Person Type, Assignment Status Type, Contract Type, Contract Category, Employment Category
Valid Key Types	Employee Category, Leaving Reason

12: MUTATION

Description	The number of employees who have left their establishment and have moved into another establishment in the same company. The restrictions can be used to determine the particular set of employees to be counted. The key information is derived from the person and assignment records that exist on the last day of employment in the reporting establishment. Note, this only processes primary assignments. A mutation is considered to have taken place if the primary assignment changes establishment where the second establishment is in the same company as the first.
Count Clause	count(distinct p.person_id)
Valid Restrictions	User Person Type, Assignment Status Type, Contract Type, Contract Category, Employment Category
Valid Key Types	Employee Category

13: PROMOTION

Description	<p>The number of employees who have moved from one employee category to another that is deemed to be higher (in grading terms) than the first. This calculation uses a seeded user defined table called FR_EMPLOYEE_CATEGORY and a seeded column within that table called BS_EMP_CAT_HIERARCHY. Each row within this table will hold a distinct employee category (as defined in the FR_EMPLOYEE_CATEGORY Lookup type). You should enter values in the column to indicate the relative grade of the various employee categories (with the highest graded employee category having the lowest value. Note, there can be multiple entries at the same level). The key information is derived from the person and assignment records that exist on the last day prior to a promotion.</p>
Count Clause	count(*)
Valid Restrictions	User Person Type, Primary Flag, Assignment Status Type, Minimum Emp Category Level
Valid Key Types	Employee Category

14: PARTIAL_LAYOFF_PEOPLE

Description	The number of employees who have a partial layoff hours payroll balance (as returned using the third party Payroll Backfeed system) that is generated on a date on which the employee is in the establishment or company and meets other restrictions you may have chosen. The balances that constitute 'partial layoff hours' should be entered as values for the Balance Name restriction, for example, there may be 2 balances called 'partial layoff paid hours' and 'partial layoff unpaid hours'. The key information is derived from the latest person and assignment records in the year that meet the restriction criteria.
Count Clause	count(distinct person_id)
Valid Restrictions	User Person Type, Primary Flag, Assignment Status Type, Balance Name
Valid Key Types	Employee Category

15: PARTIAL_LAYOFF_PAID_HOURS

Description	The sum of balance run_amounts for employees who have a partial layoff paid hours payroll balance (as returned using the third party Payroll Backfeed system) that is generated on a date on which the employee is in the establishment or company and meets other restrictions you may have chosen. The balances that constitute 'partial layoff paid hours' should be entered as values for the Balance Name. The key information is derived from the latest person and assignment records in the year that meet the restriction criteria.
Count Clause	sum(bal.run_amount)
Valid Restrictions	User Person Type, Primary Flag, Assignment Status Type, Balance Name

Valid Key Types

Employee Category

16: PARTIAL_LAYOFF_UNPAID_HOURS

Description

The sum of balance run_amounts for employees who have a partial layoff unpaid hours payroll balance (as returned using the third party Payroll Backfeed system) that is generated on a date on which the employee is in the establishment or company and meets other restrictions you may have chosen. The balances that constitute 'partial layoff unpaid hours' should be entered as values for the Balance Name. The key information is derived from the latest person and assignment records in the year that meet the restriction criteria.

Count Clause

sum(bal.run_amount)

Valid Restrictions

User Person Type, Primary Flag, Assignment Status Type, Balance Name

Valid Key Types

Employee Category

17: BAD_WEATHER_PEOPLE

Description

The number of employees who have a bad weather hours payroll balance (as returned using the third party Payroll Backfeed system) that is generated on a date on which the employee is in the establishment or company and meets other restrictions you may have chosen. The balances that constitute 'bad weather hours' should be entered as values for the Balance Name restriction, for example, there may be two balances called 'bad weather paid hours' and 'bad weather unpaid hours'. The key information is derived from the latest person and assignment records in the year that meet the restriction criteria.

Count Clause

count(distinct person_id)

Valid Restrictions	User Person Type, Primary Flag, Assignment Status Type, Balance Name
--------------------	--

Valid Key Types	Employee Category
-----------------	-------------------

18: BAD_WEATHER_PAID_HOURS

Description	The sum of balance run_amounts for employees who have a bad weather paid hours payroll balance (as returned using the third party Payroll Backfeed system) that is generated on a date on which the employee is in the establishment or company and meets other restrictions you may have chosen. The balances that constitute 'bad weather paid hours' should be entered as values for the Balance Name. The key information is derived from the latest person and assignment records in the year that meet the restriction criteria.
-------------	--

Count Clause	sum(bal.run_amount)
--------------	---------------------

Valid Restrictions	User Person Type, Primary Flag, Assignment Status Type, Balance Name
--------------------	--

Valid Key Types	Employee Category
-----------------	-------------------

19: BAD_WEATHER_UNPAID_HOURS

Description	The sum of balance run_amounts for employees who have a bad weather unpaid hours payroll balance (as returned using the third party Payroll Backfeed system) that is generated on a date on which the employee is in the establishment or company and meets other restrictions you may have chosen. The balances that constitute 'bad weather unpaid hours' should be entered as values for the Balance Name. The key information is derived from the latest person and assignment records in the year that meet the restriction criteria.
-------------	--

Count Clause	sum(bal.run_amount)
Valid Restrictions	User Person Type, Primary Flag , Assignment Status Type, Balance Name
Valid Key Types	Employee Category

20: DISABILITY

Description	The number of distinct employees on 31st March in the reporting year who have a disability record on 31st March. The COTOREP class and disability rate restrictions can be used to determine exactly which disability records should be considered in this calculation. Note, it is possible that a person has more than one disability record on the 31st March. If any of these meets the minimum inclusion parameters then the person is counted.
Count Clause	count(distinct p.person_id)
Valid Restrictions	User Person Type, Assignment Status Type, COTOREP Class, Disability Rate
Valid Key Types	None

21: ABSENCE

Description	The sum of the absence balances for employees in the run year. Each absence balance type must have an equivalent absence type for it be counted in this calculation. The units of the absence type is used to convert the run amount into days. This uses the Payroll Backfeed balances that should be populated from a third party payroll system. For a particular person's payroll run balances to be included they must meet all the restriction criteria on the processing date of the third party payroll run. The balances that constitute 'absences' should be entered as values for the Balance Name restriction. The key information is derived from the latest person and assignment records in the year that meet the restriction criteria.
Count Clause	sum(bal.run_amount)
Valid Restrictions	Balance Name, User Person Type, Primary Flag, Assignment Status Type
Valid Key Types	Absence Category, Absence Duration, Employee Category

22: THEORETICAL_WORKING_DAYS

Description	The sum of the theoretical working days balances for employees in the run year. This uses the Payroll Backfeed balances which should be populated from a third party payroll system. For a particular persons payroll run balances to be included they must meet all the restriction criteria on the processing date of the third party payroll run. The balances that constitute 'theoretical working days' should be entered as values for the Balance Name restriction. The key information is derived from the latest person and assignment records in the year that meet the restriction criteria.
-------------	---

Count Clause	sum(bal.run_amount)
Valid Restrictions	User Person Type, Primary Flag , Assignment Status Type, Balance Name
Valid Key Types	Employee Category

23: STUDENTS_HEADCOUNT

Description	The number of distinct employees who were students for at least seven consecutive days of the reporting year. The user person type or employment category restrictions should be used to define which employees are deemed to be 'students'. The key information is derived from the latest person and primary assignment records in the year that meet the restriction criteria.
Count Clause	count(distinct p.person_id)
Valid Restrictions	User Person Type, Assignment Status Type, Employment Category
Valid Key Types	Age, Gender, Employee Category

24: WORK_RELATED_DISABILITY

Description	The number of distinct employees on 31st March in the reporting year who have a work related disability record on 31st March. The COTOREP class and disability rate restrictions can be used to determine exactly which disability records should be considered in this calculation. Note, it is possible that a person has more than one work related disability record on the 31st March. If any of these meets the minimum inclusion parameters then the person is counted.
Count Clause	count(distinct p.person_id)

Valid Restrictions	User Person Type, Assignment Status Type, COTOREP Class, Disability Rate
Valid Key Types	None

2. Remuneration

30: ANNUAL_REMUNERATION

Description	The sum of `annual remuneration' balance run_amounts (as returned using the third party Payroll Backfeed system) for employees who are processed in payroll runs during the reporting year. On the processing date of the payroll run the employee must exist as an employee in the establishment or company and meet other restrictions you may have chosen. The balances that constitute `annual remuneration' should be entered as values for the Balance Name. The key information is derived from the latest person and assignment records in the year that meet the restriction criteria
Count Clause	sum(bal.run_amount)count(distinct p.person_id)
Valid Restrictions	User Person Type, Primary Flag, Assignment Status Type, Balance Name
Valid Key Types	CAGR, Gender, Employee Category

31: MONTHLY_REMUNERATION

Description	The sum of `remuneration' balance run_amounts (as returned using the third party Payroll Backfeed system) for employees who are processed in payroll runs in each month during the reporting year. On the processing date of the payroll run the employee must exist as an employee in the establishment or company and meet other restrictions you may have chosen. The balances that constitute `remuneration' should be entered as values for the Balance Name. The key information is derived from the latest person and assignment records in each month in the reporting year that meet the restriction criteria.
Count Clause	sum(bal.run_amount)count(distinct p.person_id)
Valid Restrictions	User Person Type, Primary Flag, Assignment Status Type, Balance Name
Valid Key Types	Gender, Employee Category, Month

32: DECEMBER_REMUNERATION

Description	The sum of `remuneration' balance run_amounts (as returned using the third party Payroll Backfeed system) for employees who are processed in a December payroll runs in the reporting year. On the processing date of the payroll run the employee must exist as an employee in the establishment or company and meet other restrictions you may have chosen. The balances that constitute `remuneration' should be entered as values for the Balance Name. The key information is derived from the latest person and assignment records in each month in the reporting year that meet the restriction criteria.
-------------	--

Count Clause	sum(bal.run_amount)count(distinct p. person_id)
Valid Restrictions	User Person Type, Primary Flag, Assignment Status Type, Balance Name
Valid Key Types	CAGR, Gender, Employee Category

33: ANNUAL_NON_MONTHLY_BONUSES

Description	The sum of `annual non monthly bonus' balance run_amounts (as returned using the third party Payroll Backfeed system) for employees who are processed in payroll runs during the reporting year. On the processing date of the payroll run the employee must exist as an employee in the establishment or company and meet other restrictions you may have chosen. The balances that constitute `annual non monthly bonus' should be entered as values for the Balance Name. The key information is derived from the latest person and assignment records in the year that meet the restriction criteria.
Count Clause	sum(bal.run_amount) count(distinct p. person_id)
Valid Restrictions	User Person Type, Primary Flag, Assignment Status Type, Balance Name
Valid Key Types	CAGR, Gender, Employee Category

34: 10_HIGHEST_REMUNERATION

Description	The 10 highest remuneration balances for people who are processed in third party payroll runs during the reporting year and who have third party `remuneration' Backfeed balances. On the processing date of the payroll run the employee must exist as an employee in the establishment or company and meet other restrictions you may have chosen. The balances that constitute `remuneration' should be entered as values for the Balance Name. There is no key information for this calculation.
Count Clause	sum(bal.run_amount)
Valid Restrictions	User Person Type, Primary Flag, Assignment Status Type, Balance Name
Valid Key Types	None

35: HIGHEST_10_PC_RENUMERATION and 36: LOWEST_10_PC_RENUMERATION

Description	The highest or lowest 10% remuneration balances for people who are processed in third party payroll runs during the reporting year and who have third party `remuneration' Backfeed balances. On the processing date of the payroll run the employee must exist as an employee in the establishment or company and meet other restrictions you may have chosen. The balances that constitute `remuneration' should be entered as values for the Balance Name. There is no key information for this calculation.
Count Clause	sum(bal.run_amount)
Valid Restrictions	User Person Type, Primary Flag, Assignment Status Type, Balance Name
Valid Key Types	None

37: OUTPUT_BASED_RENUMERATION

Description	The sum of `output based remuneration' balance run_amounts (as returned using the third party Payroll Backfeed system) for employees who are processed in payroll runs during the reporting year. On the processing date of the payroll run the employee must exist as an employee in the establishment or company and meet other restrictions you may have chosen. The balances that constitute `output based remuneration' should be entered as values for the Balance Name. The key information is derived from the latest person and assignment records in the year that meet the restriction criteria.
Count Clause	sum(bal.run_amount)count(distinct p.person_id)
Valid Restrictions	User Person Type, Primary Flag, Assignment Status Type, Balance Name
Valid Key Types	Employee Category

38: TIME_BASED_RENUMERATION

Description	The sum of `time based remuneration' balance run_amounts (as returned using the third party Payroll Backfeed system) for employees who are processed in payroll runs during the reporting year. On the processing date of the payroll run the employee must exist as an employee in the establishment or company and meet other restrictions you may have chosen. The balances that constitute `time based remuneration' should be entered as values for the Balance Name. The key information is derived from the latest person and assignment records in the year that meet the restriction criteria.
Count Clause	sum(bal.run_amount)count(distinct p.person_id)

Valid Restrictions	User Person Type, Primary Flag, Assignment Status Type, Balance Name
--------------------	--

Valid Key Types	Employee Category
-----------------	-------------------

39: EMPLOYER_COST

Description	The sum of costs to the employer of all remuneration, social charges etc. that are returned in balance run_amounts (as returned using the third party Payroll Backfeed system) for employees who are processed in payroll runs during the reporting year. On the processing date of the payroll run the employee must exist as an employee in the establishment or company and meet other restrictions you may have chosen. The balances that constitute 'employer costs' should be entered as values for the Balance Name. There is no key information for this calculation.
-------------	---

Count Clause	sum(bal.run_amount)
--------------	---------------------

Valid Restrictions	User Person Type, Primary Flag, Assignment Status Type, Balance Name
--------------------	--

Valid Key Types	None
-----------------	------

40: REMUNERATION_BREAKDOWN

Description	The count of distinct employees group by the level of their `annual remuneration' balance run_amounts (as returned using the third party Payroll Backfeed system) for employees who are processed in payroll runs during the reporting year. This calculation offers the ability to group the individuals annual remuneration in predefined remuneration bands. These bands should be specified in a user defined table which is referenced in the REMUNERATION_BAND key type. On the processing date of the payroll run the employee must exist as an employee in the establishment or company and meet other restrictions you may have chosen. The balances that constitute `annual remuneration' should be entered as values for the Balance Name. The key information is derived from the latest person and assignment records in the year that meet the restriction criteria.
Count Clause	count(distinct p.person_id)
Valid Restrictions	User Person Type, Primary Flag, Assignment Status Type, Balance Name
Valid Key Types	Employee Category REMUNERATION_BAND

50: WORK_ACCIDENTS_ABSENCE

Description	The number of work accidents that happened during the reporting year and which resulted in an absence. This is derived from the Work Accidents person extra information type where the `Absence Incurred' flag is set to `Y'. The set of employees processed is determined by the restrictions chosen. The key information is derived from the latest person and primary assignment records in the year that meet the restriction criteria.
-------------	---

Count Clause	count(*)
Valid Restrictions	User Person Type, Assignment Status Type, Work Accident Type, Work Accident Code
Valid Key Types	Employee Category

51: WORK_ACCIDENTS_ABSENCE_DAYS

Description	The sum of `work accident absence days' balance run_amounts (as returned using the third party Payroll Backfeed system) for employees who are processed in payroll runs during the reporting year. On the processing date of the payroll run the employee must exist as an employee in the establishment or company and meet other restrictions you may have chosen. The balances that constitute `work accident absence days' should be entered as values for the Balance Name. The key information is derived from the latest person and assignment records in the year that meet the restriction criteria.
Count Clause	sum(bal.run_amount)
Valid Restrictions	Balance Name (Absence Type), User Person Type, Primary Flag, Assignment Status Type
Valid Key Types	Employee Category

52: TRAVEL_ACCIDENTS_ABSENCE

Description	The number of travel accidents that happened during the reporting year and that resulted in an absence. This is derived from the Work Accidents person extra information type where the 'Absence Incurred' flag is set to 'Y'. The set of employees processed is determined by the restrictions chosen. The key information is derived from the latest person and primary assignment records in the year that meet the restriction criteria.
Count Clause	count(*)
Valid Restrictions	Work Accident Type, Work Accident Code, User Person Type, Assignment Status Type
Valid Key Types	Employee Category

53: FATAL_ACCIDENTS

Description	The number of fatal accidents during the reporting year. This is derived from the Work Accidents person extra information type. The set of employees processed is determined by the restrictions chosen. The key information is derived from the latest person and primary assignment records in the year that meet the restriction criteria.
Count Clause	count(*)
Valid Restrictions	Work Accident Type, Work Accident Code, Work Accident Result, User Person Type, Assignment Status Type
Valid Key Types	Seniority

54: INCAPACITY_ACCIDENTS

Description	The number of distinct employees who had a work accident that started during the reporting year, which resulted in incapacity. The set of employees processed is determined by the restrictions chosen. The key information is derived from the latest person and primary assignment records in the year that meet the restriction criteria.
Count Clause	count(distinct p.person_id)
Valid Restrictions	Work Accident Type, Work Accident Result, User Person Type, Assignment Status Type
Valid Key Types	Nationality

55: TEMP_EMPLOYEE_ACCIDENT

Description	The number of accidents that started during the reporting year. This is derived from the Work Accidents person extra information type. The restrictions can be used to derive the number of accidents for temporary employees. The set of employees processed is determined by the restrictions chosen. There is no key information for this calculation.
Count Clause	count(*)
Valid Restrictions	Work Accident Type, Work Accident Code, User Person Type, Assignment Status Type
Valid Key Types	None

56: WORK_ACCIDENTS

Description	The number work accidents that started during the reporting year. This is derived from the Work Accidents person extra information type. The set of employees processed is determined by the restrictions chosen. The key information is derived from the latest person and primary assignment records in the year that meet the restriction criteria.
Count Clause	count(*)
Valid Restrictions	Work Accident Type, Work Accident Code, User Person Type, Assignment Status Type
Valid Key Types	Seniority

57: PROFESSIONAL_ILLNESS

Description	The number of incidents of professional illness that started during the reporting year. This is derived from the Work Accidents person extra information type. The specific illnesses to be included should be entered in the Work Accident Type restriction. The set of employees processed is determined by the restrictions chosen. The key information is derived from the latest person and primary assignment records in the year that meet the restriction criteria.
Count Clause	count(*)
Valid Restrictions	Work Accident Type, User Person Type, Assignment Status Type
Valid Key Types	Illness Type

58: PATHOLOGICAL_ILLNESS

Description	The number of incidents of pathological illness that started during the reporting year. This is derived from the Work Accidents person extra information type. The specific illnesses to be included should be entered in the Work Accident Type restriction. The set of employees processed is determined by the restrictions chosen. The key information is derived from the latest person and primary assignment records in the year that meet the restriction criteria.
Count Clause	count(*)
Valid Restrictions	Work Accident Type, User Person Type, Assignment Status Type
Valid Key Types	Illness Type

4. Other Working Conditions

60: TOTAL_WORKING_TIME

Description	The sum of working time and number of weeks balance run_amounts (as returned using the third party Payroll Backfeed system) for employees who are processed in payroll runs during the reporting year. On the processing date of the payroll run the employee must exist as an employee in the establishment or company and meet other restrictions you may have chosen. The balances that constitute `working time` and `number of weeks worked` should be entered as values for the Time Balance Name and Weeks Worked Balance Name respectively. The key information is derived from the latest person and assignment records in the year that meet the restriction criteria.
-------------	--

Count Clause	sum(time.run_amount)sum(weeks. run_amount)
Valid Restrictions	User Person Type, Primary Flag, Assignment Status Type, Time Balance Name, Weeks Worked Balance Name
Valid Key Types	Employee Category

61: EXTRA_TIME_FOR_OVERTIME

Description	The number of distinct employees who have an `extra time for overtime' balance run_amount (as returned using the third party Payroll Backfeed system) that is processed in a payroll run during the reporting year. On the processing date of the payroll run the employee must exist as an employee in the establishment or company and meet other restrictions you may have chosen. The balances that constitute `extra time for overtime' should be entered as values for the Balance Name restriction. The key information is derived from the latest person and assignment records in the year that meet the restriction criteria.
Count Clause	count(distinct p.person_id)
Valid Restrictions	User Person Type, Primary Flag, Assignment Status Type, Balance Name
Valid Key Types	Employee Category

62: INDIVIDUAL_WORK_PATTERN

Description	The number of distinct employees on a particular work pattern on 31/12 in the reporting year. The specific work patterns to be used should be specified in the Work Pattern restriction. The set of employees processed is determined by the restrictions chosen. There is no key information for this calculation.
Count Clause	count(distinct p.person_id)
Valid Restrictions	User Person Type, Primary Flag, Assignment Status Type, Work Pattern
Valid Key Types	None

63: PART_TIMERS

Description	The number of distinct employees who work part time as of the 31/12 in the reporting year. The Normal Working Hours or Employment Category restrictions should be used to determine those employees who are deemed to work 'part time'. The set of employees processed is determined by the restrictions chosen. The key information is derived from the person and assignment records on the 31/12 of the reporting year.
Count Clause	count(*)
Valid Restrictions	User Person Type, Assignment Status Type, Normal Working Hours, Employment Category
Valid Key Types	Employee Category, Part Time Hours Band

64: TWO_DAYS_OFF

Description	The number of distinct employees working throughout the reporting year on a schedule that provides for two consecutive days off. This will be derived from the employee's work pattern, the specific work patterns that provide for this should be specified in the Work Pattern restriction. The set of employees processed is determined by the restrictions chosen. The key information is derived from the latest person and primary assignment records in the year that meet the restriction criteria. Note, this calculation will only process primary assignments.
Count Clause	count(distinct p.person_id)
Valid Restrictions	User Person Type, Assignment Status Type, Work Pattern, Employment Category
Valid Key Types	Employee Category

65: TOTAL_VACATION_DAYS

Description	The sum of 'total vacation days' balance run_amounts (as returned using the third party Payroll Backfeed system) for employees who are processed in payroll runs during the reporting year. On the processing date of the payroll run the employee must exist as an employee in the establishment or company and meet other restrictions you may have chosen. The balances that constitute 'total vacation days' should be entered as values for the Balance Name. The key information is derived from the latest person and assignment records in the year that meet the restriction criteria.
Count Clause	sum(bal.run_amount)count(distinct p.person_id)

Valid Restrictions	User Person Type, Primary Flag, Assignment Status Type, Vacation Balance Name
--------------------	---

Valid Key Types	Employee Category
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66: PAID_PUBLIC_HOLIDAY

Description	The sum of `paid public holidays' balance run_amounts (as returned using the third party Payroll Backfeed system) for employees who are processed in payroll runs during the reporting year. On the processing date of the payroll run the employee must exist as an employee in the establishment or company and meet other restrictions you may have chosen. The balances that constitute `paid public holidays' should be entered as values for the Balance Name. The key information is derived from the latest person and assignment records in the year that meet the restriction criteria.
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Count Clause	sum(bal.run_amount)
--------------	---------------------

Valid Restrictions	User Person Type, Primary Flag, Assignment Status Type, Balance Name
--------------------	--

Valid Key Types	Employee Category
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67: CLINICAL_EXAMINATIONS

Description	The number of clinical examinations that started during the reporting year. This is derived from the Medical Examination person extra information type. The set of employees processed is determined by the restrictions chosen. The key information is derived from the latest person and assignment records in the year that meet the restriction criteria.
-------------	---

Count Clause	count(*)
--------------	----------

Valid Restrictions	User Person Type, Primary Flag, Assignment Status Type, Medical Examination Type
--------------------	--

Valid Key Types	Medical Examination Type
-----------------	--------------------------

68: DECLARED_UNFIT

Description	The number of distinct employees declared permanently unfit for their occupation by the company physician during the reporting year. This is derived from the Medical Examination person extra information type. The specific medical result corresponding to 'declared permanently unfit' should be entered in the Medical Examination Result restriction. The set of employees processed is determined by the restrictions chosen. The key information is derived from the latest person and assignment records in the year that meet the restriction criteria.
-------------	---

Count Clause	count(distinct p.person_id)
--------------	-----------------------------

Valid Restrictions	User Person Type, Primary Flag, Assignment Status Type, Medical Examination Type, Medical Examination Result
--------------------	--

Valid Key Types	Medical Examination Type
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69: REASSIGNMENTS_UNFIT

Description	The number of distinct employees who have been reassigned in the reporting year as a result of having been declared unfit for their current assignment. This uses the assignment start reason restriction to determine whether such a change in assignment has taken place. It is limited to primary assignments only. The set of employees processed is determined by the restrictions chosen. There is no key information for this calculation.
-------------	---

Count Clause	count(distinct p.person_id)
Valid Restrictions	User Person Type, Primary Flag, Assignment Status Type, Assignment Start Reason
Valid Key Types	None

70: SHIFT_WORK

Description	The number of distinct employees working on a shift basis on 31/12 in the reporting year. This can either be derived from the employee's work pattern (specified in the FR Statutory Information, the specific work patterns that provide for this should be specified in the Work Pattern restriction) or from the employment category. The set of employees processed is determined by the restrictions chosen. The key information is derived from the person and assignment records on the 31/12 of the reporting year.
Count Clause	count(distinct person_id)
Valid Restrictions	User Person Type, Assignment Status Type, Employment Category, Work Pattern
Valid Key Types	Employee Category

71: SHIFT_WORK_OVER_50

Description	The number of distinct employees over the age of 50 working on a shift basis on 31/12 in the reporting year. This can either be derived from the employee's work pattern, the specific work patterns that provide for this should be specified in the Work Pattern restriction, or from the employment category. The set of employees processed is determined by the restrictions chosen. The key information is derived from the person and assignment records on the 31/12 of the reporting year.
Count Clause	count(distinct(person_id))
Valid Restrictions	User Person Type, Assignment Status Type, Employment Category, Work Pattern
Valid Key Types	Employee Category

72: NIGHT_SHIFT_WORK

Description	The number of distinct employees working on a night shift basis on 31/12 in the reporting year. This can either be derived from the employee's work pattern, the specific work patterns that provide for this should be specified in the Work Pattern restriction, or from the employment category. The set of employees processed is determined by the restrictions chosen. The key information is derived from the person and assignment records on the 31/12 of the reporting year.
Count Clause	count(distinct(person_id))
Valid Restrictions	User Person Type, Assignment Status Type, Employment Category, Work Pattern
Valid Key Types	Employee Category

5 Professional Relations

90: REPRESENTATION

Description	Number of distinct employees at the end of the reporting year who are representatives on works bodies. The specific type of Representation can be entered using the restriction. The key information is derived from the person and assignment records on the 31/12 of the reporting year.
Count Clause	count(*)
Valid Restrictions	User Person Type, Assignment Status Type, Representative Type
Valid Key Types	Establishment, Representation Body

91: REPRESENTATION_HOURS_CREDIT

Description	Number of hours credit for employees at the end of the reporting year who are representatives on works' bodies. The specific type of Representation can be entered using the restriction. There is no key information for this calculation.
Count Clause	sum(Hours for Duties)
Valid Restrictions	User Person Type, Assignment Status Type, Representative Type
Valid Key Types	None

Components of the Bilan Social - Count Clause

The Count Clause defines the method by which the value is retrieved. It can contain any SQL operator that is effective within a group by statement, for example COUNT, SUM, AVG, MIN, MAX.

The following describes the different Count Clauses that are used by the supplied item

types:

- **count(*)**
Count all the records that the Where Clause has selected.
- **count(distinct p.person_id)**
Count all the distinct records that the Where Clause has selected.
- **count(p.person_id)**
Count all the person_id records that the Where Clause has selected.
- **sum(bal.run_amount)**
Sum the balance run amounts that the Where Clause has selected.
- **sum(balances.time_amount)**
Sum the balance time amounts that the Where Clause has selected.
- **sum(balances.weeks_amount)**
Sum the balance weeks amounts that the Where Clause has selected.
- **sum(ceil(pos.actual_termination_date - pos.date_start))**
Sum the days between actual_termination_date and date_start that the Where Clause has selected.
- **sum(decode(nvl(abt.hours_or_days,'D'),'D',1,'H',0.175) * bal.run_amount)**
Sum the balance run amounts multiplied by the number of days that the Where Clause has selected
- **sum(to_number(pex.pei_information8)*decode(pex.pei_information9,'Y',1,'M',12,'W',52,'D',200,'H',1600)))**
Sum the hours for duties (value in pei_information8 for the extra information person type FR_REPRESENTATIVE) multiplied by number appropriate to the frequency chosen, that the Where Clause has selected.

Components of the Bilan Social - Key Types

Key Types are used to categorize the data that is retrieved by the Bilan Social Report process into certain groups, for example, gender, nationality or age band.

The Bilan Social key types can be categorized into six distinct groups:

Database Value

This category of key type simply returns the value held in a database column.

Evaluation

This category of key types uses the value held in a database column and performs a simple operation on it, such as a decode.

Lookup

This category of key types retrieves a value held in a database column. It uses this value to identify a record in the FND_COMMON_LOOKUPS table using a Lookup type specified in the definition of the key type. If such a record is found then the Lookup code is returned as the key value, otherwise the value 'GSP_OTHER' is returned. This can be interpreted in reporting tools, such as Oracle Discoverer.

This category of key is built using the hr_summary_util.get_lookup_values function which has the following specification.

```
hr_summary_util.get_lookup_values(lookup_type  
  
                                ,lookup_code_derivation  
  
                                , 'key_type_id')
```

For example:

```
hr_summary_util.get_lookup_values('ABSENCE_CATEGORY'  
  
                                , 'abt.absence_category'  
  
                                ,key_type_id)
```

Alternative Lookup

This category of key type retrieves a value held in a database column, it uses this value to identify a row in a user defined table. The table is specified in the definition of the key type. The definition also contains the name of a user defined column. The column instance value for the column/row combination will be returned as the key value.

For example, consider the following FR_EMPLOYEE_CATEGORY user defined table for employee categories

Field	Lookup
CADRE	Cadre
OUVRIER	Ouvrier
AGENT DE MAITRISE	Cadre
TECHNICIEN	Ouvrier

When an assignment is processed the employee category value will be retrieved and translated using the above tables values.

This category of key type is built using the `hr_summary_util.get_alternate_values` function which has the following specification.

```
hr_summary_util.get_alternate_values(user_defined_table_name  
  
                                   ,user_defined_column_name  
  
                                   ,row_value_derivation  
  
                                   , 'key_type_id')
```

For example:

```
hr_summary_util.get_alternate_values('FR_EMPLOYEE_CATEGORY'  
  
                                   , 'BS_EMP_CAT'  
  
                                   , 'scl.segment2'  
  
                                   ,key_type_id)
```

User Defined Band Table

This category of key type derives a numeric value from data held in the database, this value is then compared with low and high value ranges defined in a user defined table to find a row in which the value lies. The name of this row will be returned as the key value. The user defined table and the columns are specified in the definition of the key.

For instance, consider the following BS_AGE_BAND user defined table for age bands:

Field	Field	Lookup
Below 25	0	24
25-35	25	34
35-50	35	49
Over 50	50	1000000

When a person is processed their age is calculated. This is then compared to the above table in order to determine the age band in which they lie.

Note: In a band table the high value of the highest band should contain

a sufficiently large number to cover all possible values.

This category of key type is built using the `hr_summary_util.get_band_values` function which has the following specification.

```
hr_summary_util.get_band_values(user_defined_table_name  
  
                                ,low_value column_name  
  
                                ,high_value column_name  
  
                                ,row_value_derivation  
  
                                , 'key_type_id' )
```

For example:

```
hr_summary_util.get_band_values('BS_AGE_BAND'  
  
                                , 'Low Value'  
  
                                , 'High Value'  
  
'trunc(months_between(P_END_OF_YEAR,p.date_of_birth)/12) '  
  
                                ,key_type_id)
```

CAGR Specific

This category of key type is specific to collectively agreed grades. A collectively agreed grade structure ID (ID_FLEX_NUM) is retrieved from each assignment processed. This is then used to identify a row in a user defined table. The user defined table to use is specified in the definition of the key type along with the name of a user defined column. The values in this column should identify the segments of the collectively agreed grade structure which should be returned in the key value.

For example, consider the following BS_CAGR_GRADES user defined table for collectively agreed grade structures.

Field	Lookup
50001	SEGMENT1
50002	SEGMENT3
50003	SEGMENT1,SEGMENT2

Field	Lookup
50004	SEGMENT2,SEGMENT3,SEGMENT4

When an assignment is processed the ID_FLEX_NUM of its collectively agreed grade structure is retrieved. This is used to identify a specific row in the above table. The Segment column value determines which data is retrieved into the key value. In addition the ID_FLEX_NUM and the name of the structure are appended to the key value, for example:

50001 Syntec : Cadre II 270

This category of key type is built using the hr_summary_util.get_cagr_values function which has the following specification.

```
hr_summary_util.get_cagr_values('key_type_id'
                                ,cagr_structure_id_derivation
                                ,user_defined_table_name
                                ,user_defined_column_name)
```

For example:

```
hr_summary_util.get_cagr_values(key_type_id
                                , 'a.cagr_id_flex_num'
                                , 'BS_CAGR_GRADES'
                                , 'Segment Name')
```

Key Type Design

The key types delivered as part of the Bilan Social are described below.

Name	Type	Description
ABSENCE_CATEGORY	Lookup	This key retrieves data from the absence category column in the absence type table for each absence processed.

Name	Type	Description
ABSENCE_DURATION	User Defined Band Table	This key evaluates the number of days for each absence processed and then finds the corresponding absence duration band from the user defined table BS_ABSENCE_DURATION_BAND.
AGE	User Defined Band Table	This key evaluates the age of each person processed and then finds the corresponding age band from the user defined table BS_AGE_BAND.
AGE_LESS_THAN_25	Evaluation	This key evaluates the age of each person processed and then determines whether they are less than 25 years old or not.
CAGR	CAGR specific	This key identifies the collectively agreed grade structure used by each assignment processed and attempts to find a corresponding row in the user defined table BS_CAGR_GRADES. If such a row is found the value in the column 'Segment Name' is used to determine which of the Collectively Agreed Grades Flexfield segments should be returned in the key.
CONTRACT_CATEGORY	Lookup	This key retrieves the contract category (PER_CONTRACTS_F. CTR_INFORMATION2) for each contract processed.

Name	Type	Description
CONTRACT_TYPE	Lookup	This key retrieves the contract type for each contract processed.
EMPLOYEE_CATEGORY	Alternative Lookup	This key retrieves the employee category (HR_SOFT_CODING_KEYFL EX.SEGMENT2) for each assignment processed and then attempts to find a corresponding row in the user defined table FR_EMPLOYEE_CATEGORY . If such a row is found the value in the BS_EMP_CAT column is returned.
ESTABLISHMENT	Database Value	This key returns the Establishment ID for each assignment processed.
GENDER	Lookup	This key returns the gender of each person processed.
ILLNESS_TYPE	Lookup	This key returns the illness type (PER_PEOPLE_EXTRA_INFO .PEI_INFORMATION6) for each Work Accident record (Person Extra Information) processed.
LEAVING_REASON	Lookup	This key evaluates whether each assignment processed is in fact the last assignment in a period of service. If it is then the leaving reason is derived from the period of service (PER_PERIODS_OF_SERVIC E.PDS_INFORMATION2), otherwise it is derived from the assignment (HR_SOFT_CODING_KEYFL EX.SEGMENT4).

Name	Type	Description
MEDICAL_EXAMINATION_TYPE	Alternative Lookup	This key retrieves the medical examination type (PER_PEOPLE_EXTRA_INFO.PEI_INFORMATION2) for each Medical Examination record (Person Extra Information) processed and then attempts to find a corresponding row in the user defined table FR_MEDICAL_EXAMINATION_TYPE. If such a row is found the value in the BS_MEDICAL_EXAMINATION_TYPE column is returned.
MONTH	Database Value	This key returns the number of the month (eg. Jan = 01, Feb = 02 etc.) for each month processed.
NATIONALITY	Alternative Lookup	This key retrieves the nationality for each person processed and then attempts to find a corresponding row in the user defined table NATIONALITY. If such a row is found the value in the BS_NATIONALITY column is returned.
PART_TIME_HOURS_BAND	User Defined Band Table	This key retrieves the normal working hours for each assignment processed and then finds the corresponding part time hours band from the user defined table BS_PART_TIME_HOURS_BAND.

Name	Type	Description
REMUNERATION_BAND	User Defined Band Table	This key retrieves the summed annual remuneration for each person processed and then finds the corresponding remuneration band from the user defined table BS_REMUNERATION_BAND.
REPRESENTATION_BODY	Database Value	This key returns the representation body (PER_PEOPLE_EXTRA_INFO.PEI_INFORMATION2) for each Representation record (Person Extra Information) processed.
SEASONAL_WORKER	Evaluation	This key evaluates whether the contract type has a value of 'SEASONAL', if so it returns 'Y' otherwise 'N'.
SENIORITY	User Defined Band Table	This key retrieves the length of service in whole years at the end of the reporting year for each person processed and then finds the corresponding seniority band from the user defined table BS_SENIORITY_BAND.
WORK_ACCIDENT_CODE	Database Value	This key returns the work accident code (PER_PEOPLE_EXTRA_INFO.PEI_INFORMATION2) for each Work Accident record (Person Extra Information) processed.

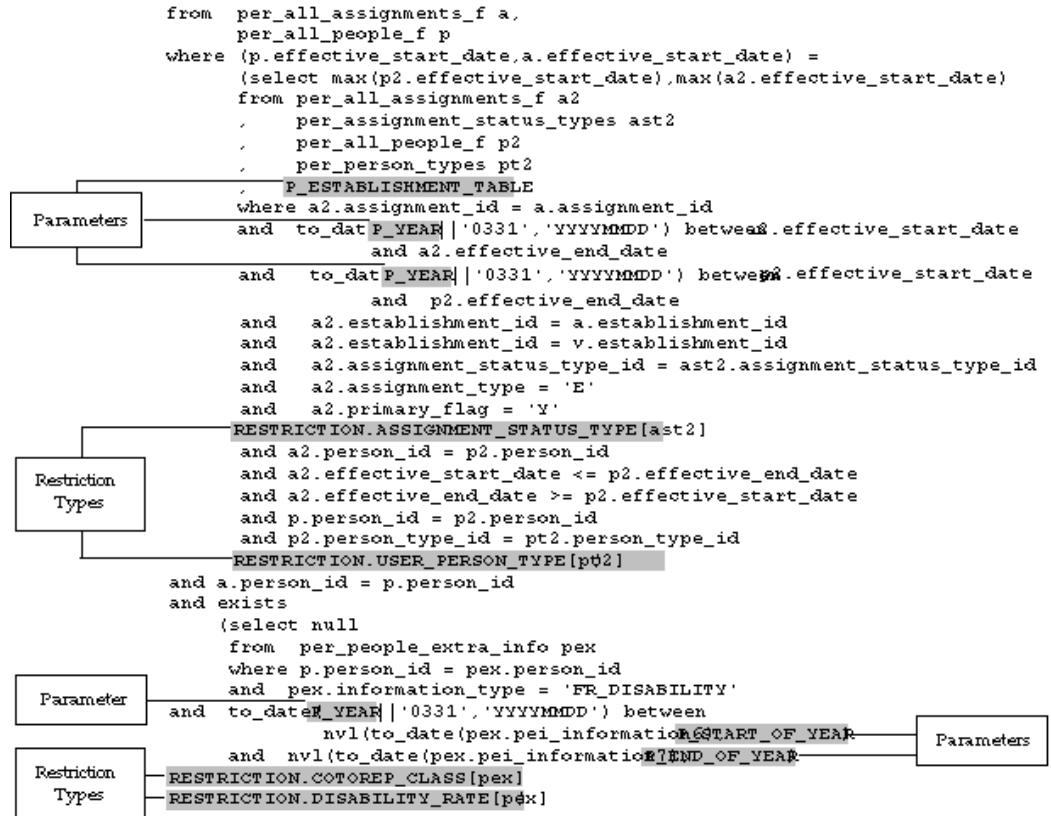
Components of the Bilan Social - Where Clause

In order to offer flexibility within the SQL statements the Where Clause may contain one or more tokens which will be replaced at run time, these fall into two categories,

parameters and restriction types, described later in this section.

The following is an example of a Where Clause with the tokens highlighted.

Example of a Where Clause



Parameters

Parameters are variables that may be embedded in an item type's Where Clause that will be substituted based on the values entered into the Parameter window when submitting the Bilan Social Report process.

