Oracle® HRMS for Germany

Supplement

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Send Us Your Comments

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Oracle welcomes customers' comments and suggestions on the quality and usefulness of this document. Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

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

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

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

Send your comments to us using the electronic mail address: appsdoc_us@oracle.com

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Preface

Intended Audience

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

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

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

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

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

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

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

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit http://www.oracle.

com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Structure

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 *i*Recruitment to manage all of your enterprise's recruitment needs.

Oracle Learning Management User Guide

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

Oracle Learning Management Implementation Guide

Implement Oracle Learning Management to accommodate your specific business practices.

Oracle Time and Labor Implementation and User Guide

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

Oracle Labor Distribution User Guide

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

Other Implementation Documentation

Oracle 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.

1

Organization Structures

Organizations

German Organizations and Additional Information

Within Oracle HRMS you can enter the following information for each HR organization within a German organization hierarchy:

- social insurance provider
    - health insurance provider
    - pension insurance provider
    - unemployment insurance provider
    - special care insurance provider
- workers' liability insurance provider
- supervising office for work incident
- tax office
- liability to chamber tax

To store this information, you first need to define each separate provider as an external organization with the corresponding organization classification. For example, you would define all the pension insurance providers that are relevant for the organization as external organizations with the organization classification *German Mandatory Pension Provider*.

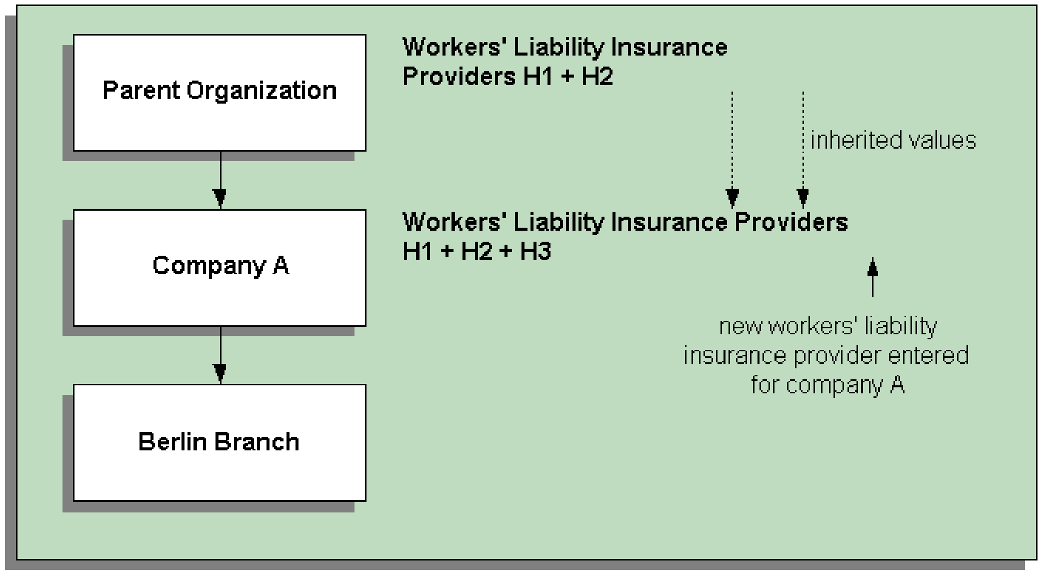
See: Creating an Organization, *Oracle HRMS Enterprise and Workforce Management Guide*

When you have defined all the required external organizations, you define links to your internal organizations. However, you do not need to define the information for each individual organization. As long as you maintain the information for at least the top level HR organization, the values will be inherited by the subordinate organizations.

> **Note:** You specify the preferred hierarchy for your organization in the German Business Group window.
>
> See: Entering German Business Group Information, page 1-11

The following diagram illustrates how values entered against the top-level organizations are inherited by the subordinate organizations. The workers' liability insurance providers H1 and H2 are stored against the top-level organization. Workers' liability insurance provider H3 is stored against the second-level organization. This means that the list of possible workers' liability insurance providers for the second-level organization (company A) is the inherited values (H1 and H2) plus H3.

Inherited Information for External Organizations



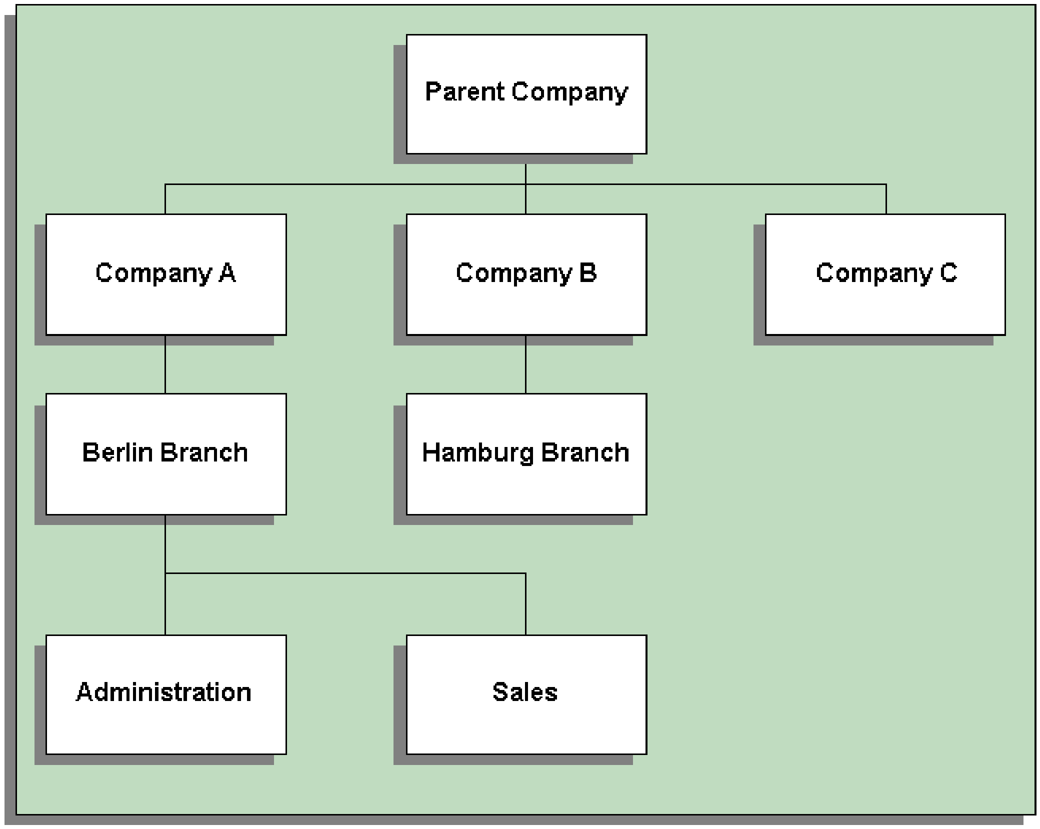
For information on defining the organizational links between external and internal organizations, see the following documentation:

- Entering Additional Information for German HR Organizations, page 1-11
- Entering Tax Office Information for German HR Organizations, page 1-16
- Entering Chamber Tax Information for German HR Organizations, page 1-14

Employees and External Organization Information

Oracle HRMS also enables you to store information about external organizations at the person level. Each employee must have an assignment to social insurance providers, a tax office, and a workers' liability insurance provider. The external organizations that are available at the person level are defined by the external organizations assigned to superordinate levels in the organization hierarchy.