The following parameters are currently supported:

- P_BUSINESS_GROUP_ID
Replaced with the value of the BUSINESS_GROUP_ID
- P_YEAR
Replaced with the value entered into the parameter form

- P_START_OF_YEAR
Replaced with to_date ('YEAR0101','YYYYMMDD') where YEAR is the value entered into the P_YEAR parameter
- P_END_OF_YEAR
Replaced with to_date ('YEAR1231','YYYYMMDD') where YEAR is the value entered into the P_YEAR parameter
- P_COMPANY_ID
Replaced with the ORGANIZATION_ID of the company selected in the parameter form
- P_ESTABLISHMENT_ID
Replaced with the ORGANIZATION_ID of the establishment selected in the parameter form
- P_ESTABLISHMENT_LIST
Replaced with value in P_ESTABLISHMENT_ID if this is not null otherwise it is replaced with a list of ORGANIZATION_IDs of the form (1001,1002,1003) where the contents are the IDs of those establishments in the selected company.
- P_ESTABLISHMENT_TABLE
Replaced with in-line view that retrieves the establishment if not null, or the set of establishments in the selected company. For example,

```
FR_00001145(select 1001 establishment_id from dual union  
  
FR_00001146select 1002 establishment_id from dual) v
```

Restrictions

Restrictions take the form:

- RESTRICTION.RESTRICTION_NAME[TABLE_ALIAS]

These are replaced when the Bilan Social Report process is run by referring to the restriction types defined in the Setup window.

The RESTRICTION_NAME is used to identify a particular restriction type. The value in its RESTRICTION_CLAUSE column is then appended to the TABLE_ALIAS value to build a string of the form "ast.assignment_status_type".

When an item type is used in a template it may make use of restrictions that are enabled for the item type. In this case an operator and one or more values will be defined as part of the restriction usage. When the item type is processed these values will be used to build up the final restriction clause.

For example, the ASSIGNMENT_STATUS_TYPE restriction may have an operator of 'IN' and some values of 'ACTIVE_ASSIGN' and 'SUSP_ASSIGN' defined. In this case the restriction line ,

```
FR_00001147RESTRICTION.ASSIGNMENT_STATUS_TYPE[ast2]
```

which was entered in an item type's Where Clause would result in the following clause

```
FR_00001148and ast.assignment_status_type in ('ACTIVE_ASSIGN', 'SUSP_ASSIGN').
```

It should be noted that 'and' is appended at the front of the clause.

In addition, if a restriction that is available in the item type Where Clause is not actually used in the template then the processed item will replace it with a NULL value, thereby ignoring the restriction entirely.

Restriction Types

The restriction types delivered as part of the Bilan Social are described below.

Name	Table/View	Column
ASSIGNMENT_START_REASON	hr_soft_coding_keyflex	segment3
ASSIGNMENT_STATUS_TYPE	per_assignment_status_types	per_system_status
BALANCE_NAME	per_bf_balances	balance_name
CONTRACT_CATEGORY	per_contracts_f	ctr_information2
CONTRACT_TYPE	per_contracts_f	type
COTOREP_CLASS	per_people_extra_info	pei_information4
DISABILITY_RATE	per_people_extra_info	pei_information3
EMPLOYMENT_CATEGORY	per_all_assignments_f	employment_category
MEDICAL_EXAMINATION_RESULT	per_people_extra_info	pei_information5

Name	Table/View	Column
MEDICAL_EXAMINATION_TYPE	per_people_extra_info	pei_information2
MINIMUM_EMP_CATEGORY_LEVEL	pay_user_column_instances_f	value
NORMAL_WORKING_HOURS	per_all_assignments_f	normal_hours
PRIMARY_FLAG	per_all_assignments_f	primary_flag
REPRESENTATIVE_TYPE	per_people_extra_info	pei_information1
TIME_BALANCE_NAME	per_bf_balances	balance_name
USER_PERSON_TYPE	per_person_types	user_person_type
WEEKS_WORKED_BALANCE_NAME	per_bf_balances	balance_name
WORK_ACCIDENT_CODE	per_people_extra_info	pei_information2
WORK_ACCIDENT_RESULT	per_people_extra_info	pei_information7
WORK_ACCIDENT_TYPE	per_people_extra_info	pei_information1
WORK_PATTERN	hr_soft_coding_keyflex	segment5

Reviewing and Modifying Calculations

Over 70 item types have been supplied as part of Oracle HR for France. If these do not satisfy the requirements of your enterprise then you must produce new item types, and if necessary the key types and restriction types to be included in the item type, that fulfill your needs.

Important: You will not be able to amend any of the delivered item types, key types, or restriction types, or the contents of the example template. The names of these objects are reserved and their contents may be modified in a future release.

To produce new item types you can either copy an existing item type and amend it, or create a new one. Key and restriction types must be created as new records. You create and copy calculation components in the Setup Window. Before you can create your new or copied component you must create a new value for the relevant Lookup type in the Lookups window.

Calculation Lookup Types

Field	Lookup
Item Type	GSP_ITEM_TYPE
Key Type	GSP_KEY_TYPE
Restriction Type	GSP_RESTRICTION_TYPE

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

The Bilan Social Template

The template groups together all the item types that will be used when the Bilan Social Report process is run. It also defines the key types and restriction types that will apply for each item type. There is no limit to the amount of data items you can include in one template. Once the template is constructed you can use it as many times as you require, for example, you could use the same template successive years.

Tip: Consider creating a template for each of the sections on the Bilan Social. This would keep the processing of the templates down to a more manageable size.

A template called Example Template has been supplied as part of Oracle HR for France. This groups together all the supplied item types and retrieves all the required data to populate the supplied Discoverer workbooks.

Important: You must not amend or delete the supplied template.

In order to amend the example template you must first make a copy of it and then you will be permitted to amend the copy. You can also copy individual item types from one template to another.

User Defined Tables Used by the Bilan Social

This set of user defined tables is supplied as part of Oracle HR for France and are used by the Bilan Social Report process. These user defined tables fall into three categories:

- Alternate Values for Lookup Codes
- Ranges of Values
- CAGR Specific

For information on how to maintain these tables, see: *Updating User Defined Tables, Oracle HRMS Configuring, Reporting, and System Administration Guide*

Alternate Values for Lookup Codes

This set of user defined tables are used to convert a Lookup code within a particular Lookup type into an alternative value.

Table	Column	Description
FR_EMPLOYEE_CATEGORY	BS_EMP_CAT	This is used to determine the Employee Category key values. The Bilan Social process establishes the employee category of assignments processed, it then finds a corresponding row in the FR_EMPLOYEE_CATEGORY table and returns the value from the BS_EMP_CAT column. This table and column will be delivered as part of a post-install step however the column values must be entered manually.

Table	Column	Description
FR_EMPLOYEE_CATEGORY	BS_EMP_CAT_HIERARCHY	<p>This is used to determine the relative levels of Employee Category for use in the Promotion Item Type. For instance a move between a category of <i>Cadre</i> to one of <i>Ouvrier</i> may be considered to be a promotion. The Bilan Social process establishes the employee category of assignments processed, it then finds a corresponding row in the FR_EMPLOYEE_CATEGORY table and returns the value from the BS_EMP_CAT_HIERARCHY column. This value should be a number indicating the relative level of the employee categories, with 1 being the highest level.</p>
FR_MEDICAL_EXAMINATION_TYPE	BS_MEDICAL_EXAMINATION_TYPE	<p>This is used to determine the Medical Examination Type key values.</p> <p>The Bilan Social process establishes the medical examination type from a person's medical examination record, it then finds a corresponding row in the FR_MEDICAL_EXAMINATION_TYPE table and returns the value from the BS_MEDICAL_EXAMINATION_TYPE column.</p> <p>This table and column will be delivered as part of a post-install step however the column values must be entered manually</p>

Table	Column	Description
NATIONALITY	BS_NATIONALITY	<p>This is used to determine the Nationality key values.</p> <p>The Bilan Social process establishes the nationality from people processed, it then finds a corresponding row in the FR_EMPLOYEE_CATEGORY table and returns the value from the BS_EMP_CAT column.</p> <p>This table and column will be delivered as part of a post-install step however the column values must be entered manually.</p>

Ranges of values

Each of these user defined tables defines a set of numeric ranges, each range is given a label which will be returned in a Bilan Social key value.

For example, the BS_AGE_BAND table might contain the following data.

Range	Low	High
Less than 25	0	24
25-40	25	39
40-60	40	59
Over 60	60	1000

Table	Columns	Description
BS_ABSENCE_DURATION_BAND	Low Value High Value	This is used in the Absence Duration key type. Each row represents an absence duration range. The ranges and their values should be entered in units of days. This table and column will be delivered as part of a post-install step however the column values must be entered manually.
BS_AGE_BAND	Low Value High Value	This is used in the Absence Duration key type. Each row represents an age range. The ranges and their values should be entered in units of years. This table and column will be delivered as part of a post-install step however the column values must be entered manually.
BS_PART_TIME_HOURS_BAND	Low Value High Value	This is used in the Absence Duration key type. Each row represents a part time hours range. The ranges and their values should be entered in units of hours. (It is assumed that all assignments use a common working hours frequency). This table and column will be delivered as part of a post-install step however the column values must be entered manually.

Table	Columns	Description
BS_REMUNERATION_BAND	Low Value High Value	This is used in the Absence Duration key type. Each row represents remuneration range. The ranges and their values should be entered in units of currency. This table and column will be delivered as part of a post-install step however the column values must be entered manually.
BS_SENIORITY_BAND	Low Value High Value	This is used in the Seniority key type. Each row represents a length of service range. The ranges and their values should be entered in units of years. This table and column will be delivered as part of a post-install step however the column values must be entered manually.

CAGR Specific

This user defined table defines which segments of a particular Collectively Agreed Grade Structure should be returned in a CAGR key value.

Table	Column	Description
BS_CAGR_GRADES	Segment Name	This is used in the CAGR key type. Each row value should be the ID_FLEX_NUM of a collectively agreed grade structure, the Segment Name value should comprise of the list of segments, delimited by a comma, that are required to be returned in a CAGR key value. This table and column will be delivered as part of a post-install step however the column values must be entered manually.

Use of Payroll Backfeed Data in Bilan Social Calculations

Description of an SQL Statement that Uses Payroll Backfeed Data

```

1 → select sum(bal.run_amount) col_value1
    from per_all_assignments_f a
    ,   per_all_people_f p
    ,   per_bal_balances bal
    ,   hr_soft_coding_keyflex scl
    ,   per_cagr_grades_def cagr_def
    where a.soft_coding_keyflex_id = scl.soft_coding_keyflex_id(+)
    and a.cagr_grade_def_id = cagr_def.cagr_grade_def_id(+)

    and (p.effective_start_date,a.effective_start_date) =
    (select
    max(p2.effective_start_date),max(a2.effective_start_date)
    from per_all_assignments_f a2
    ,   per_assignment_status_types ast2
    ,   per_all_people_f p2
    ,   per_person_types pt2
    where a2.assignment_id = a.assignment_id
    and P_END_OF_YEAR >= a2.effective_start_date
    and P_START_OF_YEAR <= a2.effective_end_date
    and P_END_OF_YEAR >= p2.effective_start_date
    and P_START_OF_YEAR <= p2.effective_end_date
    and a2.establishment_id = a.establishment_id
    and a2.establishment_id in p.establishment_list
    and a2.assignment_status_type_id =
ast2.assignment_status_type_id
    and a2.assignment_type = 'G'
    and a2.primary_flag = 'Y'
    RESTRICTION.EMPLOYMENT_CATEGORY{a2}
    RESTRICTION.ASSIGNMENT_STATUS_TYPE{ast2}
    and a2.person_id = p2.person_id
    and a2.effective_start_date <= p2.effective_end_date
    and a2.effective_end_date >= p2.effective_start_date
    and p2.person_id = p2.person_id
    and p2.person_type_id = pt2.person_type_id
    RESTRICTION.USER_PERSON_TYPE{pt2})
    and a.person_id = p.person_id

3 → and bal.assignment_id = a.assignment_id
    and bal.processing_date
    between P_START_OF_YEAR and P_END_OF_YEAR

    and bal.run_amount is not null
    and exists
    (select null
    from per_all_assignments_f a3
    ,   per_assignment_status_types ast3
    ,   per_all_people_f p3
    ,   per_person_types pt3
    where a3.assignment_id = a3.assignment_id
    and a3.assignment_status_type_id =
4 → ast3.assignment_status_type_id
    and a3.assignment_type = 'E'
    and a3.establishment_id in P_ESTABLISHMENT_LIST
    RESTRICTION.PRIMARY_FLAG{a3}
    RESTRICTION.ASSIGNMENT_STATUS_TYPE{ast3}
    and bal.processing_date between
    a3.effective_start_date and a3.effective_end_date
    and p3.person_id = p.person_id
    and p3.person_type_id = pt3.person_type_id
    RESTRICTION.USER_PERSON_TYPE{pt3}
    and bal.processing_date between
    p3.effective_start_date and p3.effective_end_date)

5 → RESTRICTION.BALANCE_NAME{bal}

```

1. The balance values are summed.
2. The latest assignment and person records that meet the criteria identified in the Restriction Clauses are found. These records will provide the data for keys such as Employee Category, Gender and Nationality etc.
3. The balance records that will be processed are identified. These are those balances that are linked to the assignment identified in 2, and that had a processing date within the run year.
4. Ensure that on the processing date of each qualifying balance record the assignment and person records meet the criteria identified in the Restriction Clauses.
5. This restriction clause allows the specific balance types to be identified.

Using Oracle Discoverer to View the Bilan Social

An Oracle Discoverer business area called HR France - Bilan Social is supplied as part of Oracle HR for France. The folders within this business area enable you to set up worksheets to display the results of process runs based on the supplied item, key, and restriction types.

Also supplied are five Discoverer workbooks. These contain worksheets that have already been set up using the folders in the HR France - Bilan Social business area. For information on the worksheets see: *Discoverer Workbooks*, page 1-168

For further information on using Oracle Discoverer see: *Oracle Discoverer Administration Guide* and *Oracle Discoverer User's Guide*.

Discoverer Workbooks

The following table contains information regarding the Oracle Discoverer Workbooks that are supplied as part of Oracle HR for France.

It details the item types used by each worksheet, and any required keys that must be selected for the item type in order for the worksheet to display the correct data. This is done during the creation of the template in the Generic Summary Process window.

Field	Field	Lookup
Employment (E)		
E1	1	Employee Category
E2	2	Employee Category
E3	3	Employee Category
E4	4	Employee Category, Month
E5	1	Employee Category, Gender
E6	1	Employee Category, Gender, Age
E7	1	Employee Category, Gender, Seniority

Field	Field	Lookup
E8	1	Employee Category, Gender, Nationality
E9	1	Gender, CAGR
E10	5	Month
E11	23	None
E12	9	Gender
E13	7	Month
E14	10	Employee Category, Contract Category
E15	10	Employee Category, Contract Category
E16	10	Employee Category, Contract Category
E17	10	Employee Category, Age Less Than 25
E18	10	Employee Category, Seasonal Worker
E19	11	Employee Category, Leaving Reason
E20	11	Employee Category, Leaving Reason
E21	11	Employee Category, Leaving Reason
E22	11	Employee Category, Leaving Reason

Field	Field	Lookup
E23	11	Employee Category, Leaving Reason
E24	11	Employee Category, Leaving Reason
E25	11	Employee Category, Leaving Reason
E26	12	Employee Category
E27	11	Employee Category, Leaving Reason
E28	11	Employee Category, Leaving Reason
E29	13	Employee Category
E30	14	Employee Category
E31	15, 16	Employee Category
E32	17	Employee Category
E33	18, 19	Employee Category
E34	20	None
E35	24	None
E36	21, 22	Employee Category
E37	21	Employee Category, Absence Category
E38	21	Employee Category, Absence Category
E39	21	Absence Duration Band

Field	Field	Lookup
E40	51	Employee Category
E41	21	Employee Category, Absence Category
E42	21	Employee Category, Absence Category
E43	21	Employee Category
E44	21, 22	Employee Category
Remuneration and Fringe Benefits (R)		
R1	30	Employee Category, Gender
R2	30, 34	Employee Category, Gender
R3.1	31	Employee Category, Gender, Month
R3.2	31	Employee Category, Gender
R4	32	Employee Category, Gender
R5	30, 33	Employee Category, Gender
R6	40	Employee Category, Remuneration Band
R7	34	None
R8	35, 36	None
R9	30	Employee Category
R10	30	Employee Category
R11	30, 37	Employee Category

Field	Field	Lookup
R12	30, 38	Employee Category
Hygiene and Security (H)		
H1	50	Employee Category
H2	51	Employee Category
H3	52	Employee Category
H4	53	Work Accident Code
H5	50, 60	Employee Category
H6	51, 60	Employee Category
H7	54	None
H8	55	None
H10	56	Work Accident Code
H11	56	Work Accident Code
H12	56	Work Accident Code
H13	56	Work Accident Code
H14	56	Work Accident Code
H15	56	Work Accident Code
H16	57	Illness Type
H18	58	Illness Type
C1	60	Employee Category
Other Working Conditions (C)		

Field	Field	Lookup
C2	61	Employee Category
C3	61	Employee Category
C4	62	None
C5	63	Employee Category
C6	64	Employee Category
C7	65	Employee Category
C8	66	Employee Category
C9	70	Employee Category
C11	71	Employee Category
C12	72	Employee Category
C21	67	Medical Examination Type
C22	67	None
C24	68	None
C25	69	None
Professional Bodies (P)		
P1	90	Establishment, Representation Body
P4	91	None

HR France - Bilan Social Business Area

The HR France Bilan Social business area is made up of a number of folders that are used by the supplied workbooks. These folders are detailed below.

Result Folder Containing All Numeric Data for All Worksheets

Result:	This folder contains the numeric results of item calculations that are processed during a Bilan Social run.
Value1	Contains data generated from the ITEM. COUNT_CLAUSE1 calculation.
Value2	Contains data generated from the ITEM. COUNT_CLAUSE1 calculation.
Name	Name of the Process Run that generated the data.
Sequence Number	Sequence Number of the Item in the Process Run that generated the data.

Folders Providing Breakdown Values Generated by the Calculations

Absence Category:	This folder contains the Absence Category breakdown for each calculation.
Absence Category	Contains the absence category code.
Absence Category Meaning	Contains the absence category meaning.

Absence Duration Band:	This folder contains the Absence Duration Band breakdown for each calculation.
Absence Duration Band	Contains the absence duration band value.
Display Sequence	Allows the worksheets to order the absence duration bands as they appear in the corresponding user defined table.

Age:	This folder contains the Age Band breakdown for each calculation.
Age	Contains the age band value.
Display Sequence	Allows the worksheets to order the age bands as they appear in the corresponding user defined table.
Age Less Than 25:	This folder contains the breakdown for each calculation based on whether the data is for people aged less than 25 or otherwise.
Age Less than 25	Contains >=25 or <25 indicating whether the value is aged less than 25 or not.
Cagr:	This folder contains the Collectively Agreed Grade breakdown for each calculation. It contains some information that has been entered as an example. If this example does not meet your requirements, you should copy this folder and modify the copy.
CAGR	Contains the full collectively agreed grade value as returned by the calculation. This is made up of the grade structure ID, the name of the grade structure, and the segment combinations.
Grade Structure ID	The grade structure ID
Cagr_value	The segment combinations
Value1	An example of extracting the first segment only
Echelon	An example of renaming the first segment column to reflect the grade structure flexfield titles.

Contract Category:	This folder contains the Contract Category breakdown for each calculation.
Contract Category	Contains the contract category code.
Contract Category Meaning	Contains the contract category meaning.
Contract Type:	This folder contains the Contract Type breakdown for each calculation.
Contract Type	Contains the contract type code.
Contract Type Meaning	Contains the contract type meaning.
Employee Category:	This folder contains the Employee Category breakdown for each calculation.
Employee Category	Contains the employee category alternate lookup value.
Establishment:	This folder contains the Establishment breakdown for each calculation.
Establishment	Contains the establishment name value.
Gender:	This folder contains the gender breakdown for each calculation.
Gender	Contains the gender code
Gender Meaning	Contains the gender meaning.
Display Sequence	Allows the worksheets to order the gender values according to user preference (this is used when gender is displayed horizontally in a worksheet).

Illness Type:	This folder contains the Illness Type breakdown for each calculation.
Illness Type	Contains the illness type code.
Illness Type Meaning	Contains the illness type meaning.
Leaving Reason:	This folder contains the Leaving Reason breakdown for each calculation.
Leaving Reason	Contains the leaving reason code.
Leaving Reason Meaning	Contains the leaving reason meaning.
Medical Examination Type:	This folder contains the Medical Examination Type breakdown for each calculation.
Medical Examination Type	Contains the medical examination type alternate lookup value.
Month:	This folder contains the Month breakdown for each calculation.
Month Number	The number of the month e.g. January = 01, February = 02 etc.
Month Name	The name of the month
Nationality:	This folder contains the Nationality breakdown for each calculation.
Nationality	Contains the nationality alternate lookup value.

Part Time Hours Band: This folder contains the Part Time Hours Band breakdown for each calculation.

Part Time Hours Band Contains the part time hours band value.

Display Sequence Allows the worksheets to order the part time hours bands as they appear in the corresponding user defined table.

Remuneration Band: This folder contains the Remuneration Band breakdown for each calculation.

Remuneration Band Contains the remuneration band value.

Display Sequence Allows the worksheets to order the remuneration bands as they appear in the corresponding user defined table.

Representation Body: This folder contains the Representation Body breakdown for each calculation.

Representation Body Contains the representation body value.

Seasonal Worker: This folder contains the Seasonal Worker breakdown for each calculation

Seasonal Worker Contains Y or N indicating whether the value is aged less than 25 or not.

Seniority: This folder contains the Seniority Band breakdown for each calculation.

Seniority Band Contains the seniority band value.

Display Sequence	Allows the worksheets to order the seniority bands as they appear in the corresponding user defined table.
User Table Name	Lists the user defined table from which the seniority bands are derived.
Work Accident Code:	This folder contains the Work Accident Code breakdown for each calculation.
Work Accident Code	Contains the work accident code.
Work Accident Meaning	Contains the work accident meaning.
Year:	This folder contains the year value that was entered as a parameter in the Bilan Social Report process run.
Year	Contains the year value.

Folders Designed to Return Data From More than One Calculation

Employee Category 2 Items:	This folder allows data from two calculations in the same Bilan Social run to be merged and reported on at once. Data breakdown is limited to the Employee Category key only.
Value11	The COUNT_CLAUSE1 value from the calculation identified by Sequence Number 1.
Value12	The COUNT_CLAUSE2 value from the calculation identified by Sequence Number 1.
Value21	The COUNT_CLAUSE1 value from the calculation identified by Sequence Number 2.
Value22	The COUNT_CLAUSE2 value from the calculation identified by Sequence Number 2.

Employee Category	The employee category alternate lookup value.
Name	The Bilan Social process run name.
Year	The year value that was entered as a parameter in the Bilan Social process run.
Sequence Number1	The sequence number of the first calculation.
Sequence Number2	The sequence number of the second calculation.

GENDER-EMPLOYEE_CAT 2 Items:	This folder allows data from two calculations in the same Bilan Social run to be merged and reported on at once. Data breakdown is limited to the Employee Category and Gender keys only.
Value11	The COUNT_CLAUSE1 value from the calculation identified by Sequence Number 1.
Value12	The COUNT_CLAUSE2 value from the calculation identified by Sequence Number 1.
Value21	The COUNT_CLAUSE1 value from the calculation identified by Sequence Number 2.
Value22	The COUNT_CLAUSE2 value from the calculation identified by Sequence Number 2.
Employee Category	The employee category alternate lookup value.
Gender	The gender code.
Name	The Bilan Social process run name.
Year	The year value that was entered as a parameter in the Bilan Social process run.
Sequence Number1	The sequence number of the first calculation.

Creating Item Types

To create a new item type:

1. Select the name of the new item type. This will be the name entered in the Meaning column for the new value in the GSP_ITEM_TYPE Lookup.
2. Select the required data type.
3. Construct your Count Clause. This will define the method by which the value will be retrieved. The Count Clause 2 field is provided so that a second group function, which could then be used, for example, to enable averages to be derived, can be entered. This would be done by retrieving a SUM and COUNT of a population and then performing the average calculation SUM/COUNT in Oracle Discoverer. For more information on the Count Clause see: Components of the Bilan Social - Count Clause, page 1-147
4. Enter the required base Where Clause using SQL. This should contain a From Clause and a Where Clause that will return a set of data that should be sufficient to cater for all possible interpretations of how a particular calculation could be performed.

It should also include a list of restrictions to further limit the Where Clause. There should be a line for each of the valid restriction types. For more information on the Where Clause see: Components of the Bilan Social - Where Clause, page 1-156

5. Select the valid key types for the item type. You must select key types that are appropriate to the tables included in the Where Clause. For example, if you are have selected the key type Gender, you must ensure that a table that contains gender information, such as PER_ALL_PEOPLE_F, is included in the Where Clause.
6. Select the valid restriction types for the item type. You must select restriction types appropriate for the restrictions that you have defined in the Where Clause.
7. Save your changes.

To copy and amend an existing item type:

1. Query the item type you want to copy and choose the copy button.
2. Select the name of the new item type in the Copy Item window. This will be the

name entered in the Meaning column for the new value in the GSP_ITEM_TYPE Lookup.

Note: The list of available item types will be limited to those that have not had any data saved against them in the Setup window.

3. Choose OK. A message will confirm the copy has been completed successfully. To view the new item type you must requery it. You can now amend the item type as required.

Creating Key Types

To create a new key type:

1. Select the name of the new key type. This will be the name entered in the Meaning column for the new value in the GSP_KEY_TYPE Lookup.
2. Enter the required key function.

Tip: You can copy and paste the text from a similar key function.

For further information on key types see: Components of the Bilan Social - Key Types, page 1-112

3. Save your changes.

Note: In order to make use of the new key information in Oracle Discoverer it is necessary to create a new folder that has a join to the Result folder. You should base your new folder on an existing key type folder, such as EMPLOYEE CATEGORY,

Creating Restriction Types

To create a new restriction type:

1. Select the name of the new restriction type. This will be the name entered in the Meaning column for the new value in the GSP_RESTRICTION_TYPE Lookup.
2. Enter the restriction clause. This restricts the data that should be retrieved when the Bilan Social Report process is run.

For example, consider a Where Clause that includes the restriction RESTRICTION.

PRIMARY_FLAG[a]. When the Bilan Social Report process is run the value in the Restriction Clause field for the Primary Flag restriction, in this case primary_flag, is appended to the table alias to form the string a.primary_flag. This restricts the data retrieved to only those records that have an entry in the primary_flag column of the table with the alias of 'a' (PER_ALL_ASSIGNMENTS_F) that satisfies the restriction specified in the Generic Summary Process window.

3. Select the data type for the restriction type. The data selected in the Value field in the Generic Setup Process window is treated appropriately according to the data type.
4. Enter the required restriction SQL. This defines the values that will be available for selection in the Values field in the Generic Setup Process window.

Tip: You can copy and paste the text from a similar restriction.

5. Save you changes.

Creating the Bilan Social Template

You create and amend templates in the Generic Summary Process window.

To create a new Bilan Social template:

1. Enter the name of your template. This will be required when you run the Bilan Social Report process.
2. Enter a sequence number for the item type. This defines the order in which the calculations will be run during the Bilan Social Report process. It is also used by Oracle Discoverer to associate a worksheet to a particular calculation.
3. Select the required item type and enter an item type usage. The combination of item type and item type usage must be unique within the template. You can enter the same item type a number of times, providing you attach a unique item type usage to it.
4. Select the required key types. This will determine how the data is categorized when the Bilan Social Report process is run.

Note: If you are using the worksheets supplied with Oracle HR for France you must enter the required sequence number, item types, and key types for the worksheet. For example, if you are using worksheet E1, Effectif total au 31.12, you must ensure that you have selected the Effectif total item type, given it the sequence number of

1, and selected the Employee Category key type. For information on worksheets and required components see: Discoverer Workbooks, page 1-168

5. Construct any required restrictions in the Restrictions block. Select the restriction type and the operator, and select the number of values required. For example, to restrict the calculation to primary assignments only, construct the restriction Primary Flag = Y, where Primary Flag is the restriction type, = is the operator, and Y is the value.
6. Save your changes and repeat steps 2-5 until you have included all the required calculations.

Note: Once you have selected the required components for a calculation you can view the SQL statement that has been dynamically created by choosing the Statement button.

To copy an existing Bilan Social template:

1. Query the required template and choose the Copy Templ. button.
2. Enter the name of the new template in the Copy Template window and choose OK. To see the new template you must requery it.

To copy an item type from one template to another:

1. Query the template that contains the required calculation and select the required item type. Choose the Copy Item button.
2. Select the name of the template to which the calculation is to be copied and choose OK. The item type, and all the selected key types and restrictions will be copied to the selected template. To see the item type you must requery the template.

Running a Query in Oracle Discoverer

Once you have run the Bilan Social Report process you can query the results in Oracle Discoverer.

To run the query for a single worksheet:

1. Open the required workbook.
2. Select the required worksheet and choose Yes in the displayed dialogue box.

3. Select the name of the process that you entered when running the Bilan Social Report process and choose Finish. The query will now run and populate your worksheet.

Running Multiple Queries

In order to populate all the worksheets in a workbook with the information from one process automatically, you can set up an icon on your desktop.

To set up and run an icon:

1. Create a new shortcut on your Windows desktop.

2. In the Command Line field enter a line similar to the following:

```
D:\ORANT\DISCVR31\DIS31USR.EXE /connect hr/pwd@hrfrance /open D:\orant\discvr31\hrfrbsee.dis /sheet all /parameter traitement 'RUN-1999'
```

Where

- *D:\ORANT\DISCVR31\DIS31USR.EXE* is the path to your Discoverer executable.
 - *hr* is your database username, *pwd* is your database password and *hrfrance* is the name of your database.
 - *D:\orant\discvr31\hrfrbsee.dis* is the path to your Discoverer workbook.
 - *'RUN-1999'* is the name of the process you want to use.
3. Choose Next and enter a name for the shortcut. Choose Finish, the shortcut will now be available on your desktop.
 4. To run the icon double-click on it. Oracle Discoverer will open and perform a query for each of the worksheets in the specified workbook in turn.

Creating a New Query

If the workbooks supplied with Oracle HR for France do not meet all your requirements you can create a new query. To create a new query follow the procedure described in the *Oracle Discoverer User's Guide*. In addition to this procedure ensure that you have created the following conditions:

- Sequence Number = X, where X is the number associated with the required calculation in the template that you are using.
- Name IN (:Process), where *Process* is a parameter that enables you to select the

process name entered when you ran the Bilan Social Report process.

This is the minimum you must set up to display the Bilan Social data. In addition you may want to apply further conditions to display the data you require. See the supplied queries for examples of the types of conditions you can apply.

In addition, if you have created any new key types in Oracle HR for France, or want to base your query on more than one calculation, you must first define new folders in the Bilan Social business area before you can create the query.

1. To create a new folder for a key type, base your new folder on one of the existing key type folders.

See: Folders Providing Breakdown Values Generated by the Calculations, page 1-173

2. To create a new folder that enables a query to use more than one calculation, base your new folder on an existing two item folder.

See: Folders Designed to Return Data from More than One Calculation, page 1-173

Running the Bilan Social Report Process

Once you have created your template, you must run the Bilan Social Report process. Here you define the parameters for your report. This process produces results that are stored in the HR_SUMMARY table, which can then be displayed in Oracle Discoverer.

Important: If you have made any changes to the NATIONALITY, FR_MEDICAL_EXAMINATION_TYPE, or FR_EMPLOYEE_CATEGORY Lookups, you must ensure that the new values are included in BS_NATIONALITY, BS_MEDICAL_EXAMINATION_TYPE, or BS_EMP_CAT_HIERARCHY column of the relevant user defined table.
See: User Defined Tables Used by the Bilan Social, page 1-162

Run the Bilan Social Reports process in the Submit Requests window.

To run the Bilan Social Report process:

1. Select the template and year for which you want the process to retrieve data.
2. Select the required company and establishment.
3. Enter a name for the process. This will be required when populating the Oracle Discoverer workbooks.

Note: If a record already exists in the HR_SUMMARY table with

the process name you enter, the process will fail.

4. Choose the Submit button.

The contents of the log file indicate the number of rows entered into the HR_SUMMARY table for each calculation.

Running the Delete HR Summary Process

If you want to delete the results that are produced by running the Bilan Social Report process you must run the Delete HR Summary process. This deletes data from the HR_SUMMARY_KEY_VALUE, HR_SUMMARY_ITEM_VALUE, HR_SUMMARY_PARAMETER and HR_SUMMARY_PROCESS_RUN tables, depending on the process run selected.

Run the Delete HR Summary process in the Submit Requests window.

To run the Delete HR Summary process:

1. Select the process run for which you want to delete the data and choose OK.
2. Choose the Submit button.

Workforce Sourcing and Deployment

People

Person Extra Information Types

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

- Carte de Resident - the issuing prefecture, the territorial validity of the carte, the identification number, the issue and expiry dates, and the professions in which the holder of the carte is authorized to work.

When recording the validity you can either enter the name of a region or enter the word "Total" to indicate that the carte is valid for all regions.

- Carte de Sejours - the issuing prefecture, the visa type and status, the territorial validity of the carte, the identification number, the holder's passport number, the issue and expiry dates and the issuing authority and office.

When recording the validity you can either enter the name of a region or enter the word "Total" to indicate that the carte is valid for all regions.

- Carte de Travail - the issuing prefecture, the identification number of the carte, and the issue and expiry date.
- Disciplinary Events - the date of the misdemeanor and the date of any hearing relating to it, the type of misdemeanor, any disciplinary action to be taken and the body that has decided upon this action, and the effective dates for the disciplinary action.

The type of disciplinary action selected will determine what other information should be recorded. For example, minor disciplinary actions such as warning or blame do not require hearings to take place.

- Driving License - the driving license number and effective dates, the issuing prefecture and authority, the categories of vehicle eligible to drive, if the license is suspended, and suspension dates if appropriate.
- Medical History - the start and end date of the illness, the class and type of illness, and the type and date of any reexamination that is to occur.
- Military Service - the military status, the type of service, the dates that the service took place, the regiment served, and their rank.

If the person is exempt from military service, or has not yet completed it, then only the first field should be completed.

- Multiple Passports and Citizenship - the holder's nationality, the issuing county,

office, authority, and the issue and expiry dates.

- Nominees for Office - the details of the nomination and the date of the election.
- Oracle Student System (OSS) Person Details - records OSS identification data for the student employee. The field Synchronize OSS Data controls synchronization of student employee address and telephone information between HRMS and OSS.
- Professional Training - the number of hours training received during the selected year.

Note: To ensure that training is shown correctly on the D2 report, both fields must be entered.

- Representation Person - the type of representation, the name of the representative body they represent, their mandate, the dates for their term of office, their representative responsibilities, and the amount of time they have to carry out their representative duties.
- Citizenship Information for Public Sector Organization - use this to record additional citizenship details such as date of citizenship and date of publication in the official journal. This information is used to record the identification details of the employee.
- French Public Sector Bonification Details - use this to record the Bonification details such as the military campaign is full time, half time or twice the time and the years in co-operation. This information is used to calculate the total military service period for an individual with different military situations.
- French Public Sector Additional Seniority Details - use this to record seniority details, which show the different lengths of service. These details are used when calculating employee rights for promotion and pensions.
- French Public Sector Soldier Details - use this to record information about the soldier status of an employee. These details are used only for the Army corps. This information is used to identify the rank and to know if they are full-time permanent soldiers, reserve officers, or volunteers.
- Seasonal Work Contract - use this to record work permit details such as seasonal work contract issue and expiry dates, and also the authorized professions.
- Residence Certificate - use this to record work permit details such as issue and expiry dates. This certificate is valid either for one or ten years and enables a foreigner to stay and work in France without any professional or geographical restrictions within the validity period.

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). All other personal information is optional.

To enter a new person:

1. Set your effective date to the appropriate date for adding the person to the system. If you are entering an employee, this should be his or her hire date.
2. Enter the person's name and other details in the Name region.

Only the last name is required.

- You can use the Title field to enter a title such as Mrs. or Doctor for the person.
 - 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, this enables you to 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.
 - You can use the Suffix field to hold part of the last name, such as Junior or II. This enables the suffix to be reported on separately, as required in some government-mandated reports.
3. In the US, you must select the gender, Male, Female or Unknown Gender, from the list. In the UK, if you are entering an employee you must enter their gender.
 4. Select an action type, for example Create Applicant, in the Action field and select a person type from the list of values. 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, a list of values is not displayed and the user person type displays automatically in the Person Type for Action field.

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.

Entering Employee Information

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

1. If necessary, 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 your employee's earliest, previous period of service. This date must be on or before the start date of the earliest period of service.

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

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

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

Entering Identification Information

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

1. If your enterprise uses the national identifier, use the National Identifier field to enter the numero securite social. This number relates directly to an employees personal information.
 - The first digit represent the gender.
 - The second and third digits represent the year of birth.
 - The fourth and fifth represent the month of birth.
 - The sixth and seventh represent the region or country of birth.

Oracle HR automatically validates these parts of the National Identifier against the gender, date of birth, region and country of birth fields. If these fields are completed, the corresponding parts of the National Identifier must match. When you complete a field, you must enter the corresponding digit in the National Identifier. An X is not a valid input.

Important: The National Identifier is often entered in stages as personal information for the employee becomes available. You enter an X for each of the missing digits and replace the last two digits of the numero securite social with XX. This stops the validation of the number and Oracle HR will not produce an error message.

2. 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 is displayed in the Number field. If the person does not have an employee number but has a contingent worker number and an applicant number the contingent worker number is displayed. However, you can choose to view any of the identification numbers held for a person by selecting them from the list.

Entering Personal Details

Enter details for the person as required in the Personal tabbed region:

1. To assign an employee to a payroll, you must enter his or her date of birth.
2. Enter additional birth information into the Town of Birth and Country of Birth fields. If the person is a French national then also enter their department of birth.
3. If the Work Telephone field is displayed, enter the person's work telephone number. Otherwise, use the Phone Numbers window to enter this information.
4. Enter the date of first entry for people born outside of France.
5. In the Status field, select the person's marital status.
6. Select the employee's nationality.
7. In the Registered Disabled field, you can select whether your employee

or applicant 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.

8. Save your work.

Multiple Person Records

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

If you have not entered either a first name or a date of birth then the list of values will display all the records that match the information you have entered.

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

Do one of the following:

- 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 will be copied across to existing records in other business groups. If existing records have values for fields

that have been left blank in the new record, then these values will be 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 existing record is retrieved and the save you were trying to make is cancelled as you cannot have two records for the same person in one business group. 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 are either are in 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.
- If the person you are entering does not match any of the records displayed, then select No Match in the lookup. Your new person record is saved.

What Next?

Optionally, you can enter additional information for people in the tabbed regions.

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

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

Entering Additional Personal Information (People Window)

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

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

To enter information for an applicant:

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

To enter information concerning the background check for a person:

1. Choose the Background tabbed region.
2. Check whether the employee's 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. Check whether the former manager has recommended the applicant for rehire.
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/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 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 the person 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.

If you enter the termination reason of deceased and the actual termination date on the Terminate window and date of death has not been entered, it is set to the employee's termination date.

6. Select the current status of the student, if your employee is a student.
7. In the Date Last Verified field, you can enter the date the person last checked this personal information for accuracy.

To enter benefits information:

1. Choose the Benefits tabbed region.
2. Change the date first hired for your employee. For employees who have previously worked for your enterprise, the Date First Hired field displays the start date of your employee's earliest, previous period of service. This date must be on or before the start date of the earliest period of service.
3. Enter an adjusted service date for your employees. The adjusted service date is necessary to adjust the employee's start date to reflect for example time spent in the company as a contingent worker, or time spent in another company within the same group. Some of the collective agreements consider these types of previous services as service within the company.

Oracle HRMS uses this date to dynamically calculate and display the difference between the adjusted service date and the current date as adjusted seniority for your workforce. The application also calculates and displays the seniority adjustment, which is the length of time between the hire date and adjusted service date. The total seniority details enable you to determine the eligibility, enrollment, and rates for your workforce, and run payroll calculations.

To enter employment information for employees:

1. Choose the Employment Information tabbed region.
2. Select the employee's current military status. More detailed information, including service history, should be entered in the Military Service extra information type.

See: Person Extra Information Types, page 2-2

3. Select the agent type. This information is used in deciding certain employee rights such as remuneration and pension.

The agent type you can select depends on the person type of your person:

- Fonctionnaire and Non-titulaire can only be selected for employees
- Unemployed can be selected for applicants
- Pensioner can be selected for ex-employees

Note: You must define a default Normal Inactivity statutory situation for a public sector type organization to select an employee as a Fonctionnaire in the specific public sector type organization. See: Additional Implementation Steps for French Legislations, page 5-1 and Statutory Situations, page 1-39

Once you have saved an employee as either Fonctionnaire or Non-titulaire you cannot change this.