Organization Hierarchy and Employee Data



For example, to identify the possible workers' liability insurance providers for an employee in the Sales organization, Oracle HRMS identifies any health insurance providers that are stored for the Sales organization plus the workers' liability insurance providers for the Berlin organization plus the workers' liability insurance providers for Company A, and finally, the workers' liability insurance providers for the parent company. You can assign any of the workers' liability insurance providers from this superset to the employee.

If no workers' liability insurance providers are stored for the organization to which the employee is assigned, the system looks at the next superordinate organization in the organization hierarchy. In the above example, this would be the Berlin organization.

> **Note:** When searching for external organizations, the system only travels up the organizational hierarchy in the direction of the parent organization.

For more information on entering external organization information at the person level, see the following documentation:

- Entering Tax Information for Employees, page 4-16

- Entering Social Insurance Information for Employees, page 4-17

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 1-5

For HR organization see: HR Organization, page 1-6

For representative body see: Representative Body, page 1-7

For constituency see: Constituency, page 1-7

For bargaining association see: Bargaining Association, page 1-8

For company cost center see: Company Cost Center, page 1-8

For professional body information see: Professional Body Information, page 1-8

For mandatory health/special care insurance provider information, see German Mandatory Health/Special Care Insurance Provider, page 1-9

For mandatory pension insurance provider information, see German Mandatory Pension Insurance Provider, page 1-9

For private health/special care insurance provider information, see German Private Health/Special Care Insurance Provider, page 1-10

For tax office information, see: German Tax Office Information, page 1-10

For unemployment insurance provider information, see German Unemployment Insurance Provider Information, page 1-10

See Organization Classifications, *Oracle HRMS Enterprise and Workforce Management Guide* if you need to check which classification to select.

To enter Business Group additional information:

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

2. Choose the Others button to open the Additional Organization Information window.

3. Select one of the following:

   - Business Group Information, see: Entering Business Group Information, *Oracle HRMS Enterprise and Workforce Management Guide*

   - Budget Value Defaults, see: Business Groups: Entering Budget Value Defaults, *Oracle HRMS Enterprise and Workforce Management Guide*

- German Business Group Information, see Entering German Business Group Information, page 1-11
- Work Day Information, see: Business Groups and HR Organizations: Work Day Defaults, *Oracle HRMS Enterprise and Workforce Management Guide*
- Benefits Defaults, see: Business Groups: Defining a Default Monthly Payroll, *Oracle HRMS Enterprise and Workforce Management Guide*
- PTO Balance Type, see Business Groups: Selecting a PTO Balance Type, *Oracle HRMS Enterprise and Workforce Management Guide*
- Public Sector Details, see Business Group: Setting Up Public Sector-type Functionality, *Oracle HRMS Enterprise and Workforce Management Guide*
- Recruitment Information, see Business Groups: Entering Recruitment Information, *Oracle HRMS Enterprise and Workforce Management Guide*

4. Repeat these steps to enter further information.

To enter HR organization additional information:

1. Click on the organization classification for which you want to enter additional information.
2. Choose the Others button to open the Additional Organization Information window.
3. Select one of the following:
   - German Chamber Tax, see: Entering Chamber Tax Information for German Organizations, page 1-14
   - Costing Information, see: HR Organizations: Entering Costing Information, *Oracle HRMS Enterprise and Workforce Management Guide*
   - German HR Organization, see: Entering German HR Organization Information, page 1-11
   - 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 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 German mandatory health/special care insurance provider 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. In the Provider Type region, select Mandatory Health/Special Care Insurance Provider.. See: Entering German Social Insurance Provider Information, page 1-14

4. Select German Social Insurance. See: Entering German Social Insurance Information, page 1-14

5. Select Provider Location. See: Entering Provider Location Information, page 1-16

6. Repeat these steps to enter further information.

To enter German mandatory pension insurance provider 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. In the Provider Type region, select Mandatory Pension Insurance Provider.. See: Entering German Social Insurance Provider Information, page 1-14

4. Repeat these steps to enter further information.

To enter German private health/special care insurance provider 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. In the Provider Type region, select Private Health/Special Care Insurance Provider.. See: Entering German Social Insurance Provider Information: page Entering German Social Insurance Provider Information, page 1-14

4. Repeat these steps to enter further information.

To enter German unemployment insurance provider 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. In the Provider Type region, select Unemployment Insurance Provider.. See: Entering German Social Insurance Provider Information, page 1-14

4. Repeat these steps to enter further information.

To enter German tax office 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 German Tax Office. See Entering Tax Information for German Tax Organizations, page 1-16

4. Select Provider Location. See: Entering Provider Location Information, page 1-16

5. Repeat these steps to enter further information.

Entering German Business Group Information

To enter German business group 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 German Business Group.

2. Click in the field in the Additional Organization Information window to open the German Business Group window.

3. Select the preferred hierarchy for your business group in the Organization Hierarchy field,

   Note: The named hierarchy defines the way in which additional information is stored for your internal organizations. Information that is defined for a particular organization also applies to all child organizations within the named hierarchy.

   See: German Organizations and Additional Information, page 1-2

4. Save your work.

Entering German Public Sector Information

Use the German Public Sector window to record organization information for your German public sector organizations. You should complete this information for each organization included in the operation plan.

To enter German public sector information:

1. Enter the number and short name of the organization. This information will be used for reporting purposes and to identify the organization.

2. Select the status of the organization.

3. Select the organization keys and the statistical indicators. You can use these to satisfy the reporting requirements of your enterprise.

4. Save your work

Entering Additional Information for German HR Organizations

You use the German HR Organization window to enter additional information on

German HR organizations. For example, you can enter information on the external organizations associated with your HR Organization.

See: German Organizations and Additional Information, page 1-2

To enter information on the German HR Organization:

1. In the Organization window, query the HR Organization if it does not already appear there. In the Organization Classifications region, select HR Organization.
2. Choose Others and select German HR Organization to open the Additional Organization Information window.
3. Enter the employer's Betriebsnummer.
4. Enter the payroll Betriebsnummer.
5. Select the tax office for organization by selecting either the tax office name or the tax office code.
6. Enter the employer's tax number.
7. If the employer is exempt from workers' liability insurance, check the Workers Liability Insurance Exempt check box.
8. Save your work.

To enter social insurance information:

1. Select the Social Insurance tabbed region.
2. Select the Provider Type and Provider Name for each of the social insurance organizations you use.

   Note: To display the social insurance organizations in the list, you must have already defined them as organizations in the Organizations window.

   See: Creating an Organization, *Oracle HRMS Enterprise and Workforce Management Guide*
3. Select one of the health insurance providers to be the default health insurance provider for the organization.

   Note: To display the health insurance organizations in the list, you must have already defined them as organizations in the Organizations window.

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

4. Optionally, enter the membership number.

5. Save your work.

To enter workers' liability insurance provider information:

1. Select the Workers Liability Insurance tabbed region.

2. Select the status for the workers' liability provider.

3. Select the workers' liability insurance provider.

   Note: To display the workers' liability insurance providers in the list, you must have already defined them as organizations in the Organizations window.

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

4. Optionally, enter the class of risk for the workers' liability insurance provider.

5. Optionally, enter the membership number.

6. Save your work.

To enter organization links information:

You use this tabbed region to store information on the relationship to other external organizations such as the supervising bodies for work incidents.

1. Select the Miscellaneous tabbed region.

2. Select the type of organization link.

3. Select the organization.

   Note: To display the organizations in the list, you must have already defined them in the Organizations window.

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

4. Save your work.

Entering Chamber Contribution Information for HR Organizations

You use the German Chamber Contrib. Info window to specify whether an organization is liable to or exempt from the chamber contribution payment.

To enter chamber contribution information:

1. In the Organization window, query the HR Organization if it does not already appear there. In the Organization Classifications region, select HR Organization.
2. Choose Others and select German Chamber Contrib. Info to open the Additional Organization Information window.
3. Place your cursor on the German Chamber Contrib. Info field to open the Chamber Contribution window.
4. Choose Yes or No.
5. Choose OK.
6. Save your work.

Entering Social Insurance Provider Information

Use the Social Insurance Provider window to enter provider information for the following organization classifications:

- German Mandatory Health/Special Care Insurance Provider
- German Mandatory Pension Insurance Provider
- German Private Health/Special Care Insurance Provider
- German Unemployment Insurance Provider
- German Additional Second Pension Insurance

The availability of the tabbed regions on the Social Insurance Provider form is determined by your implementation settings.

To enter social insurance provider information:

1. In the Organization window, query the social insurance provider if it does not

already appear there. In the Organization Classifications region, select one of the above classifications.

2. Choose Others to open the German Social Insurance Providers window.

3. Select the valid social insurance provider type in the Provider Types region.

4. If enabled, select the Reference Information tab to check the information.

   Note: This information is provided by Oracle and cannot be changed.

5. If enabled, select the Contribution Levels tab.

6. Enter the normal, increased, and reduced employer contribution levels.

7. Optionally, enter the normal, increased, and reduced employer contribution amounts.

8. If enabled, select the Provider Information tab. If you are entering information for a health/special care insurance provider, select the health provider type. If you are entering information for a pension provider, select the pension provider type.

9. Optionally, enter the East or West employer number.

10. If enabled, select the Flat Taxation Up To tab and enter the contribution limits for flat-rate taxation for a month or year.

11. If enabled, select the Employer/Employee Contribution tab. This tab will usually only be used by public sector type organizations.

12. Enter the starting value and for the increased contribution in the Minimum field. This is the level at which the increased contribution set in the Contributions Levels tab is used.

13. Enter the ceiling value for the increased contribution in the Maximum field. This is the level beyond which no contribution is made.

14. Optionally, enter a month where the increased contribution limits differ from normal, and enter the lower and upper contribution limits. You would use this to cover months in which bonuses are paid.

    For example, if your organization standard minimum, level is 4000 Euros and the maximum is 5000 Euros and you pay a Christmas bonus of 100% in November, then you would select November in the month field, and enter 8000 and 10000 in the minimum and maximum fields, to account for the increased amount of pay.

15. Optionally, enter a second month for increased contribution and enter the lower and upper contribution limits.

16. If the employee is required to make a contribution, then enter the amount as a percentage in the Employee's Contribution field.

17. Save your work.

Entering Additional Information for German Tax Organizations

You use the German Tax Office window to enter additional information about a tax office.

To enter German Tax office information:

1. In the Organization window, query the tax organization if it does not already appear there. In the Organization Classifications region, select German Tax Office.

2. Choose Others.

3. Place your cursor on the German Tax Office field to open the German Tax Office window.

4. Enter the tax office number and Bundesland.

5. Save your work.

Entering Provider Location Information

Use the Provider Location window to enter location information for the following organization classifications:

- German Tax Office

- German Additional Second Pension

- German Mandatory Health Provider

To enter provider location information:

1. In the Organization window, query the organization if it does not already appear there. In the Organization Classifications region, select one of the above classifications.

2. Choose Others and select Provider Location to open the Additional Organization Information window.

3. Click the Provider Location field to open the Provider Location window.

4. Enter the address and phone number information for the provider.

5. Save your work.

Running the Organization Upload Process

Oracle Human Resources for Germany provides two processes to enable you to upload a delivered set of organizations to your application. You can currently upload the following organizations:

- Tax offices

- Social insurance providers

You can run the process in two modes: Merge or Analyse.

If you choose Merge, the process checks to see whether the organization already exists (if already uploaded or entered manually) and if the information does not exist, the process creates, or uploads, the new organization.

> **Note:** If the process cannot create the organization for any reason, for example, if the name and Betriebsnummer (company identifier) for the organization do not match, the process displays a message.

If you choose Analyse, the process checks to see whether the information already exists but does not create the organization. You can manually create the organizations based on the process output.

You run processes from the Submit Requests window.

To run the Organization Upload process:

1. In the Name field, select either Upload Tax Offices or Upload Social Insurance Providers.

2. Enter the Parameters field to open the Parameters window.

3. Select the upload mode for the process.

4. If you are uploading tax offices, select the federal state.

5. If you are uploading social insurance providers, select the provider type.

6. Submit the process.

2

Jobs and Positions

Work Places and Stellen

Work Places

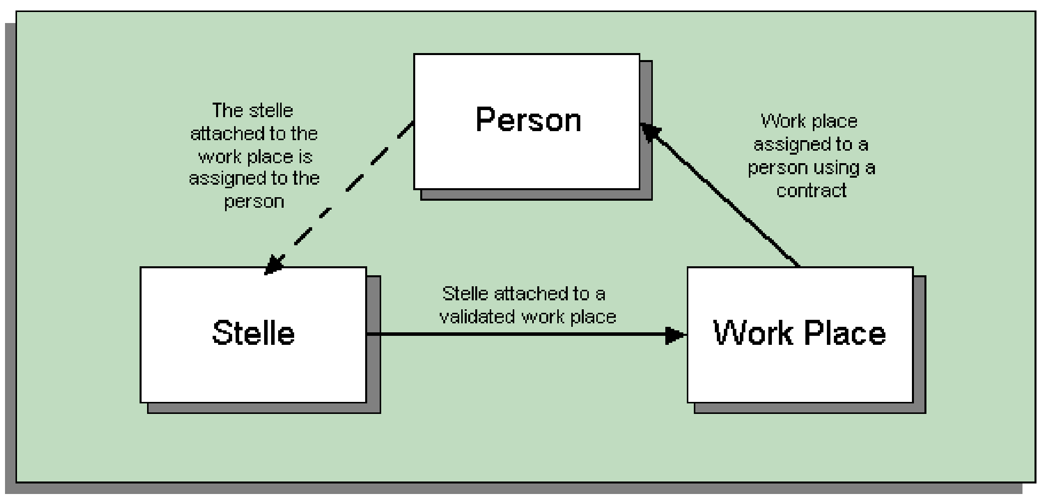
A work place defines certain terms and conditions by which an employer performing a specific job is covered. For example, when you create a work place you must enter information such as; the organization to which the employee is assigned, the location in which the employee works, the FTE for the work place, and the functional description. Other information such as payroll or salary basis can also be recorded.

A work place usually only applies to one employee, though if your organization has multiple people doing the same job, then you can assign an FTE greater than one to the work place.

Once you have set up your work place you must create a validation for it. The method by which you create this validation is dependant on the employment type of the work place.

When you have attached the validation, you then attach a stelle with the same pay grade in order to maintain the costs for the work place. Finally you assign it to an employee using a contract. The following diagram shows the relationship between work places, stellen, and the employee.

Relationship Between Stellen, Work Places and People



Validations for a Workplace

The process to create a validation for a work place depends on the employment type of the work place, that is, white collar worker, blue collar worker, or civil servant, and the structure of your Remuneration Regulation hierarchy.