4. Select the employee's CPAM office.

Note: Oracle HR generates the number of dependents and dependent children based on the information you have entered in the Contact window. The number of dependent children is also based on the details entered in the shared type Contact. See: Setting Up Dependent Child Contact Relationships, page 2-40

To enter education information for a dependent:

This tabbed region should only be used when the person displayed in the People window is a dependant of an employee. It enables you to record education information for a dependent. You should enter an employee's education details in the Qualifications, and Schools and Colleges Attended windows.

1. Choose the Education Information tabbed region.
2. Select the dependent's level of education.
3. If the dependent is a student, enter the date that the last school certificate was issued, and the name of their current school.

Contracts

Contracts

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

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

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

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

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

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

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

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

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

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

Entering Contracts

You enter and maintain contracts in the Contracts window.

To enter a new contract:

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

Note: The document status is not DateTracked.

6. You can enter any remaining information relating to the contract such as start reason, duration, or contractual job title.

Entering Further Contract Information

Additional Information: If you already recorded the working time in the Assignment window and do not want to reenter the details in the Further Contract Information descriptive flexfield, you can migrate the existing working time details. *See: Migrating Employee Time Data to Contract Descriptive Flexfield, page 2-16*

1. Click in the More Information field to display the Further Contract Information

window.

2. Select the type of employee, and the category of the contract, for example, permanent, or fixed-term.
3. You can enter a proposed end date and an event which defines the end of the contract, for example, completion of project. You can also select the name of the person replaced. This is normally only required for fixed-term contracts.
4. Enter details about any probation period, if required.
5. Enter the days adjusted to calculate the legal minimum wage applicable to employees.
6. Indicate whether the employee has fixed working time. If yes, then record the unit of time such as hours or weeks and the frequency of working time.

Note: For Payroll customers only - Ensure to enter, in the Assignment window, the working time in hours for employees whose working time you are recording in days in the Further Contract Information window. See: Entering Additional Assignment Details (Assignment Window), page 2-28

7. Optionally, you can enter the total working time of the employee.
8. Save your changes.

You can attach an electronic copy of any written contract that accompanies the record using the Attachments button.

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

Maintaining Contracts

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

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

Deleting Contracts

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

Note: Contracts cannot be date effectively end dated.

Migrating Employee Time Data to Contract Descriptive Flexfield

Oracle HRMS enables you to specify the working time on the employee's contract of employment to calculate different types of compensation such as holiday entitlements, sick pay, overtime, rebates, and minimum earning based on the working hours.

If you already recorded the working time in the Assignment window and do not want to reenter the details in the Further Contract Information descriptive flexfield, you can migrate the existing working time details.

Use the Submit Request window.

To migrate working time details from Assignment window to the Further Contract Information descriptive flexfield:

1. Select the Migrate Employee Time Data to Contract DDF (France) process in the name field.
2. Click Submit.

Employees

Services Validation Process

Oracle HRMS provides the services validation process. This process concerns an employee who is a titulaire and validates the period in which this employee has worked as a non-titulaire in some other public-sector type organization. This process enables you to transfer the rights as well as the contributions made so far by the employee from the general insurance schemes to the specific insurance scheme.

You can proceed with the validation process as soon as the permanent status is attained. This helps you in calculating the amount that has to be paid to validate the previous periods with the current salary situation of the employee. The Services Validation process captures the difference between the contributions and charges already paid to insurance schemes registered and the contributions and charges that should have been paid to the specific insurance scheme. Oracle HRMS records the validated contribution amounts due from the employer as well as the employee. These amounts are recorded for informational purposes and you can use it while processing the payroll to complete the pending payments.

Entitlements: Accommodation, Awards, and Decorations

Oracle HR enables you to record details of entitlements and recognition given to your employees. You can use the Accommodation, Awards and Decorations self-service interface and French Public Sector National Awards and French Public Sector Ministry Awards Special Information Types to record information about accommodation, awards and decorations and grant these.

You can maintain details of accommodations available for your organizations with the attributes of the accommodation. You can also set up the eligibility criteria for each entitlement. Based on the eligibility criteria you have defined, eligible employees are given the entitlement. Oracle HR also allows you to grant an indemnity amount, if for some reason an accommodation cannot be given to an employee.

You can maintain details of the awards and decorations granted to your employees. You can record details of the National Awards granted to an employee for eminent and distinguished service. You can also enter details of the awards granted to the employee at the ministry level such as Ministerial Orders and medals specific for each ministry or organization.

HR Administrator Actions

In a public sector-type organization, you manage employment-related information on a day-to-day basis. This information affects the career, compensation, and benefits of the

workforce. Typically you manage this data for the following types of workforce:

- Civil servants - The civil servants have a career guaranteed within the public sector-type organization. Typically they join the public sector-type organization through a competitive exam. They belong to a corps, have a grade within that corps and are permanent workforce.
- Non-permanent - The non-permanent workforce do not have a career guaranteed. Typically, they fill positions available on a temporary basis.

Oracle HRMS groups the maintenance of employment data into the following actions for civil servants and non-permanent workforce:

- Manage employment terms
- Manage career progression
- Manage affectations
- Manage statutory situations

Manage employment terms: HR Administrator Actions functionality enables you to manage the employment terms such as the establishment and the person's normal working hours share, and also the contract details for non-permanent employees. You can also specify the reasons for hiring a non-permanent employee. The establishment serves as the legal point of contact for settling any disputes and manages the personal details of the workforce. The other employment terms affect the salary and other benefits.

You manage the employment terms for the civil servants using the Change Administrative Employment Terms option, and the terms for non-permanent workforce using the Change Employment Terms option. You can manage term changes in the past and in the future. Using the Administrative Links, you can view date-tracked employment history and positions the civil servant has on the current corps.

Manage career progression: HR Administrator Actions functionality enables you to define and modify career for a civil servant and non-permanent workforce to ensure successful career progression in the enterprise. You can record career details such as corps, grade, and step. Additionally, you can define personal gross index to override the value of step gross index. For example, when a person, whose gross index is, at one point in time IB 441, is joining a given step within a grade, which IB is 342, the HR clerk can, as mentioned, keep IB 441 as a personal gross index and therefore override IB 342.

You manage career progression for civil servants using the Administrative Career option and for non-permanent employees using the Manage Career option. Using the Administrative Links, you can view date-tracked career history and positions the civil servant has on the current corps to enable them to track the career progression.

Manage affectations: In a public sector-type organization, affectation refers to assigning positions to the workforce, to define the activities carried out by the workforce. A

worker (civil servant or non-permanent) can hold multiple positions simultaneously. For a civil servant, the assigning of positions is more formal than for a non-permanent worker. You must set up the administrative career for a civil servant and employment terms for a non-permanent worker before managing affectations for your workforce.

Manage statutory situations: Statutory situation is the civil servant's employment status. The employment status can be any of the statuses defined by law such as in activity, on long-term leave of absence or temporarily working on loan in another organization. Many entitlements and processes depend on the statutory situation. For example, the statutory situation determines the pension entitlements, salary payments and seniority benefits for a civil servant.

Using this functionality, you can enter and maintain the statutory situations for the civil servants. You can renew the statutory situation (if it is renewable, as set up while defining the statutory situation) and reinstate the civil servant from a statutory situation for example from parental leave to normal activity. The statutory situations apply only to civil servants.

Using HR Administrator Actions

Based on the workforce type, HR Administrator Actions displays the pages for civil servants or non-permanent workers. It is recommended not to perform any transaction for affectation, career progression, or employment terms with back dated days when you have some updated transactions in future for them.

Caution: You must not have any segment of the People Group flex field as mandatory field as it will not enable you to create the affectation for an employee using the HR Administrator Actions functionality.

Setting Up Accommodation, Awards, and Decorations Entitlements

Oracle HR enables you to record accommodation, awards and decorations granted to the employees. To do this you must complete the following steps:

To set up accommodation, awards and decorations entitlements:

1. Define entitlement items offered in your enterprise.

Note: Select the value set CAGR_YES_NO as the item value set in the Entitlement window and leave the Field Name field blank.

See: Define Entitlement Items, *Oracle HRMS Enterprise and Workforce Management Guide*

2. Define eligibility profiles to be used with your collective agreements.

See: Define an Eligibility Profile, *Oracle HRMS Compensation and Benefits Management Guide*

3. Define collective agreements for your enterprise.
See: Setting Up a Collective Agreement, *Oracle HRMS Enterprise and Workforce Management Guide*
4. Define collective agreement entitlements to set up the values associated with all the entitlement items in your collective agreement.
See: Defining Collective Agreement Entitlements, *Oracle HRMS Enterprise and Workforce Management Guide*
5. Attach collective agreements to an establishment at the organization classification level.
See: Establishment: Entering Collective Agreements, page 1-30
6. Assign the collective agreement to all employees who are covered by its terms.
See: Entering an Assignment, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*
7. Select entitlement items for an entitlement. This enables you to associate an entitlement item with the specific entitlement.
See: Setting Up Accommodation, Awards, and Decorations Entitlements, page 1-53
8. Use the Accommodation self-service interface to set up your accommodation details. You can define accommodations for your enterprise, assign them to eligible employees, and grant indemnity in the case that accommodation is not given even though the employee is eligible.
9. Use the Awards and Decorations self-service interface to grant awards to eligible employees.

Setting Up Seniority Details

Oracle HR enables you to set up seniority details. Seniority is always based on a length of service and assures an employee of certain entitlements. You need to define entitlement values for different length of services, specific events in the employee's career, which affect the length of service and for different employee types.

To set up seniority details:

1. Use the Length of Service Situations self-service interface to define the entitlements for different situations under different situation types.

2. Use the French Public Sector Additional Seniority Details person extra information type to record the additional length of service done by the employee, either in your enterprise or in another enterprise. This additional length of service is recorded as correcting period. In some cases, to obtain an accurate length of service, you may need to input this correcting factor (in days) to add to the given duration to the length of service.

See: Entering Person Extra Information, page 2-2

Setting Up Salary Share

While recording the assignment details of your employees, you need to associate the salary share with the appropriate physical share. The physical share is the working hours for the Position or Business Group. You need to set these up as a salary share is derived in correspondence with the physical share. The salary share value is displayed once you select the physical share in the Statutory Information tab in the Assignment window.

Use the User Types and Statuses window.

To set up salary share:

1. Select the name FR_PQH_PHYSICAL_SHARE from the lookups.
2. Select your Business Group.
3. Select the percentage of salary share to be derived from physical share.
4. Enter a brief description about the salary share.
5. Enter the salary share value using the Further Information column. You can enter any value between 0 and 100.
6. Save your work.

Validating Previous Services

Oracle HRMS enables you to validate previous services of your employees. Using this functionality you can enter the previously validated services of the employee in the previous organization. You can also record the services for which the current employer initiates the validation or the services that are transferred to the current employer. Oracle HRMS enables you to record and update various events that alter or stall the normal flow of the services validation process and also send notifications to the concerned employees. You can update, view and delete the services validation details.

Caution: You cannot update validation details if the validation process status is Finished.

To validate previous services:

1. Use the Previous Services Validation pages to select an employee and either record the previously validated services or initiate the services validation process.

Entering Periods of Service

You use the Terminate window to end employment. You can also use it to enter further information relating to an employee's period of service, for example, starting and ending reason, type of work, and employee status. This information is required when producing the ASSEDIC report.

To enter further periods of service information:

1. Click in the Further Information field. The Add'l Periods of Service Info window is displayed.
2. You can define the nature of the employee's work by selecting the employee's type of work and status. These fields are not applicable to many employees.
3. Select whether the employee is affiliated with the Alsace-Moselle DSS, and their relationship with the managing director, if required.
4. Select the final payment schedule. This information is used to determine how the Notice Period in Lieu payments are processed.
5. Select Yes to indicate that the period of service is covered by a social benefits plan. Select No if it is not covered by a social benefits plan. This information is used during pay processing.
6. If the employee is sick or on unpaid leave when terminated, enter the date of the last working day before the absence began.
7. The Date Attestation ASSEDIC Run is automatically updated with the effective date of the report run. To run the report again for the employee, you must clear this information.
8. Save your changes.

Entering Previous Employment Details

You enter previous employment information in the Previous Employment Information window.

Note: If your localization currently uses the Employment History window see: *Entering Employment History, Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

The Previous Employment Information window is divided into three regions with each region recording separate information about an employee's previous employment. The three regions in the Previous Employment Information window are:

- Previous Employer
- Previous Job
- Assignment - Previous Job Mappings

To enter previous employment details:

1. Enter the previous employer name.
2. Enter an address.
3. Select a country.
4. Select the type of business.
5. Select a subtype for the business type selected at step 4.
6. Enter a description for the employer.
7. Enter start and end dates for the employee's period of employment. The dates entered automatically calculate the period of service in years, months and days.
8. You can override the period of service calculation by entering your own period of service in the Years, Months and Days fields.
9. Select the All Assignments check box to specify that the service period is taken into account for all assignments.

Note: The All Assignments check box can only be selected if there are no further previous job usages defined in the Assignment region. Once the All Assignments check box is selected no further

previous job usages can be defined.

10. Save your work.

To enter further previous employer information:

1. Click in the Further Information field to display the Further Previous Employer Information window.
2. Select Yes if employee approval is taken. This enables the previous service period to be added in the total length of service calculation. If you select No, the previous employment period will not be calculated in the length of service.
3. Enter the date the employee approval was taken.
4. Save your work.

To enter previous job details:

1. Select an empty row in the Previous Job region or place your cursor within an existing row and choose the New button to add a new row.
2. Enter start and end dates for the previous job. The job entered must be associated with the employer and period of service entered at steps 1 to 11. The dates entered automatically calculate the period of service in years, months and days.
3. Enter a job title.
4. Select an employee category.
5. You can override the period of service calculation by entering your own period of service in the Years, Months and Days fields.
6. Enter a description for the previous job.
7. Select the All Assignments check box to specify that the previous job period is taken into account for all assignments.

Note: The All Assignments check box can only be selected if there are no further previous job usages defined in the Assignment region. Once the All Assignments check box is selected no further previous job usages can be defined.

8. Choose the Extra Information button to open the Previous Job Extra Information window.

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

9. Save your work.

To enter further previous job information:

1. Click in the Further Information field to display the Further Previous Job Information window.
2. Enter the agent type. This information identifies whether the previous employment period caters to a non-titulaire period or not. It also indicates the rights the employee had, like remuneration and pension.
3. Enter the corps details. This information identifies the career path of the employee.
4. Enter the grade, step and position details of the previous job.

To map previous jobs to an assignment:

1. Select an empty row in the Assignment region or place your cursor within an existing row and choose the New button to add a new row.
2. Select an assignment to map to a previous job specified at steps 12 to 19.
3. Select a job to map to the assignment selected at step 21. Selecting a job automatically displays the Start Date and End Date fields as specified for the job in the Previous Job region.
4. You can override the period of service calculation by entering your own period of service in the Years, Months and Days fields.
5. Use the Further Information flexfield to enter further previous job usage details.
6. Save your work.

To enter further previous job usage information:

1. Click in the Further Information field to display the Further Previous Job Usage Information window.
2. Enter the corps details of the previous employment.

Note: These details are validated against the existing set of values for the current public sector-type organization and enables you to map the different structures maintained in different public sector-type organization, to the structure of the current public sector-type organization.

What Next?

Enter the previous employment awards and decorations details.

See: Entering Ministry Awards and Medal Details, page 2-26

See: Entering National Awards Details, page 2-27

Enter the previous employment work incidents details.

See: Entering Work Incident Information, page 1-58

Entering Ministry Awards and Medal Details

Oracle HR enables you record details of the awards granted to the employee at the ministry level such as Ministerial Orders and medals specific for each ministry. Please use the self-service interface to maintain your awards as this contains more validation. Use this special information type to view the information, override existing award details and grant awards to an employee who does not match the eligibility criteria but your enterprise decides to grant the award.

Use the FR PS Ministry Awards special information type.

To enter ministry awards and medal details:

1. Select the type of award granted to the employee. This information is used in deciding a premium or an indemnity on the following month's payroll.
2. Select the award name.
3. Select the level of the award.

Note: This field is enabled only for award type Medal.

4. Enter the date of attribution, which is the date when the award is announced for the employee.

5. Enter the date of remittance, which is the date when the employee receives the award.
6. Save your work.

Entering National Awards Details

Oracle HR enables you to record details of the National awards granted to an employee for eminent and distinguished service. We recommend that you use the self-service interface to maintain your awards as this contains more validation. Use this special information type to view the information, override existing award details and grant awards to an employee who does not match the eligibility criteria but your enterprise decides to grant the award.

Use the FR PS National Awards special information type.

To enter national awards details:

1. Select the award type. This information is used to generate premiums on payroll.
2. Select the grade/dignity granted to the employee. This information shows the level in the award.
3. Enter the date of attribution, which is the date when the award is announced for the employee.
4. Enter the date of remittance, which is the date when the employee receives the award.
5. Save your work.

Workforce Information Management

Assignment Extra Information Types

You can define as many Extra Information Types as you require to hold information about assignments. There are also some predefined assignment EITs. These are:

- **Hiring Declaration** - the date of the employee's pre-hire medical, if they are related to the employer, if they are agent titulaire, their previous employment status and training level, the proposed salary, whether they qualify for any contribution reductions, whether they are on a work initiative contract, the currency code, and whether they should be included in the next run of the Declaration Unique d'Embauche.

Note: These details will be used when you produce the Declaration Unique d'Embauche.

The date of the pre-hire should be before the end of the employee's trial period. Also, an employee can qualify for contribution reductions if they are the first employee in an enterprise, or if they are part-time.

You must not use this extra information type for a contingent worker, as an employer need not submit the hiring declaration for a contingent worker. If you have a responsibility that manages only contingent workers, you must not assign this extra information type to that responsibility.

Entering Additional Assignment Details (Assignment Window)

Once you have set up basic assignment details, you can enter additional information in the tabbed regions of the Assignment window, for example, supervisor details, special ceiling progression points or salary information. The tabbed regions that appear in the Assignment window vary according to person type and localization. In addition, certain segments within the tabbed regions are specific to the person type. For example, if you are entering statutory information for a contingent worker, the Statutory Information tab displays the segments required for a contingent worker.

Note: For a public sector type organization, the Corps, Physical Share, Salary Share, and Employee Category fields, and the Primary check box under the specific tabbed regions are read only. You must record these details using the HR Administrator Actions pages. See: HR Administrator Actions, page 2-17

Entering Supervisory Information

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: This information is not updated by the system. Use organization and position hierarchies to show management reporting lines.

Entering Probation and Notice Period Information

The probation period defaults from the employee's position.

To enter probation period and notice information for an employee:

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.

Entering Standard Conditions 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.

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

1. Choose the Standard Conditions tabbed region.
2. Amend the standard work day information for your employee or contingent worker assignment, if required.
3. For benefit administration, enter whether your employee's 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.

Statutory Information

The details you need to record depend upon the choice you have made while entering additional organization details.

Note: See: Business Group: Setting Up Public Sector-type Functionality, page 1-25

To enter statutory information for a new assignment:

1. Choose the FR Statutory Info tabbed region.
2. Select the employee category and the starting reason for the assignment. The lookup values from which you can select depend on the person type.

Note: For a new employee, you should also enter a starting reason in the Add'l Periods of Service window.

See: Entering Periods of Service, page 2-22

3. Select the work pattern and the URSSAF code for the employee.
4. Enter the work pattern start day for the employee. This information identifies the day in the work pattern from which the work schedule starts. You can use the effective date to relate this to an actual start date.
5. Enter the total number of working days per year. This information is used while reporting the employee's working hours/days.
6. Select the Detache Status. This information is used for taxation purposes.
7. Select Yes to indicate that the employee has an address abroad and is a border worker. These details are used for taxation purposes.

Note: Oracle HRMS displays the corps, physical share, and salary

share recorded using the HR Administrator Actions pages. The corps information is used for career path, salary, and grade placement. The physical share is the amount of work the employee does with respect to the normal working hours of the employee's organization and the normal working hours of the job or the position the employee occupies and the salary share is the corresponding salary amount.

Entering Primary or Secondary Assignment and Miscellaneous Information

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, if required. 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. 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.
5. 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.)

Primary or Secondary Assignment

By default, the first assignment entered for an employee is the primary assignment, and the Primary box is automatically checked. If you are now entering a secondary assignment, the Primary box is automatically unchecked. You can leave the Primary box as it is.

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

See: *Changing Primary Assignments, Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

Entering Special Ceiling Information

A special ceiling progression point is the highest point to which the Increment

Progression Points process can automatically progress the employee.

Entering Salary Information/Assign Employees to a Salary Basis

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.

To enter salary information for an employee:

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*

Entering Bargaining Unit and Union Membership Information

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.

Entering a Billing Title (Oracle Projects only)

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

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

1. Choose the Project Information tabbed region.
2. Enter a billing title. The information you enter in the Billing Title field is used as the default title on project customer invoices. You can override this information using Project Accounting.
3. Enter a project title.

Entering Employment Terms

Before you can enter employment terms you must:

- Define the establishment in the Organization window using the Establishment classification.
- Define the collective agreement, if required, in the Collective Agreements window.
- Define the reference grades, if required, for the relevant combination of establishment and collective agreement in the Agreement Grades window.

To enter employment terms for an employee:

1. Query the employee or applicant if they are not already displayed.
2. Choose the Employment Terms tabbed region.
3. Select the establishment to which the employee or applicant is linked.
4. Select the contract that is to be referenced by the assignment.

Note: When you are selecting a contract to link to an assignment you will only be able to select from contracts that have start dates on or before the assignment start date.

5. Select the agreement grade structure for the collective agreement. A window is displayed showing the grade factors for that grade structure.
6. 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 that 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 will not be available for reuse with other assignments. In order to reuse a combination, you must define it as a reference grade in the Agreement Grades window.

Entering Supplier Information

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.

To enter supplier information for a contingent worker:

If you are not using Oracle Services Procurement:

1. Choose the Supplier tabbed region.
2. Select the name of the supplier and the supplier site for the contingent worker.
3. Enter supplier IDs for the contingent worker and the assignment, if available. These values identify the worker and the assignment to the supplier.

If you are using Oracle Services Procurement:

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

Entering Grade Ladder Information

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.

Note: For a public sector type organization, the Grade Ladder tab is renamed as French Public Sector Corps. This tabbed region displays the corps you entered using the HR Administrator Actions pages.

Contact Information

Contact Information Overview

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

Entering People as Contacts

You enter people as contact records to identify:

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

Entering Contact Information

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

Entering Next of Kin and Other Contacts

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

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

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

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

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

Creating The Same Contact Relationship More Than Once

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

Updating a Contact Relationship Start Date to Make it Earlier

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

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

To enter a contact:

1. Do one of the following:
 - Enter the name of a new person.
 - Select from a list of people already entered on the system.
2. If you enter a new person:
 - Enter their gender and date of birth.
 - Select the user person type.
You can only select user person types which are set up for the system person type of Other, for example contact.
3. Enter details about the different contacts for your employee in the Contact Relationship fields.

To enter contact relationships:

1. Select the contact relationship, for example child or spouse.
2. Enter the start and end date (if known) of the relationship.
3. If you use Oracle Advanced Benefits or Standard Benefits, select a start and end

reason for the relationship.

4. Select whether the contact:

- Is the primary contact.
- Is the recipient of a third party payment (for example, from a court-ordered deduction/wage attachment).

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

- Shares the same residence as the employee.
- Has a personal relationship with the employee. This identifies whether the third party should be considered as a possible dependent and/or beneficiary.
- Is a beneficiary or dependent. You can only enter these fields if you do not use Standard or Advanced benefits.

5. You can enter a sequence number for the contact relationship. This must be a unique number for each contact the employee has. However, because sequence numbers are employee based, these numbers only need to be unique within the employee's record.

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

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

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

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

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

Oracle HRMS automatically creates a mirror relationships when you enter a spouse, parent or child. For example, if you create the spouse relationship from person A to

person B, when you query person B in the Contact window, a mirror relationship of spouse to person A is automatically created.

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

7. Save your work. If a person already exists on your application with the same surname and a first name that is either the same or not entered, then a list of values is displayed that shows all the people who share the details.

See: *Multiple Person Records, Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

Entering Further Contact Relationship Information

1. Click in the Further Information field to display the Further Contact Relationship Information window.
2. Select Yes or No. This information specifies if the employee has submitted dependent proof in the form of a certificate or declaration, which entitles the employee for benefits.
3. Select the name of the payee. This information is used to enable a person other than the employee to be entitled for the benefits associated with a child.
4. Save your work.

What Next?

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

Entering Dependents

As part of an employee's personal information it is important to record any dependents that the employee may have as this information is used in some payroll calculations.

To enter information about a dependent:

1. In the People window, query the employee if they do not already appear there. Enter the information about the dependent in the Contact window.

See: *Entering Next of Kin and Other Contacts*, page 2-36

2. In the People window, query the dependent if they do not already appear there.

3. Enter details about the dependent's education in the Education Information tabbed region.

See: Entering Additional Person Information (Person Window), page 2-9

Setting Up Dependent Child Contact Relationships

You need to set up the dependent child relationship to record the number of dependent children. You need to indicate which of the contact relationships Oracle HR should treat as a dependent child relationship. You need to set these up before selecting the relationship of Contact with employees in the Contact window. Based on your set up, Oracle HR calculates the number of dependent children, which is seen in the Employment tab in the Person window.

Use the User Types and Statuses window.

To set up dependent child details:

1. Select the name CONTACT from the lookups.
2. Select your Business Group.
3. Select the Child relationship.
4. Enter a brief description about the relationship you have selected.
5. Select YES for the Child relationship using the Further Information column. This enables Oracle HR to calculate the number of dependent children.
6. Save your work.

Talent Management

Qualifications

Qualification Types

Oracle HRMS enables you to record the types of qualifications recognized by your enterprise, including:

- Educational and vocational qualifications
- Licenses
- Awards
- Honors

You can rank qualifications. For example, you could rank a doctorate as 1, a master's degree as 2, a bachelor's degree as 3, and so on. You can rank equivalent qualifications at the same level. For example, you could rank both a bachelor's degree and a vocational qualification as level 3. This feature is useful for identifying all workers qualified at level 3 or above, for example.

Qualifications Framework Qualifications

Qualifications Framework qualifications result from the achievement of unit standard competencies. For this type of qualification, you record national Qualifications Framework details, including the number of credits attached to the qualification, the awarding body, and the field of learning to which the qualification belongs.

Schools and Colleges

You can identify the schools and colleges that deliver the qualifications that your enterprise recognizes so that you can record where a worker gained a qualification. As schools and colleges are available to all business groups, you have to define them once only.

Defining Qualification Types

Use the Qualification Types window to define the qualifications that your enterprise recognizes.

Before you start this task, your system administrator must define generic qualification types (such as Degree, Diploma, and License) in the PER_CATEGORIES lookup.

To define qualification types:

1. Enter the name of the qualification.
2. In the Category field, select the qualification type.
3. If required, rank the qualification.

Entering Further Qualification Types Information:

1. Click in the Further Information field to display the Further Qualification Information window.
2. Select the name of the body that delivered the diploma.
3. Select whether a diploma is recognized at national level or not. This option is applicable to all diplomas, except professional exam. This information is used for granting rights to employees such as the right to pursue further training or take part in a competitive exam.
4. Select the type of diploma such as general, technical or professional.
5. Select the classification for every diploma recognized at national level. This information is used in different processes to classify the different diplomas and to build a sort of hierarchy between them.
6. Enter the level of the diploma. This information helps in ranking them according to the number of years study after the baccalaureat.
7. Select the main speciality of the diploma.
8. Select the sub speciality of the diploma.
9. Save your work.

Entering Qualifications Framework Details:

Note: This section applies only if you are defining a Qualifications Framework qualification.

1. Enter the Qualifications Framework identifier for the qualification.
2. Select the Qualifications Framework qualification type (for example, Diploma, Bachelor of Arts, or School Certificate).
3. Select the main and subsidiary fields of learning to which the qualification belongs.

The main field of learning identifies the industry or sector to which the qualification belongs (for example, Management Studies or Nursing).

The subsidiary field identifies the subject area within the field of learning to which the qualification belongs (for example, Marketing or Neonatal Care).

4. Select the level type and level.

Qualifications Framework levels indicate the extent to which knowledge and skills have been advanced by learning. For example, a qualification could be at Level 3 on a scale ranging from Level 1 through Level 5.

The level type identifies the category to which the Qualifications Framework level belongs (for example, NQF, NVQ, or HND).

5. Select the credit type and enter the total number of credits for this qualification.

The credit type identifies the unit of measure for unit standard credits. For example, the credit type could be notional hours of work or study required to achieve a Qualifications Framework qualification.

6. Select the qualification provider.

7. Select the Quality Assurance (QA) organization that registered the qualification provider.

Entering Qualification Competencies

Note: This section applies only if you are defining a Qualifications Framework qualification.

8. Click Competencies to open the Qualification Competencies window.

9. In the Unit Standard Competency Links region, select the name of a unit standard competency that contributes to this qualification.

The Unit Standard ID appears automatically.

10. Select the unit standard type. This value specifies the relevance of the unit standard competency to the qualification (for example, core or optional).
11. Enter the dates between which the link is valid. You must enter a start date, but you can leave the end date blank.
12. Repeat Steps 9 through 11 for additional unit standard competencies.
13. Save your work.

Entering Qualifications

You can enter your workers' completed and in-progress qualifications when they first join the enterprise. You may need to update a worker's qualifications record after completion of a training course, for example.

Note: If the worker for whom you are entering qualifications has qualifications records in other business groups, then you will be able to see, but not update, qualifications entered for the worker in those other business groups.

Workers and managers can use these SSHR functions to enter and update worker qualification records:

- Education and Qualifications
- Other Professional Qualifications

In the forms-based interface, use the Qualifications window, accessed from the People window, to enter and update qualifications.

To enter qualifications:

1. Select the qualification type, and enter its title.

For information about defining qualification types, see: *Defining Qualification Types, Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

2. Select the qualification status, for example, ongoing or completed.

3. Enter the grade at which the worker holds the qualification, if appropriate.

4. Select the establishment at which the worker gained the qualification. The list comprises establishments you recorded the worker as having attended.

See: *Entering Schools and Colleges Attended, Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

5. Enter the name of the body that awards the qualification. If you record this value in the qualification types record for a Qualifications Framework qualification, it appears here automatically.

6. Enter the dates between which the worker studied for the qualification. Leave the end date blank if the qualification is in progress.

7. Enter the worker's ranking in the study group, if relevant.

8. Save your work.

Entering Further Qualification Information:

1. Click, where applicable, in the Further Information field to display the Further Qualification information window.
2. Enter a number for the decision that made the foreign diploma equivalent to a French diploma.
3. Enter the date this decision was taken.
4. Select the type of decision. This information shows the impact of the decision.
5. Enter the name of the foreign diploma, which is equivalent to a French diploma.
6. Select the type of record. This information shows the kind of training undertaken to receive this diploma.
7. Save your work.

To enter license details:

1. Click the License tab.
2. Enter the license number, for example, a driver's license number.
3. Enter any restrictions on the license. For example, the license may not be valid in certain states.
4. Enter the license expiry date.

To enter tuition fees:

1. Click the Tuition tab.
2. Enter the fee amount, and select the currency.
3. Select the tuition method, for example, day release.
4. Specify how the worker's tuition fees will be reimbursed (for example, bank transfer when the qualification is awarded).

To enter training details:

1. Click the Training tab.

2. Enter the amount of training completed. For example, enter 30 days completed of a training program that lasts 60 days.
3. Enter the total amount of training required to deliver the qualification (for example, 60 days).
4. Enter the units in which the training is measured, for example, days.

To enter professional membership details:

1. Click the Professional Membership tab.
2. Select the professional body to which the person belongs. The list comprises organizations with the classification Professional Body.
3. Enter the worker's membership number and category.

The available membership categories depend on the table used to calculate subscription rates for the professional body. Oracle Payroll uses this table when calculating the amount to deduct from a worker's salary during the payroll run.
4. Select the method by which the subscription is to be paid. This is optional and for information only.

To view Qualifications Framework details:

Note: This section applies to Qualifications Framework qualifications only.

1. Click the Qualifications Framework Details tab.
2. Details of the selected qualification appear. For example, you can see its ID, the field of learning to which it belongs, and the number of credits earned. You cannot update this information.

To enter subject details:

1. Save your work.
2. Select the first subject the qualification comprises.
3. Select the subject status, for example, passed or ongoing.
4. Enter the dates between which the subject is studied. You must enter a start date, but you can leave the end date blank.

5. If the subject forms a major part of the qualification, select Major.
6. Optionally, enter the grade at which the worker studies the subject.
7. Enter further subjects, as appropriate.
8. Save your work.



Compensation and Benefits Management

Grades and Pay

Corps, Grades and Pay Scales

Oracle HRMS enables you to define the career path of a civil servant in a public sector type organization. You define the career path at the corps level as the corps holds all the career progression related information. To define the career path, you must set up the corps, grade, and pay scale information using the Plan Design Wizard.

A corps is a ladder of grades. For example, the Corps of Administrative Assistant has Administrative Assistant as the starting grade, followed by 2nd Class Administrative Assistant and 1st Class Administrative Assistant grades. Within the corps, the grade determines the compensation the employee receives. Each grade connects to a pay scale, which breaks down into a series of steps. Each step defines the compensation levels, such as the basic pay and the length of time that must pass at each step before moving to the next step. You associate a grade with a pay scale at the time of setting up a corps. You define the steps in a pay scale using the index values in the Global Table of Indices - Gross Index (IB) and Increased Index (INM) - for Legislative pay scale or enter the salary rates for Exception scales that are outside the legislatively defined pay limits.

Corps Level Details

To set up the employment terms in your organization, Oracle HRMS enables you to record various details for the corps. You indicate:

- the type of public sector, such as the state, health or local public sector.
- the primary professional activity of the civil servants on the corps.
- the tasks and duties a civil servant performs on this corps.
- the starting grade and step for the corps.
- the working hours, if defined by corps.
- the probation period for a civil servant on the corps.
- the maximum percentage of civil servants you can place simultaneously on secondment.

For information purposes, you maintain details such as:

- any required entrance examinations.
- any required training.
- the legal documents that contain the corps rules.

- additional professional activities, if required.

Grade Level Details

At the grade level, you specify the quotas to meet the statutory requirements. Oracle HRMS enables you to record the occupancy and progression speed quotas for the grade and pay scale associated to the grade.

Occupancy quota is the number of civil servants you can place on the grade in relation to the total number of civil servants on the corps or in relation to another grade. For example, in the corps of Attaches in civil aviation, there are three grades in total:

- Attaches
- Attaches Principal - both classes cannot exceed 35 percent of the total number of civil servants in the corps.
 - 2nd Class - no more than 65 percent of Attaches Principal.
 - 1st Class - no more than 35 percent of Attaches Principal.

Progression speed quota is the number of civil servants who can progress at the different speeds of the scale associated with the grade. For example, if the scale has three progression speeds, you can define the percentage of employees that can progress at a speed:

- fast - 10 percent
- average - 30 percent
- slow - remainder

You define the career path for the corps at the grade-step level for effective career management. Normally an employee joins on the starting step of the lowest grade in the corps. Within a grade, the civil servant can move up the pay scale, from one step to another based on the step progression you specify in the pay scale. A civil servant can move from one grade to another within the same corps based on the grade sequence you specify. For example, within the corps of Administrative Assistants, you can set up the civil servants to progress from the grade of Administrative Assistant to 2nd Class Administrative Assistant, or to another corps. You can move civil servants from a grade in a corps to another corps based on the corps sequence you specify in the career paths.

While defining the career paths, you set up the corps and grades to which the civil servant can progress. You specify the eligibility conditions to move from one grade and corps to another. You indicate the method of progressing to a grade or corps. For example, civil servants can progress by nomination or by clearing an exam.

Pay Scale Level Details

At the pay scale level, you indicate whether the pay scale is Legislative or Exception

type. Legislative pay scale has pay rates within the statutory pay limits. It uses the index values in the Global Table of Indices - Gross Index (IB) and Increased Index (INM) - published by the government and the legal indemnity rates. Oracle HRMS calculates the pay rates for this type of pay scale by multiplying the increased index value with the indemnity rates. You must define the indemnity rates and the global indices using the Global Pay Scale functionality before you create the Legislative pay scale. For the Exception pay scale you enter the salary rates directly.

Global Pay Scale

Global Pay Scale provides information about the legal indemnity rates and the index values - Gross Index (IB) and Increased Index (INM) - in the Global Table of Indices published by the government. You maintain the global pay scale as site level information as it applies across your organization and is not specific to a business group.

Use the Global Pay Scale functionality to define the legal indemnity rates and create the global indices based on the Global Table of Indices. Oracle HRMS uses the indemnity rates and the index values in the global table of indices to calculate various compensation values in the Legislative type of pay scales. The Legislative type of pay scale is within the legislatively defined pay limits.

Indemnity Rates

Indemnity rates are the pay rates in your global pay scale. You define and update the pay rates for the points in the global pay scale used across your organization. For example, you define and update point values for basic salary and housing indemnity.

You must define the indemnity rates before you create the global indices. You can select an update mode for the indemnity rates. Choose Correction to overwrite the existing information with the current changes and Update with Replace to change the existing information from the effective date onward. However, changing the point values and indexes will have an impact on the salary information on the grade. The application prompts you to run the Synchronize Salary Rates process to match the salary rates you entered in the grade ladder set up with the updated rates. You can run this program from the self-service interface or run it from the professional interface Submit Request window if you have not completed setting up your corps and grade details.

Global Indices

You create the global indices based on the Global Table of Indices published by the government and enter the gross index and increased index values. You can update the global indices to keep up with the legislative updates to the table. Choose Correction to overwrite the existing information with the current changes and Update with Replace to change the existing information from the effective date onward.

This functionality integrates closely with the Corps, Grades and Pay Scales functionality, which refers to the data you enter using the Global Pay Scale functionality. Based on the indemnity rates you defined and the increased index values in the global indices, Oracle HRMS calculates the compensation values by multiplying

the increased index value for a step with the basic salary rate.

Import Global Indices

You can import global indices from a spreadsheet application using Web Application Desktop Integrator (WebADI). You must search global indices and then import global indices. While importing indices, Oracle HRMS generates an Excel spreadsheet in the format it recognizes. Use this spreadsheet to enter the global indices and then upload them to Oracle HRMS using the Excel menu option *Oracle - Upload*. The application creates these indices on the effective date you entered while searching global indices. It also validates the details and displays an error message if you have entered any invalid value.

Grade/Step Progression

Grade/Step Progression is a business process that enables you to move large numbers of employees from one grade or grade step to the next, in an automated, bias-free way.

You do this by defining how employees become eligible for progression and the details of the grade or step to which they are eligible to progress (including the rate of pay associated with the proposed step or grade). Then, you run a pre-process to check which employees are eligible for progression according to your rules. This triggers a post-process that either progresses eligible employees automatically, or identifies them as eligible so that you can approve their progression manually (depending on how you set up Grade/Step Progression). If you have set up Grade/Step Progression to apply automatic salary updates, the application makes these salary changes and passes them to your payroll.

In order to understand Grade/Step Progression, you need to understand the following key concepts:

- Grade Ladder
- Salary Rates
- Progression Rules

Grade Ladder

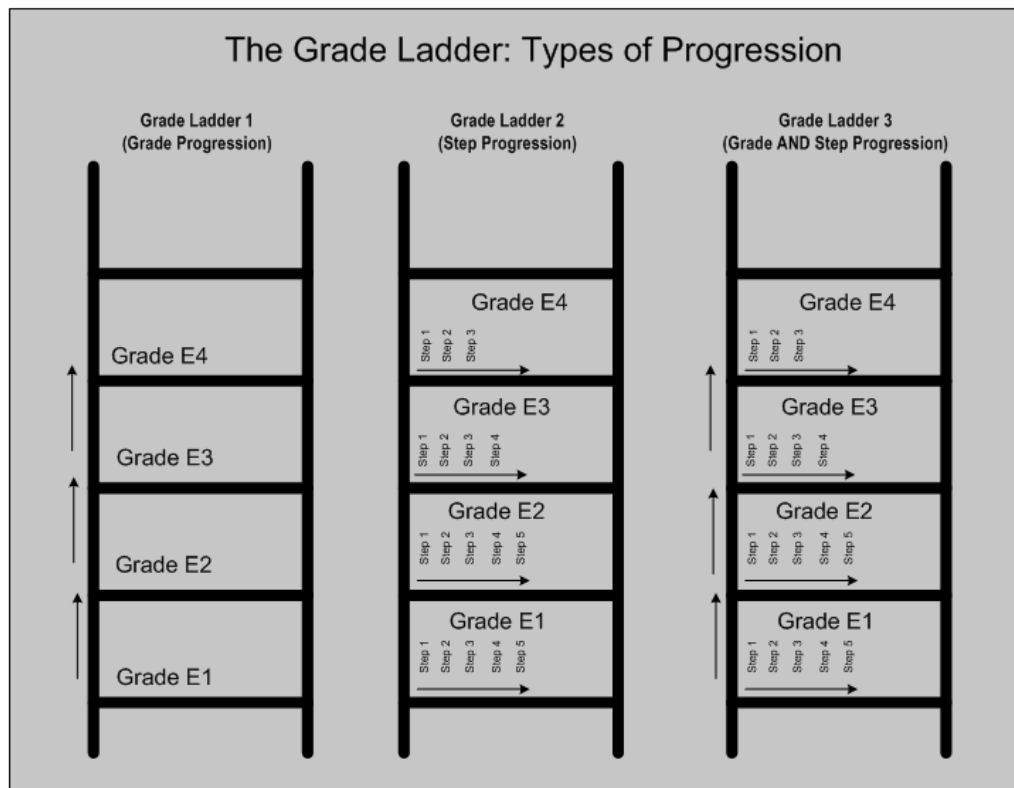
At the centre of grade/step progression is the *grade ladder*. You use the grade ladder to:

- Define, categorize and group your grades and steps in the sequence in which your employees typically progress. For example, you might decide to create three grade ladders for your enterprise: one for technical grades, another for management grades, and a third for administrative grades.
- Define the rules that determine an employee's eligibility for progression, and optionally add scores to the eligibility criteria to define the employees most eligible

to progress, as guidance for manual approvals

- Specify pay administration rules for the grades and steps on the grade ladder. For example, define how salaries are updated and passed to payroll when an employee progresses from one grade to the next.
- Vary grade and step pay according to employees' individual circumstances.
- Determine the type of approval (manual or automatic) required to progress an eligible employee.

The graphic below illustrates the types of progression the grade ladder supports:



As shown in this graphic, you can set up a grade ladder to progress employees in one of the following three ways:

- From one grade to another. Example: Grade E1 to Grade E2.
- From one grade step to another grade step (on the same grade). Example: Step 3 on Grade E2 to Step 4 on Grade E2.
- From one grade step to another grade step (on another different grade). Example: Step 5 on Grade E2 to Step 2 on Grade E3.

Note: You can only progress employees within the same grade ladder, and not across different grade ladders.

You set up the grade ladder using the Total Compensation Setup Wizard. This wizard guides you through the Grade Ladder setup pages and the tasks you must perform to create the grade ladder.

French Users

For a public sector type organization, you set up the grade ladder using the French Public Sector Corps business area in the Total Compensation Setup Wizard. When you create a grade ladder, Oracle HRMS creates a corps with the same name as that of the grade ladder. You can then set up the corps details.

Note: In a public sector type organization, the grade ladder is the corps and you can progress employees within and across different grade ladders.

Salary Rates

Grade/Step Progression enables you to record the pay rates associated with grades and steps (and to make the necessary salary changes when an employee progresses from one grade or step to the next.)

If you are using Grade/Step Progression, these pay rates are known as *salary rates*. You can enter two types of salary rate:

- Default salary rates
- Criteria salary rates

Default Salary Rates

Default salary rates represent a single set of values for one grade. For example, if you enter minimum, maximum, and mid-value default salary rates for the grades on your grade ladder, the rate for every assignment on that grade must fall within the specified range. Or, if you are using grade steps, the default salary rate you define for each step applies to every assignment on that step.

Criteria Salary Rates

Criteria salary rates represent different sets of values for the same grade or step. If your enterprise compensates its employees using a group pay model (but without a common pay scale), then you can use criteria salary rates to vary the rates that you pay employees on the same grade.

See: Recognizing Your Grade Implementation Model, *Oracle HRMS Compensation and Benefits Management Guide*

For example, your enterprise may use the same grades and steps in all its office locations. However, differences in cost of living mean that you pay your employees different amounts depending on where they work.

To enable you to vary grade and step pay in this way, you use *criteria sets* and *criteria salary rates*. If your enterprise varies pay by location only, you could create one criteria set for each location (for example, one for Melbourne, one for Sydney, and one for Perth). Each criteria set would include just one criterion (the location name). You can use any of the following criteria in your criteria sets:

- Bargaining Unit
- Full Time/Part Time
- Job
- Location
- Organization
- Performance Type (including Rating Type information)
- Person Type
- Rule
- Service Area

See: Eligibility Profile Criteria, *Oracle HRMS Compensation and Benefits Management Guide* for more information about these criteria

Important: You can use the above criteria only to create criteria sets for use in Grade/Step Progression. If you use other criteria, the variable rate profile is available as a criteria set in the Total Compensation Setup Wizard, but it contains no criteria.

Having defined unique criteria sets, you can enter the salary rates for each grade and/or step that use different rates of pay.

The application identifies employees who are on the grades (or grade steps) that meet the criteria in your criteria sets. If they meet the criteria, they are eligible for the criteria salary rate. If they do not meet the criteria (for example, they work in the Auckland office, where grade pay does not vary by location), they are eligible for the default salary rate.

If your organization does not use variable rates of pay for the same grade, you need to use only default salary rates and do not need to define criteria salary rates.

Reuse of Existing Grade Rates and Scale Rates

You can upload grade rate and scale rate values created in the Grade Rate and Scale Rate windows to create default salary rates. However, once you have uploaded any existing rates, we recommend that you use the Total Compensation Setup Wizard to maintain salary rates for use in Grade/Step Progression.

Note: If you are not using Grade/Step Progression, you can define grade and scale rates using the Grade Rate and Scale Rate windows only.

French Users

In a public sector type organization, Oracle HRMS derives salary rates from the pay scales that you define. It calculates the salary using the Grade and Step Rate method that uses the index values in the Global Table of Indices - Gross Index (IB) and Increased Index (INM). For a grade, the application derives the salary rates from the increased index in the Global Table of Indices and the legal indemnity rates, in case of legislative pay scales. It uses the salary rate directly, in case of exception pay scales.

As you create the pay scales and then define the grade steps from the progression points, you do not have the option of using progression points for the grade ladder.

Progression Rules

To progress employees using Grade/Step Progression, you need to define how a person becomes eligible for progression. You do this using *eligibility profiles*, which you can attach at grade ladder, grade, or step level:

- Grade ladder profiles apply to every grade or step in this grade ladder.
- Grade profiles apply to this grade (and its step, if used) in this grade ladder.
- Grade step profiles apply to this grade step in this grade ladder.

Note: When you attach an eligibility profile to a grade, you can specify if you want the profile to apply to this ladder only, or to every other grade ladder using this grade. You can only attach step-level profiles to the selected grade ladder.

A profile contains one or more criteria that an employee must meet to become eligible for progression. If their current grade or step is associated with multiple profiles, they must meet the criteria in any mandatory profiles and at least one of the optional profiles

For example, you may want to specify that anyone on this grade ladder must have been on their current grade or step for at least two years before they are eligible for progression, and each grade has additional rules for progression. To address this, you could define the following two rules:

- A grade ladder profile that specifies the employee must have been on their current grade or step for a minimum of two years.
- Grade level profiles for rules that are specific to each grade.

You can reuse the same eligibility profiles in other grade ladders, grades and steps. You can define eligibility profiles using either the Participation Eligibility Profiles window or directly from the Total Compensation Setup Wizard, then attach them to grade ladders, grades, or steps in the Total Compensation Setup Wizard.

If you set up your grade ladder to rank employees on the basis of the eligibility criteria they satisfy, you must assign scores to the eligibility criteria, using the Participation Eligibility Profiles window. The application computes scores for people, on the basis of applicable eligibility criteria, to arrive at a rank for each person.

Manual Approval

An employee may be eligible for progression to one or more grades or steps. Based on the progression rules you defined, the application progresses the employee automatically to the appropriate grade or step.

If your grade ladder uses manual approval, and the employee is eligible for more than one grade or step, the application proposes the default progression and marks it on the Approvals page.

If you have set up your grade ladder to rank employees to determine the people you want to progress from a group of eligible employees, the application displays the ranks and the computed scores of employees of that grade ladder in the Approvals page.

If you have enabled Workflow for a grade ladder that uses manual approval, the application notifies the managers of the employee for approval of the proposed progressions.

The Grade/Step Progression process determines the default grade or step by applying the following rules:

- If you have not assigned a grade ladder to an employee and the employee's current grade is attached to the default grade ladder for the business group, then it uses the default ladder.
- If the employee has no current grade associated with their assignment, the process stops.
- If the default grade ladder uses both grade and step progression, the process proposes a step based on the Progression Style defined for the grade ladder. The proposal may be to the lowest step in the grade, the next grade (but no step), or to the step with the lowest increase in salary.
- If the default grade ladder uses grade progression, the process proposes the next grade in the grade ladder for which the employee is eligible. When grade ladders are set for automatic progression, the Grade/Step Progression process flags the

proposed progression so that the post-process can complete this progression. If this grade ladder requires manual approval for all progressions, the default grade or step is shown on the Approvals page for you to reject or approve the progression.

French Users

In a public sector type organization, you can define progression within corps and across corps based on the career path and using the appraisal scores, ranks, and quota restrictions. You can move civil servants across corps if they satisfy all the eligibility conditions for the corps, and the seniority requirements defined for the career path.

Linking Professional Activity to Public Sector Type

Oracle HRMS enables you to link the field of professional activities to the type of public sector. This helps you view only the fields of professional activity you linked to the type of public sector when you are associating a field of professional activity as the primary area of professional activity in a corps. You can link one professional activity to more than one public sector type to meet your organization requirements. For example, you can link the Administrative activity to Health and State public sector types.

Use the User Types and Statuses window.

To link the professional activity to public sector type:

1. Select the name PQH_CORPS_FILERES.
2. Leave the Business Group field blank as you link professional activity to public sector type at site level.
3. Select the field of professional activity that you want to link to the public sector type.
4. Enter a brief description and code for the field of professional activity you selected.
5. Select the type of public sector using the Further Information column.
6. Choose OK.
7. Save your work.

Setting Up Corps

You set up corps using the Plan Design Wizard. The wizard guides you through the steps for creating a new corps (or updating an existing corps). When you create a grade ladder, Oracle HRMS creates a corps with the same name as that of the grade ladder. You can then set up the corps details. In a public sector type organization, a grade ladder is the corps.

Caution: You can perform many of the grade ladder setup tasks in either the Professional User Interface (PUI) or using the Plan Design Wizard. However, we strongly recommend that you use the Plan Design Wizard unless there is a specific instruction to use a window in the PUI. You should only use the PUI if you have extensive knowledge of Total Compensation data model and experienced in plan design setup, because there are many dependencies in grade ladder design that you may set up incorrectly if you do not use the Plan Design Wizard.

After you enter the mandatory details, you can save your work at any stage of the corps setup process. For example, while entering corps details, you cannot save for later without entering the effective date which is a mandatory detail.

You can make changes to a completed corps at any point. Grade/Step Progression will use the corps setup that was valid at the time of running the grade/step progression process. For example, if your existing corps uses automatic approval and you change it to use manual approval on 01-JAN-2003, progression that occurs after that date uses manual approval. The application will not, however, allow you to remove a step or a grade from a corps if employees are already placed on that step or grade.

To set up corps:

1. Set up grade/step progression. See: *Setting Up Grade/Step Progression, Oracle HRMS Compensation and Benefits Management Guide*
2. Define the indemnity rates and the Global Table of Indices using the Global Pay Scales self-service interface. Oracle HRMS uses these indemnity rates and the index values in the Global Table of Indices to calculate the salary rates in your pay scales.
3. Using the Plan Design Wizard Welcome page, select the French Public Sector business area.
4. Using the Search: Grade/Step Progression page, click Create Grade Ladder. The Grade/Step Progression Task List page is displayed. If you want to make changes to an in-progress grade ladder, use this page to find the ladder and complete any of the following outstanding tasks.

Note: When you search and change an existing corps, the date for the change is the search date and not the effective date of the corps.

If you choose the manual posting style for a grade ladder, then you can enable or disable workflow for the grade ladder to assist in the approval of the employee progression. You can also indicate whether to use ranking for the grade ladder, and the method of ranking, to enable HR managers and line managers to change employee ranks in the Approval page.

You record corps-related additional details such as entrance exams and trainings for completed corps. You can view the corps summary information.

5. Using the Grade/Step Progression Task List page, select the first task in the list (Task 1 Grade Ladder) and enter basic details about the grade ladder, such as its name, its effective date, and whether it uses grade steps. You can indicate whether quota restriction applies for the grade ladder to check quota requirements while processing step progression. You can choose the appraisal type and the review period of approval for the grade ladder to enable HR managers and line managers to view appraisal details in the Change Progression Speed page.

Note: You can create corps on or after the effective date of 01-JAN-1951. The application creates compensation objects, such as the plan, using the same effective date.

6. Using the French Corps Details page, define the corps (Task 2 French Corps Details). This is a mandatory task to complete the corps setup.

7. Enter salary information for the corps (Task 3 Salary Information).

Specify the currency used for grade and step rates, if the system should update salaries automatically upon progression, based on pay administration rules.

Even if you are not linking salary updates to a corps, but you use grade and step rates, you need to review the currency and rate information on this page:

- We recommend that you use the default currency that is used by the business group.
 - If you are creating multiple corps for the same business group, use the same rate period for each corps. If you select different rate periods, there may be conflicting values for a grade that is shared across corps.
8. Select (or define) grades to attach to this corps and place them in sequence on the corps (Task 4 Grades). You can attach existing grades that you created in the Grades window. However, we recommend that you use the Plan Design Wizard to create any new grades for use on corps.

Note: You can add a grade to a corps only if the grade is valid on the corps' effective date.

You can reuse grades in other corps, but the corps must use the same Period. (You set this up as part of the corps' salary information.) Also, if the grade uses progression points, you can only add the grade to other corps that also use progression points.

Launch the Define Grade Quotas pages to define occupancy for grades as you must

honour these quotas at the time of actually progressing civil servants across grades.

9. Create and add steps to the grades on the corps and define the step ceiling for each grade (Task 5 Steps). A ceiling step is the highest step attached to a grade to which an employee may progress. If your corps uses progression points, use this page to create (or reuse) pay scales and use those pay scales to create steps. Please omit this task if your corps does not use steps.

You define the Legislative or Exception type of pay scales used in a public sector type organization. The Legislative type of pay scale derives the point values from the Global Table of Indices. For the Exception type of pay scale, you enter the salary rates at the time of creating this pay scale. You also enter progression speeds for each step to indicate the duration a civil servant must spend on a step to be eligible for progressing further.

10. As Oracle HRMS derives the step rates from the index values in the Global Table of Indices and the indemnity rates for Legislative type of pay scale or the rates you enter at the step level for Exception type of pay scale, this page shows the basic salary rate in read-only format.
11. Specify the progression rules for this corps (Task 7 Progression Rules). Select the criteria (as eligibility profiles) an employee must meet to be eligible for progression.

Use the Participation Eligibility Profiles window to define your eligibility profiles, ensuring they are valid for the corps start date. An eligibility profile can be held at corps, grade or step level. You must specify which of these eligibility profiles are used for ranking.

See: Defining an Eligibility Profile, *Oracle HRMS Compensation and Benefits Management Guide*

Note: While defining the eligibility profiles, assign the fast formula you created to the required participation eligibility profiles. This formula evaluates whether an employee satisfies the length of service required in the current step, current grade, or grade ladder depending upon the career path you defined at the step. See: Additional Implementation Steps for French Legislations, page 5-1

Launch the Define Career Paths page from here to specify the corps to which a civil servant can progress. You can also specify the grade-step level within the corps.

12. Using the Corps Legal Documents pages, you enter the details of the official document that publishes the amendments to the corps (Task 8 Corps Legal Documents).
13. Review, save, and validate the corps setup (Task 9 Review and Submit). When you are satisfied that your corps is complete, you can activate it to make it available for

employee progression.

Grade and Pay Administration

Promotions Process

The Promotions process enables you as a HR manager or line manager to promote employees across corps (grade ladders). You promote an employee from one grade to another within a grade ladder depending on the eligibility criteria attached to the grade, employee appraisal scores, ranks, and quota restrictions for the grade. You can also move employees from a grade-step in one grade ladder/corp to a grade-step in the other grade ladder/corp, based on the career path and eligibility criteria defined for each grade-step.

The Promotions process uses the marks and rank given to an employee by the employee's manager. This process checks the quota requirements, and based on the eligibility defined for grade and step, generates the list of employees eligible for promotions using the Participation process of the Grade Step Progression functionality. HR Managers can use the Approval page to see the total score, to see score details such as scores at each eligibility level, and to change the proposed rank for the employee.

The Promotions process checks if the grade is workflow-enabled, then moves the employee's record to the next approver. If the grade is not workflow-enabled, then you approve the employee's promotion.

See: Processing Promotions, page 4-17

Processing Step Progression

Oracle HRMS enables you as the HR manager or line manager to move employees from one step to another within the same grade using the appraisal scores, ranks, and quota restrictions. You must complete the following tasks before you progress employees from one step to another:

1. Define appraisal types to meet your business requirements and appraise employees using the SSHR Appraisal functionality. See: *Appraisals (Self-Service), Oracle HRMS Deploy Self-Service Capability Guide*
2. Set up corps to meet step progression requirements. While setting up the corps, choose the appraisal type and the review period of approval. In addition, indicate whether to use ranking for the grade ladder, the method of ranking, and whether quota restriction applies to the corps. See: *Setting up Corps*, page 4-11
3. Change the progression speed of the employee such as fast, average, or slow speed. From the Change Progression Speed page, you can view the marks for an employee and decide the progression speed. When you change the progression speed of an employee, the application validates any quota restrictions. For example, while

setting up the corps, if you have indicated that at a specific grade only 5 percent of the employees can progress at maximum speed and 3 percent at average speed, then the application validates this quota restrictions.

If the marks are not available due to a non-existent, incomplete, or outdated appraisal, then you can notify the manager of the employee to complete the appraisal.

4. Run the Participation Process to determine the set of grades and/or steps to which an employee is eligible. See: *Running the Participation Process: Grade Step, Oracle HRMS Compensation and Benefits Management Guide*

If the posting style for the grade ladder is automatic, then the Step Progression process progresses the eligible employees automatically. If the posting style is manual for the grade ladder, then the Ranking functionality ranks the eligible employees and displays their names in the Approval page for you to approve.

5. Approve the employee step progression. Using the Approval page, you can change the rank as required and approve the progression based on the vacancy quota restrictions. For example, if there are 2 vacancies on a specific grade, the application validates this vacancy quota.

If the grade is workflow-enabled, then the first approver can approve the employee and the progression notification will move to the next approver. If the grade is not workflow-enabled, and the posting style for the grade ladder is manual, then you approve the employee's progress to the next step in the grade.

Processing Promotions

Oracle HRMS enables HR manager or line manager to promote employees across corps (grade ladders). You must complete the following tasks before you promote employees:

1. Ensure you set up the corps. See: *Setting up Corps, page 4-11*
2. Ensure you place employees on appropriate grades using the HR Administrator Actions page. See: *HR Administration Actions, page 2-17*
3. Run the Participation Process to generate the list of employees eligible for promotions. See: *Running the Participation Process: Grade Step, Oracle HRMS Compensation and Benefits Management Guide*

If the posting style for the grade ladder is automatic, then the Promotions process progresses the eligible employees automatically. If the posting style is manual for the grade ladder, then the Ranking functionality ranks the eligible employees and displays their names in the Approval page for you to approve.

4. Approve the employee promotion using the Approval page. This page enables you to change the rank as required and approve the promotion based on the quota

restrictions. If the grade is workflow-enabled, then the first approver can approve and the progression notification will move to the next approver. If the grade is not workflow-enabled, and the posting style for the grade ladder is manual, then you approve the employee's promotion across corps.

Running the Synchronize Salary Rates Process

Oracle HRMS enables you to match the existing salary rates in the corps setup when you update the indemnity rates defined for your global pay scale. This match ensures that you use current compensation values in your pay scales. You can run this process from the self-service interface or the professional interface. If you did not complete the corps and grade information, you can run this process from the professional interface after you complete the corps and grade setup.

You run this process from the Submit Request window.

To run the Synchronize Salary Rates process:

1. Select Synchronize Salary Rates in the Name field.
2. Click in the Parameters field to open the Parameters window.
3. Enter the effective date from when you want to synchronize the salary rates.
4. Select the mode of running this process to indicate if you want to run it for all global indices or specific indices.
5. Select the commit mode to update the grade-step rates. You can choose not to commit if you want Oracle HRMS to process the details and show you any exceptions. This will not update the grade-step rates.

Note: If you run this process from the self-service interface, Oracle HRMS updates the grade-step rates by default.

6. Select the gross index values to synchronize, if you selected specific indices. The process will consider only the selected gross index values while matching the updated indemnity rates with the existing salary rates.
7. Choose OK.
8. Choose Submit.

Absence Management Setup

Absence Categories and Types

Oracle HRMS provides a convenient way to maintain information about the various absence types your enterprise recognizes. To facilitate reporting and analysis of employee absences, you can distinguish between *absence types* and *absence categories*. An absence category is a group of related absence types.

Some absence categories may be predefined for your legislation. The table below contains examples of absence categories and types, for illustration purposes only. You can extend the list of predefined categories and define your own absence types, as required.

Example Absence Categories and Types:

Absence Category	Absence Type
Medical Leave	Illness or Injury
	Work-related Injury
	Work-related Illness
	Medical Appointment
Family Leave	Paid Maternity/Paternity
	Unpaid Maternity/Paternity
	Dependent Care
Personal Leave	Compassionate Leave
	Personal Business
Professional Leave	Certification Classes
	Meeting Attendance

Also, to assist with absence reporting and analysis, you can provide *reasons* to select from when recording employees' time taken for an absence type. For example, if you

need information to analyze the particular family-related responsibilities that cause employees to miss work, you can define reasons for absence types as follows:

Example Absence Category, Types and Reasons:

Absence Category	Absence Type	Absence Reasons
Family Leave	Paid Maternity/Paternity	Birth of a child
		Adoption of a child
	Dependent Care	Child Care
		Elder Care
		Disabled Care

Setup of Absence Types

Setting up each absence type is essentially a two-step process. One step involves defining the type, that is, entering its name, and optionally selecting a category and reasons for it. The other step involves defining an element to associate with the type. This element serves two important purposes:

- It provides a way to *maintain a running total* of time taken for the absence type. The Absence Detail window shows the running total of absences with an end date before the effective date, and with an absence duration on record. Each absence can add to, or subtract from, the running total, depending on how you define the absence type.
- It provides a way to *restrict employee eligibility* for the absence type. The links you build for the element establish which employees are eligible to use the type.

For example, if the absence type compassionate leave is available only to full time employees, you link its element to the assignment category Full Time.

To hold a single running total of time taken for two or more absence types, you associate all the types with the same absence element. For example, your absence category Personal Leave may include two absence types you need for certain reporting purposes, Compassionate Leave and Personal Business. However, you require just one running total to be kept of employees' time taken for both types of personal leave. In this case you simply associate both absence types with the same absence element.

Note: If you want to use absence types without recording accrued totals or eligibility rules, you can define the type with no associated element.

Absence Elements

You can associate each absence type with a recurring or nonrecurring absence element. Each element has an input value with either hours or days as its unit of measure.

Using a Nonrecurring Element

Nonrecurring element entries are valid for one payroll period. When you enter an absence of a type associated with a nonrecurring element, the application creates an element entry for the period in which the absence start date falls. For example, if you enter an absence that starts on 4 May for someone on a monthly payroll, the entry is dated 01 May to 31 May.

The entry is only created when you enter the absence end date, and you must enter the absence duration at the same time. The duration can be defaulted if you set up an absence duration formula. The full value of the absence duration is recorded in the absence element entry, even if the end date falls outside of the payroll period.

Using a Recurring Element

Important: This option is only available if you use Oracle Payroll and the Proration functionality is enabled in your localization.

UK Users: If you use the Statutory Absence Payments feature you must continue to use nonrecurring elements to record long term sick leave.

Use this approach if you want to begin processing absences before end dates are recorded. You do not enter absence duration on the recurring element entry. Instead, you use a payroll formula to calculate the absence duration to be processed in each payroll period. Use the absence duration formula to calculate the duration displayed on the Absence Detail window. This value is deducted from the current PTO accrual when you enter an end date for an absence type that is associated with a PTO accrual plan.

Recurring element entries start on the absence start date and end on the absence end date (if there is an end date). If the absence ends in the middle of a payroll period, the payroll run detects and processes the absence using the proration functionality.

Absence Balance Information

When you define an absence type, you specify whether the application should maintain an increasing balance, a decreasing balance, or no balance of time off. The balance is a running total of the hours or days an employee has taken for the absence type, as recorded in the Duration field.

Increasing Balances of Time Taken

As you would expect, an increasing balance for an absence type starts with no time entered, and increases as you enter employees' hours or days absent. For example, if the absence type Compassionate Leave has an increasing balance, the balance starts from zero for each employee and increases by the number of hours entered for each absence of this type.

Increasing balances are appropriate for most absence types. For absence types for which your enterprise sets a maximum time allowed, the system issues a message when an entry of time absent exceeds this maximum, or Oracle Alert can notify you when an employee reaches the maximum time or takes excess time.

See: *Oracle Alert User's Guide*

When defining an absence type for a PTO accrual plan, you give it an increasing balance that shows the employee's accrued time taken. When you record an absence using the Absence Detail window, you can see the amount of accrued time a plan participant has available for use as vacation or sick leave.

Decreasing Balances of Time Remaining

If your enterprise sets a maximum time allowed for an absence type, you have the option of setting up a *decreasing balance* for this type, instead of an increasing balance. (If the absence type is used for a PTO accrual plan, it is simpler to use an increasing balance and an accrual formula that records an up-front accrual amount.)

For example, suppose your enterprise allows certain employees 32 hours leave per year for professional development. The Professional Leave absence type can have a decreasing balance, and an initial entry of 32 hours.

If you record an employee absence of 4 hours for this absence type, the decreasing balance shows 28 hours still available to be taken.

Decreasing absence balances require more maintenance than increasing balances. They need a prorated initial balance entry for all eligible new hires throughout the year, and require resetting each year for all eligible employees.

Notice that an absence type cannot have both a decreasing and an increasing balance; it has one or the other.

Initializing an Absence Balance

You can initialize or adjust an absence balance using the Element Entries window, or the Element Entry API. You can also initialize a decreasing balance by entering a negative value using BEE. For example, if you enter -16 hours using BEE, a decreasing balance starts at 16 hours. However, be aware that using BEE creates an absence record that will show on employees' absence history.

Referencing Absent Time in Payroll Runs

You can define an absence element as an Information element or an Earnings element.

Using an Information Absence Element

If you define an Information absence element, you can use a recurring Earnings element to manage the calculation and payment of vacation and sick pay. When you define the absence element, you check the Database Item box for the input value that holds the absence balance. Entries to this input value then become database items that formulas for payroll calculations can access.

US Users: You will typically set up your absence elements in the Information classification for employees who do not submit timecards (Timecard Required = No on the Statutory Information tab of the Assignment window). If you are using the seeded Regular Salary or Regular Wages elements, the payroll run creates indirect results for the seeded Vacation Pay or Sick Pay elements when it finds absence entries in the Vacation or Sickness categories. These elements appear on the Statement of Earnings, but the Information elements do not. You do not need to set up any additional absence Earnings elements for these employees.

Other localizations: Typically, you define an Earnings element to have a skip rule that triggers processing when it finds an entry for the absence element. The element's payroll formula uses the database item for the entry value so that it automatically gets the sum of all the entries in the pay period. Then, using the salary database item to get the salary or hourly rate, it calculates the total absence pay for the period. You can also use the formula to reduce regular earnings for the period so employees do not get paid twice.

The advantage of this approach is that it simplifies the processing of absence payments into one calculation.

Using an Earnings Absence Element

Select the Earnings classification for absence elements if you want to process absences individually in each payroll period. You can use these elements with Oracle Time and Labor. This approach creates a one-line entry on the statement of earnings for each absence type. Typically, you would create nonrecurring Sick and Vacation Pay earnings elements. You can also create different absence elements for each rate or multiple of pay if the element must appear on the statement of earnings as a different line item.

US Users: For employees who *do* submit timecards (making entries in BEE to the Time Entry Wages element), you can create your absence elements as Earnings. This also applies if you do not use the seeded Regular Salary and Regular Wages elements, and you want your absence payment to show on the Statement of Earnings. Use the Earnings window to initiate the element. Select the Category *Regular* and check the Reduce Regular box.

Retrospective Entries and Adjustments

Oracle Payroll users: If you enter or update an absence retrospectively, or you delete an absence that started in the past, these changes are listed in the Retro Notification report the next time you run this report. This enables you to use RetroPay to correct any payroll processing.

Holiday Pay

Oracle HRMS enables you to make both a deduction and a payment for an absence. You can also regularize the holiday payments after all the entitlement has been used. You can regularize the payments at the end of the holiday period or at the end of the holiday year for all previously paid absences in the accrual plan for the relevant assignment.

Note: When you process a retrospective absence in a previous accrual year, you should regularize the holiday payments before running retro pay.

For processing the holiday pay, Oracle HRMS has provided a sample formula FR_PTO_SAMPLE_HOLIDAY_PAY and two predefined elements, FR_HOLIDAY_PAY and FR_HOLIDAY_DEDUCTION. For regularizing the pay, you need to use the sample formula FR_SAMPLE_HOLIDAY_REGULARIZE and a predefined element, FR_HOLIDAY_REGULARIZE.

You can change these sample formulas to meet your requirements. You need to set up the formula results before you run the payroll.

For processing holiday pay, you cannot do a QuickPay run as well as the normal payroll run. If you do, the figures are recalculated incorrectly.

Sick Pay

Oracle HRMS enables you to process sick pay for your employees according to the statutory requirements. Using the sick pay processing functionality, you can provide details of absences, work incident that caused the absence, benefits, and deductions.

The work incidents details enable you to determine the rate of benefits to be paid to the employee. You can record sickness against an absence type in the absence category "Sickness".

Note: The absence category "Sickness" is designed to be used with Payroll and not Self Service.

Oracle HRMS creates entries for the FR_SICKNESS_INFORMATION element--which must be associated with the Absence Type--when you enter the duration of the absence.

Linked Absences

In Oracle HRMS any sickness absence that occurs within 48 hours of a previous one is treated as an extension of the previous sickness absence. Some of the information used for processing the absence is held only for the parent absence. For example you have recorded absences from 01-JAN-1990 to 03-JAN-1990 and 02-JAN-1990 to 05-JAN-1990. When recording absence for 02-JAN-1990 to 05-JAN-1990 you can link it to the earlier absence.

IJSS Payments

IJSS is the sickness benefit paid by CPAM (Social Security Office) if the eligibility conditions are met. IJSS is normally paid to the employee who can authorize the employer to receive the payment (subrogation). In Oracle HRMS you can do this by providing a default value to the HR: Subrogation user profile option. You can override the user profile option for each absence, if required.

In Oracle HRMS you can either choose to estimate the social security payment or wait for the payment details from the social security office to process sick pay.

- If you choose to select the estimate IJSS option while entering absence details, Oracle Payroll triggers the sickness processing elements. If you set estimate IJSS to "YES" absence gets processed in the period of absence.
- If you are waiting for the payment details from the social security office, you need to select the No option for IJSS estimate. When you receive the payment, you enter the payment information in the form of an element entry for the FR_SICKNESS_CPAM_INFO. You also need to create separate entries for received IJSS amount as their IJSS Net and Gross daily rates may bear different rates.

Note: If Estimate IJSS option is not selected on the absence record or left blank, then it defaults to NO during processing. Absence gets processed only in the period when CPAM payment is received. If the employee has already had a sickness absence where IJSS Estimate is set to No, you cannot enter another absence with IJSS Estimate set to Yes until you have received notification of all the IJSS Payment for the first absence and the corresponding entry of FR_SICKNESS_CPAM_INFO has been completely processed.

Processing Sickness CPAM information: Preprocessor

FR Payroll provides a Pre-processor to create information for CPAM processing. When you create an entry for the FR_SICKNESS_CPAM_INFO element, the pre-processor functionality creates element entries for the FR_SICKNESS_CPAM_PROCESS element based on payment dates and absence details. If the payment dates are crossing the payment period or the payment is related to multiple absences or if there is any rate

change for IJSS Net and IJSS gross, the preprocessor creates element entries for each of them.

For example: There is an absence from 27th Feb till 02nd April and then there is a linked absence from 03rd to 05th April. Payments are received in the month of April from dates 02 March to 17th March and 18th March to 5th April. Assuming 27th Feb to 1st March are Absence IJSS delays, the pre-processor creates separate entries for the different pay periods and the absence dates as given in the table:

Entries created by Pre-processor

Number of Entries	INFO_CPAM Payment Start Date to End Date	PROCESS_CPAM Start Date to End Date	IJSS Net Rate	IJSS Gross Rate
1	27 Feb - 01 Mar	27 Feb - 28 Feb	0	0
2	-	01 Mar - 01 Mar	0	0
3	02 Mar - 17 Mar	02 Mar - 17 Mar	30	50
4	18 Mar - 5 Apr	18 Mar - 31 Mar	35	55
5	-	01 Apr - 05 Apr	35	55

Incase of overlap of payment period boundaries, the preprocessor performs the task of breaking these entries for payroll periods.

The preprocessor performs certain validations while creating entries for the CPAM processing element to check the following:

- The payment dates do not overlap with any existing entries for FR_SICKNESS_CPAM_INFO.
- Multiple entries are created for different IJSS rates and for linked absences
- Separate entries are created for each period with the period start and end dates limited by the absence dates.

Once the preprocessor creates entries for the process FR_SICKNESS_CPAM_PROCESS element, you cannot directly modify the entries for this element using the Element Entries window. You can modify or delete only the original entry that you made for the FR_SICKNESS_CPAM_INFO element. The preprocessor works only with the sickness elements and not the entries made for the maternity and paternity absences. This is because for the maternity and paternity absence the net amount is guaranteed. The CPAM Pre-processor functionality is also available when using the Batch Element Entry form.

You can allow Oracle Payroll to calculate eligibility for IJSS, or you can enter a manual override when you enter the absence. Eligibility depends on the level of SMID contributions and the calculation of working hours in a reference period that is determined by the length of the absence.

- For the first six months of sickness the conditions of IJSS entitlement are, that the social contributions paid on the employee salary over the past six months should be equal to the social contributions payable on a salary equivalent to 1015 times the SMID value as at the first day of reference period or the employee must have completed 200 working hours in the last three calendar months.
- After six months the conditions of entitlement are that the employee must have been registered to social security for at least 12 months or either the social contributions made on the salary over the past 12 months are equal to the social contributions payable on a salary equivalent to 2030 times the SMID value or the employee should have completed 800 working hours in the last 12 calendar months.

Guaranteed Income

Legal guaranteed income is a legal top up payment paid by the employer to guarantee a certain level of gross income (90% of salary for a set number of calendar days followed by 66.6% for a number of days, determined by seniority). The employee has to be eligible for IJSS and not on holiday. In the calculation of the legal guarantee amount the number of days of sick leave taken prior to the start of the absence within a rolling year is taken into account. For the first ten days of each non-occupational absence no guarantee is paid. The daily rate is based on the seeded balance `FR_SICKNESS_GUARANTEE_REFERENCE_SALARY`.

Employees may also be entitled to guaranteed income specified in a collective agreement. Eligibility is based on criteria such as seniority and whether the sickness is work-related. The collective agreement guarantees a certain number of calendar days at a certain rate, which may be a percentage of gross or net. The number of days already taken may be based on a rolling year (that is, one year back from the start date of the absence) - as for the legal guarantee - or based on the calendar year.

You can use the `FR_SICK_BENEFIT` element to make entries for the company and collective agreements' guaranteed income. Oracle Payroll calculates the actual sickness benefit from the information you enter on this element, such as:

- Guarantee Type: Net, Gross, or Gross adjusted for IJSS
- Waiting days: The number of days before the compensation is paid
- Bands: The type of guarantee that applies to the employee, such as 14 days at 90% pay and 14 days at 50% pay. You can define up to four bands.
- Balance: The balance used to calculate the reference salary from which the daily rate is calculated.

If the employee is entitled to legal guaranteed income and guaranteed income from one or more collective agreements, Oracle HRMS makes comparisons for best pay. So if the employees are covered by more than one guarantee, then they receive the most beneficial one.

Insurance Payment

One of the third party payments received by an employer is medical insurance. Medical insurance could cover the guaranteed income or long term sickness and the contributions could be of certain percentage. In such cases, you can find third party insurance adjustment amount to reduce employer's liability. You can enter the details of insurance payment using the FR_SICKNESS_INSURANCE_PAYMENT element. Oracle Payroll calculates insurance payments subject to deductions and exempt from deductions to derive Net pay for the employee.

Note: Third party insurance payments should only be processed when the employee was covered by 100% net guarantee. If employee was covered by any other guaranteed income, insurance payment would be processed as if the employee was covered by 100% net guarantee and it would be wrong.

Sickness Deduction Calculation

To process sickness deductions, you can use the two sample sickness deduction fast formulas:

- FR_SICK_DEDUCT_WORKING_DAY_FORMULA
- FR_SICK_DEDUCT_OPEN_DAY_FORMULA.

You can set these formulas at the company or establishment information level. The formula set at establishment level overrides the formulas set at company level.

- If you set the FR_SICK_DEDUCT_WORKING_DAY_FORMULA, then Oracle Payroll calculates sickness deduction as per the working days proration method.
- If you set the FR_SICK_DEDUCT_OPEN_DAY_FORMULA, then Oracle Payroll calculates sickness deduction as per the open days proration method.

You can create your own formulas for sickness deduction and set them at establishment or company information level. Ensure to prefix the formulas with FR_SICK_DEDUCT. The formula set at establishment level overrides the formulas set at company level. If the working day or open day value exceeds the global value, then the number of working days and open days will default to the value held by the globals FR_WORK_DAYS and FR_OPEN_DAYS, 21.66 and 26 days respectively.

Sick Pay Processing

In Oracle Payroll you can process sick pay through a Payroll Run or QuickPay. The seeded sickness element has the following attributes, which determine how it is processed:

- Run Type is Sickness, which determines that sick pay is calculated within its own sub run. This helps you to calculate normal earnings and deductions.
- Process Separately, which determines that each occurrence of sickness is processed independently.
- Iterative, which indicates that a number of Gross to Net runs are performed. These runs calculate each of the guarantees to decide the most beneficial pay for your employees.
- Prorated, which indicates that the sickness element should be processed if it exists at any date during the payroll period, not just on the Date Earned of the payroll run.

When you submit a payroll run with an element entry for FR_SICKNESS_INFORMATION, Oracle Payroll creates a sickness run_type action in addition to the Standard run_type action. The iterative formula FR_SICKNESS_CONTROL attached to the FR_SICKNESS_INFORMATION element sets up the sickness calculation. If the Pay IJSS Estimate field was set to No for this absence, the sickness processing is skipped until you receive notification of an IJSS payment from CPAM. If this field was set to Yes, the processing proceeds as follows.

The process fetches the absence details, including any linked absences. It checks IJSS eligibility; if eligible, it calculates IJSS Net and Gross for the absence or part absence, based on number of dependents, the length of the leave and the payroll category of the work incident, if a work incident is linked to the sickness absence. The IJSS daily rate is based on IJSS_REFERENCE_SALARY (limited to the Social Security ceiling) over the previous 3 calendar months. If not eligible, only sickness deduction is processed. It calculates the sickness deduction using the formula set at establishment or company level.

Next it calculates the legal guaranteed income, taking into account the number of days of sick leave prior to the start of the absence : it pays out the remaining entitlement if prior sickness exist within the rolling year. As this is a top up payment, the Gross IJSS payment is determined for the days in receipt of guarantee, and this is offset against the guarantee payment. One effect of this is to reduce the contributions since IJSS is not subject to deductions.

The process then calculates the company or collectively agreed guaranteed income. The waiting days, bands, and rates for the calculation of the guarantee are fetched from the FR_SICK_BENEFIT element entries that are current for the duration of the absence. As for legal guaranteed income, Gross IJSS is offset against the collective agreement

guarantee payment.

For a net guarantee, the process uses the balance FR_SICKNESS_TARGET_NET. Then a series of payroll runs are performed to calculate each guarantee and to determine the adjustments required to achieve a net guaranteed amount.

The coverages now include a net figure for the part of the absence being calculated for each guarantee. It also holds the Net figure for previous calculations for this parent absence. A comparison is made to determine the most beneficial guarantee (highest Net) across the whole of the absence.

Over the duration of the absence the guarantee that pays the best rate may change. In that case an adjustment figure is posted in the current period that is the difference between the previous best guarantee and the current best guarantee. The effect is that only a single guarantee is paid for a particular absence. Since different delay days apply to different guarantees an adjustment figure for IJSS Gross is also be posted in this case.