Validation for White Collar or Blue Collar Workers Using Additional Job Features

The validation for a white, or blue collar worker based on additional job features is done using the Remuneration Regulation hierarchy. After creating the validation you can select which tariff contract, tariff group, pay grade, and case group apply to this work place. Each option you select, limits the values you can select from the next level, for example, if you select BAT as the tariff contract, you can then only select tariff groups that belong to the BAT tariff contract. Alternatively you can select the correct case group straight away and the other information will be completed automatically.

Validation for White Collar Workers Using the Common Part

Validation using the Common Part compares the job features required for a work place with the job features assigned to case groups in the remuneration regulation hierarchy.

When creating a validation using the common part, you can either select structures from your operation plan, or you can create new ones during the validation.

For example, suppose your remuneration regulation contains the following setup:

- Grade Vc, case group 1a, 50% thorough versatile knowledge and 33% independent performance
- Grade Vc, case group 1b, 50% thorough versatile knowledge and 50% independent performance
- Grade Vb, case group 1a: 50% thorough comprehensive knowledge and 50% independent performance

Within your organization there is a person who works in the human resources department for 20 days a month. Her job involves her working 5 days on payroll, 10 days on correspondence to applicants, and 5 days on interviewing applicants.

This means that when creating a validation for this work place you could enter the following details for the above operations:

- Payroll: 25%. Job features: independent performance and thorough comprehensive knowledge
- Correspondence to applicants: 50%. Job feature: thorough versatile knowledge
- Interviewing applicants: 25%. Job feature: independent performance

This means that the total for this validation would be:

- 50% thorough versatile knowledge
- 50% independent performance
- 25% thorough comprehensive knowledge

If we compare this to the grade setup we see that the validation would return the values grade Vc and case group 1b as this is the highest level that is satisfied. Note that the 25% thorough comprehensive knowledge is not taken into account as to satisfy the next level 50% thorough comprehensive knowledge is required.

If you include job details in your validation then it behaves slightly differently. For example, suppose that for the above operation of payroll you have the following job details:

- Entering Overtime. job feature: light job
- Recalculation of payrolls. job feature: independent performance

When validating this operation, only the most important job feature is applied to the operation, in this case independent performance. Whenever you see the job features listed in the application they are always shown with the least important at the top.

Validation for Civil Servants

The validation for a civil servant is based on a list of levels with corresponding gradual value numbers, and a results set. The levels are criteria against which you can describe a person's job. An example of part of a list of levels is shown in the following table:

Level 1	Responsibility	Gradual Value Number
1	Little responsibility	15
2	Medium responsibility	27
3	High responsibility	34
Level 2	Independence	Gradual Value Number
1	No independence	24
2	The job is ruled supervised; some independence in how to do the job.	37
3	Certain independence concerning the results of the job.	49

The results set is used to map number ranges to particular grades. An example of this is shown in the following table:

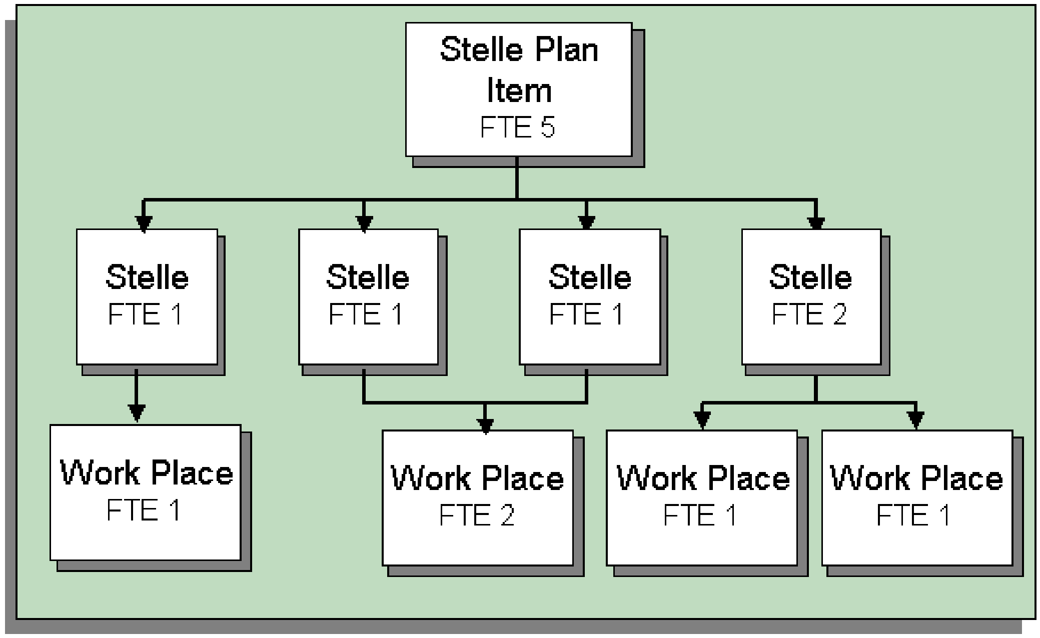
Gradual Value Number Range	Grade
0 to 113	A.1
114- 268	A.2
268 to 384	A.3

During the validation of a civil servant, you must select the appropriate level code for each level to describe the job the employee is performing. The total of the gradual numbers for each of the selected level codes is then compared to the results set to calculate the grade to assign to the civil servant.

Stellen and the Stellenplan

The Stellenplan forms part of the budget plan for public sector type organizations. It details the number of positions that are budgeted for each pay grade. To represent this, you use the components shown and described below. The following diagram shows how stellen plan items, stellen, and work places can be associated.

Stellen Plan Items, Stellen, and Work Places



Stellen Plan Items

Stellen plan items are used to group together a number of positions that all have the same grade and the same budget plan structure. Each stelle plan item equates to one row of your stellenplan.

When you define a stelle plan item you specify to what type of employment it applies. This then controls to which work places the stelle plan item can be attached, for example, only stelle plan items with a civil servant employment type can be attached to work places of that type.

You must also include the FTE and the functional description for each stelle plan item. The functional description is entered using the job functionality and then selected here and could be values such as clerk or manager, or more detailed descriptions like junior inspector, chief inspector.

Stellen

The stelle is used to hold the budget details for individual work places, though they use FTE and not money. Once a stelle has been set up you attach it to a validated work place with the same employment type and pay grade to indicate that the number of people defined in the FTE are permitted to fulfill this work place.

For each stelle you must select a stellen plan item. This defaults some information such as budget plan unit 1, the functional description and the pay grade. These can be changed for the stelle. The employment type is also defaulted and cannot be updated.

Reserved Stellen

Reserved stellen are used to show stellen for which no costs appear during the financial year, for example because of maternity leave, or those which are delegated to another authority which takes over the payment.

A reserved stelle is stored for a particular person and cannot be assigned to anyone else. When the person returns to work they can be paid using the reserved stelle, or if there is a vacant stelle with the same criteria, then you end the reserved stelle and assign the person to the vacant stelle.

Substitute Stellen

Substitute stellen are used when you need to pay more than one person for a particular stelle for a period of time.

For example, during pre-retirement, if Employee A does not actually work for the last two years before his retirement, then you will probably need to recruit someone to fulfil the tasks that Employee A was doing. However, you cannot assign Employee A's stelle to the new employee as Employee A is still on the payroll. What you must do is create a substitute stelle with the same criteria that expires after two years. You then assign the substitute stelle to Employee A , and assign the normal stelle to the new employee.

Operation Plan

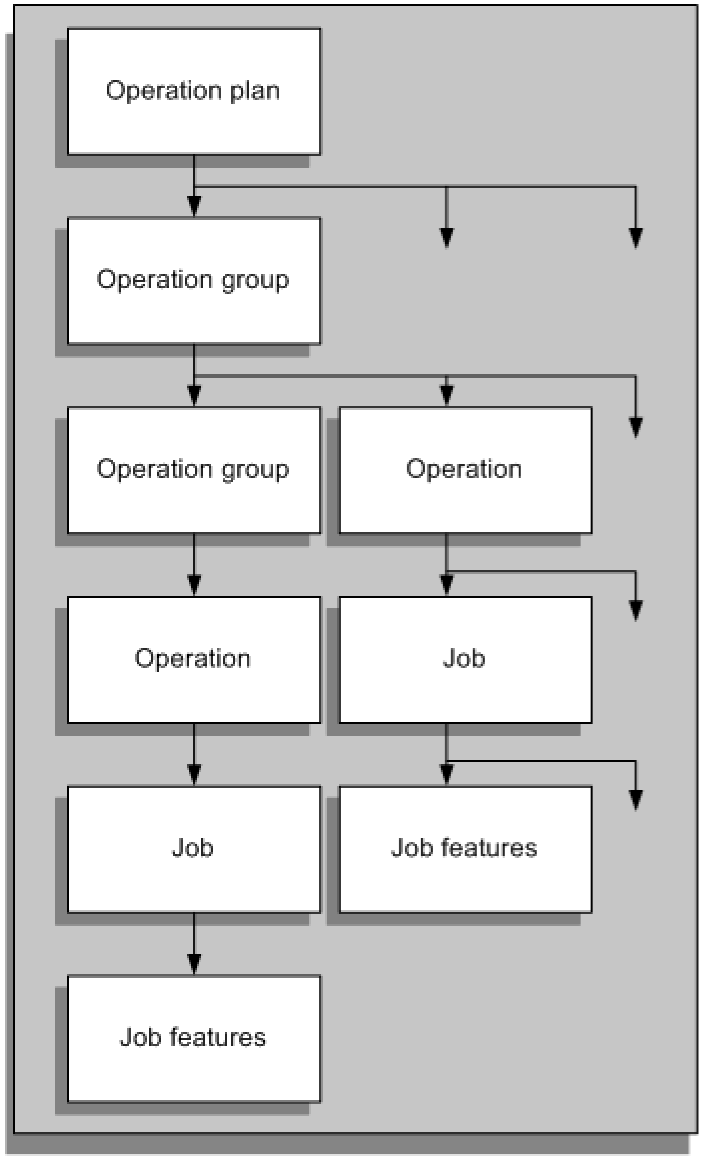
An operation plan stores all the operations, jobs, and associated job features for a particular office or department. Similar or related operations can be grouped together into an operation group.

For example, a typical operation may be Time Recording and Absence Administration within an operation group called HR Administration This operation would then typically have the following jobs:

- Controlling closing balances
- Checking errors
- Entering and checking leave accruals

The structure of a typical operation plan is as follows:

Structure of Operation Plan



You define the operation groups, operations, and jobs using the self-service functionality. The operation group and job levels are optional.

Using the Operation Plan with Work Place Validation

Although creation of an operation plan is optional, it can be helpful to create an operation plan if you are using work place validation. By using an operation plan, you can ensure that the operations and job features for a particular work place are consistent throughout your organization. When you create your workplace validation, you can either add operations and job features directly to the validation or you can assign operations that have already been defined in an operation plan.

See: Work Places, page 2-2

Setting Up Work Places

To set up work places for your enterprise you must complete the following steps.

To set up work places:

1. Create your work places.

   See: Creating Work Places, Stellen Plan Items, and Stellen, page 2-10, or if your organization uses position control, see: Creating Work Places, Stellen Plan Items, and Stellen using the Transaction Window, page 2-17

2. Validate your work places using the Validation of Work Place self service function.

3. Attach the validation to a work place

   See: Creating Work Places, Stellen Plan Items, and Stellen, page 2-10, or if your organization uses position control, see: Creating Work Places, Stellen Plan Items, and Stellen using the Transaction Window, page 2-17

What Next?

You can now attached a stelle to the validated work place and assign it to an employee using a contract.

Setting Up Stellen

To set up stellen for your enterprise you must complete the following steps.

To set up stellen:

1. Set up a stellen plan item for each of the rows in your enterprise's stellen plan.

   See: Creating Work Places, Stellen Plan Items, and Stellen, page 2-10, or if your organization uses position control, see: Creating Work Places, Stellen Plan Items, and Stellen using the Transaction Window, page 2-17

2. Set up the stelle required by your enterprise and link it to an existing stellen plan item.

   See: Creating Work Places, Stellen Plan Items, and Stellen, page 2-10, or if your organization uses position control, see: Creating Work Places, Stellen Plan Items, and Stellen using the Transaction Window, page 2-17

3. Attach each stelle to a work place using the Attach Stellen to Work Place self service function.

Creating Budget Plan Units

To fully identify where a stellen plan item or a stelle exist in the budget plan, it is necessary to assign two budget plan units to each of them.

The first of the budget plan units you select is an organization with the classification Budget Plan Unit. These organization make up your budget hierarchy.

You set up the second budget plan unit by creating a subset of values for the EMPLOYEE_CATG lookup. This means that for each of your employment category values, you can have multiple budget plan units.

Use the User Types and Statuses window to create budget plan units based on EMPLOYEE_CATG.

To create budget plan units:

1. Select EMPLOYEE_CATG in the Name field.

2. Select the business group for which you want to create budget plan units.

   Note: If you have already entered budget plan units for your business group you may wish to run a query on EMPLOYEE_CATG and your business group so that the existing values are displayed

3. Select the employee category in the System Type field, and enter the budget plan unit in the description field.

4. Save your work once you have entered all the required budget plan units.

Creating Work Places, Stellen Plan Items, and Stellen

You use the Work Places, Stellen Plan Items, and Stellen windows to define the budgeting and work place components required for your organizations and to add them to hierarchies. You can also enter the skills that position holders require and the grades to which they can be assigned.

> **Note:** Use the Transaction window for work places, stellen plan items, and stellen 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 component belongs to an organization selected for position control. The check boxes indicate whether the component 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 With a Position Transaction, *Oracle HRMS Enterprise and Workforce Management Guide*, Defining Transaction Templates, *Oracle HRMS Enterprise and Workforce Management Guide*

To create a work place, stellen plan item or stellen:

1. Set your effective date early enough to handle any historical information about the component 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. The start date defaults to the effective date. Change this if you want this component to become active on a different date.
3. Enter a unique name for the component in the Date Effective Name field in the Details tabbed region.

   > **Note:** The Name field at the top of the window displays the latest name on record, irrespective of your effective date. This name is used on all other windows.

   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.

4. Select the type. The choices are:

- Single Incumbent, meaning that only one employee is allowed to at any time
- Shared, meaning there can be several incumbents, up to the value of the FTE field
- Pooled (Public Sector only), meaning it 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 types

5. If the component is permanent and budgeted every year, select the Permanent check box.
6. For work places, select the organization and functional description, in the Job field. For stelle plan items and stellen, select the budget unit 1 and the functional description.