When you perform the final run, it is processed with the guarantee identified as 'best method' and any adjustments caused by the 'best method' changing over the course of an absence. It also returns the results of the coverages as a set of audit results in element FR_SICKNESS_GI_INFO. The result is the selection of a single guarantee to be paid for the duration of the absence.

RetroPay

RetroPay of sickness may occur for several reasons:

- **Sickness Category Change.** For example, the CPAM may take time to establish if an absence is Occupational Sickness or related to Work Accident. When this occurs, IJSS, Legal and Guaranteed Incomes may require adjustment.
- **Change in Earnings.** A retrospective change in earnings could affect the reference salaries used in retro pay.
- **Change in Deductions.** A retrospective change in deductions could affect the Net based Guarantee Income.

Similarly, RetroPay of Maternity, Adoption and Paternity may also occur. For example, a change in earnings in the reference period for IJSS will affect the IJSS payment which will affect the deductions taken in the maternity period.

Oracle HRMS provides the necessary predefined elements, formulas and balances to ensure that retrospective changes are correctly calculated. When Oracle HRMS performs retrospective sickness calculations, a full recalculation occurs without the earnings bases being fixed and any retrospective deduction rates applied. Deduction calculations are performed within the retro and the Adjustment figure is calculated. Any deductions calculated on retro Sickness payments or deductions are taken in the payment period.

Sickness RetroPay

The predefined sickness elements for RetroPay are:

Sickness Elements included in Standard Run Type

Element	Retro Element
FR_GI_PAYMENT1	FR_GI_PAYMENT_RETRO
FR_IJSS_GROSS1	FR_IJSS_GROSS_RETRO
FR_IJSS_GROSS2	FR_IJSS_GROSS_RETRO
FR_IJSS_GROSS_ADJUSTMENT	FR_IJSS_GROSS_RETRO
FR_IJSS_NET	FR_IJSS_NET_RETRO
FR_IJSS_NET_PAYMENT	FR_IJSS_NET_PAYMENT_RETRO
FR_SICKNESS_ADJUSTMENT	FR_SICKNESS_ADJUSTMENT_RETRO
FR_SICKNESS_DEDUCTION	FR_SICKNESS_DEDUCTION_RETRO
FR_SICKNESS_GI_ADJUSTMENT	FR_SICKNESS_GI_ADJUSTMENT_RETRO

Note that the audit element FR_SICKNESS_GI_INFO does not have a retro element. Retro audit has to be processed before sickness so that the adjustments in band consumption and previous best method for guarantee are available to the sickness calculation.

MAP elements

MAP elements require retro elements. These process in the Standard Run and they have the same attributes as the normal elements but are Final Close with a skip rule of FR_ONCE_EACH_PERIOD.

MAP Elements included in Standard Run type

Element	Retro Element
FR_MAP_DEDUCTION	FR_MAP_DEDUCTION_RETRO

Element	Retro Element
FR_MAP_GI_PAYMENT	FR_MAP_GI_PAYMENT_RETRO
FR_MAP_IJSS_ADJUSTMENT	FR_MAP_IJSS_ADJUSTMENT_RETRO
FR_MAP_IJSS_GROSS	FR_MAP_IJSS_GROSS_RETRO
FR_MAP_IJSS_NET_PAYMENT	FR_MAP_IJSS_NET_PAYMENT_RETRO

Sickness Insurance Elements

Sickness Insurance elements require retro elements. These process in the Standard Run and they have the same attributes as the normal elements but are Final Close with a skip rule of FR_ONCE_EACH_PERIOD.

Sickness Insurance Elements included in Standard Run type

Element	Retro Element
FR_SICKNESS_INSURANCE_ADJUSTMENT	FR_SICKNESS_INSURANCE_ADJUSTMENT_RETRO
FR_SICKNESS_INSURANCE_PAYMENT	FR_SICKNESS_INSURANCE_PAYMENT_RETRO
FR_SICKNESS_INSURANCE_PAYMENT_EXEMPT	FR_SICKNESS_INSURANCE_PAYMENT_EXEMPT_RETRO
FR_SICKNESS_INSURANCE_PAYMENT_SUBJECT	FR_SICKNESS_INSURANCE_PAYMENT_SUBJECT_RETRO
FR_SICKNESS_INSURANCE_REDUCTION	FR_SICKNESS_INSURANCE_REDUCTION_RETRO

Generally, the RetroPay elements have the same attributes as the elements they are based on. However, there are some element inputs that are mandatory to ensure the input is populated with RetroPay. Those elements with some or all mandatory inputs are:

- FR_SICKNESS_GI_INFO
- FR_GI_PAYMENT_RETRO

- FR_IJSS_GROSS_RETRO
- FR_SICKNESS_DEDUCTION_RETRO

Sick Pay Elements, Formulas, and Secondary Classifications

Oracle Payroll delivers predefined elements and formulas for sick pay processing including RetroPay. You can use the secondary classifications that have been provided for sickness balances. The following table describes the predefined elements and formulas:

Element Name	Description
FR_SICKNESS_INFORMATION	This is a recurring absence element and has these formulas associated with it - FR_SICKNESS_SKIP (skip formula), FR_SICKNESS_ITERATE (iterative formula), and FR_SICKNESS_PROCESSING (payroll formula)
FR_SICKNESS_DEDUCTION	This earnings adjustment element holds the deduction from gross for the absence. Uses indirect result from the FR_SICKNESS_PROCESSING formula.
FR_SICKNESS_DEDUCTION_RETRO	Retro element for Sickness Deduction that is processed once each period in the standard run type. The inputs are as for FR_SICKNESS_DEDUCTION but are mandatory so they are automatically populated on the retro entries.
FR_SICKNESS_ADJUSTMENT	Earnings element holds an adjustment to gross which is introduced when a net to gross calculation is required. The iterative formula modifies this Pay value until the desired net is achieved.
FR_SICKNESS_ADJUSTMENT_RETRO	Retro element for Sickness Adjustment that is processed once each period in the standard run type. The inputs are as for FR_SICKNESS_ADJUSTMENT.

FR_SICKNESS_INSURANCE_PAYMENT_SUBJECT	Earning element holds the component from third party insurance payment that is subject to deductions (indirect result from FR_INSURANCE_PROCESSING formula).
FR_SICKNESS_INSURANCE_PAYMENT_SUBJECT_RETRO	Retro element for Sickness Insurance Payment Subject that is processed once each period in the standard run type after earnings before deductions processing. The inputs are as for FR_SICKNESS_INSURANCE_PAYMENT_SUBJECT.
FR_SICKNESS_INSURANCE_PAYMENT_EXEMPT	Net payment element holds the third party insurance payment component that is exempt from deductions (indirect result from FR_INSURANCE_PROCESSING formula)
FR_SICKNESS_INSURANCE_PAYMENT_EXEMPT_RETRO	Retro element for Sickness Insurance Payment that is processed once each period in the standard run type after earnings before deductions processing. The inputs are as for FR_SICKNESS_INSURANCE_PAYMENT_EXEMPT.
FR_SICKNESS_INSURANCE_PAYMENT_REDUCTION	Net payment element - is included only if the employee receives payment directly from insurer (indirect result from FR_INSURANCE_PROCESSING formula)
FR_SICKNESS_INSURANCE_REDUCTION_RETRO	Retro element for Sickness Insurance Reduction that is processed once each period in the standard run type after earnings before deductions processing. The inputs are as for FR_SICKNESS_INSURANCE_REDUCTION
FR_IJSS_CPAM_PAYMENT	Information element for social security payment made by the social security office.
FR_IJSS_GROSS	This reduction element holds the gross component for the social security benefit payment. Gross IJSS to deduct from the guaranteed income.

FR_IJSS_GROSS_RETRO	Retro element for IJSS Gross that is processed once each period in the standard run type. The inputs are as for the FR_IJSS_GROSS elements.
FR_IJSS_GROSS_ADJUSTMENT	Element used to adjust gross IJSS if the most beneficial agreement changes over the duration of the absence.
FR_IJSS_NET	Information element that holds the net component for the social security payment. If subrogation is 'No' while recording absence details, FR_IJSS_NET run results are created to hold information about the IJSS net. Uses the indirect result from FR_SICKNESS_PROCESSING formula.
FR_IJSS_NET_RETRO	Retro element for IJSS Net that is processed once each period in the standard run type. The inputs are as for the FR_IJSS_NET element.
FR_IJSS_NET_PAYMENT	Net payment element for social security payment. IJSS Net actually paid when payment is subrogated. Uses the indirect result from FR_SICKNESS_PROCESSING formula.
FR_IJSS_NET_PAYMENT_RETRO	Retro element for IJSS Net Payment that is processed once each period in the standard run type. The inputs are as for the FR_IJSS_NET_PAYMENT element.
FR_SICKNESS_INSURANCE	Information element contains information for third party insurance payment.
FR_SICKNESS_INSURANCE_ADJUSTMENT	Earnings element used to adjust Gross Insurance.
FR_SICKNESS_INSURANCE_ADJUSTMENT_RETRO	Retro element for Sickness Insurance Adjustment that is processed once each period in the standard run type after earnings before deductions processing. The inputs are as for the FR_SICKNESS_INSURANCE_ADJUSTMENT element.

FR_SICKNESS_INSURANCE_GROSS	Reduction element that holds the gross component for the third party insurance payment
FR_SICKNESS_INSURANCE_NET	Information element for the net component of the third party insurance payment.
FR_SICKNESS_INSURANCE_PAYMENT	Net payment element for the third party insurance payment. This holds payment, employee percentage and recipient information from third party insurer. Third party insurance is entered in current period when payment is received for an absence. Uses the FR_INSURANCE_PROCESSING formula.
FR_SICKNESS_INSURANCE_PAYMENT_RETRO	Retro element for Sickness Insurance Payment that is processed once each period in the standard run type after earnings before deductions processing. The inputs are as for the FR_SICKNESS_INSURANCE_PAYMENT element.
FR_SICK_BENEFIT	Information element for the collective agreement benefit. This element is entered for the same date effective dates as the absence and holds the rules guarantee. For example, Net Guarantee with 0 delay - first 30 days paid at 100%, next 20 at 60%. Uses the FR_SICK_BENEFIT formula.
FR_GI_PAYMENT	Net payment element for the Sickness Guaranteed Income payment.
FR_GI_PAYMENT_RETRO	Retro element for Sickness Guarantee that is processed once each period in the standard run type. The element inputs are as for the FR_GI_PAYMENT elements but are mandatory ensuring that they are populated on the retro entries.
FR_SICKNESS_GI_INFORMATION	Non-Recurring information element for each income guarantee covering the sickness absence.

FR_SICKNESS_CPAM_INFO	Information element for details of IJSS payment made by CPAM.
FR_SICKNESS_CPAM_PROCESS	This element with a classification of CPAM Process Information holds details of the absence dates and the IJSS payment made by CPAM. Triggers the processing of the matching sickness absence.
<hr/>	
Formula	Usage
FR_SICK_DEDUCT_WORKING_DAY_FORM ULA	Used in calculating sickness deduction as per working days proration method
FR_SICK_DEDUCT_OPEN_DAY_FORMULA	Used in calculating sickness deduction as per open days proration method
FR_SICKNESS_SKIP	Skip formula for the element FR_SICKNESS_INFORMATION. This is responsible for deciding if the FR_SICKNESS_INFORMATION is processed
FR_SICKNESS_CONTROL	Iterative formula for sickness processing element FR_SICKNESS_INFORMATION
FR_SICKNESS_PROCESSING	Payroll formula for sickness processing element FR_SICKNESS_ELEMENT
FR_SICKNESS_AUDIT	Payroll formula for the audit element for sickness process. FR_GI_INFORMATION element uses this formula to create audit elements for each guarantee that cover the absence
FR_INSURANCE_PROCESSING	Used in calculating all direct values held by the sickness adjustment element
FR_INSURANCE_CONTROL	Formula for controlling processing of Sickness Insurance Payments
FR_SICKNESS_CPAM_CONTROL	Formula for controlling processing of CPAM payment

Predefined Secondary Classifications for Sick Pay

Oracle Payroll provides predefined secondary classifications to process your sick pay. In the Balance Feed Control window, select the predefined sickness secondary classifications--Sickness Deduction Reference Salary, Sickness IJSS Reference Salary and Sickness Legal Guarantee Reference Salary--for the elements in the following primary classifications:

- Earnings
- Benefits
- Earnings Adjustments
- Supplementary Earnings
- Reductions
- Overtime

Note: If you do not want the element to feed these balances, which are used in sickness calculation, delete the classification rules which will remove the balance feeds.

If you are creating any balances as required by your collective agreements, and setting up the feeds for these balances you need to associate the ASG_PRO_RUN dimension with these balances. Oracle Payroll uses this dimension in sick pay calculation.

Maternity, Paternity, and Adoption Pay

When you enter a maternity, paternity, or adoption absence, Oracle Payroll determines whether the employee is entitled to the statutory pay IJSS, and calculates the appropriate adjustments to pay.

IJSS is a daily indemnity paid by the Social Security Office (CPAM) over the maternity, paternity, or adoption leave (providing that the conditions of entitlement are met). It amounts to 100% of the average daily net salary--calculated over a period of 3 months--limited to the net social security ceiling.

Guaranteed Net Income

If the employee's salary is higher than the social security ceiling, there is no legal obligation for the employer to top up to the employee's normal salary, except if stipulated in the collective agreement.

You can specify, for each absence record, whether there is an income guarantee. There

are three options:

- Eligible for guarantee irrespective of IJSS--Employee is covered by a guarantee irrespective of whether he or she is eligible for IJSS
- Eligible for guarantee only with IJSS--Employee is covered by guarantee only if he or she is eligible for IJSS
- Not eligible for guarantee

Oracle HRMS makes the following assumptions about the income guarantee:

- If there is no guarantee, the only processing required is a deduction for the time absent. (IJSS will always go straight to the employee and the employer won't be notified.)
- If there is a guarantee then the IJSS will be subrogated (that is, the employee authorises the employer to receive the payment from CPAM).
- The guarantee is always for the duration of the maternity absence.
- The guarantee is always 100% Net.

Entitlement to IJSS

Entitlement for IJSS is assessed at the absence start date.

You can allow Oracle Payroll to calculate eligibility for IJSS, or you can enter a manual override when you enter the absence. Eligibility depends on the level of SMID contributions and the calculation of working hours in a reference period. (The employee must have completed 200 working hours in the last three calendar months.)

Statutory information for maternity, paternity, and adoption leave duration is maintained in the seeded user defined table FR_MAP_DURATION. This table records the number of days entitlement (ante-natal and post-natal, in the case of maternity leave). The entitlement depends on the number of children born or adopted and (in the case of maternity and adoption) the number of existing dependent children.

You record the number of children born or adopted on the absence record. Oracle HRMS calculates the number of dependent children at the time of the absence start--subsequent changes are ignored. You must therefore ensure that all dependent children are recorded as contacts with the (system) contact type Child, and marked as dependent. You define a user contact type as "child" using the User Types and Statuses window.

Recording Maternity, Paternity, and Adoption Absences

You record these absences by entering an absence type in the categories Maternity, Paternity, or French Adoption. When you enter the absence, you specify whether the

employee is guaranteed 100% net pay for the duration of the absence, and whether Oracle Payroll must estimate the IJSS payment when it processes the absence record, or whether it processes the IJSS adjustment later, when you have received notification of the CPAM payment.

If you choose not to estimate the IJSS payment, you must enter the element FR_MAP_IJSS_INFO in the periods in which the CPAM notifications are received.

For maternity, you can link a post-natal maternity absence to a parent maternity absence that started within the last 6 months. For example, if a mother returns to work while her child is in hospital, she can continue her post-natal maternity leave when the child is discharged.

Maternity, Paternity, and Adoption Pay Processing

When you enter an absence in the seeded categories Maternity, Paternity, or French Adoption, Oracle HRMS creates a recurring element entry of the element FR_MAP_INFORMATION. The payroll run processes this entry in a separate run of the Sickness run type. First it checks whether the employee is eligible for IJSS for this absence. Then the processing that must be performed depends on whether the absence is subject to an income guarantee and whether the employee has elected to have pay processed with estimated IJSS. There are three cases:

No Income Guarantee

In this case the employee always receives IJSS directly from CPAM. The only processing is to deduct the appropriate amount from earnings for the time absent in the payroll period (using proration if required). You can choose a method for calculating this deduction--see the section Deduction Calculation, below.

Income Guarantee but IJSS Estimate not Required

Oracle Payroll calculates the deduction for the absence and an adjustment to ensure that the employee receives 100% net pay. Further processing is performed when the Notification of IJSS payment is received from CPAM. You record the notification using the element FR_MAP_IJSS_INFO. Oracle Payroll includes the IJSS Net and Gross in the period in which notification is received and makes an adjustment to ensure that the employee receives their normal guaranteed net. IJSS is not subject to all deductions, so this run will include negative deductions to back out contributions made previously.

Income Guarantee and IJSS Estimate

In the period in which the absence is recorded, Oracle Payroll calculates IJSS Gross and Net, the deduction for the absence, and an adjustment to ensure that the employee receives 100% net pay. In this case entering the FR_MAP_IJSS_INFO element to record notification of IJSS payment received from CPAM does not trigger any further processing. The element entry is skipped.

Deduction Calculation

The negative earnings adjustment can be calculated using a seeded formula, or a formula you create yourself. The seeded formulas are:

- FR_SICK_DEDUCT_WORKING_DAY_FORMULA--Derives daily rate for pay period by counting number of working days in pay period using information held on work patterns.
- FR_SICK_DEDUCT_OPEN_DAY_FORMULA--Derives daily rate for pay period by counting number of open days in pay period.

You select a formula at the company or establishment level. Oracle Payroll uses the selected formula for sick pay calculation as well as maternity, paternity, and adoption pay calculation. The formula set at establishment level overrides the formula set at company level.

If you create your own formula for deduction calculation, be sure to prefix the formula name with FR_SICK_DEDUCT.

Extended Maternity Leave

French legislation allows for extended maternity leave for medical reasons.

Ante-natal Leave

An employee is entitled to an additional two weeks ante-natal leave at the maternity IJSS rate. This must be recorded as one or more separate maternity absences, without a confinement date. If these two weeks have been taken, you must enter any additional ante-natal leave as sick leave; it is treated as non-occupational sickness.

Post-natal Leave

Employees are also entitled to an additional four weeks post-natal leave, paid at the IJSS sickness rate, but without the three day delay. If a sickness absence is recorded with a start date within 48 hours of the maternity absence end date, it is treated as a sickness extension to maternity leave. The sickness record is automatically linked to the parent maternity record. The parent maternity record determines whether the employee is eligible for IJSS and whether the IJSS is to be estimated for the sickness extension. However, you can select whether the IJSS is subrogated separately for the sickness record.

If the employee takes sick leave beyond the four week maximum, or if the start date of the sickness absence is more than 48 hours after the end of the maternity absence, the additional leave is treated as non-occupational sickness. This means it incurs 3 days IJSS delay and 10 days Legal guaranteed income delay.

Elements, Formulas, and Balances for Maternity, Paternity, and Adoption Pay

Oracle Payroll delivers the following predefined elements, formulas, and balances for maternity, paternity, and adoption pay processing.

Elements

Notice that the only elements you must link are FR_MAP_INFORMATION, FR_MAP_IJSS_INFO, FR_MAP_IJSS_GROSS_RETRO, FR_MAP_IJSS_NET_PAYMENT_RETRO, FR_MAP_IJSS_ADJUSTMENT_RETRO, FR_MAP_DEDUCTION_RETRO and FR_MAP_GI_PAYMENT_RETRO. You can link the others for costing purposes. The only element you enter for employee assignments is FR_MAP_IJSS_INFO. Oracle HRMS enters FR_MAP_INFORMATION when you enter an absence. The other elements receive indirect results.

Element Name	Classification	Description
FR_MAP_IJSS_GROSS	Earnings Adjustment	The gross component of the payment, always negative since it is not subject to most taxes. Used to reduce subject to balances where a guarantee exists
FR_MAP_IJSS_GROSS_RETR O	Earnings Adjustment	Retro element for Map IJSS Gross that is processed once each period in the standard run type after earnings before deductions processing
FR_MAP_IJSS_NET_PAYME NT	Net Payments	The net component of the social security payment, estimated or as reported by CPAM
FR_MAP_IJSS_NET_PAYME NT_RETRO	Net Payments	Retro element for IJSS Net that is processed once each period in the standard run type
FR_MAP_IJSS_ADJUSTMEN T	Earnings Adjustment	An adjustment to employee's pay that may be required after iterative processing

Element Name	Classification	Description
FR_MAP_IJSS_ADJUSTMENT_RETRO	Earnings Adjustment	Retro element for Map IJSS Adjustment that is processed once each period in the standard run type after earnings before deductions processing
FR_MAP_DEDUCTION	Earnings Adjustment	Holds the deduction from gross for the absence
FR_MAP_DEDUCTION_RETRO	Earnings Adjustment	Retro element for MAP deduction that is processed once each period in standard run type after earnings before deductions processing
FR_MAP_GI_PAYMENT	Payment for Absence	Value as for FR_MAP_DEDUCTION
FR_MAP_GI_PAYMENT_RETRO	Payment for Absence	Retro element for MAP GI Payment that is processed once each period in the standard run type after earnings before deductions processing
FR_MAP_IJSS_INFO	Information	Holds information about the IJSS payment from CPAM. Processed if the IJSS payment was not estimated
FR_MAP_INFORMATION	Information	Entered automatically when you create a maternity, paternity, or adoption absence

Formulas

Formula	Description
FR_MAP_SKIP	Skip formula for the element FR_MAP_IJSS_INFO; this element is processed if the IJSS payment was not estimated when the absence was entered.
FR_MAP_CONTROL	Iterative formula for the element FR_MAP_INFORMATION, responsible for calling the PLSQL package to control the overall processing.
FR_CPAM_CONTROL	Iterative formula for the element FR_MAP_IJSS_INFO, responsible for calling the PLSQL package to control the overall processing.
FR_MAP_PROCESSING	Payroll formula for the elements FR_MAP_INFORMATION and FR_MAP_IJSS_INFO; returns indirect results to the appropriate elements, such as FR_MAP_DEDUCTION, FR_MAP_GI_PAYMENT, FR_MAP_IJSS_GROSS, FR_MAP_IJSS_NET_PAYMENT, and FR_MAP_IJSS_ADJUSTMENT

Balances

The following balances are used in the processing of maternity, paternity, and adoption pay:

- FR_MAP_TARGET
- FR_MAP_IJSS_REFERENCE_SALARY
- FR_SICKNESS_DEDUCTION_REFERENCE_SALARY

They are fed by elements in secondary classifications with similar names:

- MAP Target_<name of primary classification>
- MAP IJSS Reference Salary
- Sickness Deduction Reference Salary

You can choose which elements feed these balances by entering or deleting

classification rules on the Balance Feed Control window.

Examples of Processing Maternity, Paternity, and Adoption Pay

The processing of maternity, paternity, and adoption pay is controlled by two main factors:

- The existence of an income guarantee
- The decision to estimate IJSS in the absence period or process IJSS only when the notification of IJSS payment is received from CPAM

If there is no income guarantee, Oracle Payroll assumes that the IJSS payment goes directly to the employee (that is, it is not subrogated) and therefore the question of estimating IJSS does not arise. So, there are three possible scenarios, which are described here:

- No income guarantee
- Income guarantee and IJSS *not* estimated
- Income guarantee and IJSS estimated

No Income Guarantee

In this case, Oracle Payroll just takes the deduction for the absence.

Example: An employee's expected confinement date is 16th June 2001. Start of maternity leave is 6 weeks earlier--5th May. Her gross monthly salary is 1000EUR.

In May, her payslip will be:

Earning/Deduction	Amount
Basic Salary	1000.00
Deduction for maternity absence	-866.70
Gross	133.30
SS Contributions (21%)	-28.00
Net Payment	105.30

In June, her payslip will be:

Earning/Deduction	Amount
Basic Salary	1000.00
Deduction for maternity absence	-1000.00
Gross	0
SS Contributions (21%)	0
Net Payment	0

Income Guarantee and IJSS *Not* Estimated

In the absence period, Oracle Payroll calculates the deduction for the absence and an adjustment to meet the guaranteed amount. In the period when the IJSS payment is received from CPAM, Oracle Payroll processes the gross and net IJSS and calculates any adjustment required to guarantee net pay.

Example: An employee's expected confinement date is 16th June 2001. Start of maternity leave is 6 week earlier--5th May. Her gross monthly salary is 3000EUR. Employer guarantees net pay of 100% and IJSS Payment reduces employer's liability. IJSS Payment is received in month of July and employer decided not to estimate IJSS Payment in period of absence.

Payslip for first Absence Period (May):

Earning/Deduction	Amount
Basic Salary	3000.00
Deduction for maternity absence	-2600.00
Garantie au net	2600.00
Gross	3000.00
SS Contributions (21%)	-546.00
Net Payment to be guaranteed	2454.00

Period when Payment received from CPAM (July):

Calculating Net amount in a standard run without IJSS payment to establish the net

payment to be guaranteed:

Earning/Deduction	Amount
Basic Salary	3000.00
Gross	3000.00
SS Contributions (21%)	-546.00
Net Payment to be guaranteed	2454.00

Adding the IJSS payment:

Earning/Deduction	Amount
Basic Salary	3000.00
Gross IJSS from CPAM	-853.00
Gross	2147.00
SS Contributions (21%)	-451.00
Net IJSS	796.00
Net with IJSS payment	2492.00

The effect of the IJSS payment is to increase the net to the employee to 2492EUR. Oracle Payroll must perform a net-to-gross run to find the necessary adjustment to bring the net figure for this second calculation back to 2454EUR.

Earning/Deduction	Amount
Basic Salary	3000.00
Gross IJSS from CPAM	-853.00
IJSS Adjustment	-49.00

Earning/Deduction	Amount
Gross	2098.00
SS Contributions (21%)	-440.00
Net IJSS	796.00
Net with IJSS payment	2454.00

Income Guarantee and IJSS Estimated

In the absence period, Oracle Payroll calculates IJSS Gross and Net, the deduction for the absence, and an adjustment to meet the guaranteed amount.

Example: An employee's expected confinement date is 16th June 2001. Start of maternity leave is 6 weeks earlier--5th May. Her gross monthly salary is 3000EUR. Employer guarantees net pay of 100% and IJSS Payment reduces employer's liability. IJSS Payment is received in month of July and employer decided to estimate IJSS Payment in period of absence.

Calculating Net amount in a standard run without IJSS payment to establish the net payment to be guaranteed (May):

Earning/Deduction	Amount
Basic Salary	3000.00
Deduction for maternity absence	-2600.00
Garantie au net	2600.00
Gross	3000.00
SS Contributions (21%)	-546.00
Net Payment to be guaranteed	2454.00

Adding the IJSS payment:

Earning/Deduction	Amount
Basic Salary	3000.00
Deduction for maternity absence	-2600.00
Garantie au net	2600.00
Gross IJSS (estimated)	-853.00
Gross	2147.00
SS Contributions (21%)	-451.00
Net IJSS (estimated)	796.00
Net with IJSS payment	2492.00

The effect of the IJSS payment is to increase the net to the employee to 2492EUR. Oracle Payroll must perform a net-to-gross run to find the necessary adjustment to bring the net figure for this second calculation back to 2454EUR.

Earning/Deduction	Amount
Basic Salary	3000.00
Deduction for maternity absence	-2600.00
Garantie au net	2600.00
Gross IJSS	-853.00
IJSS Adjustment	-49.00
Gross	2098.00
SS Contributions (21%)	-440.00
Net IJSS	796.00
Net with IJSS payment	2454.00

Setting Up Absence Management

Use the following steps to set up absence management.

1. If you want to associate recurring elements with absence types, you must set up proration and retro notifications. This ensures that absences that end in the middle of a payroll period are detected and processed by the payroll run, and that retrospective changes to absences are recorded in the Retro Notifications report.

Note: Proration is available to Oracle Payroll users in selected localizations only.

To set up proration and retro notifications, you must:

- Find all the dynamically generated triggers for the table PAY_ELEMENT_ENTRIES_F in the Dynamic Trigger Definition window. (You must deselect the Insert triggering action so that all the triggers are returned by the Find.) Make sure the Generated and Enabled check boxes are checked for all the continuous calculation triggers.
- Query the Incident Register functional area in the Functional Area Maintenance window, and enter the business groups for which you want to enable proration on the Business Group tab. Optionally, you can further secure the proration functionality by selecting payrolls on the Payroll tab.
- Use the Table Event Group window to group the two events that you need to detect to prorate absences - datetracked updates to absence start date and absence end date. Select Proration for the event group type, and Payroll Period for the proration period. In the Datetracked Events region, select DateTrack Update as the update type, PAY_ELEMENT_ENTRIES_F as the table, and EFFECTIVE_START_DATE and EFFECTIVE_END_DATE as the columns.
- Use the Table Event Group window to group the datetracked events on the PAY_ELEMENT_ENTRIES_F table you want to track in the Retro Notifications report. The event group type is Retro.

See: Setting Up Proration and Retro Notifications, *Oracle HRMS Payroll Management Guide*

2. Define an absence element, with at least one input value, for each absence type. Link this element to define who is eligible.

See: Defining and Linking an Absence Element, page 4-52

Note: Omit this step if you are setting up an absence type for which you do not need to maintain a running total of time taken or

remaining, and you do not need eligibility rules.

US and Canada Payroll only: If you want to process the absence element in the payroll run, generate it using the Earnings window.

Mexico only: If you want to process the absence element in the payroll run, generate it using the Element Design Wizard.

3. Define categories of absence types as values for the Lookup Type ABSENCE_CATEGORY, and your absence reasons as values for the Lookup Type ABSENCE_REASON. In some legislations there are predefined categories and reasons.

You can select the same reason for different absence types.

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

4. Define each absence type, and associate it with an absence element.

See: Defining an Absence Type, page 4-55

Note: To keep a single record of employees' time taken for two or more different absence types, you can associate the same element with several types.

5. For an absence type with a decreasing balance, use BEE or the Absence Detail window to initialize the absence balances for employees eligible for the type.

If you want to make batch entries, see Making Batch Element Entries Using BEE, *Oracle HRMS Configuring, Reporting, and System Administration Guide*.

6. If you defined a recurring element, create a payroll formula that handles proration to process the element and calculate the appropriate absence duration in each pay period (taking into account the number of days or hours in a month, working and shift patterns, public holidays, and so on).

Sample Proration Formulas, *Oracle HRMS FastFormula User Guide*

7. If you want to set up the application to calculate the duration of an absence automatically, you have two options:

- Set the HR: Schedule Based Absence Calculation profile option to Yes, if you want the application to use the worker's schedule and calendar events from their primary assignment to calculate absence durations. To use this option, you must first define schedules and calendar events that are relevant to your enterprise and assign them to various levels in your work structures.

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

- To calculate absence duration from the absence start and end dates without using the schedules and calendar events information of an employee, create a basic formula. If you want the absence duration calculation to update automatically each time you change the absence dates, you must set the profile option HR: Absence Duration Auto Overwrite to Yes.

See: *Writing Formulas to Calculate Absence Duration, Oracle HRMS FastFormula User Guide*

Setting Up Absence Categories

Oracle HRMS enables you to identify the absences, either predefined or user created as non-working time. While calculating the working days, certain absences are treated as non-working days. These days are the unpaid absences. You need to capture this information for calculating sickness related working days/hours.

Use the User Types and Statuses window to set up Absence Categories.

To set up absence categories:

1. Select the lookup type ABSENCE_CATEGORY.
2. Select your business group.
3. Select the required absence in the System Type field.
4. Enter a brief description about the absence.
5. Select Yes in the Further Information field to indicate that the absence is to be treated as non-working time. If you select No, the absence is treated as working time.
6. Save your work.

Defining and Linking an Absence Element

Define an absence element in the Element window.

US and Canada Payroll only: If you want to process the absence element in the payroll run, initiate it on the Earnings window instead of using the Element window.

Mexico only: If you want to process the absence element in the payroll run, initiate it with the Element Design Wizard instead of using the Element window.

Spain only: If you want to compute the social security earnings you must use the

predefined elements for Sickness Details, Maternity Details, Part-time Maternity Details, Pregnancy-at-Risk Details and Adoption Details.

To define an absence element:

1. Set your effective date to a day on or before the start of the first payroll period for which you want to enter absences.
2. Enter a name for the element, and select the classification Information or Earnings.

Tip: Give the absence element and its absence type the same name, or coordinate the element name with the type name. For example, for the absence type Compassionate Leave, name the element Compassionate Leave or Compassionate Leave Absence.

3. Enter a reporting name, for display on reports.
4. If you are creating a recurring absence element, select your absence element event group in the Proration Group field. This field is only available to Oracle Payroll users in certain localizations.
5. Select the processing type.
 - Select Recurring if you want to be able to process absences that do not have an end date and you want to apportion absence time correctly across payroll periods.

Note: You can only select Recurring if you use Oracle Payroll and the Proration functionality is enabled for your localization. (In this case, you should see the Proration Group field on the Element window)

- Select Nonrecurring if it is acceptable to record the full duration of the absence in the payroll period in which the absence starts.
6. Select the termination rule. This is normally Actual Termination.
 7. Check the Multiple Entries Allowed box if you want to enable employees to have:
 - (Nonrecurring) More than one instance of the absence type within a pay period.
 - (Recurring) Overlapping entries of the absence.
 8. If this is an absence element for a PTO accrual plan, do not select Process in Run. Uncheck this box if necessary.

If the element is recurring, ensure that the Process in Run box is checked so that the absence duration can be calculated by the payroll run.

9. If employees must be a certain age or have served for a certain number of years to be allowed this absence, enter this information in the Qualifying Conditions region.

Note: If this is an absence element for a PTO accrual plan, the plan setup relates length of service to accrued time off. Do not make an entry here for length of service.

10. Save the element, then choose the Input Values button.
11. In the Input Values window, create an input value to hold the amount of time taken. Select units of Day, Hours in HH format, or Hours in Decimal Format (to one, two, or three decimal places).

If you are defining an absence element for a PTO accrual plan, give the input value the name Hours or Days, to accord with the unit of measure of the plan. When you define the plan using the Accrual Plan window, this input value name appears in the Units field of the Absence Information region.

Important: If you select Required for an input value, you must select this input value on the Absence Attendance Type window. Do not select Required for more than one input value.

New Zealand users only: You must also create the following input values:

- Seasonal Shutdown - for Annual Leave and Annual Leave Termination elements
 - Number of complete weeks - for the Special Leave and Protected Voluntary Service Leave elements.
12. You can define minimum and maximum days or hours that can be entered in an absence record. If you do this, select what happens if these limits are breached:
 - Select Warning for the system to warn users but allow them to breach the limits.
 - Select Error for the system to issue an error message and prevent users from saving an entry that breaches the limits.
 13. Save your work.

To link the absence element:

1. Set your effective date to a day on or before the start of the first payroll period for

which you want to enter absences.

2. In the Element Link window, select the absence element you defined.
3. Select eligibility criteria for this absence element, if appropriate. If you want to make the element available to all employees, do not select any criteria.
4. Save the link. Then define the absence type associated with this absence element.

See: Defining an Absence Type, page 4-55

Defining an Absence Type

Use the Absence Attendance Type window to define an absence type and associate it with an element.

To define an absence type:

1. Enter a name and category for the absence type.

Tip: Give the absence type and its associated element the same name, or coordinate the type name with its element name. For example, name the absence type for a PTO accrual plan Salaried Sick PTO Plan, and its associated element, Salaried Sick PTO Absence.

2. Select Allow Absence Overlaps if absences of this type can overlap other absences. If you deselect this option, the application warns you if you enter an absence that overlaps another absence of any type.
3. In the Associated Element region, select the element defined for this absence type. Select the element's input value that holds days or hours. The unit of measure for the input value appears in the Units region.
4. In the Balance region, select *Increasing* if you want each absence entry to add to a running total of time taken to date. The running total covers all absence types associated with the selected element. Select increasing balances for absence types for PTO accrual plans, and for most other absence types.

For absence types that have a set maximum amount of hours or days allowed, you may select *Decreasing*. In this case, each absence recorded reduces an initial balance to show time remaining to be taken for the type.

Note: Decreasing balances require more maintenance. You must enter an initial balance amount for each new hire eligible for the

absence type, and must initialize the balance for all eligible employees at the start of each year.

5. Optionally, select reasons that are valid for entries of this type of absence.
6. Save the absence type.

Setting Up an Absence Benefit Plan

You can set up absence benefit plans so that the Participation process checks employee eligibility for the plans when it processes absence life events. You set up participant eligibility profiles to determine which absence categories or types are valid for each plan. Both Standard and Advanced Benefits users can set up absence benefit plans.

Tip: Use the same effective date, such as 01 Jan 1951, for all your definitions

UK Users only: There are **sample plans** provided for Occupational Sick Pay and Occupational Maternity Pay, called PQP OSP Plan and PQP OMP Plan. You can copy these plans using Plan Design Copy and configure them to meet your needs. If you are not using the sample plans, see: *Creating Your Own Absence Plan*, page 4-59.

Using the Sample Plans

To set up an absence benefit plan using a sample plan:

1. Set the BEN:Enable Absence Plans Functionality profile option to Yes for the users or responsibilities who will enter absences for absence benefit plans, if you want them to run the Participation Process to process the absence life events. This displays the Enroll Absences button on the Absence Detail window.

See: System Profile Values Window, *Oracle Applications System Administrators Guide*

2. In the Submit Requests window, select the process *Plan Design Copy - Import*. In the Data File parameter, enter the file **pqgbgap1.ldt**, which is located at patch/115/import/us in Product Top: PQP.

See: Importing a Plan Design From a File, *Oracle HRMS Compensation and Benefits Management Guide*

3. Use Plan Design Copy to copy the imported plan. In the Process Name field, enter PQP GB OSP/OMP Absence Plan.

See: Copying a Program or Plan, *Oracle HRMS Compensation and Benefits Management Guide*.

Tip: First make a copy of the seeded plan in your business group without entering any prefix or suffix for your copy. Select the first option on the Enter Target Details page, which is "Reuse existing objects if current name exists in the target." Then you can make further copies of this copy to configure your plans. When you make further copies, you can select the same option if you want plans to share objects, such as eligibility profiles, or you can select the option "Reuse existing objects if new name exists in target".

4. Write or configure any formula rules you require, such as the following:

Important: The formulas attached to the sample plans are for UK users only. In other legislations, you must create your own formulas.

Rule	Formula Type	Supplied Examples (UK Only)
Eligibility rule	Participation Eligibility	PQP_OSP_PARTICIPATION_ELIGIBILITY_PROFILE_OTHER_RULE PQP_OMP_PARTICIPATION_ELIGIBILITY_PROFILE_OTHER_RULE
Person Change	Person Change Causes Life Event	PQP_GB_BEN_ABSENCE_START_LER_ PERSON_CHANGE_RULE, PQP_GB_BEN_ABSENCE_END_LER_ PERSON_CHANGE_RULE, PQP_GB_BEN_ABSENCE_DELETE_LER_ PERSON_CHANGE_RULE

Rule	Formula Type	Supplied Examples (UK Only)
Extra Input Rule	Extra Inputs	PQP_OSP_STANDARD_RATES _GENERAL_EXTRA_INPUT_RULE PQP_OMP_STANDARD_RATES _GENERAL_EXTRA_INPUT_RULE
Length of service rate	Length of Service Calculation	PQP_OSP_STANDARD_RATES _CALCULATION_METHOD_VALUE_RULE PQP_OMP_STANDARD_RATES _CALCULATION_METHOD_VALUE_RULE

See: Total Compensation Formula Types, *Oracle HRMS FastFormula User Guide*

5. Ensure you have Program/Plan years set up.

See: Defining a Program or Plan Year Period, *Oracle HRMS Compensation and Benefits Management Guide*

6. Select the appropriate Person Changes for the three absence life event reasons, created by the Plan Design Copy process. There is one life event reason for each Life Event Operation Code: Start Event, End Event, Delete Event.

Note: You only perform this step once. You use the same life event reasons for all your absence plans.

- The Start Absence life event reason must detect changes to any columns except the end date. Use the Person Change formula rule you created in step 4 to define the columns you want to use to trigger this life event.

UK users: You must attach the PQP_GB_BEN_ABSENCE_START_LER_PERSON_CHANGE_RULE formula to the absence start life event

- You can also use formula rules to define the person changes that trigger the End Absence and Delete Absence life events too.

See: Life Event Definition, *Oracle HRMS Compensation and Benefits Management Guide*

7. Query the absence plan in the Plans window, and change the status from Pending to Active. Choose the Details button and select your plan periods.

See: Defining a Benefits Plan, *Oracle HRMS Compensation and Benefits Management Guide*

You have completed the plan setup based on a seeded plan, but make sure you complete the Next Steps, page 4-63.

Creating Your Own Absence Plan

To set up an absence benefit plan without using the sample plans:

1. Set the BEN:Enable Absence Plans Functionality profile option to Yes for the users or responsibilities who will enter absences for absence benefit plans, if you want them to run the Participation Process to process the absence life events. This displays the Enroll Absences button on the Absence Detail window.

See: System Profile Values Window, *Oracle Applications System Administrators Guide*

2. Write or configure any formula rules you require, such as the ones shown in the following table.

Note: UK users: If you want to use the supplied formulas, you must run the following scripts:

- PQPGBLER.SQL script to create the life event formulas
- PQPGBOSP.SQL script to create the OSP formulas
- PQPGBOMP.SQL script to create the OMP formulas

Rule	Formula Type	Supplied Examples (UK Only)
Eligibility rule	Participation Eligibility	<base name>_OSP_PARTICIPATI ON_ ELIGIBILITY_PROFILE_OT HER_RULE <base name>_OMP_PARTICIPATI ON_ ELIGIBILITY_PROFILE_OT HER_RULE

Rule	Formula Type	Supplied Examples (UK Only)
Person Change	Person Change Causes Life Event	PQP_GB_BEN_ABSENCE_START_LER_ PERSON_CHANGE_RULE, PQP_GB_BEN_ABSENCE_END_LER_ PERSON_CHANGE_RULE, PQP_GB_BEN_ABSENCE_DELETE_LER_ PERSON_CHANGE_RULE
Extra Input Rule	Extra Inputs	<base name>_OSP_STANDARD_RATES _GENERAL_EXTRA_INPUT_RULE <base name>_OMP_STANDARD_RATES _GENERAL_EXTRA_INPUT_RULE
Length of service rate	Length of Service Calculation	<base name>_PQP_OSP_STANDARD_RATES _CALCULATION_METHOD_VALUE_RULE <base name>_PQP_OMP_STANDARD_RATES _CALCULATION_METHOD_VALUE_RULE

See: Total Compensation Formula Types, *Oracle HRMS FastFormula User Guide*

3. Define a new plan type, selecting Absences as the Option Type.

See: Defining Plan Types, *Oracle HRMS Compensation and Benefits Management Guide*

4. Ensure you have Program/Plan years set up.

See: Defining a Program or Plan Year Period, *Oracle HRMS Compensation and Benefits Management Guide*

Eligibility Profiles

5. Create a participant eligibility profile for each absence benefit plan.

Important: Ensure that these profiles are exclusive: participants must only be eligible for one plan at a time.

- Ensure that your eligibility profile checks that the absence is for the appropriate absence category, such as sickness. You can further restrict eligibility to one or more absence types.
- **UK users:** Choose the Others tab and select Rule. Select the supplied rule <base name>_OSP_PARTICIPATION_ELIGIBILITY_PROFILE_OTHER_RULE for an OSP scheme, or <base name>_OMP_PARTICIPATION_ELIGIBILITY_PROFILE_OTHER_RULE for an OMP scheme, or another formula that you have created.

See: Defining an Eligibility Profile, *Oracle HRMS Compensation and Benefits Management Guide*

Life Event Reasons

6. Create three life event reasons, all of type Absence, and one for each Life Event Operation Code: Start Event, End Event, Delete Event.

Note: You only perform this step once. You use the same life event reasons for all your absence plans.

- Select the Person Changes that trigger these life events. The table is PER_ABSENCE_ATTENDANCES. Select columns and values as follows:

Life Event	Column	Old Value	New Value
Start Absence	DATE_START	any value	any value
End Absence	DATE_END	any value	any value
Delete Absence	DATE_START	any value	no value

- The Start Absence life event reason must detect changes to any columns except the end date. Use the Person Change formula rule you created in step 2 to define the columns you want to use to trigger this life event.
UK users: You must attach the PQP_GB_BEN_ABSENCE_START_LER_PERSON_CHANGE_RULE formula to the absence start life event
- You can also use formula rules to define the person changes that trigger the

End Absence and Delete Absence life events too.

See: Life Event Definition, *Oracle HRMS Compensation and Benefits Management Guide*

Plan

7. Define the absence plan.

- Select your plan type.
- Select May Not Be In Program for the Plan Usage.

See: Defining a Benefits Plan, *Oracle HRMS Compensation and Benefits Management Guide*

- On the Eligibility Rates tab, check all the check boxes. Select Participant in the Eligibility Check field.

See: Defining Eligibility and Activity Rate Requirements for a Plan, *Oracle HRMS Compensation and Benefits Management Guide*

- On the Not in Program tab, enter a Sequence number and the activity rate details.

UK users: Select Per Pay Period for the Enrolment Rate/Frequency and select a value, such as Monthly, for the Activity Reference Period.

See: Defining a Plan Not in a Program, *Oracle HRMS Compensation and Benefits Management Guide*

- Choose the Details button and select your plan periods. Return to the Plans window.

See: Maintaining Plan Related Details, *Oracle HRMS Compensation and Benefits Management Guide*

- Choose the Plan Eligibility button then the Eligibility button. Select your eligibility profile on the Profile tab. Close this window.

See: Defining Participant Eligibility Criteria for a Compensation Object, *Oracle HRMS Compensation and Benefits Management Guide*

- Choose the Life Event button. Select your End Absence life event and select Ineligible in the Eligible/Ineligible field.

See: Associating a Life Event Reason With a Compensation Object, *Oracle HRMS Compensation and Benefits Management Guide*

Enrollment Requirements

8. Define the plan enrollment requirements.

- Choose the General tab, the Plan tab, then Enrollment. Select Automatic in the Method field.
- Select Current Can Keep or Choose; New Can Choose as the Enrollment Code.
See: Defining an Enrollment Method for a Plan, *Oracle HRMS Compensation and Benefits Management Guide*
- Choose Coverage. Select Event as the Enrollment Coverage Start Date Code and End Date Code.
See: Defining Enrollment Coverage Requirements for a Plan , *Oracle HRMS Compensation and Benefits Management Guide*
- Choose Rates. Select Event as the Rate Start Date Code and End of Pay Period as the Rate End Date Code.
- Choose the Timing tab and the Life Event tab. Select Life Event as the Enrollment Type. Select your Start Absence life event in the Life Event column and select *When Elections are Made* as the Close Enrollments Date to Use.
See: Defining Requirements for a Life Event Enrollment for a Plan, *Oracle HRMS Compensation and Benefits Management Guide*
- Click on General and choose the Periods region. Select *As of Event Date* for the Enrollment Period Start Date, and *End of Pay Period* for the Enrollment Period End Date.

Next Steps

Define or generate the elements required for the plan, then define a standard rate for the plan to calculate values for the absence element entry.

UK Users: Use the Absence Scheme Creation template, then set up the generated user-defined tables, and define a standard rate for the absence plan (or configure the copied rate if you are using a copy of the seeded plans).

Setting Up Holiday Pay

To enable you to process holiday pay, Oracle HRMS has provided a sample holiday payment formula, which specifies how the payment formula should be. Before you start processing the holiday pay, you need to complete several tasks.

To set up holiday pay:

1. Create your holiday pay formula using the sample formula FR_PTO_SAMPLE_HOLIDAY_PAY.

See: Writing or Editing a Formula, *Oracle HRMS FastFormula User Guide*

2. Create a Standard formula processing rule to associate your formula with your absence element.

See: Defining Formula Processing and Result Rules, *Oracle HRMS FastFormula User Guide*

3. Set the formula results for your holiday formula as per the following table:

Result Name	Type	Element	Input Value
L_DEDUCTION	Indirect	FR_HOLIDAY_DEDUCTION	Pay Value
L_PAYMENT	Indirect	FR_HOLIDAY_PAY	Pay Value
L_ABSENCE_ATTENDANCE_ID	Indirect	FR_HOLIDAY_DEDUCTION	Absence Attendance ID
L_ABSENCE_ATTENDANCE_ID	Indirect	FR_HOLIDAY_PAY	Absence Attendance ID
L_ACCRUAL_PLAN_ID	Indirect	FR_HOLIDAY_DEDUCTION	Accrual Plan ID
L_ACCRUAL_PLAN_ID	Indirect	FR_HOLIDAY_PAY	Accrual Plan ID
L_BASE_DAILY_RATE_P	Indirect	FR_HOLIDAY_PAY	Base
L_BASE_DAILY_RATE_D	Indirect	FR_HOLIDAY_DEDUCTION	Base
L_RATE_NUMBER_OF_DAYS	Indirect	FR_HOLIDAY_DEDUCTION	Rate
L_RATE_NUMBER_OF_DAYS	Indirect	FR_HOLIDAY_PAY	Rate
L_REGULARIZED	Indirect	FR_HOLIDAY_PAY	Regularized Flag
L_PROTECTED_DAYS_PAID	Indirect	FR_HOLIDAY_PAY	Protected Days Paid

Result Name	Type	Element	Input Value
L_ACCRUED_DATE	Indirect	FR_HOLIDAY_DEDUCTION	Accrual Date
L_ACCRUED_DATE	Indirect	FR_HOLIDAY_PAY	Accrual Date
L_START_DATE	Indirect	FR_HOLIDAY_DEDUCTION	Start Date
L_START_DATE	Indirect	FR_HOLIDAY_PAY	Start Date
L_END_DATE	Indirect	FR_HOLIDAY_DEDUCTION	End Date
L_END_DATE	Indirect	FR_HOLIDAY_PAY	End Date

4. Set up a work pattern schedule on the employee's assignment.
See: Setting Up a Work Pattern, page 4-70
5. Link the FR_HOLIDAY_PAY and FR_HOLIDAY_DEDUCTION elements to the required payroll.
See: Defining Element Links, *Oracle HRMS Compensation and Benefits Management Guide*
6. Run the payroll.
See: Starting a Payroll Run, *Oracle HRMS Payroll Processing Management Guide*

Regularizing Holiday Pay

To enable you to regularize holiday pay, Oracle HRMS has provided a sample holiday payment regularization formula, which specifies how the payment regularization formula should be. Before you start regularizing the holiday pay, you need to complete several tasks.

To regularize holiday pay:

1. Create your holiday pay regularization formula using the sample formula FR_SAMPLE_HOLIDAY_REGULARIZE.

See: Writing or Editing a Formula, *Oracle HRMS FastFormula User Guide*

2. Create a Standard formula processing rule to associate your formula with your absence element.

See: Defining Formula Processing and Result Rules, *Oracle HRMS FastFormula User Guide*

3. Set the formula results for your regularization formula as per the following table:

Result Name	Type	Element	Input Value
L_PAYMENT	Direct	FR_HOLIDAY_REG ULARIZE	Pay Value

4. Link the FR_SAMPLE_HOLIDAY_REGULARIZE element to the required payroll.

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

5. Run the payroll.

See: Starting a Payroll Run, *Oracle HRMS Payroll Processing Management Guide*

Setting Up Sick Pay

Oracle HRMS enables you to process sick pay for your employees . To do this you must complete the following steps:

To set up sick pay processing:

1. Enter company or establishment information.

See: Company: Entering Company Information, page 1-26

See: Establishment: Entering Establishment Information, page 1-31

2. Enter a default value for subrogation by setting the HR: Subrogation user profile option. Enter Yes if you normally receive payment from CPAM and pass this on to your employees. Enter No if employees normally receive payment directly from CPAM. You can override the default on each absence record, if required.

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

3. If you add any lookup values to the following lookup types, you must run the "Seed French Data" process.

FR_TERM_REASON_ADS_STATUS_CODE

FR_ABS_CATG_ADS_STATUS_CODE

FR_ABS_CATG_ADS_ABS_CODE

FR_WORK_INC_ADS_ABS_CODE

This process creates new columns in a user-defined table that has the same name as the lookup type. Enter the appropriate values in the new column this process creates to ensure that your new lookup values are mapped onto the correct values in the Absences Report (FR).

See: Running the Seed French Data Process, page 5-12

4. Enter work incident sickness details.

See: Entering Work Incident Information, page 1-58

5. Enter medical assessment details.

See: Entering Medical Assessments, page 1-63

6. Link the predefined FR_SICKNESS_INFORMATION and FR_SICK_BENEFIT elements to the payroll for sick pay processing. You can also link the IJSS elements, Deduction for sickness element, GI Payment element, sickness adjustment element and sickness insurance element if you want to setup costing information.

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

See: Sick Pay Elements, Formulas and Secondary Classifications, page 4-33

7. On your user-defined elements (such as Earnings) use the Balance Feed Control window to check which of the predefined secondary classifications for sickness balances should apply. By default, Earnings elements include the following classifications, meaning that they feed the equivalent balances:

- Sickness Deduction Reference Salary
- Sickness IJSS Reference Salary
- Sickness Legal Guarantee Reference Salary

8. If you do not want the element to feed these balances-which are used in sickness calculation-delete the classification rules, which removes the balance feeds.

See: Sickpay Elements, Formulas and Secondary Classifications, page 4-33

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

9. If company/collective agreement requires a specific balance for guaranteed salary then you need to create it and set up the feeds for these balances. You need to

associate the ASG_PRO_RUN dimension as Oracle Payroll uses this dimension in sickness calculation. That balance is specified on the sick benefit element.

10. Define the sickness absence type using the Absence Type window. You need to select the Sickness category for sickness absence type and the FR_SICKNESS_INFORMATION element. The sickness absence type that you define covers all types of sickness such as work accident, travel accident, occupational and non-occupational sickness.

See: Defining an Absence Type, page 4-55

To test your sick pay processing setup:

1. Enter sickness absence details. In Oracle Payroll, entry of the absence triggers the creation of a recurring element entry that starts the sickness calculation.

See: Entering Absences, page 4-107

See: Entering Sickness Absences, page 4-111

2. If you are waiting for the payment details from the social security office, you need to select the No option for IJSS estimate in the previous step. You must enter the payment information when you receive the notification from CPAM office. To do this, you enter information for the FR_SICKNESS_CPAM_INFO element.

See: Entering CPAM Payment Details for Absences, *Oracle HRMS Enterprise and Workforce Management Guide*

3. If the employee is eligible for a collectively agreed guarantee for this sickness absence, enter the FR_SICK_BENEFIT element for the dates of the absence. The input values define the parameters for processing the guarantee, such as the payment bands.

See: Entering Collective Agreement Details for a Sickness Absence, page 4-114

4. You can process sick pay through a payroll run or QuickPay. Select the employee assignment and the element entries that you want to process for QuickPay or for a Payroll run.

See: Running QuickPay, *Oracle HRMS Payroll Processing Management Guide*

See: Starting a Payroll Run, *Oracle HRMS Payroll Processing Management Guide*

5. Run the Absence Report (FR).

See: Running the Absence Report (FR), page 4-124

Setting Up Maternity, Paternity, and Adoption Pay Processing

Follow these steps to set up Oracle Payroll to process pay for maternity, paternity, and

adoption absences.

To set up maternity, paternity, and adoption pay processing:

1. Select the deduction calculation method to use for all sickness, maternity, paternity, and adoption pay calculation in your company or establishment.

See: Company: Entering Company Information, page 1-26

See: Establishment: Entering Establishment Information, page 1-31

2. Link the predefined element FR_MAP_INFORMATION. You can also link the other predefined elements if you want to set up costing information.

See: Elements, Formulas, and Balances for Maternity, Paternity, and Adoption Pay, page 4-42

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

3. On your user-defined elements (such as Earnings) use the Balance Feed Control window to check the predefined secondary classifications. The following classifications feed balances used in calculating maternity, paternity, and adoption pay. By default, the first two will appear in the Balance Feed Control window for elements in certain primary classifications, and the third will not.

- MAP IJSS Reference Salary
- Sickness Deduction Reference Salary
- MAP Target_<name of primary classification>

If you do not want the element to feed these balances, delete the classification rules, which removes the balance feeds.

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

4. Define the absence types you will use for recording maternity, paternity, and adoption absences. These absence types must be within the seeded absence categories--Maternity, Paternity, or French Adoption--and they must all be associated with the seeded element FR_MAP_INFORMATION.

See: Defining Absence Types, page 4-55

5. In the User Types and Statuses window, select all the contact types you use for recording dependent children and enter Yes in the Child segment of the Further Information field for each one. This ensures that Oracle Payroll counts contacts of this type as dependent children.

Note: The seeded contact types include: Child, Adopted Child, Foster Child, Step Child, and Domestic Partner Child. You can also create your own Contact types in the Application Utilities Lookups window.

6. Use the Contacts window to ensure that you have a record of all children who are dependent on your employees. The number of dependent children affects eligibility for maternity and adoption pay.
7. If you add any lookup values to the following lookup types, you must run the Seed French Data process:
 - FR_TERM_REASON_ADS_STATUS_CODE
 - FR_ABS_CATG_ADS_STATUS_CODE
 - FR_ABS_CATG_ADS_ABS_CODE
 - FR_WORK_INC_ADS_ABS_CODE

This process creates new columns in a user defined table that has the same name as the lookup type. Enter the appropriate values in the new column this process creates to ensure that your new lookup values are mapped onto the correct values in the Absences Report (FR).

Setting Up a Work Pattern

Oracle HR enables you to set up work patterns for your employees. This information helps you to make holiday pay or deduction for an absence that exists over more than one payroll period. To set up a work pattern, perform the following steps:

1. Define the lookup value for the user-extensible lookup FR_WORK_PATTERN.
See: Adding Lookup Types and Values, Oracle HRMS Configuring, Reporting, and System Administration Guide
2. Enter table column information for the table FR_COMPANY_WORK_PATTERNS.
See: Setting Up User Tables, Columns and Rows, Oracle HRMS Configuring, Reporting, and System Administration Guide

Note: Column name should be the same as value entered in the Code field while defining lookup values.

3. Enter table values for the table FR_COMPANY_WORK_PATTERNS.

See: Entering Table Values, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Note: You must enter the value P to indicate the day should be treated as a protected day for the purposes of holiday pay. For the remaining days, enter the number of hours the employee is scheduled to work.

4. Select the work pattern and the work pattern start day for the employee.

See: Entering Additional Assignment Details, page 2-28

Note: You must date track to the start date of the employee's accrual plan . The Work Pattern start day will be the same day of the week as the accrual start date day.

5. Set up absences as non-working days.

See: Setting Up Absence Categories, page 4-52

6. Enter the public holidays that the employee worked.

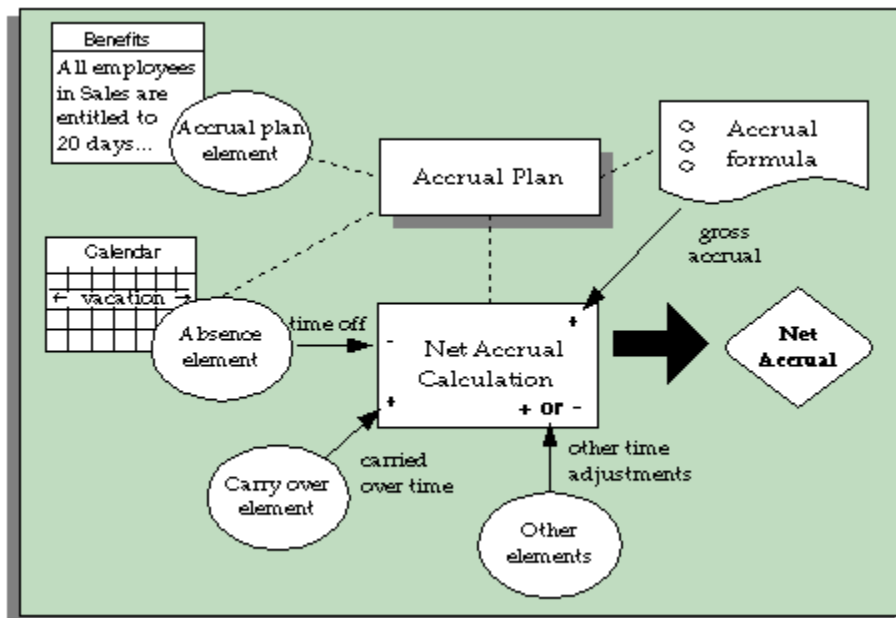
See: Entering Statutory Holiday Absences, page 4-120

PTO Accruals Setup

Accrual Plan Structure

In Oracle HRMS, accrual plans are based on elements, formulas, and a net accrual calculation. All of these are available for you to configure so you have complete control over the rules underlying your plans.

Oracle HRMS does not store net accrual totals. It calculates gross accruals dynamically by calling the Accrual formula. The net accrual calculation specifies the element entries that should add to or subtract from this figure to create the net entitlement.



If you use Oracle Payroll, you can set up your accrual plan so that gross accruals are stored in a payroll balance. Each payroll run retrieves the latest balance and calls the accrual formula to calculate new accruals since the end of the last payroll period. This approach - using a payroll balance - is optional but provides performance enhancements if you need to calculate accruals in a batch process. See: Accrual Balances Maintained By the Payroll Run, page 4-77.

The table below further explains the role of the elements, formulas, and net accrual calculation.

This aspect of an accrual plan ...	Is for...	Generated Automatically?
Absence element	Storing entries of days or hours absent.	No
Accrual plan element	Enrolling employees in the accrual plan.	Yes
Carry Over element	Storing unused time at end of plan term; Carry Over process makes entry.	Yes
Residual element	Storing unused time that cannot be carried over at end of plan term; Carry Over process makes entry.	Yes
Payroll balance element	Feeding the payroll balance that stores gross accruals; payroll run makes entry.	Yes
Tagging element	Identifying absences and other element entries that have been entered retrospectively and not yet included in the gross accrual calculation. The payroll run creates a tagging element entry and updates accrual accordingly.	Yes
Other elements	Storing other amounts of time to be included in the net accrual calculation (such as time bought and sold); you create any other elements your plan requires.	No
Accrual formula	Calculating gross accrual to date	No, but predefined examples

This aspect of an accrual plan ...	Is for...	Generated Automatically?
Carry Over formula	Returning the maximum permitted time an employee can carry over, and the effective date and expiry date of the carry over; called by the Carry Over process.	No, but predefined examples
Ineligibility formula	Checking whether an employee is eligible to use accrued PTO on the effective date of an absence entry made by BEE (Batch Element Entry); called by BEE validation. NOTE: This formula is not required if you enter the plan's ineligibility period in the Accrual Plan window.	No, but predefined examples
Payroll formula	Calling the accrual formula during a payroll run and returning the gross accrual to the payroll balance element, which feeds the payroll balance.	Yes
Net accrual calculation	Defining which element entries add to or subtract from the gross accrual to create net.	Yes, but you can update
Payroll balance	Storing the gross accrual so that batch processes do not have to recalculate the accrual from the beginning of the accrual term each time they are run.	Yes

Accrual Elements

For each accrual plan, you define and link an absence element and then define a plan using this absence element. The system generates elements for the plan.

Generated Elements

The system generates the following elements when you save a new accrual plan:

- An element representing the plan and which has the same name as the plan. You use this element to enroll participants in the plan.
- An element to hold participants' unused PTO that is available for carry over to the next year.
- An element to hold *residual PTO*, that is, unused PTO not available for carry over under plan rules.

If you use Oracle Payroll and have elected to store gross accruals in a payroll balance, the system also generates:

- An element to feed a payroll balance. This element receives an entry from the accrual formula during a payroll run.
- A tagging element, which the payroll run uses to keep track of retrospective absences (and other element entries included in the net accrual calculation) that need to be included in the gross accrual calculation.

The Carried Over and Residual elements have input values that automatically receive entries when you run the PTO Carry Over process:

- Hours or Days (depending on the plan's units)
- Effective Date
- Expiry Date (on the Carry Over element), which is the date by which the employee must use the carried over time.

Oracle HRMS automatically links these elements using the same link criteria that you created for the absence element associated with the plan. If you change the links for the absence element, you should also update the links for the other plan elements.

Other Elements

Your enterprise may require other elements to reflect individual plan policies. For example:

- Employees may be permitted to sell back PTO they have accrued but not used.
- Employees may also be permitted to purchase additional PTO in certain circumstances.
- You may need to store time in a special balance after running the Carry Over

process, such as a balance of time that can be carried over for several plan terms and is not subject to the usual expiry date

- You may need an element for entering unused PTO from another plan that is being transferred to this plan on enrollment.

These policies are not standard across enterprises. So, in Oracle Human Resources you can define elements, configured to your own requirements, for entering or storing these accrual amounts.

Accrual Formulas

Most accrual plan rules are incorporated in two formulas:

- An Accrual formula, which calculates the amount of PTO accrued at any given time, and
- A Carry Over formula, which returns the maximum amount of accrued time that a plan participant can carry over to the next plan period, the date on which this carry over is effective (normally the first day of the new accrual term), and any expiry date by which the carried over PTO must be used, or forfeited.

When the Formulas Are Run

The Carry Over formula is called by the Carry Over process. When the Accrual formula is run, it always receives a calculation date as input, as shown in the following table.

Accrual formula is run when you:	Calculation date is:
Enter an absence associated with an accrual plan and open the Associated Accrual Plans window. Accrual formula is run three times to calculate the time accrued before and after the current absence, and at the end of the plan term	Start date of the absence, or Day before the start date of the absence, or End of plan term
View PTO entitlement in the Accruals window	Effective date entered in Change Effective Date window
Run the Carry Over process	Entered as a parameter
Run your payroll and some other batch processes (Oracle Payroll users only)	The date paid, or date earned, of the current payroll run - determined by the PTO Balance Type selected for your business group

Examples of Plan Rules

These formulas can access certain data that is available as database items. For example, they can use hire date, plan enrollment date, grade, job, assignment status, assignment category (full time/part time), hours worked, or pay elements to determine:

- The employee's entitlement each accrual period
- Any accrual ceiling beyond which the employee will accrue no more time
- The maximum amount that can be carried over to the next accrual term

These values can be embedded in the formulas, or entered in a user table. If they vary with length of service, which is a common criterion for accrual bands, they can be entered in the Accrual Bands window when you define the accrual plan.

Some accrual plans allow new hires to accrue time from the date of their hire. Others allow accrual to begin at the start of the next accrual term, or six months after hire, or some other start date. Some plan rules incorporate a period of ineligibility, when a new employee can accrue time but not use it. Start rules such as these can be incorporated in your Accrual formulas.

Note: Depending on how you define the ineligibility period, you may have to associate an Ineligibility formula with your plan, if you want to make absence entries using BEE (Batch Element Entry). See: Period of Ineligibility, page 4-88.

Adding Your Own Plan Rules

Some formulas are seeded. You can use these, as supplied, or use them as models to create your own, incorporating the rules required for your accrual plans.

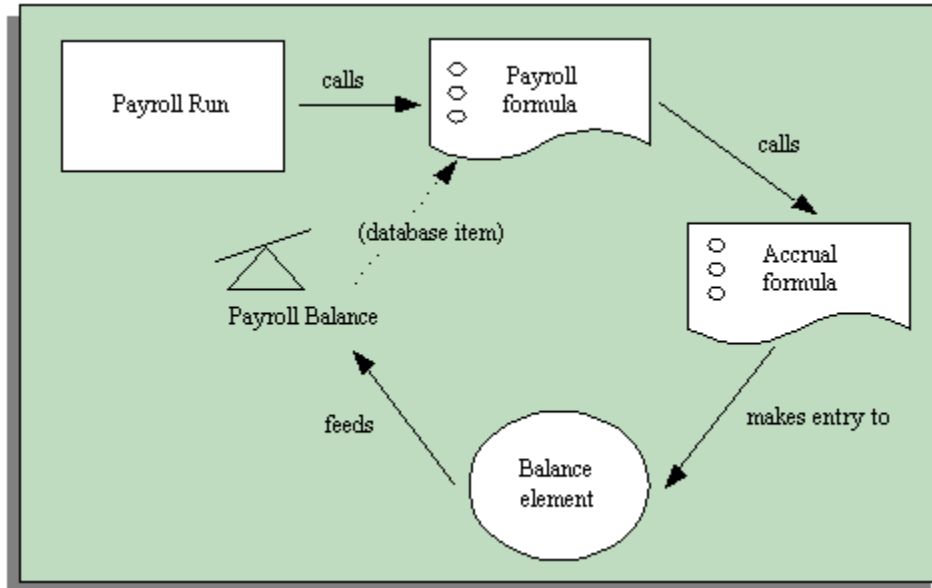
Accrual Balances Maintained By the Payroll Run

If you use Oracle Payroll, you can choose to use a payroll balance to store gross accruals for an accrual plan. You do this by selecting a balance dimension (such as calendar year to date) when you define the accrual plan. The system then automatically generates the balance and other components you require.

Why Use a Payroll Balance?

Some batch processes, such as the US Check Writer, call the accrual formula to calculate PTO accruals for each assignment. If you use such processes, you will benefit from faster batch processing if you set up your accrual plan to use a payroll balance. This reduces the number of calculations the formula has to perform.

How The Balance Is Maintained



The payroll balance is maintained by the payroll run. When the payroll run processes an accrual plan element entry, it calls an Oracle Payroll formula associated with the accrual plan element. This formula calls your accrual formula to calculate the gross accrual, passing in the following information:

- The name of the database item for the payroll balance, so the accrual formula can retrieve the number of days or hours currently in the payroll balance
- Date to begin calculating new accruals, which is the day after either the Date Earned or the Date Paid of the last payroll period in which the assignment was processed

You can choose whether the formula uses Date Paid or Date Earned by selecting the Payroll Balance Type for your business group in the Organization window.

Date Earned is the date the payroll run uses to determine which element entries to process. In North America (and typically elsewhere too) it is the last day of the payroll period being processed. **Date Paid** is the date that appears on pay advices. The payroll run uses this date to select taxation rules, and store balances. In some legislations, these dates are always the same.

- Calculation date, which is either the date earned or the date paid of the payroll run

The accrual formula returns the new gross accrual to an element that feeds the balance.

So normally the formula only has to calculate accruals since the last payroll run, and add this value to the existing payroll balance. However, if the accrual formula finds retrospective absences or other assignment changes that affect entitlement, it

recalculates accruals for the whole accrual term. This processing ensures that the employee receives their full accrual entitlement.

Note: You can also force the payroll run to recalculate accruals for the full accrual term by setting the action parameter Reset PTO Accruals to "Y" before running a payroll for a set of assignments. Update the parameter to "N" after processing these assignments to ensure faster processing in your normal run.

Example

Supposing an accrual plan has a ceiling of 10 days, and two days accrual per month. An employee has a net accrual of 10 at the end of May. The June payroll run does not award any new accrual to this employee because the net accrual must not exceed the ceiling. However, in July the employee's manager enters five days vacation in May, retrospectively. The July payroll run recalculates the accrual and updates the gross accrual balance to 14. The net accrual is now nine (14 minus 5).

How To Set Up An Accrual Plan To Use a Balance

If you want the payroll run to maintain an accrual balance, you must use a formula that supports balances. This means that the system can pass the latest accrual balance to the formula, along with the date to start calculating new accruals to add to the balance.

You can use or configure one of the following seeded formulas:

- PTO_HD_ANNIVERSARY_BALANCE
- PTO_PAYROLL_BALANCE_CALCULATION
- PTO_SIMPLE_BALANCE_MULTIPLIER

You must also select a balance dimension when you define the accrual plan. The balance dimension controls the period of time over which the balance accumulates before it is reset to zero. Three types of dimension are predefined:

Note: For each type, there are two dimensions. Use the Date Earned dimension (such as `_ASG_PTO_DE_YTD`) if you selected Date Earned as the PTO Balance Type for your business group. Otherwise use the Date Paid dimension (such as `_ASG_PTO_YTD`).

See: Business Groups: Selecting a PTO Balance Type, *Oracle HRMS Enterprise and Workforce Management Guide*

- `_ASG_PTO_YTD` and `_ASG_PTO_DE_YTD`

The balance accumulates over a calendar year, resetting on 01 January. Select one of

these dimensions if you are using the PTO_PAYROLL_BALANCE_CALCULATION formula.

- _ASG_PTO_SM_YTD and _ASG_PTO_DE_SM_YTD

The balance accumulates over a year, resetting on 01 June, or at the end of the payroll period that contains this date. Select one of these dimensions if you are using the PTO_SIMPLE_BALANCE_MULTIPLIER formula.

- _ASG_PTO_HD_YTD and _ASG_PTO_DE_HD_YTD

The balance accumulates over a year, resetting on the anniversary of the employee's hire date, or at the end of the payroll period that contains this date. Select one of these dimensions if you are using the PTO_HD_ANNIVERSARY_BALANCE formula.

For further information on balance dimensions, see the technical essay: Balances in Oracle Payroll, *Oracle HRMS Implementation Guide*.

Notice that the Oracle Payroll formula, payroll balance, element that feeds the balance, element link, and formula processing and result rules are all generated by the system when you save your accrual plan.

If you want Oracle Payroll to recalculate the accrual balance from the beginning of the accrual term when there are retrospective assignment changes that affect entitlement, you must ensure your accrual formula can track these changes. You enable a trigger for assignment updates, define an event group for the assignment changes you want to track, and ensure your PTO accrual formula references this event group. See: Setting Up PTO Accrual Plans, page 4-95.

Note: The predefined PTO_PAYROLL_BALANCE_CALCULATION formula handles retrospective changes to assignment status.

Net Accrual Calculation

Oracle HRMS uses the following calculation for an employee's net accrual:

Net PTO accrual = (Accrued PTO + PTO carried over) - PTO taken to date

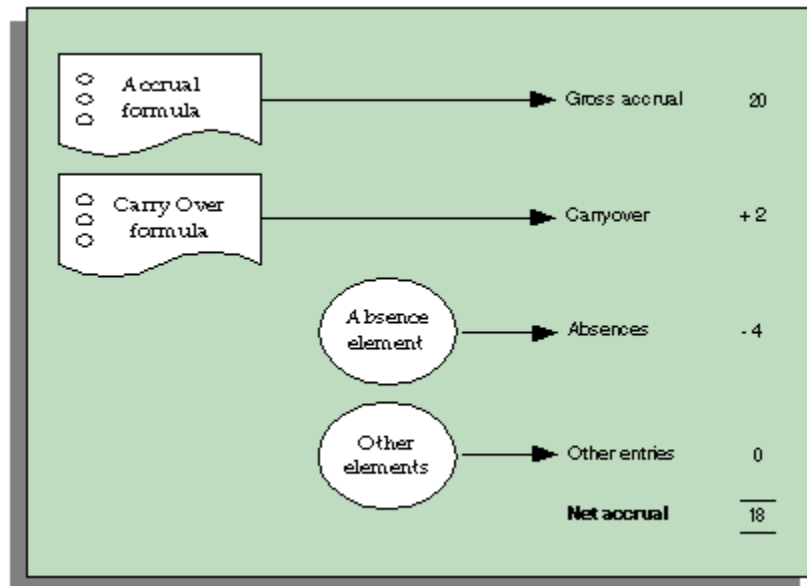
Accrued PTO is the sum of regular accruals to date in this accrual term, calculated by your Accrual formula.

PTO Carried Over is the hours or days carried over from the previous accrual term, obtained from the plan's Carried Over element.

PTO Taken To Date is all PTO taken in this accrual term, obtained from the entries to the plan's absence element.

You may require a more complex calculation of net accruals, perhaps to take some account of time stored in the residual PTO element, or to take account of time entered

on other elements that you have created. You cannot change the predefined rules for PTO taken to date (the absence element) and PTO carried over, but you can add your own rules in the Net Calculation Rules window.



Notice that the system does no automatic processing of the entries of employees' residual PTO. Your enterprise may want to use these entries to inform employees of accrued but unused time they may forfeit, or to make payments for part or all of this time.

Seeded Accrual Type Formulas

There are four seeded formulas (of formula type Accrual) for calculating accruals. Each repeatedly calls another formula (of type Accrual Subformula), in a loop, to calculate the accrual for each accrual period. There is a Carry Over formula supplied to use with each Accrual formula. The top level seeded Accrual formulas are:

- PTO_PAYROLL_BALANCE_CALCULATION
- PTO_SIMPLE_BALANCE_MULTIPLIER
- PTO_ROLLING_ACCRUAL
- PTO_HD_ANNIVERSARY_BALANCE

The formulas with "Balance" in their names can be called from the payroll run to maintain a balance of gross accruals. See: Accrual Balances Maintained By the Payroll Run, page 4-77.

Note: There are also two seeded formulas called PTO_PAYROLL_CALCULATION and PTO_SIMPLE_MULTIPLIER. These incorporate the same rules as PTO_PAYROLL_BALANCE_CALCULATION and PTO_SIMPLE_BALANCE_MULTIPLIER, except that they cannot be called from the payroll run to maintain a balance of gross accruals. We recommend that you use the formulas that support balances so you can use balances now or in the future.

Ineligibility Formula

There is also a seeded Ineligibility formula:

- PTO_INELIGIBILITY_CALCULATION

You may require an Ineligibility formula if you use BEE (Batch Element Entry) to enter absences against an accrual plan. BEE validation must ascertain whether an employee is eligible to use accrued PTO on the effective date of an absence entry in a batch line. First it checks the Accrual Plan table, so if you enter the period of ineligibility in the Accrual Plan window, you do not need to create an Ineligibility formula.

If there is no ineligibility information in this table, BEE validation checks whether there is an Ineligibility formula to call. You need an Ineligibility formula if you use BEE *and* you calculate the period of ineligibility within your Accrual formula, rather than entering it in the Accrual Plan window. This formula is only used by BEE.

Note: If you use the seeded formulas, you do not need an Ineligibility formula, because these formulas take the ineligibility period from the Accrual Plan table.

Description of Seeded Accrual Formulas

This section describes the main features of each of the seeded formulas. The rules are summarized, later, in tables.

PTO_PAYROLL_BALANCE_CALCULATION

This formula calculates accruals in the same way as the accrual function in earlier releases of Oracle HRMS. It calls another formula which is called PTO_PAYROLL_PERIOD_ACCRUAL. It is designed to be used with the Carry Over formula PTO_PAYROLL_CARRYOVER.

These formulas are based on the following rules:

- An accrual term of one calendar year, starting 1 Jan. So, accrual calculations restart at the beginning of each calendar year.

- An accrual frequency based on the participant's pay periods. So, employees on a monthly payroll accrue time each month, employees on semi-monthly payrolls accrue time twice each month, and so on. PTO accrual occurs automatically for each eligible plan participant on the last day of his or her pay period, independently of any payroll run.
- Accrual amounts and ceiling are determined by length of service.
- Accruals are prorated for suspended assignments.
- Carry over is always effective on 31 Dec of the plan year being processed. So, if you run the Carry Over process and specify the parameters '15 January 2000' and 'Previous' (plan year), the formula calculates the carry over for the year 1 Jan to 31 Dec 1999 and the result has the effective date 31 Dec 1999.
- Carry over expires at the end of the plan year. So carried over time with the effective date 31 Dec 1999 must be used before 31 Dec 2000.
- Maximum carryover depends on length of service bands.

PTO_SIMPLE_BALANCE_MULTIPLIER

This is a simple formula to provide a useful starting point for your own accrual plans. It calls another formula, called PTO_SIMPLE_PERIOD_ACCRUAL. It is designed to be used with the Carry Over formula PTO_SIMPLE_CARRYOVER.

These formulas are based on the following rules:

- An accrual term of one calendar year, starting 1 June. So, accrual calculations restart at the beginning of each June.
- An accrual frequency of one month.
- Accrual amounts and ceiling are fixed within the formula.
- Carry over is always effective on 31 May of the plan year being processed.
- Carry over expires at the end of the plan year. So carried over time with the effective date 31 May 1999 must be used before 31 May 2000.
- Maximum carry over is fixed within the formula.

PTO_HD_ANNIVERSARY_BALANCE

This formula is very similar to PTO_SIMPLE_BALANCE_MULTIPLIER, but the accrual start date is the anniversary of the employee assignment's hire date.

Note: Notice that the accrual term starts on the anniversary of the hire date. It is not affected by the entry of a continuous service date for an employee on enrollment in the plan. The continuous service date affects length of service calculations (for accrual bands and calculation of period of ineligibility), but it does not affect the accrual term.

PTO_ROLLING_ACCRUAL

This is an example formula for an accrual plan that does not have a fixed term start date. It calls the formula PTO_ROLLING_PERIOD_ACCRUAL. It is designed to be used with the Carry Over formula PTO_ROLLING_CARRYOVER. (Although carry over is not relevant to rolling accrual plans, you must select this formula for your accrual plan. It returns an effective date to the Absence Detail window.)

These formulas are based on the following rules:

- An accrual term of one calendar year, with no fixed start date. Accruals are calculated for the previous 12 months.
- An accrual frequency of one month.
- Accrual amounts and ceiling are fixed within the formula.
- Carry over is not relevant, since the accrual term never ends, but rolls forward. Time is lost if it is not used within 12 months.

Summary of Rules in Seeded Formulas

The following tables summarize the rules incorporated in the seeded Accrual formulas.