   Note: You cannot change the organization, budget unit 1 or the functional description once you have saved the definition.

7. If you know that the position will be transferred to another organization budget unit or functional description in the future, enter the proposed end dates now, for information.
8. The Status field displays the type of component this is, either Work Place, Stellen Plan Item, or Stelle.

   The Start Date field indicates when the current status came into effect.
9. Optionally, you can enter a proposed end date for Proposed or Active statuses, for information.
10. Select a location for a work place, or leave the default, which is the location of the organization. If you are creating a stellen plan item or a stelle, you can select a second budget unit to further describe where in the budget plan it exists.
11. 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 component. If the Type is Single Incumbent, FTE must be 1.0 or less.

2. If appropriate, select a bargaining unit code. 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. If required, enter the earliest date at which incumbents can be hired using this component. If you are creating a work place and have created a requisition and vacancy for it, the earliest hire date must be within the vacancy dates.

4. Enter the date by which it should be filled. This date must be on or after the Earliest Hire Date.

5. Select the Permit Recruiting check box if it is not open but you want to enable advertising, job posting and acceptance of applications.

   For example, you might select this check box for a work place that is frozen but due to become active in the near future.

Proposed Entry Salary

1. Select the payroll to which the component'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 component's incumbents are normally assigned.

3. For stellen plan items and stellen, select the default grade to be used to determine the entry salary of position incumbents. The grade for work places is calculated during the work place validation.

4. Do **one** of the following or leave these fields blank:

   - If payment is made from a pay scale, select the grade step and scale rate that represent the entry level salary. The system displays the value of the step on the scale rate you selected.

   - If you maintain a grade rate to hold entry salary, 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, 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 Additional Details (Stellen Only)

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

Entering Stelle Details (Stellen Only)

1. Select a title of employment and status for the stelle. The employment type defaults from the stellen plan item and cannot be updated.

2. If the stelle is exempt from the Limitation Act, then check the check box and enter a reason.

Entering a Position/Budget Note (Stellen Plan Item and Stellen Only)

You use position notes to indicate that either a change to the FTE, employment type, or grade for a stelle plan item or stelle is required, or that a stelle plan item or stelle to become invalid, on a certain date. All stelle that are set to become invalid on a certain date are considered to be substitute stellen.

Note: These notes are for information only.

1. Select the type of note you want to create. The choices are:

   - KU - this indicates a change that is to be made in the future

   - KW - this indicates that the stelle or stellen plan item will become invalid on a certain date.

2. If you are making a change, then select the new FTE, type of employment or grade.

3. Enter the any reference that exists for the note, and select its status. Also enter any additional reason or explanation as required.

4. Save your work.

Attach Validation (Work Places Only)

For a work place to be available to assign to an employee, using a contract, you must first attach validation to it, to indicate that it is included in the budget plan. If a work place can be assigned to two different types of worker, for example white collar worker or civil servant, you can attach two validations to a work place. However, as it is usual to attach only one stelle to a work place then the employment type of the stelle defines what type of employee can fulfil the workplace.

1. Select the primary employment type, and select the validation for this employment type and work place. The version number for the validation is displayed.

2. Select the status of the primary validation. You can only assign work places with an active validation to a contract.

3. If you want to enter a validation for a secondary employment type, complete the fields as described above.

4. Save your work.

More Information for Positions

1. 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.

2. 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*.

3. 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*

4. Choose the Others button to enter Requirements, Occupancy, Extra Information, Work Choices and Define Survey Mapping.

5. 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.

6. 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*

7. Choose Work Choices to enter work choices that can affect an employee's, applicant's, contractor's, or ex-employee'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*

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

   See: Mapping Salary Survey Lines, *Oracle HRMS Enterprise and Workforce Management Guide*

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

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

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

Creating Work Places, Stellen Plan Items, and Stellen using the Transaction Window

Use the Transaction window to define and maintain work place, stellen plan item and stelle definitions for organizations that you have selected as position-control organizations. You use the stellen plan item and stelle components for budgeting, and you use the work place component to define working criteria for an employee.

For information about selecting organizations for position control, refer to Organization Hierarchies, *Oracle HRMS Enterprise and Workforce Management Guide*

Use the Transaction window to create or change a work place, stellen plan item or stelle definition. To view history prior to updating, choose Position Transaction History from the Tools menu.

To create or change a work place, stellen plan item or stelle:

1. In the Apply Template dialog, select task template(s) from the list of values. Select the Enabled check box to use the template(s).

   The Apply Template dialog is available only to the initiator. If you receive a routed transaction and wish to apply an additional task template, choose Apply Template from the Tools menu.

   The application automatically applies your role template to the task template(s).

2. Enter a name.

   - To create a definition, complete the fields in the Position Flexfield dialog and choose OK.

   - To update a work place, stellen plan item or stelle definition, select the name from the list of values.

     Note: When entering data in the window, you must enter the mandatory fields (shown in yellow) before saving or routing the transaction. You must complete the required fields (shown in blue) prior to applying the transaction.

3. In the Action Date field, enter the effective date.

   The checkmarks in the Open, Under Review, and Approved Future Actions check boxes indicate the status of the transaction:

   - *Open*: You can fill the position, FTE is still available.

   - *Under Review*: A pending transaction for the position has an Under Review template applied. No one can process a transaction for that position until a user updates the current transaction.

   - *Approved Future Actions*: There is at least one pending transaction with a future effective date.

   Complete one of the following sections according to the type of component you are creating.

Stellen Plan Items

1. Complete the fields for the Stellen Plan Item Details, Hiring Information, and Position/Budget Note as covered in Creating Work Places, Stellen Plan Items, and Stellen, page 2-11. Begin with the step that describes selecting the type. Once you have done this, go to step 8 in this procedure.

Stellen

1. Complete the fields for the Stellen Definition Details, Hiring Information, Additional Details, Stelle Details and Position/Budget Note as covered in Creating Work Places, Stellen Plan Items, and Stellen, page 2-11. Begin with the step that describes selecting the type. Once you have done this, go to step 8 in this procedure.

Work Places

1. Complete the fields for the Work Place Details, Hiring Information, and Attach Validation as covered in Creating Work Places, Stellen Plan Items, and Stellen, page 2-11. Begin with the step that describes selecting the type.

2. Choose Requirements from the list to enter position requirements such as ADA Disability Accom's and OSHA - reportable incident. Once you have done this, go to step 8 in this procedure.

3. Save your work. Route the transaction to gather the necessary approvals, and then apply and update the transaction when you have completed it.

   See: Routing Budget Worksheets and Position Transaction, *Oracle HRMS Enterprise and Workforce Management Guide*

4. After you approve and update the data to the database, choose Position Transaction History from the Tools menu.

   You can view all changes made to the currently selected position. These include changes made using the Position window and those that have a transaction status of Submitted or Applied.

Remuneration Regulations and Generic Hierarchies

Hierarchies for Remuneration Regulation and Local Cost-of-Living Allowance

You can create generic hierarchies to represent work structures such as remuneration regulations for tariff contracts in your enterprise. The advantage of using the generic hierarchy functionality is that you only need to define the hierarchies once and they can then be reused, for example, for several different types of employment.

Oracle Human Resources for Germany uses the following hierarchy types:

- Local Cost of Living Allowance
- Remuneration Regulation

These hierarchy types define the basic structure of the hierarchies, although you must setup the hierarchies for your tariff contracts based on these hierarchy types.

The following sections look at each of these hierarchies in turn:

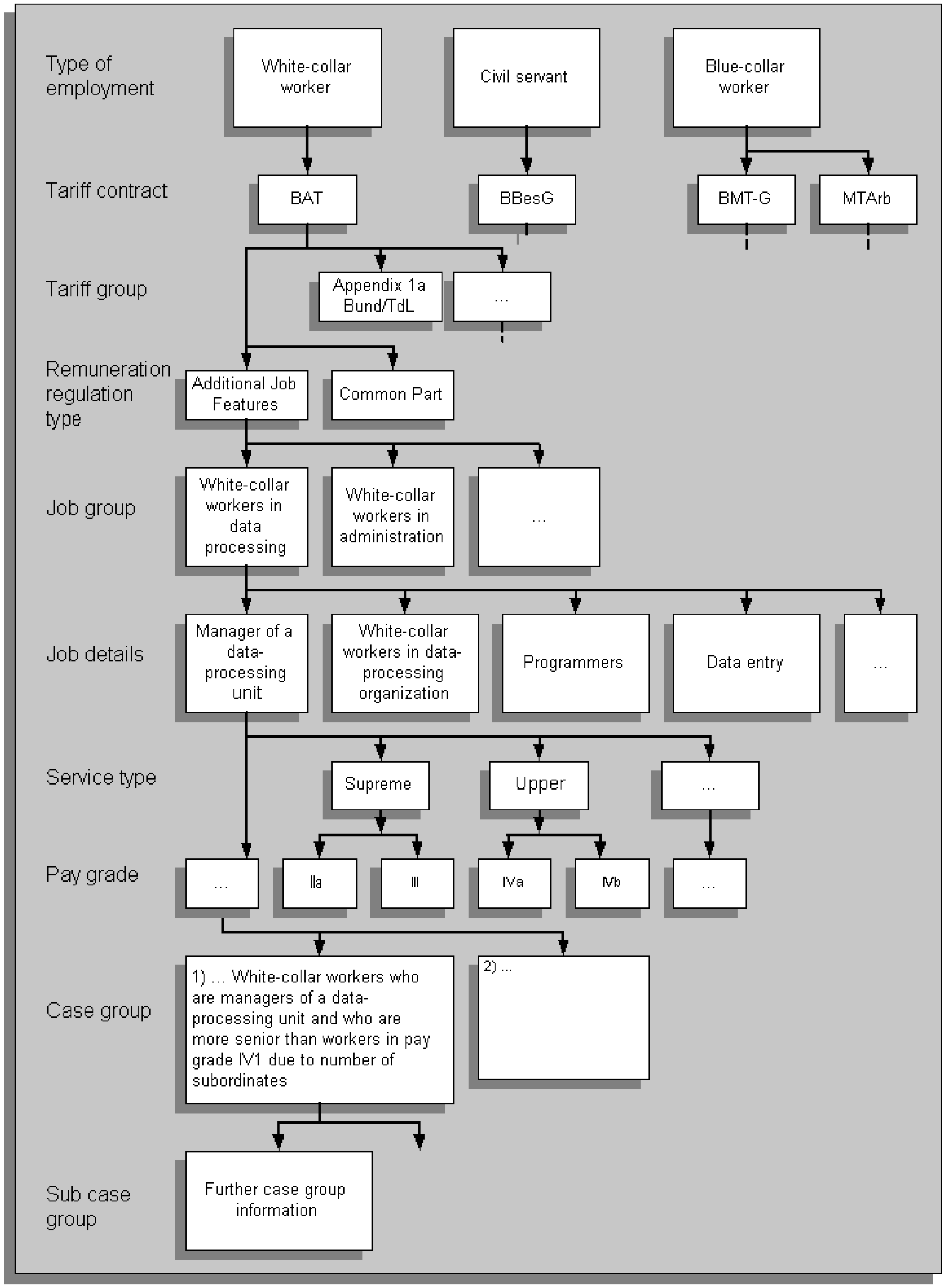
Remuneration Regulation

The remuneration regulation defines the structure of tariff contracts. It enables you to define work structures and jobs in accordance with the tariff contract. Each tariff contract stores information on a number of levels.

You can use the same generic hierarchy to store information about more than one tariff, for example, you can create a hierarchy to store information on both the BAT and the MTArb tariffs.

The following graphic illustrates possible tariff contract structures.

Remuneration Regulation Structures



You enter information at the following levels:

Type of Employment

The type of employment classifies employees as either white-collar workers, blue-collar workers, civil servants, or apprentices.

Tariff Contract

The tariff contract is the legal agreement which defines the employee's work conditions and benefits. Examples of tariff contracts include the Bundesangestelltentarif (BAT), Bundesbesoldungsgesetz (BBesG), Ausbildungstarifvertrag (AZUBI).

Tariff Group

The tariff group is a subdivision of the tariff contract. For example, the tariff groups for the BAT tariff contract are: Appendix 1a Bund/TdL (White-collar workers in federal government and federal state governments), Appendix 1a VKA (White-collar workers in local government), and Appendix 1b (Public Sector employees in healthcare).

Remuneration Regulation Type

At this level, you define whether you are setting up the Common Part or the Additional Part of the remuneration regulation.

Job Group

You can group together the jobs in your remuneration regulation into Job Groups. For example, you could create a job group for all white collar technical workers.

Job Details

The job details level identifies a particular job in the remuneration regulation hierarchy. For example, within a job group for technical white-collar workers, you may have the following jobs:

- Electrical manager
- Electrical Line manager
- Electrical assistant, and so on

Type of Service

For some tariff contracts, such as those for white collar workers or civil servants, you must specify a type of service. The type of service is a structure used for defining a pay grade and differs between tariff contracts.

Pay Grade

You set up pay grades and rates in the Professional Forms Interface. When you have set up your grades and rates, you can select them in the Pay Grade level.

See: Grades and Grade Structures, *Oracle HRMS Compensation and Benefits Management*

Guide

You set up the data for the final two levels of the remuneration hierarchy using the self-service interface.

Case Group

You set up case groups using the Define Case Group self-service function. The information on the Case Group Details page corresponds to the remuneration hierarchy. When creating your case groups you select exactly where in the remuneration hierarchy the case group belongs.

You use the case group to store information on periods of probationary advancements to pay grades and other groups and on time advancements to pay grades and case groups. You can also store job features for case groups. Job features provide additional job information such as the level of knowledge required and form the basis for validating work places using the Common Part.

Sub Case Group

The sub case group is a further level of the case group. You enter sub case group information on the Case Group Details page of the self-service interface.