Length of Accrual Term

All Seeded Formulas
One year

Accrual Term Start Date

PTO_PAYROLL_BALANCE_CALCULATION	PTO_SIMPLE_BALANCE_MULTIPLEPLIER and PTO_HD_ANNIVERSARY_BALANCE	PTO_ROLLING_ACCRUAL
1 January	1 June (PTO_SIMPLE_BALANCE_MULTIPLEPLIER) Anniversary of hire date (PTO_HD_ANNIVERSARY_BALANCE)	No fixed date; accruals calculated for preceding 12 months

Accrual Frequency

PTO_PAYROLL_BALANCE_CALCULATION	PTO_SIMPLE_BALANCE_MULTIPLEPLIER, PTO_HD_ANNIVERSARY_BALANCE, and PTO_ROLLING_ACCRUAL
Payroll period	Monthly

Accrual Amount

PTO_PAYROLL_BALANCE_CALCULATION	PTO_SIMPLE_BALANCE_MULTIPLEPLIER, PTO_HD_ANNIVERSARY_BALANCE, and PTO_ROLLING_ACCRUAL
Depends on length of service accrual bands	A fixed amount per month (2 days)

Accrual Ceiling

Note: For all the formulas, the accrual ceiling is a limit at which the employee will accrue no more time. However, net accrual can exceed the ceiling if you have made an entry of the Carry Over element, or another adjustment element affecting net calculation rules. If you have adjusted net accrual so that it exceeds the ceiling, the employee will accrue no time until net accrual falls below the ceiling.

PTO_PAYROLL_BALANCE_CALCULATION	PTO_SIMPLE_BALANCE_MULTIPLIER, PTO_HD_ANNIVERSARY_BALANCE, and PTO_ROLLING_ACCRUAL
--	---

Depends on length of service accrual bands	Set within the formula to 20 days
--	-----------------------------------

Length of Service

All Seeded Formulas

Uses continuous service date (if present) or hire date. **Note:** continuous service date is entered using an input value on the accrual plan element.

Accrual Start Date for New Hires

PTO_PAYROLL_BALANCE_CALCULATION	PTO_SIMPLE_BALANCE_MULTIPLIER, PTO_HD_ANNIVERSARY_BALANCE, and PTO_ROLLING_ACCRUAL
--	---

Choice of start rules on Accrual Plan form: hire date, or six months after hire date, or 01 Jan after hire date Accrual starts in the first accrual period after the chosen date (or plan enrollment date if this is later).	Accrual starts in the first accrual period after hire date or plan enrollment date, whichever is later.
---	---

Period of Ineligibility

All Seeded Formulas

Accrued amounts are not credited until end of period of ineligibility (entered on Accrual Plan form), which is calculated from the hire date (or continuous service date if this was entered). Note that accrued amounts are not carried forward if the end of the accrual term falls within the ineligibility period.

Calculation of Gross Accrual

PTO_PAYROLL_BALANCE_CALCULATION	PTO_SIMPLE_BALANCE_MULTIPLIER and PTO_HD_ANNIVERSARY_BALANCE	PTO_ROLLING_ACCRUAL
Sums accruals in all full pay periods of the year ending on or before the calculation date;	Sums accruals in all full months of the year ending on or before the calculation date;	Sums accruals in the 12 months ending on or before the calculation date;
takes account of any employee termination date, accrual start rules, ineligibility period, assignment status, and accrual ceiling.	takes account of any employee termination date, ineligibility period, and accrual ceiling.	takes account of any employee termination date, ineligibility period, and accrual ceiling.

Suspended Assignments

PTO_PAYROLL_BALANCE_CALCULATION	PTO_SIMPLE_BALANCE_MULTIPLIER and PTO_HD_ANNIVERSARY_BALANCE	PTO_ROLLING_ACCRUAL
Calculates the number of working days (Monday to Friday) in the payroll period and checks assignment status for each day. Multiplies normal accrual rate by active days divided by working days, to prorate the accrual.	No processing of assignment status.	No processing of assignment status.

Changing and Adding Rules in Formulas

If you write your own formulas (perhaps using the simple multiplier or rolling accrual formula as a basis) you can change any of these rules and add new rules as required. However, your formulas must return certain values and must check for certain conditions (such as employee termination) to avoid errors.

For information about required formula content, see: *Writing Formulas for Accrual Plans, Oracle HRMS FastFormula User Guide*.

For a sample accrual formula and suggestions on how to edit it to incorporate a whole range of plan rules, see: *Sample Accrual Formula, Oracle HRMS FastFormula User Guide*.

Accrual Start Date for New Hires

Using the seeded PTO_PAYROLL_BALANCE_CALCULATION formula, accrual of PTO begins on a fixed date each year (01 January). For each plan that uses this formula, you can select a value in the Accrual Start field of the Accrual Plan window. This specifies when newly hired employees start to accrue PTO. The seeded choices are:

- Hire Date
- Beginning of Calendar Year after their hire date
- Six Months after Hire Date

If you need additional start rules, you can define them as values for the Lookup Type US_ACCRUAL_START_TYPE. You must add a line to the seeded formula to calculate the accrual start date using your new start rule.

The other seeded formulas (PTO_SIMPLE_BALANCE_MULTIPLIER, PTO_HD_ANNIVERSARY_BALANCE, and PTO_ROLLING_ACCRUAL) do not use values in the Accrual Start field. For plans using these formulas, new hires begin accruing on their hire date or plan enrollment date, whichever is later.

If you are writing your own accrual formulas, you can choose whether to use the Accrual Start field on the Accrual Plan form to specify start rules for new hires. This is only useful if you are using the same formula for several accrual plans with different start rules. Otherwise you can specify the start rule within the formula.

Period of Ineligibility

Some accrual plans require participants to work for a period of time, perhaps three or six months, before they are eligible to use accrued PTO. They accrue time at the usual rate during this time, but it is not registered on the system until the Period of Ineligibility expires. If plan participants take vacation or sick leave during this period, the system displays a negative value for accrued time. Many enterprises set up an absence type for "approved but unpaid leave" to use for absences taken during periods of ineligibility.

You can enter the period of ineligibility on the Accrual Plan form. The seeded Accrual formulas illustrate how a formula should use the entered values. They calculate the period of ineligibility from the continuous service date (if it was entered) or the employee's hire date.

Alternatively, you can define the period of ineligibility within your Accrual formula.

Note: If you use the seeded formulas, time accrued during the ineligibility period is not carried over if the end of the accrual term falls within the ineligibility period.

Batch Element Entry and the Ineligibility Period

If you want to use Batch Element Entry (BEE) to make absence entries against the accrual plan, the BEE validation process must be able to check when the ineligibility period expires.

- If you record the ineligibility period for the plan on the Accrual Plan form, BEE retrieves the ineligibility period directly from the table. It interprets it as a period of time from the employee's continuous service date or hire date.
- If the period of ineligibility is defined within your Accrual formula, you must associate an Ineligibility formula with the plan. BEE calls the formula, which returns Y or N to indicate whether the employee is eligible to use accrued PTO on the date supplied by BEE. This formula should calculate the end of the ineligibility period in the same way as the Accrual formula for the plan.

If the employee is not eligible, the BEE validation process creates a warning on the batch line for the absence entry.

Note: If you use a custom method of entering timecard data, calling the Element Entry API, you can add logic to call the Ineligibility formula.

How the Seeded PTO_PAYROLL_BALANCE_CALCULATION Formula Interprets the Start Rules

The formula calculates the start date from hire date and compares it with the employee's plan enrollment date. Accrual begins on whichever of these two dates is later.

Start Rule: Hire Date

For plans with this rule, participants' accruals begin from the first full period following their hire date. For example, if the hire date of a participant on a semi-monthly payroll falls on the first day of either the first or second period in the month, PTO accrual starts as of that date.

If the hire date falls sometime after the first of the month but before the end of the first period, accruals start in the second period of the month. If the hire date falls after the first day of the second period but before its end, accruals start with the first period in the next month.

Start Rule: Beginning of Calendar Year

With this start rule, participants' accruals begin from the start of the year following the year in which they are hired. This means that a participant with a hire date of 1 January 1999 and another with a hire date of 31 December 1999 both start to accrue time as of 1 January 2000.

Notice that the amount of PTO each accrues may not be the same, as accrual amounts often depend on employees' length of service.

Start Rule: Six Months After Hire

For plans with this start rule, participants' accruals do not begin until the first full pay period after the six-month anniversary of their hire date. For example, someone on a semi-monthly payroll who is hired on 5 February 1996, completes six months of service on 5 August 1996, and starts to accrue PTO in the second period in August.

Notice that if people are hired on the first day of a period, their accruals begin with the pay period of the six-month anniversary of their hire date. For example, someone on a semi-monthly payroll who is hired on 1 February 1996 completes six months of service on 1 August 1996, and hence starts to accrue PTO in the first period in August.

The period of ineligibility is not applicable to plans with the start rule Six Months After Hire.

Accrual Bands

For many accrual plans, the time off that plan participants can accrue increases with their length of service, or varies by job, grade, or number of hours worked. That is, *accrual bands* determine accrual amounts. In addition, these bands can determine *ceiling* and *maximum carry over* amounts.

Ceiling rules, found in some vacation accrual plans, set a maximum amount of PTO an employee can hold at any time. When a participant's accrued PTO reaches the ceiling, no additional time accrues. Accruals begin again only after the participant uses some accrued time.

In the PTO_PAYROLL_BALANCE_CALCULATION seeded formula, the accrual amount, ceiling and maximum permitted carry over depend on length of service bands. Alternatively, you can use bands based on other factors, such as grade, or a combination of factors, to determine the accrual amounts for your plans.

Length of Service Bands

You set up length of service bands using the Accrual Bands window. For each band (such as 0 to 5 years of service), you can enter the accrual amount for the whole accrual term (such as an annual amount), an accrual ceiling, and the maximum permitted carry over.

Length of Service Override

In Oracle HRMS, the **first day of the month of an employee's hire date** is the default date from which his or her length of service is calculated for accrual purposes. For example, someone hired on 18 January 1997 completes one year of service on 1 January 1998, and someone hired on 31 December 1996 completes one year of service on 1

December 1997.

For individual accrual plan participants, you can override the default date from which a plan starts its length of service calculations. This is useful for managing exceptional cases that arise when, for example, employees who already have accumulated periods of service in your enterprise transfer from one place to another. You enter the date override when enrolling a participant in a plan.

Note: The default length of service start date (or the overriding continuous service date) determines the length of service for accrual bands and for the calculating the end of the ineligibility period. However it is *not* the same as the accrual start date. This is determined by the accrual start rules selected in the Accrual Plan window or set within the accrual formula.

Other Banding Criteria

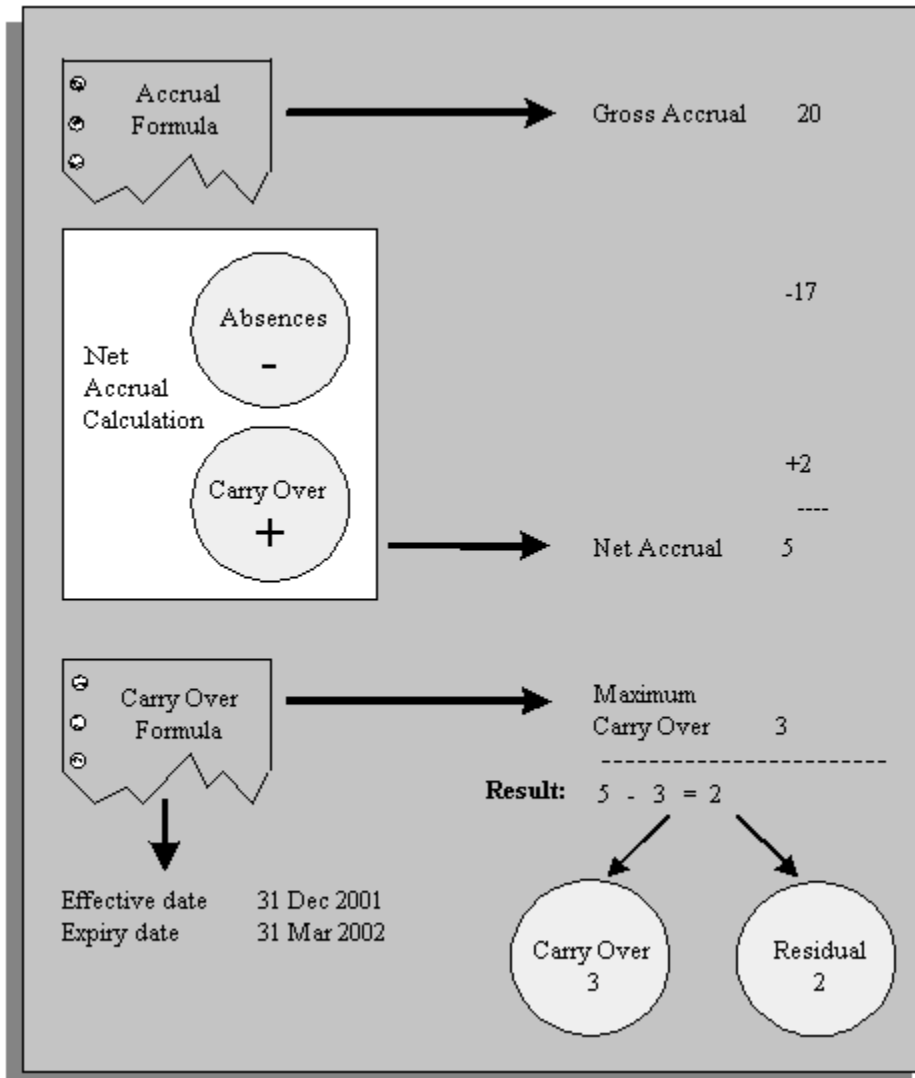
For some accrual plans, the amount of time accrued may vary by other criteria, such as job or grade. You can create a user table to hold time accrued, ceiling rules, maximum carryover rules, and any other information you require for each job or grade. See: User-Defined Tables, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Include the GET_TABLE_VALUE function in your accrual and carry over formulas for the plan to access the information held in the user table. For an example of using a user table to store banding criteria, see: Sample Accrual Formula, *Oracle HRMS FastFormula User Guide*.

PTO Carry Over Process

To manage the carry over of employees' unused PTO to a new accrual term, you run the PTO Carry Over process from the Submit Requests window:

- For accrual plans with a *fixed term start date* (such as 1 April), you run the process at the end of each accrual term.
- For accrual plans with a *variable term start date* (such as hire date or seniority date), you should run the process every night to update plan information for any employees whose term has ended that day.
- For accrual plans based on a *rolling plan term* (such as those using the seeded PTO_ROLLING_ACCRUAL formula), this process is not relevant.



For each participant in an accrual plan, the PTO Carry Over process first uses the Accrual formula to calculate the participant's accrued PTO as of the last day of the plan's accrual term. The process then uses the Carry Over formula to get:

- the maximum amount of time this employee can carry forward to the next accrual term
- the effective date for the carry over, and
- any expiry date by which the employee must use the time carried over, or lose it.

The process calculates the net accrual using time off recorded on the Absence element and any other elements associated with the plan. Finally, it compares the net accrual with the maximum carry over, permitted to determine both the amount to carry over, and the amount of any residual PTO that cannot be carried over.

For employees with unused, accrued time to carry over, Oracle HRMS enters this time on the plan's <plan name> Carried Over element. Similarly, for employees with unused, accrued time they cannot carry over, Oracle HRMS enters this time on the plan's Residual <plan name> element.

Accounting Accruals

There are many accounting accruals that are related to payroll. These accruals fall into three basic categories:

- Holiday pay and similar accruals, such as seniority days, RTT days, conventional days, time-savings scheme and time-off in lieu.
- Taxes, such as apprenticeship tax, construction tax, training tax and CDD training tax.
- Gross salary accounting, which includes end of contract indemnity for fixed term contracts.

The monetary value of accruals due to employees and the employer charges on these amounts must be calculated, costed and transferred to the general ledger each month.

Holiday Accounting Liabilities

Each employee's holiday accrual and unspent entitlement for the current year and the last 3 years are processed as if they were to be paid in the current period. This becomes the holiday accrual liability. If this were to be paid, then charges would also be paid on these values. The percentage charge (an estimate of the actual charges levied) is held, by process type, in the establishment organization information. A default value is also held at Company level in case there is no Establishment percentage available.

The charges and holiday accruals are posted to elements, which can be posted to the GL account using the cost allocation flexfield.

Accrual Information Classification

Oracle Payroll provides a predefined Element classification, Accrual Information. Because accruals are calculated on totals as at the present date, they are not applicable for RetroPay. You must ensure that any elements with an Accrual Information classification are excluded from your RetroPay processes.

Elements and Formulas in Holiday Accounting Liabilities

There is a predefined sample formula, FR_HOLIDAY_PAY_ACCOUNTING_ACCRUAL_SAMPLE, which calculates the liabilities. You must tailor this formula to your needs and attach the formula to your accrual plan element otherwise the accruals are not calculated.

The formula returns accrual values to 8 elements that hold the liabilities. One for each of

the holiday payment liabilities for each of the 4 years and one for the charges on those liabilities for each of the 4 years.

The following elements are created by the accrual plan:

Element	Input Value
<Accrual Plan name> Current Year Accrual Amount	Pay Value
<Accrual Plan name> Current Year Accrual charges	Pay Value
<Accrual Plan name> Current Year minus 1 Accrual Amount	Pay Value
<Accrual Plan name> Current Year minus 1 Accrual charges	Pay Value
<Accrual Plan name> Current Year minus 2 Accrual Amount	Pay Value
<Accrual Plan name> Current Year minus 2 Accrual charges	Pay Value
<Accrual Plan name> Current Year minus 3 Accrual Amount	Pay Value
<Accrual Plan name> Current Year minus 3 Accrual charges	Pay Value
<Accrual Plan name> Termination Payment	Pay Value
FR_Termination_Regularize	Pay Value

These results are not displayed on the payslip, but are available to be posted to the GL account. You will need to set up costings against the element links.

Oracle Payroll calculates the net entitlement of unspent days, per year, per assignment, per accrual plan, for each of the last 4 years. As these holidays may be paid at separate rates (either the current pay rate or a factor of the pay rate at the time of accrual), the payment is calculated separately per year. The charges are also calculated separately.

Holiday Pay on Termination

The <Accrual Plan name> Termination Payment elements hold up to four years of accrual payment information and stores the payment for accrued time off in lieu when an employee is terminated. A separate element is created for every year. You must link these elements with your Accrual Plan Elements's payroll formula so that PTO termination processing is initiated when an employee terminates. Set up the Accrual Plan ID as an indirect result to '(Accrual Plan Name) Termination Payment' and a formula results L_Warn_message to indicate that no percentage charge exists for the Company/Establishment.

The FR_Termination_Regularize elements hold up to four years of Accrual

Regularization Payments, Accrual Plan ID and the Accrual Date for when an employee terminates. A separate element is created for every year showing the regularization payment for each accrual year..

Setting Up PTO Accrual Plans

1. Define and link an element for the plan's absence type.

See: Defining and Linking an Absence Element, page 4-52

Important: It is important that you link the absence element before you define the accrual plan since Oracle HRMS automatically creates links for the accrual plan elements based on your absence element links. If you define criteria on the link so that employees lose eligibility for the accrual plan as their assignments change, you must manually transfer accrual balances to the employee's new accrual plan. For simplicity, consider using open element links (that is, links with no assignment criteria).

2. Define an absence type for the plan, associating its absence element with this type.

See: Defining an Absence Type, page 4-55

3. Optionally, define new accrual start rules as values for the Lookup Type US_ACCRUAL_START_TYPE. There are three seeded categories: Hire Date, Beginning of Calendar Year and Six Months after Hire Date.

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

4. Decide which Accrual and Carry Over formulas to use. You can use the seeded formulas, configure them, or write your own.

See: Writing Formulas for Accrual Plans, *Oracle HRMS FastFormula User Guide*

5. If your Accrual formula defines a period of ineligibility and you want to use BEE to enter absences against the accrual plan, define an Ineligibility formula. BEE calls this formula to check whether an employee is eligible to use accrued PTO.

See: Period of Ineligibility, page 4-88

Note: If you use the seeded Accrual formulas, you do not need to define an Ineligibility formula. They use a period of ineligibility entered in the Accrual Plan window, and BEE validation can use the same value.

This does not apply to the New Zealand seeded formulas. If you are using these

formulas, do not define an Ineligibility formula *or* enter a period of ineligibility in the Accrual Plan window.

6. Optionally, define new accrual categories as values for the Lookup Type US_PTO_ACCRUAL. There are predefined categories for some legislations.

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

7. **Oracle Payroll users:**

The following three steps are for Oracle Payroll users only. Skip these steps if you do not want to use a payroll balance to store gross accruals.

Decide whether the payroll run should update accruals as of the run's *date earned* (the date the payroll run uses to determine which element entries to process) or *date paid* (the date that appears on pay advices). Select your choice for the business group.

See: Business Groups: Selecting a PTO Balance Type, *Oracle HRMS Enterprise and Workforce Management Guide*

8. Consider which balance dimension to use. Dimensions are predefined that reset the balance each year on 1 January, 1 June, or hire date anniversary. UK users: If you require your balance to accumulate over a different period of time, or reset at a different date, you can create your own balance dimension.

See: Balances in Oracle Payroll, *Oracle HRMS Implementation Guide*

9. If you want Oracle Payroll to recalculate the accrual balance from the beginning of the accrual term when there are retrospective assignment changes that affect entitlement, you must perform this setup:

1. Navigate to the Dynamic Trigger Generation window. In the Find Triggers window, enter the following values then click Find:

- Dynamically Generated Triggers: selected
- Application: Oracle Human Resources
- Trigger Name: PER_ALL_ASSIGNMENTS_F_ARU
- Triggering Actions: Update selected

Ensure that this trigger is generated and enabled. On the Components tab, ensure that the module pay_continuous_calc.

PER_ALL_ASSIGNMENTS_F_ARU is enabled.

2. In the Functional Area Maintenance window, query the seeded functional area called PTO Events. Check that the trigger PER_ALL_ASSIGNMENTS_F_ARU is listed in the Details region. Select the Business Group tab in the Details region

and select the business groups that are to track the assignment changes.

3. In the Table Event Group window, query the seeded PTO Event Group. This group includes the following datetracked events; you can add others that you want to track:
 - Date Track Update: Table - per_all_assignments_f, Column - assignment_status_type_id
 - Date Track Correction: Table - per_all_assignments_f, Column - assignment_status_type_id
 - Date Track Delete Future: Table - per_all_assignments_f, Column - blank
4. Ensure that your accrual formula uses the Get_Earliest_AsgChange_Date function to handle the events you want to track. Refer to the PTO_PAYROLL_BALANCE_CALCULATION formula as an example of how to use this function.
10. Define the accrual plan, selecting the formulas and absence element it is to use.

See: Defining a PTO Accrual Plan, *Oracle HRMS Compensation and Benefits Management Guide*
11. Optionally, set up length of service bands for the plan.

See: Setting Up Length of Service Bands, page 4-99
12. **Oracle Payroll users:** If you want the payroll run to calculate employer liability for PTO, define an employer liability element and balance, link the element, and edit the generated payroll formula and result rules.

See: Costing Liability for PTO Accruals, *Oracle HRMS Compensation and Benefits Management Guide*
13. Review the net calculation rules for the plan. If necessary, create additional elements and associate them with the plan by selecting them in the Net Calculation Rules window.

See: Changing Net Accrual Calculations, page 4-100
14. **SSHR users:** If you want to view employee accrual balances using SSHR, create an element set that include elements that correspond to the appropriate accrual plans, and attach the element set to the profile HR: Accrual Plan Element Set Displayed to User at the appropriate levels.

See: Viewing Accrual Balances in SSHR, *Oracle HRMS Deploy Self-Service Capability Guide*.

Defining a PTO Accrual Plan

Use the Accrual Plans window to define an accrual plan and enter holiday accruals.

To define a PTO accrual plan:

1. Enter the plan name, and select an accrual category for it.

Tip: Suggestion: Coordinate the names of the accrual plan, the plan's absence type if any, and the element used to record absences taken under the plan. For example, for the Day Vacation PTO Plan for your daily workers, you could name the absence type and its element Day Vacation PTO Absence.

2. Optionally, select a start rule for the plan in the Accrual Start field. This rule determines the date on which newly hired employees begin to accrue PTO.

Note: Some plans including the Main Holiday and RTT plans based on the predefined French PTO sample formulas do not use this value; it depends which Accrual formula you select.

3. Select Days in the Accrual Units field. The units selected here must be the same as the units for the input value you select in the Absence Information region.
4. You can enter a description, summarizing the purpose and rules of the plan.
5. Select the Accrual formula and Carry Over formula to associate with the plan.

For a description of the seeded formulas, see Seeded Accrual Type Formulas, page 4-81.

Note: Oracle HRMS has provided two sample French Accrual formulas (FR_PTO_SAMPLE_REFERENCE and FR_PTO_SAMPLE_REFERENCE_ACCRUAL) and one sample Carry Over formula along with the existing core samples. You must copy these formulas and create your own formulas from them. You can then adjust the formulas to calculate seniority days, or conventional days, for your plan. If you are creating an RTT plan, you must also copy the formulas and remove the references to young mothers, seniority and conventional days.

6. In the Name field of the Absence Information region, select the element associated with the plan's absence type. In the Units field, select the element's input value that

holds the entries of days absent.

7. Enter Further Accrual Information.

For Main Holiday plan type:

- Enter the month when the reference period begins. This information is used for processing entitlements.
- Enter the entitlement offset in months. This information indicates the start of the holiday period after the beginning of the holiday reference period.
- Enter the entitlement duration. This information indicates the number of months available for you to spend the entitlement.
- Enter the number of working days you can accrue.
- Enter the number of protected days. This information indicates the maximum number of protected days, which are paid if a holiday is taken. These days are usually Saturdays, but may be any day as dictated by the work schedule.
- Select the accounting method. This information is used for calculating the absence pay by indicating a factor to derive the average number of days in a month.

Note: For RTT plan type, you only enter further information about accrual start month, entitlement offset month, entitlement duration and the number of working days.

Note: For Additional Days plan type, you only enter further information about Accrual start month, number of working days, protected days, Main Accrual Plan and accounting method.

8. Save your work.

Setting Up Length of Service Bands

Use the Accrual Bands window to define length of service bands for an accrual plan.

To set up length of service bands for a PTO plan:

1. For each length of service band applicable to this plan, establish the band's duration by making an entry in the To field. The first band starts from zero years of service. If it extends for five years, enter 5 in the To field. The system then sets the From field for the second band at 5, as the second band starts after five years of service.

For the last band you enter, in order to cover all participants with any length of service beyond the band's From entry, enter 99 in the To field. For example, if your bands cover service of 0-5 years, 5-10 years and 10+ years, the third band's From and To entries should be 10 and 99.

2. For each band, enter in the Term Accrual field the number of hours or days that participants whose length of service falls into this band can accrue each accrual term. For example, if plan participants accrue 80 hours of vacation per year during their first five years of service (band 0 - 5), enter 80 in the Term Accrual field.
3. If a band does not permit participants to carry unused accrued time over to the next accrual term, leave the Maximum Carryover field blank. Otherwise, enter in this field the maximum number of accrued, unused hours or days that participants at this band may carry forward.
4. If a band has no ceiling that limits the total number of hours or days participants at this band can accrue at any one time, leave the Ceiling field blank. Otherwise, enter the ceiling number for the band.
5. Save your work.

Changing Net Accrual Calculations

The rules for automatic calculation of employees' net PTO appear in the Net Calculation Rules window. You enter this window by choosing the Net Calculation Rules button in the Accrual Plan window.

The default net accrual calculation takes account of absences (entered on the Absence element) and time carried over from the previous accrual term (entered by the Carry Over process on the plan's Carried Over element). You cannot change these rules. However, if your plan's calculation needs to take account of other values (such as time bought or sold), you can add new rules in this window.

To change the net accrual calculation:

1. Create and link any additional elements you need for the plan. For example, you might need an element to store the amount of PTO an employee has bought or sold. Use the Information classification for these elements, define them as nonrecurring, and give them at least two input values:
 - An input value with the same units (days or hours) as you selected for the accrual plan, and
 - An input value with the units Date (to hold the effective date).

Tip: Use names for these elements that clearly link them to the appropriate accrual plan. For example, if the accrual plan is called Standard Vacation, you could name the element Standard Vacation Bought or Sold.

2. Query the new elements in the Net Calculation Rules window.
3. Select the input value that hold the days or hours you want to use in the net accrual calculation.
4. Select the date input value that holds the effective date for the accrual calculation.

Note: The predefined rule for the absence element does not include a date input value because the application uses the absence start date as the effective date for subtracting the time taken from the gross accrual.

5. For each input value, select Add or Subtract to determine whether the value should increase or decrease the net accrual available to an employee.
6. Save your work.

Absence and Accrual Plan Administration

Absence Recording

When you record an absence for an employee using the Absence Detail window or self-service, you must always select an absence type.

Dates and Times

In the Absence Detail window you can conveniently record start and end dates and times of a particular type of absence, as well as the date you receive notification of the absence.

You can enter either projected or actual dates and times. When an actual absence occurs in accordance with projected absence information already entered, you record this by simply clicking a button.

Oracle HRMS records an employee's absences using the employee's payroll calendar, so all employees for whom you record absence information must have a payroll component in their primary assignment.

Some absence types are associated with nonrecurring elements. For these types, the absence is not recorded on the employee's element entries until you enter the absence end date. You cannot change the absence start date so that it is outside the original payroll period--you must delete the absence and create a new one.

Note: For Oracle Payroll users in some localizations: some absence types may be associated with recurring elements. For these types, the absence is recorded in element entries when you enter an actual start date. If you change the start date, the element entry is deleted and a new one created. When you enter or change the end date, the element entry's end date is date effectively updated.

Absence Duration

To calculate the duration of an absence automatically, you can either use the schedule and calendar event features from Oracle HRMS and Common Application Components (CAC), or use a formula that calculates absence duration from the absence start and end dates.

For the first method, the application calculates the duration of the absence based on the worker's schedule and applicable calendar events for their primary assignment. To use these features, set the HR: Schedule Based Absence Calculation profile option to Yes.

You set up availability information such as shifts, schedules, and calendar events, and

assign them to various levels in your work structures.

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

For the second method, you write a formula to calculate absence duration from the start and end dates and times entered for an absence. Your localization team may have written a formula that the application uses by default.

See: *Writing Formulas To Calculate Absence Duration, Oracle HRMS FastFormula User Guide*

To control whether the formula automatically recalculates and overwrites the absence duration when a user updates the end date or time, set the user profile option HR: Absence Duration Auto Overwrite to Yes or No. For example, if you do want the duration to be updated when the end date changes, set the profile option to Yes.

When you enter an absence, the application warns you if:

- Duration is greater than the person's net entitlement recorded in a PTO accrual plan
- A decreasing absence balance becomes negative
- Duration is not equal to the value calculated by the absence duration formula. Or, if there is no absence duration formula, duration is not equal to <end date/time - start date/time>. Here, the application calculates the hours using the standard hours recorded for the assignment (or for the business group if the assignment contains no record).

Authorization and Replacement

When recording a projected or actual absence in the Absence Detail window, you can select both the name of an employee authorizing the absence, and of an employee replacing the absent worker.

Absence Cases

If an employee has multiple absences that result from the same cause or are associated in another way that you want to record in Oracle HRMS, you can enter an *absence case* for the employee. For example, if an employee takes two periods of sick leave due to a back injury sustained at work, you can create an absence case, associate the two absences with the case, and link the case to the work incident.

Batch Entry of Accrued Time Taken

For fast batch entry, you can use BEE, instead of the Absence Detail window, to enter sick or vacation time recorded together with other timecard data. You can enter the absence start and end dates, as well as any input values defined for the element. If you leave the date fields blank, they both default to the effective date for a nonrecurring

absence element; only the start date defaults for recurring elements. Note that the batch line produces an error if you enter a duration but no end date for a recurring element.

Self-Service Entry of Absences

If you have licensed Oracle SSHR, you can delegate the responsibility for recording absences to individual employees or their line managers. They can enter proposed or actual absences and submit them for approval by their supervisors (or any other approvers in a workflow).

Additionally, using self-service, employees can view their accrued leave details, and managers can view the same for employees in their team.

See: *Accrual Balances Maintained by SSHR, Oracle Self-Service Human Resources Deploy Self-Service Capability Guide*

See: *Leave and Absence Management Overview, Oracle HRMS Compensation and Benefits Management Guide*

See: *How do we track and analyze absences and net accrual entitlement: Leave and Absence Management, Oracle HRMS Compensation and Benefits Management Guide*

See: *Leave and Absence Management:Self-Service Functionality, Oracle Self-Service Human Resources Deploy Self-Service Capability Guide*

Viewing and Reporting on Absence Information

For monitoring and analyzing recorded employee absences, use the:

- *View Absence History window, Oracle HRMS Compensation and Benefits Management Guide*
- *List Employees by Absence Type window, Oracle HRMS Compensation and Benefits Management Guide*
- *Absences Report, Oracle HRMS Compensation and Benefits Management Guide*

For reviewing PTO plan participants' accrued time earned and taken, use the *Accruals window, Oracle HRMS Compensation and Benefits Management Guide*.

Accrual Plan Administration

Just as elements constitute the underlying structure of absence types, so they provide the structure of accrual plans. Each accrual plan is associated with an absence element, which holds information about absences taken under the plan. There is also an element for the plan itself, which you use to enroll participants in the plan.

Enrollment

You enroll an employee in an accrual plan by entering the accrual plan element. You can only enroll employees who are eligible for the plan (that is, their assignments match the element's links). When you do the enrollment you can override the default date for calculating length of service (which is used in many accrual plans to determine the appropriate accrual amount and the start date of accruals for new hires).

Note: You enter the accrual plan element for the employee's primary assignment. If another assignment becomes the primary one, you must re-enter the accrual plan element for the new primary assignment. You can transfer the accrual balance to the new assignment using a balance adjustment element entry, if your implementation team has added a balance adjustment element to the net calculation rules for this accrual plan.

Recording Accrued Time Taken

You record time taken under the accrual plan by making entries of the absence element associated with the plan.

Normally you make these entries using the Absence Detail window so you can record additional information, such as an absence reason, the name of the employee authorizing the absence, and the name of the employee replacing the absent worker. The window shows the participant's net accrual at the start of the absence and the projected accrual at the end of the accrual term.

You can also use BEE to make batch entries of hours of accrued sick or vacation time that employees have taken and noted on their timecards. Any entries you make to absence elements using BEE for an employee's primary assignment can then be viewed in the Absence Detail window. Entries made using BEE can include a reason, but the list of absence reasons available in the Absence Detail window is not automatically available here.

Viewing Accruals

You can use the Accruals window to see, at any time, how much time an employee has accrued and used under an accrual plan. You cannot change the amount accrued using this window. The gross accrual is calculated by a formula that may, for example, vary the accrual according to length of service, grade, overtime or other factors.

Recording PTO Sold or Purchased

If your enterprise pays employees for time they have accrued but not used, or if you permit employees to buy additional time, you may decide to define your own PTO-related elements to record information about these transactions. You then use the

Element Entry window to enter these elements for the appropriate employees.

Running the Carry Over Process

Once each year (or other plan term), an employee's balance of unused accrued time must be cleared down ready for the new plan term. You run the PTO Carry Over process to clear down these balances and record both unused time available for carryover, and residual time unavailable for carryover. For accrual plans with a variable term start date (such as hire date or seniority date), you should run the process every night to update plan information for any employees whose term has ended that day.

Note: Some accrual plans are based on a rolling plan term. The Carry Over Process is not relevant to this type of plan.

Holiday Absences and Accruals

Oracle HRMS enables you to record and process Holiday Absences and Accruals.

You can maintain information about two basic types of French Holiday accrual, namely RTT Accrual, Main Holiday Accrual and Additional Days Accrual. You can enter the reference period that is the time period when the holiday is accrued and the holiday period that is the time period when you can take the entitled holiday. Oracle HRMS also provides you with concurrent processes to create entitlements in these new French accrual plan types and to obsolete entitlement. You also have sample French Accrual and Carry Over formulas along with the existing core samples to help you process absences and create accrual plans.

The Main Holiday accrual type and sample formula allows you to have:

- An accrual reference period different from the holiday period.
- A holiday period greater than 12 months.
- Extra entitlement available at the end of the accrual reference period.
- Some paid non-working days that are protected days, up to a limit.

The RTT Holiday accrual type allows you to have:

- A holiday period greater than 12 months.

The Additional Days Holiday accrual type creates entitlement based on holidays booked under the Main Plan

The Main Holidays plan and the RTT plan allow you to make adjustments to the holidays you have accrued. You can also make separate adjustments to entitlements that are accrued holidays, which you are entitled to spend as on a specific date. Oracle HRMS calculates and displays the accruals at any point in time, including into the

future. For this you need to create absences with recurring elements. This allows holidays to be booked across payroll periods and for future dates. The start and end dates of the absence reflect the actual absence dates.

The Additional Days plan has no accrual. The entitlement only occurs during a defined period which is after the legal period. The entitlement is calculated by running the 'French PTO Accruals - Create Additional Days Entitlements' process.

Oracle HRMS does not use PTO accruals in the standard manner for the Main Holiday Plan. The concept of 'Carryover' is considered as 'Enduring Entitlement'. This allows you to have the entitlement until it is spent, or becomes obsolete entitlement. In this way you can spend holiday from previous accrual periods, if it is as yet unspent. The FR_PTO_SAMPLE_CARRYOVER formula determines how much entitlement should be obsoleted at any point in time. You can then obsolete the specific entitlement using the Obsolete Entitlement process. The obsolescence process obsoletes a number of days, so that the remaining entitlement is 5 days, if the entitlement is greater than 14 months after the entitlement first became available. You can change this by creating a copy of the sample formula FR_PTO_SAMPLE_CARRYOVER and editing it. If there are too many days entitlement, the Obsolete Entitlement process deletes entitlements in the following order:

- Young mother's entitlement,
- Protected Days
- Seniority Days
- Conventional Days
- Main Days

Entering Absences

Enter projected or actual absences for an employee using the Absence Detail window.

Because the calendar holding absence records for an employee is the same as that of the employee's payroll, the primary assignments of employees for whom you enter absence information must include an assignment to a payroll. For absence types based on nonrecurring elements, the effective start date of this assignment must be no later than the start of the current payroll period.

To enter absences for an employee:

1. Select the absence type. The following information appears:
 - The category of the type.
 - The occurrence of the new absence record you are entering. For example, if the

employee has already incurred two absences of this type, the occurrence of the new record is 3.

- The running total of hours or days absent for all the absence types associated with the element.
- For absence types with increasing balances, this is the number of days or hours absent with an end date on or before your effective date. For any types with decreasing balances, this is the number of hours or days remaining to be taken.
- The number of days absence recorded for the absence type in the current calendar year.
- The name of the element that maintains each employee's time taken or time remaining for this absence type.

2. Do one of the following:

- Enter projected dates for the absence. You can copy these later to the Actual Date fields by choosing the Confirm Projected Dates button.
- Enter actual dates and duration as days. If you enter an end date, you must also enter the duration.

Note: The Actual Start and End date are mandatory if you are recording absences for sickness, maternity, paternity or adoption.

Important: If you change the start or end date of a saved absence record that is linked to a parent record, check that the parent record is still valid. Otherwise, the payroll run may fail to retrieve information stored on the parent record.

3. Enter further information about the employee's absence.

Note: The further information you need to enter depends on the absence type you have selected:

See: Entering Holiday Absences, page 4-110

See: Entering Sickness Absences, page 4-111

See: Entering Maternity Absences, page 4-115

See: Entering Paternity and Adoption Absences, page 4-116

See: Entering Training Absences, page 4-119

4. You can also select:
 - Reasons for the absence.
 - The employee authorizing the absence.
 - The employee who replaces the absent employee for the duration of the absence.
5. Save your work.
6. If you entered an absence type that is eligible under an absence benefit plan, you can choose the Enroll Absences button to run the Participation Process in Absence mode. This process assesses the person's eligibility for the absence plan. If they are eligible, the process changes the status of the potential absence life event to Processed, and evaluates any standard rates linked to the plan.

Alternatively, you can run this process for a group of employees from the Submit Requests window. See: *Running the Participation Process: Absence, Oracle HRMS Compensation and Benefits Management Guide.*

Viewing Accruals for Plans Associated with the Absence Type

If the employee is enrolled in an accrual plan, the Accruals button is available. Choose this button to display the Associated Accrual Plans window, where you can see information about any accrual plans associated with the type of absence you are entering.

To view accruals:

1. Enter or query an absence in the Absence Detail window, and choose the Accruals button.
2. If nothing is displayed, run a query in the Associated Accrual Plans window to display the name and category of any accrual plans associated with the absence type.

For each plan, three net accrual amounts are displayed:

The **Net Entitlement** figures on the This Absence tab show the effect of the absence displayed in the Absence Detail window.

- The **Before Absence** figure is the net accrual calculated on the day before the absence.
- The **After Absence** figure is calculated on the start date of the absence.

In most cases these figures will differ by the length of the absence you are entering. However, if the absence happens to start on the day that this period's PTO entitlement is accrued, the new accrual is also shown in the After figure. Similarly,

if any other time (such as time bought or sold) is debited or credited to the accrual on that day, it is reflected in the After figure.

Projected Entitlement on the End of Plan tab shows the projected net accrual at the end of the current accrual plan term, taking account of any future absences already entered on the system. If the employee has future-dated assignment changes that affect his or her accrual entitlement, these are taken account of in the calculation.

Note: This figure does not take account of absences with a *projected* start date. It only includes absences that have an actual start date.

Example

Suppose Ms. Shah is enrolled on a vacation plan that runs each calendar year starting 1 January, with a gross accrual of 2 days per month. Ms. Shah did not carry over any entitlement from last year and has taken no absences before May.

Net entitlement is calculated for the last complete accrual period (that is, the period that ends on or before the start of the absence being entered). This absence is only included in the calculation if it starts on the last day of an accrual period.

The following table shows the accrual amounts (net entitlement) that would display if you enter four absences in the sequence shown.

Absences:	2 - 4 May	31 May - 3 June	12 - 15 Aug	15 June
Before absence	8	5	7	3
After absence	5	3	3	2
End of plan term	21	17	13	12

Entering Holiday Absences

You use the Absence Detail window to record absence details. You can also use it to enter further information relating to an employee's holiday absences. This information is required for payroll processing.

To enter further holiday absence information:

1. Click in the Further Information field. The Additional Absence Detail Information window is displayed.

2. Enter the date this absence was accrued.

Note: You can only book an absence from one accrual year at a time. To be able to book an absence that was accrued from more than one accrual year, you must enter two absences. Also, it is not possible to book a holiday over the plan year-end. For example, if you entered an accrual year start month of 6 while defining the accrual plan, you cannot book a holiday that spans 1st June. To do this you must book two sequential absences.

3. Enter the Main Holiday accrual days spent in this absence.

Note: These days exclude other types of accrual days.

4. Enter the number of protected days.

Note: Number of protected days is usually limited to 5 days per year. A protected day is usually a Saturday (a non working day) when the preceding Friday (working day) is taken.

5. Enter the Conventional accrual days spent in this absence.

6. Enter the Seniority accrual days spent in this absence.

7. Enter the Young Mothers accrual days spent in this absence.

Note: You need to set up the Child Relationship type for Young Mothers. This information is used for calculating the young mothers holiday pay.

See: Setting Up Dependent Child Contact Relationships, page 2-40

8. Save your work.

Note: For RTT and Additional Days absences, you only enter the date accrued and the number of Main Holiday accrual days.

Entering Sickness Absences

You use the Absence Detail window to record absence details. You can also use it to enter further information relating to an employee's holiday absences. This information is required for payroll processing.

To enter further sickness absence information:

1. Click in the Further Information field to display the Additional Absence Information window.
2. Select the parent absence. When you select the parent absence date, you link the current absence that you record to a previous absence. This information is useful for processing IJSS, legal and conventional guaranteed income. You need not enter the parent absence if you are recording a new absence.

Note: Any sickness absence that occurs within 48 hours of a previous one is treated as an extension of the previous sickness absence. You can record the current absence, as child absence if the difference between the previous sickness absence end date and current sickness start date is not more than 2 days.

3. Select Yes to enable subrogation. This means that the social security benefit payments from the social service office will be made through the employer. Select No, if the payment is made directly to the employee (the employee has to authorize the employer to receive the payment).
4. Select the medical certificate type for the sickness absence you are recording. These details are used while printing the Absence Report (FR).

Note: Selecting Final enables you to select the final certificate conclusion.

5. Select the final certificate conclusion.
6. Select the work incident reference if any that caused the sickness absence.
7. Enter the date after which the employee is not eligible for social security benefits (IJSS) as a result of not satisfying the administrative conditions. The social security office notifies this date. This information helps in identifying whether the employee is eligible for social security benefits or not.
8. Select Yes to pay IJSS benefits. This information helps in estimating IJSS payment for sickness processing. This enables you enter values for working hours. If you select 'No', sickness processing does not occur during the current payroll run till an element entry indicating IJSS payment received from CPAM is made. If left blank, it defaults to 'No' in the processing.

Note: If the employee has already had a sickness absence where IJSS Estimate is set to 'No', you cannot enter another absence with

IJSS Estimate set to 'Yes' until you have received notification of the IJSS Payment for the first absence and the corresponding entry of FR_SICKNESS_CPAM_INFO has been processed.

9. The social contributions paid over the last six and twelve calendar months are populated on saving the record from payroll results. (If the employee has less than 6 (or 12) months seniority, the contributions are estimated for the whole period based upon current contributions; however if the employee joins in the period when the sick leave occurs, the amount of contribution is not estimated). You can override the figures populated by the system. These amounts will be used in the processing to assess employee's entitlement to IJSS.
10. The working hours over the last 3 calendar months or the last 12 calendar months are populated based on the FR_ACTUAL_HOURS. You can override the figures populated by the system and provide the values.

Note: Values in the SMID contributions and working hours are only valid if you do not provide a Parent Absence and if you select Yes as Pay IJSS estimate. You may choose to enter the values or Oracle HRMS automatically populates the values when you save the absences.

11. Save your work.

Entering Insurance Payment Details for a Sickness Absence

Use the Element Entries window to provide insurance payment details to process sickness benefits. In many companies a medical insurance is taken out for employees. Both employee and employer make contributions at a specific percentage. You can provide the details of the insurance payment made to the employees using the seeded FR_SICKNESS_INSURANCE_PAYMENT element. Using this information you make the adjustments to calculate the Net and the Gross insurance payment.

See: *Making Manual Element Entries, Oracle HRMS Compensation and Benefits Management Guide*

To enter insurance payment details for sickness absence for an employee assignment:

1. In the Element field, select the FR_SICKNESS_INSURANCE_PAYMENT element.
2. Choose the Entry Values button to open the Entry Values window.
3. Enter values in the following fields:

- Payers Name: Enter the name of the medical insurer.
- Date Received: Enter the date on which the insurance payment is received. This information is mandatory.
- Start Date: Enter the start date of the insurance duration. This is mandatory information.
- End Date: Enter the end date of insurance duration. This information is necessary.
- Recipient: Select either Employee or Employer.
- Amount: Enter the value of the insurance amount.
- Employee Percentage: Enter the percentage of the amount contributed by the employee.

4. Save your work.

Entering Collective Agreement Details for a Sickness Absence

Use the Element Entries window to provide collective agreement details to process sickness benefits. Oracle Payroll has seeded the FR_SICK_BENEFIT element to calculate the sickness benefit. The details are needed to determine the Net or Gross collective agreement benefit. Oracle Payroll calculates the actual sickness benefit from the information you enter on this element.

See: *Making Manual Element Entries, Oracle HRMS Compensation and Benefits Management Guide*

To enter collective agreement details for sickness absence for an employee assignment:

1. In the Element field, select the FR_SICK_BENEFIT element.
2. Choose the Entry Values button to open the Entry Values window.
3. Enter values in the following fields:
 - Absence ID: The unique reference number of the sickness absence of the employee. This is the number generated by the application when you enter the sickness absence details in the Additional Absence Information window.
 - Guarantee ID: Enter the unique reference number associated with the particular sickness guarantee for the employee. This information is mandatory.

- **Guarantee Type:** Select the guarantee type for the employee. This information is mandatory. You can select from the following sickness guarantee types:
 - Guaranteed net
 - Guaranteed percentage of gross with no adjustment for IJSS
 - Guaranteed percentage of gross with adjustment for IJSS
 - Guaranteed percentage of net
 - Legal
 - No income guarantee
 - **Waiting Days:** Enter the number of days before the compensation is paid to the employee. This information is mandatory.
 - **Band Expiry Duration:** Select the band expiry duration. Select Rolling Year if you sum absences in each band over the period of a year back from the start date of the absence. Select Calendar Year if you sum absences in each band over the calendar year from January to December.
 - **Band1 to Band 4:** This is the type of guarantee that applies to the employee such as 14 days at 90% pay and 14 days at 50% pay. Enter the number of days in each band.
 - **Band1 Rate to Band 4 Rate:** Enter the percentage of Gross or Net paid to the employee in each band.
 - **Balance Name:** Enter the name of the salary balance. This is used only for calculating Gross Guarantees.
4. Save your work.

Entering Maternity Absences

You enter these absences in the Absence Detail window. For the general procedure for entering absences, see: Entering Absences, page 4-107. This topic explains what to enter in the Further Information field of the Absence Detail window.

Entering further information for Maternity absences:

1. Click in the Further Information field to display the Additional Absence Information window.
2. If this is a post-natal absence linked to another maternity absence, select the dates of the parent absence. For example, you might link two records when a mother chooses to interrupt her post-natal maternity, perhaps because the child is retained

in hospital.

3. In the Eligible for Guarantee au Net field, select one of the following options:
 - Eligible for guarantee irrespective of IJSS--Employee is covered by a guarantee irrespective of whether he or she is eligible for IJSS
 - Eligible for guarantee only with IJSS--Employee is covered by guarantee only if he or she is eligible for IJSS
 - Not eligible for guarantee
4. Select the Medical Certificate Type: Initial, Final, or Extension. These details are used by the Absence Report (FR).
5. Enter the Confinement Date and Status (actual or expected).
6. After the birth, enter the number of children born. This affects the length of maternity absence the employee is eligible to take.
7. In the Pay IJSS Estimate field, select Yes if you want Oracle Payroll to estimate IJSS when it processes this absence record. Select No if you want Oracle Payroll to process IJSS when you receive notification of the payment from CPAM.
8. In the Plus 200 working hours field, select Yes to record that the employee has completed 200 working hours in the last 3 calendar months. Select No if the employee has not met these eligibility requirements for IJSS.

Important: Leave the Plus 200 working hours and the SMID Contributions fields blank if you want Oracle Payroll to calculate these values when you save the record. Only make an entry in these fields if you want to override the information recorded in the database.
9. In the SMID Contributions field enter the social contributions paid over the last six months, or leave blank for Oracle Payroll to calculate the contributions. This is used to determine eligibility for IJSS.
10. Save your work.

Entering Paternity and Adoption Absences

You enter these absences in the Absence Detail window. For the general procedure for entering absences, see: Entering Absences, page 4-107. This topic explains what to enter in the Further Information field of the Absence Detail window.

Entering further information for Paternity and Adoption absences:

1. Click in the Further Information field to display the Additional Absence Information window.
2. Enter the actual birth or adoption date.
3. In the Eligible for Guarantee au Net field, select one of the following options:
 - Eligible for guarantee irrespective of IJSS--Employee is covered by a guarantee irrespective of whether he or she is eligible for IJSS
 - Eligible for guarantee only with IJSS--Employee is covered by guarantee only if he or she is eligible for IJSS
 - Not eligible for guarantee
4. Enter the number of children born or adopted. This affects the length of paternity or adoption absence the employee is eligible to take.
5. In the Pay IJSS Estimate field, select Yes if you want Oracle Payroll to estimate IJSS when it processes this absence record. Select No if you want Oracle Payroll to process IJSS when you receive notification of the payment from CPAM.
6. In the Plus 200 working hours field, select Yes to record that the employee has completed 200 working hours in the last 3 calendar months. Select No if the employee has not met these eligibility requirements for IJSS.

Important: Leave the Plus 200 working hours and the SMID Contributions fields blank if you want Oracle Payroll to calculate these values when you save the record. Only make an entry in these fields if you want to override the information recorded in the database.
7. In the SMID Contributions field enter the social contributions paid over the last six months, or leave blank for Oracle Payroll to calculate the contributions. This is used to determine eligibility for IJSS.
8. Adoption absences only: Optionally enter the number of days of adoption leave taken by the employee's spouse. This enables adoption leave to be shared between spouses.
9. Save your work.

Viewing Holiday Absences

Oracle HRMS enables you to view holiday absences. You can view different entitlements and remaining days (which can be taken as holidays) for an assignment in a particular holiday reference period. The absences displayed cover the whole holiday period; they are not 'period to date' as holidays may have been booked in the future. This allows you to see how much entitlement is spent from the earliest reference period. When it is fully spent, this information helps you in the decision to allocate the holiday to the next reference period.

Use the Absence Detail window to view all absences for an employee.

To view holiday absences for an employee:

1. Query the employee's name.
2. Select the absence type.
3. Choose the Accruals button.

The absences appear in the Associated Accrual Plans window. This window shows the accrual plan associated with the absence type, the accrual category and accrual units. The Accruals tab in this window shows the holiday reference period and the number of days accrued. The Entitlement tab shows the holiday reference period, the breakup of the entitlements into Main Days, Protected Days, Conventional Days, Seniority Days and Young Mothers Days and the remaining days for each of these entitlements.

Recording Training Absences

Oracle HRMS enables you to record training absences such as time spent in DIF and professionalisation periods. You can calculate the DIF entitlement for each employee in accordance with the training laws. To record hours spent in training as absences, you must complete several tasks.

1. Create absence type, such as DIF Training Information, with Training Absence category and associate the absence type to the predefined element FR_DIF_TRAINING_INFORMATION.

Note: If you create your element to record DIF accrual information, then ensure you add the DIF Absence element subclassification to the element. This enables the application to identify the element's use for DIF absence and accruals.

See: Defining an Absence Type, page 4-55

2. Define the DIF accrual plan to record the DIF entitlement for the employee. You must associate the predefined element FR_DIF_TRAINING_INFORMATION as the element linked to the plan's absence type. You must select the predefined accrual formula FR_SAMPLE_DIF_ACCRUAL which uses the predefined subformula FR_SAMPLE_DIF_SUB_ACCRUAL for each period such as each month, to calculate the accruals.

Additional Information: You can copy and modify the sample carryover formula FR_SAMPLE_DIF_CARRYOVER to calculate the total DIF hours at present.

See: Defining a PTO Accrual Plan, page 4-98

3. Associate the DIF accrual plan to the employee by entering the accrual plan element for the employee assignment.

See: Making Manual Element Entries, *Oracle HRMS Compensation and Benefits Management Guide*

4. Enter time spent in training.

See: Entering Absences, page 4-107

Entering Training Absences

You use the Absence Detail window to record absence details. You can also use it to enter further information relating to an employee's holiday absences. This information is required for payroll processing.

To enter further training absence information:

1. Click in the Further Information field to display the Additional Absence Information window.
2. Select training leave category such as Professionalisation Period.
3. Enter the course name the employee is attending.
4. Select the training provider and the type of training.
5. Enter the training reference to identify the training.
6. Indicate whether the training is within the training plan of your enterprise.

Note: If the training is outside of the training plan, then you can record legal category, hours spent in training outside normal

working time, and subsidy details. If the training is within the training plan, then you must record the legal category and hours spent in training outside normal working time in Oracle Learning Management. See: *Entering Training Plan Cost Information, Oracle Learning Management User Guide*

7. Select the legal category in accordance to the training laws.
8. Enter the subsidized training type and the subsidizing organization.
9. Enter the external organization and employer subsidy currency, amount, and hours spent in training outside the normal working time for payroll calculations.
10. Enter the student salary that employees receive while on training.
11. Enter the training allowance amounts that employees receive during the year.

Note: If you are an Oracle Learning Management user, then you must enter the student salary and training allowance information. The 2483 report processes this information along with the amounts you record against the Deductible Student Salary and Deductible Training Allowance measurement types. See: *Measurement Types, Oracle Learning Management User Guide*

Entering Statutory Holiday Absences

Oracle HRMS enables you to record the public holidays on which an employee has worked. You can also indicate the alternate holiday taken. You need to record this information to make an accurate calculation of the number of hours or days worked between two dates by an employee.

Use the Standard Holiday Absences window.

To enter statutory holiday absences:

1. Query the employee for whom you want to enter the public holidays details.
2. Select the public holiday date on which the employee did not take leave.
The holiday name is displayed automatically.
3. Enter an alternate date when the leave is taken.

Note: You cannot check the Expire check box if you have entered

an alternate date.

4. Enter a reason for working on a public holiday.
5. Save your work.

Running the French PTO Accruals - Create Additional Days Entitlements Process

This process calculates the Additional Days Holiday entitlement for your employees when they have not taken the minimum holiday during the legal take period.

This process creates element entries for all employees entitled to additional days. Those entries will be created as at the effective date which must be after the end of the take period.

You run the French PTO Accruals - Create Additional Days Entitlements process in the Submit Requests window.

To run the Additional Days Entitlements process:

1. Select the French PTO Accruals - Create Additional Days Entitlement process
2. Select the assignment number if you need to create entitlement entries for a specific assignment. Otherwise, leave the field blank to process all assignments.
3. Enter the Accrual Date. This is the date when the Main holiday is accrued. For example, if this process is run in June, then the accrual date is 31st May in the preceding year.
4. Choose the relevant Accrual Plan.
5. Choose OK and Submit the process.

Running the Create Entitlements Process

Oracle HRMS enables you to create entitlement from accruals, so that holidays may be spent. You need to date track to the correct date, before running this process. This date would normally be the 31st of May in the year of the accrual period. You need to run this process for French Main Holiday Accrual and RTT plans at the end of the Reference Period.

If you re-run the entitlement process in the same accrual period, any changes to employee details that cause a reduction in entitlement, are not reflected. For example, if a child is included as a dependent to generate young mothers holiday entitlement and

later this is found to be incorrect, then the entitlement should be less. The process if rerun, will not reduce entitlement and shows only positive increments to entitlement, or the reference salary from a closed accrual period. You must manually adjust them.

You run the process from the Submit Request window.

To run the create entitlement process:

1. Select the French PTO Accruals - Create Entitlements Process in the Request Name field.
2. Select the assignment number if you need to create entitlement entries for a specific assignment. Otherwise, leave the field blank to process all assignments.
3. Enter the accrual date.
4. Enter the accrual plan to be processed.
5. Choose OK to close the Parameters window.
6. Choose the Submit button.

Running the Obsolete Entitlements Process

Oracle HRMS enables you to obsolete unspent entitlement. You can do this on close of a holiday period as not all unspent entitlement may be carried forward indefinitely. You need to run this process for French Main Holiday Accrual and RTT plans.

You run the process from the Submit Request window.

To run the obsolete entitlement process:

1. Select the French PTO Accruals - Obsolete Entitlements Process in the Request Name field.
2. Select the assignment number if you need to create entitlement entries for a specific assignment. Otherwise, leave the field blank to process all assignments.
3. Enter the accrual date.
4. Enter the accrual plan to be processed.
5. Choose OK to close the Parameters window.
6. Choose the Submit button.

Reviewing Employees' PTO Accruals

Oracle HRMS enables you to view holiday accruals. You can view previous period entitlements and accruals for an assignment in a particular holiday reference period. All accruals displayed are from the current reference period to the effective date. If there is already entitlement stored in the reference period, the accrual will be zero in the case of future dated entitlement. Otherwise, it is calculated from the period after the entitlement was stored, up to the effective date. The future booked holidays are also displayed along with obsoleted entitlement while calculating net entitlements and breakdown of entitlements or absences are shown along with their effective dates.

Use the Accruals window to view net accruals to date.

To view an employee's net PTO accrual:

1. Set your effective date to the day for which you want to calculate PTO entitlement.
2. In the Assignments Folder, query the employee's name. Choose the Accruals button to go to the Accruals window.
3. Query the accrual plan in the Name window.

The Accruals field displays the accrual for the year, from the latest entitlement date up to effective date, if there is entitlement stored for the accrual year. In case there is no entitlement stored for the year, it displays the net accrual that is the net of holidays booked.

The Dates region shows the dates that the accrual formula uses for the accrual calculation. These are typically from the start of the accrual term to your effective date. The Last Accrual date is the end of the last complete accrual period, if the formula does not calculate accrual for partial periods. The Entitlement calculation dates display the dates of the reference period. You can adjust these if an assignment joined the plan after the reference period started.

The Entitlement region displays the accrued days, which are converted to entitlement by the Create Entitlement process, between these dates. This region also shows the accruals for the immediate previous reference period and the net accruals for two years prior to the immediate previous reference period. For example, if the current reference period is Jun 2002 / May 2003, the immediate previous reference period would be Jun 2001 / May 2002 and the two prior years would be Jun 2000 / May 2001 and Jun 1999 / May 2000.

If you allow maintenance of negative balances of accrued time at your installation and an employee's time absent exceeds time accrued, the net entitlement appears as a negative number.

The Entitlement Details region shows the values used in the calculation of the net entitlement:

- The <plan name> Entitlement element stores current accrued time.
- The <plan name> Obsolescence element stores accrued time lost because it was not taken.
- The <plan name> Adjustment element stores accrued time added by users. You can add time, of any type, like main, protected, seniority, conventional, young mothers, to a person's net entitlement for a year by adding an element lost because it was not taken.
- The absence element stores accrued time taken.

Running the Absence Report (FR)

The absence report lists absences that match the parameters you enter and includes details of the employer, the absence, and the salary payment received by the employee over a reference period (either 3 or 12 calendar months before the first day of absence). The absences are sorted by CPAM, employee name, then absence start date.

This report is for the social security office (CPAM) to determine the benefits to be paid to the employees. You can run this report periodically (such as weekly) or each time you record an absence. You can include sickness, maternity, and paternity absences.

Since employees cannot receive benefits for sickness until they have been absent for three days, the report only includes sickness absences of more than three days duration. One exception is a sickness absence that begins within two days of a maternity absence--these sickness absences are included, irrespective of their duration.

Use the Submit Request window to run the report.

To run the Absence Report (FR):

1. Select Absence Report (FR) in the name field.
2. Click the Parameters field to display the Parameters window.
3. Optionally, select the company for which you want to run the report.
4. Optionally, select the establishment that is the part of the company.
5. Optionally, select the name of the person for whom you want to run the report.
6. Optionally, select the category of absence: sickness, maternity, paternity, or all.
7. Optionally, enter the absence start and end date to run the report. The report only prints out absences that have a start date within the range given. In case of extended sickness absences, the report prints details related to the whole of the

linked absence. In contrast, linked maternity absences are printed separately.

8. Select Yes to print employee number. Yes is the default value. Select No to keep the employee number confidential.
9. Select Yes to limit salary amount to the social security ceiling. The default value is No.
10. Choose OK.
11. Choose the Submit button.

Note: If you do not enter any of the above parameters, the report is run for all absences within the business group. When you receive new medical certificates for extended absences you can reprint the Absence Report (FR) with different dates.

Implementing Oracle HRMS

Additional Implementation Steps for French Legislations

If you are implementing Oracle HR for France you must also complete the following additional implementation steps.

Additional Implementation Steps

Populate User Defined Tables *Required Steps*

A number of user defined tables are used by the reports supplied with Oracle HR for France. These tables interpret the data held in the database and convert it into the format required by the particular report.

In order to ensure the tables contain the correct data for your enterprise you must perform the following step:

Step 1: Define the Values Required in the User Defined Tables

A number of tables have been supplied with empty columns that must have the relevant values for your enterprise entered. For details of the supplied tables:

See: User Defined Tables, page 1-78

Use the Table Values window.

See: Entering Values Into Tables, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Step 2: Include Assignment Extra Information in the Navigator *Optional Step*

The Declaration Unique d'Embauche reports on information in the employee or applicant assignment, depending on whether it is run before or after the hire date. It also retrieves information entered in the Hiring Declaration assignment extra information type. On delivery, you can only access the Hiring Declaration assignment

extra information type from the Assignment window, and therefore you can only enter information for employees. To enable your users to enter information in the Hiring Declaration assignment extra information type for applicants you should include it Navigator.

On selecting the assignment extra information from the navigator you can find the required person and assignment combination and enter details accordingly.

Use the Menus window.

See: *Oracle E-Business Suite Security Guide*

Set up the Bilan Social Required Steps

Before you can run the Bilan Social Report process you must first perform the following setup steps.

Step 3: Review and Modify Item Types

You must review the item types, and all the associated restriction and key types that have been supplied with Oracle HR for France. Where these do not meet the requirements of your enterprise you must copy and modify them accordingly.

Use the Setup window.

See: *Reviewing and Modifying Calculations*, page 1-160

Step 4: Set up the Bilan Social Template

The template groups together all the item types that will be used when the Bilan Social Report process is run. It also defines the key types and restriction types that will apply for each item type. If the supplied Example Template does not meet your requirements you must either copy and amend it, or create a new template.

Use the Generic Summary Process window.

See: *Creating the Bilan Social Template*, page 1-183

Step 5: Review and Modify the HR France - Bilan Social Business Area

If the folders that are supplied do not meet the requirements of your enterprise you must create new folders accordingly.

Use Oracle Discoverer.

See: *Using Oracle Discoverer to View the Bilan Social*, page 1-168

Additional Information: See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1*.

Step 6: Review and Modify the Supplied Workbooks

If the workbooks that are supplied do not display the data required by your enterprise you must create new workbooks accordingly.

Use Oracle Discoverer.

See: Using Oracle Discoverer to View the Bilan Social, page 1-168

Step 7: Configure the Supplied Worksheets

In order for a number of the supplied worksheets to work correctly you must amend them according to the values you have entered in you user defined tables. The worksheets that need to be modified are as follows:

- **C22:** This worksheet has a condition set, Medical Examination Type = 'Additional', that limits the records retrieved to those with a medical examination type that has a corresponding value of 'Additional' in the FR_MEDICAL_EXAMINATION_TYPE user defined table. You must change the condition so that the value (i.e. 'Additional') reflects the value in your FR_MEDICAL_EXAMINATION_TYPE user defined table.
- **R9:** This worksheet uses a number of calculations that rely on the FR_EMPLOYEE_CATEGORY user defined table. The calculation R9:AVG(Ouvrier) includes all records with an employment category that has a corresponding value of 'Ouvrier' in the FR_EMPLOYEE_CATEGORY user defined table. You must replace all occurrences of 'Ouvrier' in the calculation with the required value from your FR_EMPLOYEE_CATEGORY user defined table.

The calculation R9-R10:AVG(Cadre) includes all records with an employment category that has a corresponding value of 'Cadre' in the FR_EMPLOYEE_CATEGORY user defined table. You must replace all occurrences of 'Cadre' in the calculation with the required value from your FR_EMPLOYEE_CATEGORY user defined table.

- **R10:** This worksheet uses a number of calculations that rely on the FR_EMPLOYEE_CATEGORY user defined table. The calculation R10-AVG (Employee) includes all records with an employment category that has a corresponding value of 'Employee' in the FR_EMPLOYEE_CATEGORY user defined table. You must replace all occurrences of 'Employee' in the calculation with the required value from your FR_EMPLOYEE_CATEGORY user defined table.

Use Oracle Discoverer.

See: *Oracle Discoverer User's Guide*

Step 8: Customize MMO and D2 FastFormulas *Required Step*

The D2 and the Declaration Mensuelle Obligatoire des Mouvements de Main d'Oeuvre use Oracle FastFormula to define formulas that control some of the data that is retrieved. If the supplied formulas do not meet the requirements of you enterprise you

must create new formulas.

Use the Formula window.

See: MMO and D2 FastFormulas, page 1-77

Step 9: Public Sector-type Functionality *Optional Step*

You can set up a particular Business group for Commercial or Public Sector-type functionality.

See: Business Group: Setting Up Public Sector-type Functionality, page 1-25

Step 10: Collective Agreement Entitlement Items *Required Step*

You need to associate the entitlement items you have created for accommodation, awards and decorations with the specific entitlements you have defined for your enterprise.

See: Setting Up Collective Agreement Entitlement Items, page 1-53

Step 11: Salary Share *Required Step*

You need to associate the salary share with the appropriate physical share.

See: Setting Up Salary Share, page 2-21

Step 12: Dependent Child Relationship *Optional Step*

You need to indicate which of your contact relationships should be treated as dependent child relationships by the application to calculate the number of dependent children.

See: Setting Up Dependent Child Relationship, page 2-40

Step 13: Reasons and Subtypes for Statutory Situations *Optional Step*

You can add more reasons and subtypes for statutory situations to meet your business requirements.

See: Reasons and Subtypes for Statutory Situations, page 1-40 and Adding Lookup Types and Values, *Oracle HRMS Configuring, Reporting, and System Administration Guide*.

Step 14: Define a Default Normal Inactivity Statutory Situation *Required Step*

You must define a default Normal Inactivity statutory situation for a public sector type organization to select an employee as a Fonctionnaire in the specific public sector type organization.

See: Statutory Situations, page 1-39 and Entering Additional Personal Information (People Window, page 2-9)

Step 15: Link Professional Activity to Public Sector Type *Required Step*

You must link the fields of professional activity to type of public sector before you

associate a field of professional activity as the primary area of professional activity in a corps.

See: Linking Professional Activity to Public Sector Type, page 4-11

Step 16: Extend the Types of Public Sector *Optional Step*

You can define types of public sector using the predefined value Other in the system lookup is FR_PQH_ORG_CATEGORY. For example, you can define Other as French Army to maintain and process the workforce details in the French army. The lookup has a DDF in the Further Information field to record whether the type of public sector allows incomplete employment time. The incomplete employment time details enable the HR Administrator to enter the agreed number of work hours and the frequency of work for the workforce.

See: Extending Types of Public Sector, page 1-35

Step 17: French Workers Election Person Extra Information Type *Required Step*

Before you can run the Prod'hommale (Workers Election) Declaration process, you must enable the French Workers Election Person extra information type for your responsibility.

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

Step 18: Set Up Element Group Names *Required Step*

When you define an element, you select a group name. All the elements allocated the same group name normally appear on one line of the pay advice against the group name, rather than the element reporting name. The exceptions are:

- If the elements in the group use different rates, the bases are not summed; they appear on separate lines.
- If the elements were prorated and the proration dates are different, they are listed on separate lines.
- Some classifications behave differently. For example overtime and payments/deductions for absences show all elements separately.

Selecting a group name is required for most classifications. You set up as many group names as you require using the lookup FR_USER_ELENT_GROUP.

Step 19: Absence Payments *Optional Step*

If you want to process pay for sickness, maternity, paternity, or adoption absences, then you must perform some additional implementation.

See: Setting Up Sick Pay, page 4-66

See: Setting Up Maternity, Paternity, and Adoption Pay Processing, page 4-68

Step 20: Setting up the Personnel Registry Report *Optional Step*

To customize the details displayed on the Personnel Registry report, you must complete several tasks.

See: Customizing XML Reports, page 1-108

Use the predefined template RUP_TEMPLATE.rtf as a sample while creating your report template. See: Personnel Registry Report Template Tags, page 1-84

Use the following details of the predefined template definition as a sample while creating a new template definition for your report template:

Column Name	Column Value
Name	French RUP Report
Code	PERFRRUP
Application	Human Resources
Data Definition	French RUP Report
Type	RTF
Start Date	01-Jan-1900
Default File	RUP_TEMPLATE.rtf
End Date (not mandatory)	
Default File Language	English
Subtemplate (not mandatory)	
Default File Territory	United States
Description	French RUP Report

While creating the template definition, you must specify the data definition as French RUP Report as Oracle XML Publisher associates your template definition with this predefined data definition.

While modifying the predefined template, you can add as new fields the values that are available in the lookup FR_RUP_XML_REPORT and HR tables such as PER_ALL_PEOPLE_F, PER_CONTRACTS_F, but not mapped with the predefined

report template RUP_TEMPLATE.rtf. You must not add new fields that have no data source in either the FR_RUP_XML_REPORT lookup or HR tables.

Step 21: Setting up the Training Access Individual Report *Optional Step*

To customize the details displayed on the Training Access Individual report, you must complete several tasks.

See: Customizing XML Reports, page 1-108

Use the predefined template BIAF2005.rtf as a sample while creating your report template. See: Training Access Individual Report Template Tags, page 1-92

Use the following details of the predefined template definition as a sample while creating a new template definition for your report template:

Column Name	Column Value
Name	BIAF
Code	BIAFXMLR
Application	Human Resource
Data Definition	BIAFXMLR
Type	RTF
Start Date	01-Jan-1900
Default File	BIAF2005.rtf
End Date (not mandatory)	
Subtemplate (not mandatory)	
Default File Language	English
Territory Description	United States

While creating the template definition, you must specify the data definition as BIAFXMLR as Oracle XML Publisher associates your template definition with this predefined data definition.

You can modify the predefined rich text format template by:

- Adding new fields in the predefined template to display the required details in the

BIAF report. You can add Full Name, Birth Date (date of birth), and Maiden as new fields without changing the existing fields in the predefined template. The full name, date of birth, and maiden name fields are available in the lookup BIAF_LOOKUP_CODE but not mapped with the predefined report template BIAF.rtf. In order to use these field names, you must customize the rich text format template with these label form fields and the corresponding data form field. You cannot add new data form fields.

- Changing the name of the existing labels in the template. To change the display name of the labels in the template, you must change the existing values in the lookup BIAF_LOOKUP_CODE.

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

Step 22: Setting up the DIF Statement *Optional Step*

To meet the training law requirements, Oracle HRMS enables you to print DIF statement for all your employees. You can print the statement using the sample DIF statement template, or you can change the layout to display details that meet your business requirements. To configure the details displayed on the DIF statement, you must complete several tasks. See: Customizing XML Reports, page 1-108

While configuring the statement details, you can:

- Use the predefined template DIF_stmt_tmpl.rtf as a sample while creating your statement template. See: DIF Statement Template Tags, page 1-98
- Use the following details of the predefined template definition as a sample while creating a new template definition for your statement template:

Column Name	Column Value
Name	DIF Statement Template
Code	DIFSTM
Application	Oracle Human Resources
Data Definition	FRDIFSTM
Type	RTF
Start Date	01-Jan-1990

Column Name	Column Value
Default File	DIF_stmt_tmpl.rtf
End Date (not mandatory)	
Subtemplate (not mandatory)	
Default File Language	English
Territory Description	French Republic (comprises Metropolitan France, French Guiana, Guadeloupe, Martinique, Reunion, Mayotte, Saint Pierre, Miquelon, French Polynesia, French Southern Territories, New Caledonia, and Wallis and Futuna)

While creating the template definition, you must specify the data definition as FRDIFSTM as Oracle XML Publisher associates your template definition with this predefined data definition.

- You can modify the predefined rich text format template by:
 - Adding new fields in the predefined template to display the required details in the DIF Statement. You can add new fields that are available in the DIF_STMT_LOOKUP_CODE lookup but not mapped with the predefined report template DIF_stmt_tmpl.rtf. You can also remove fields from the predefined template.

Note: Ensure you save the modified template with a different name to retain the predefined template as a sample for reference.

- Changing the name of the existing labels in the template. To change the display name of the labels in the template, you must change the existing values in the lookup DIF_STMT_LOOKUP_CODE.

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

Step 23: Create and Assign Fast Formula to Eligibility Profiles For Corps *Required Step*

Before you define eligibility profiles for the corps, use the predefined PL/SQL function PQH_FR_SPEED.chk_speed_length() to create the formula function and fast formula of

type Participation and Rate Eligibility. This fast formula evaluates whether an employee satisfies the length of service required in the current step, current grade, or grade ladder depending upon the career path you defined at the step. You must assign this fast formula to the required participation eligibility profile. See: Setting Up Corps, page 4-11

While creating the formula function, ensure the following:

- The formula function definition matches the PL/SQL function PQH_FR_SPEED.chk_speed_length().
- Click Context Usages and add Assignment_Id as context name with Number as data type and Date_Earned as context name with Date as data type.

See: Registering a Function, *Oracle HRMS FastFormula User Guide*

While creating the fast formula, ensure that you select Participation and Rate Eligibility as type and return a variable with name ELIGIBLE. This is required as the calling Eligibility program expects a variable having the name "ELIGIBLE" and should return a value of either "Y" or "N". See: Writing or Editing a Formula, *Oracle HRMS FastFormula User Guide*

Setting Up Web/ADI to Produce the Full Settlement Report *Optional Steps*

Web/ADI is the replacement for ADE. It allows a view to associated with a professional form. When the export button on the form is pressed the view is executed using the WHERE clause existing in the form to restrict the data. The output of the view is downloaded into either an Excel or Word document, and the system can be configured to automatically link this to become the source of a Word MailMerge.

See: Implementing Web ADI for use with Oracle HRMS, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Setting up Web/ADI to produce this behaviour requires the following steps:

Step 24: Adding Web/ADI responsibility to the user

The user should be given the responsibility Web ADI with the Standard security group.

Step 25: Create mapping between view and form

Enter the Web Adi responsibility and navigate to Create Document

1. Select Settings - click Next
2. Select Integrator - choose HR Integrator Setup - click Next
3. Select Content - click Next
4. Document Creation Review - click Create Document
5. Spreadsheet should be created - complete as follows

- a. METADATA_TYPE = DOWNLOAD
 - b. APPLICATION_ID = 800
 - c. INTEGRATOR_USER_NAME = FR_TERMINATION
 - d. VIEW_NAME = HR_FR_TERMINATION_V
 - e. FORM_NAME = PERWSTEM
6. Choose Oracle -> Upload
 7. In dialog window - click Upload
 8. Close dialog and spreadsheet
 9. From Web ADI responsibility choose "Define Layout"
 10. Select Integrator - choose FR_TERMINATION - Go
 11. Define Layout
 - a. Layout Name = FR_TERMINATION
 - b. Layout Key = FR_PERWSTEM
 - c. Field List = HR_FR_TERMINATION_V
 12. Click Next
 13. Define Layout - Select All, then deselect system values, i.e. Assignment ID etc. - Apply, Cancel
 14. Add "Web ADI Create Document" function to FR_HRMS_NAV menu
 15. In End Employment form query person. Use Export to download the information to a word document. Save as a temporary file.
 16. Create Mail Merge Template document using the temporary download doc as the data source.
 17. Add "HRMS ADI Document Manager Menu" submenu option to FR_HRMS_NAV
 18. Upload the Mail Merge Temporary document from the Document Management menu option.
 19. Alternatively use the following to upload the document :


```
FNDGFU apps/apps 0 Y PROGRAM_NAME=HRMS_ADI PROGRAM_TAG=TERMINATION
LANGUAGE=US CONTENT_TYPE=application/msword {document}.doc
```

Check if the document now exists following the upload using

```
select FILE_NAME
```

```
from fnd_lobs
where PROGRAM_NAME like 'HRMS_ADI';
```

20. Web/ADI -> Manage Document Links
21. Select Integrator - choose FR_TERMINATION - Go
22. Select Layout - FR_TERMINATION - Link a document - Go
23. In End Employment form query person. Use Export to download the information to a Word 2000.
24. Mail Merge occurs automatically.

Use the View -> List -> People Folder form (PERWSFPE) to produce the Full Settlement Report for multiple employees.

A new folder should be defined that only contains those employees who have been terminated. One possible way of doing this is to create a folder with the following additional WHERE clause:

```
l=1 and exists (select null from per_periods_of_service where person_id
= per_people_v2.person_id and actual_termination_date is null)
```

Note: This additional WHERE clause returns all employees who have a period of service with an actual termination date. It may not be restrictive enough in which case an alternative restriction must be found.

Step 26: Run the Seed French Data Process*Optional Step*

This process creates and populates user defined tables using predefined lookup types and rows. It generates new columns in a user defined table that has the same name as the lookup type. There are no parameters to be completed for this report.

You run the 'Seed French Data' process from the Submit Requests window.

To Run the Seed French Data Process

- Select Seed French Data in the Name field.
Choose the Submit button.

Oracle Learning Management France

Oracle Learning Management France Overview

Important: You must license and implement Oracle Learning Management (OLM) to create organization training plans and generate statutory reports.

OLM supports a wide range of business activities associated with learning and development. The training plan functionality enables you to group together courses and classes into a plan to define the proposed training for your organization. OLM also enables you to maintain information for statutory reports that you submit to government bodies or worker's councils.

Organization Training Plans

Companies use training plans to set out their proposed training activities for a certain period, usually a year. OLM enables you to create and maintain the following:

- Organization Training Plans
- Training Plan Budgets
- Training Plan Costs
- Training Plan Measurement Types

Statutory Reports

You can maintain the information needed to produce the following statutory reports:

- **Plan de Formation** - this report must be produced by every company and presented to the worker's council so that the proposed level of training for the year can be

agreed.

- **Budget and Cost Reconciliation Report** - this is a mandatory report that must be produced by each company to show how much of the training they proposed to undertake at the beginning of the year has actually taken place.
- **Declaration 2483** - this is a mandatory report that assesses the amounts of contributions and the actions taken by an employer during the year to satisfy the legal obligation and then produces the employer's debit or credit balance.

Additional Information: For implementation steps and related information about Oracle Learning Management, see the Oracle Learning Management France Supplement (Metalink Note: 344405.1).

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