Local Cost of Living Allowance

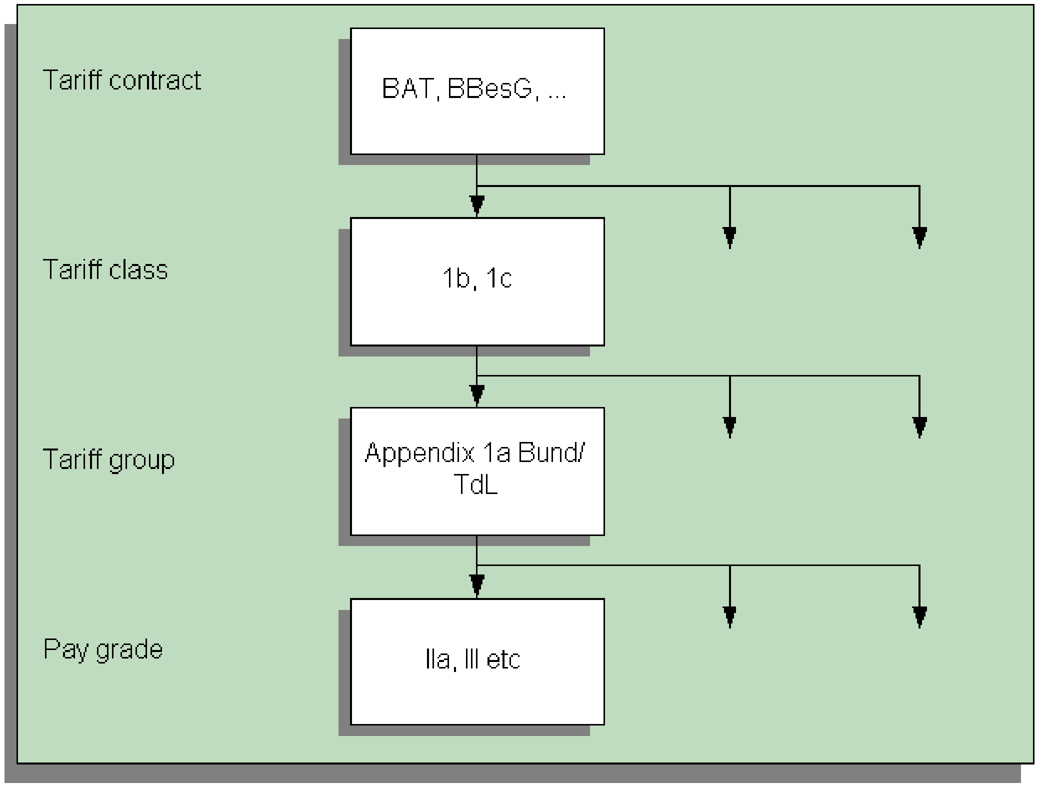
The local cost-of-living allowance is a payment made to employees within the German Public Sector. The criteria used to calculate the allowance are determined by the tariff contracts to which the employee is assigned. The following table shows the collective agreements and the calculation criteria:

Tariff Contract	Calculation based on
BAT 29 (BL, VKA, and KR) (white-collar workers)	Marital status, number of children, pay grade
BBesG (civil servants)	Marital status, number of children, pay grade
MTArb and BMT-G (blue-collar workers)	Number of children, pay grade

In addition, the allowance amount is also determined by the area of Germany in which the employee lives (former East or West).

The following diagram shows the structure of the local cost-of-living allowance:

Local Cost-of-Living Allowance Structure



The local cost-of-living allowance uses some of the same structure levels as the remuneration regulation structure, however, the local cost-of-living allowance also uses the tariff class level which groups together several pay grades.

3

Employment Agreements and Legal Compliance

Occupational Health

Occupational Health: Medical Assessments, Disabilities and Work Incidents

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

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

Medical Assessments

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

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

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

Disabilities

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

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

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

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

Work Incidents

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

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

Using the Work Incidents window, you can record:

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

A person can have multiple work incident records.

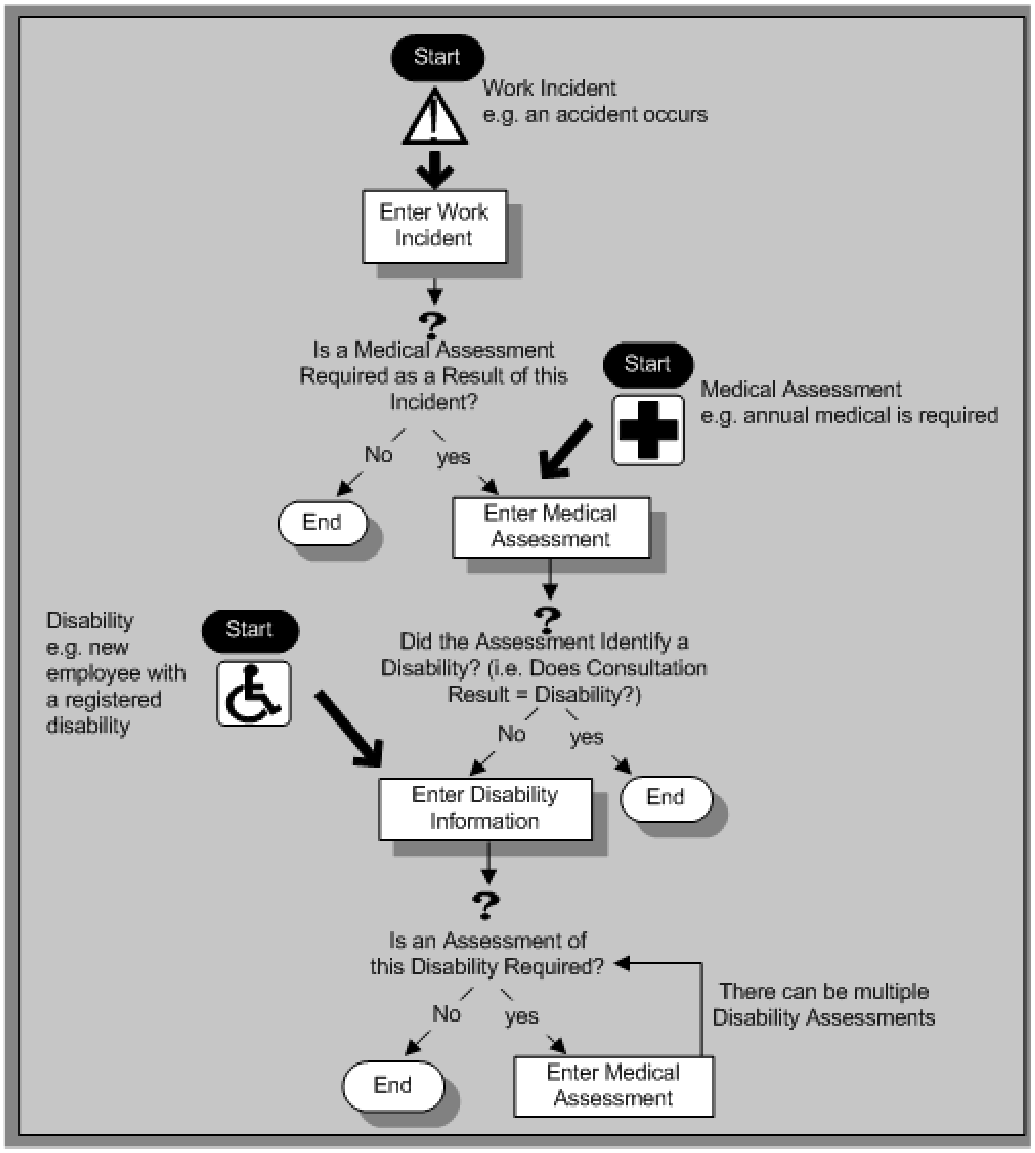
The graphic illustrates the relationship between the medical assessment, disability and work incident tasks. It shows the full process that you could follow if you wanted to record:

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

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

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

Recording a Disability



Entering Work Incident Information

You use the Work Incidents window to enter information about the work incident in which a person was involved. The information that must be entered in this window meets German statutory requirements.

> **Note:** Some assignment-based information is required for this window. For this reason, only use this window to record details of work

incidents for employees and loaned employees. Do not use the window to record work incidents for visitors or applicants.

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.

     Note: If the type of incident is not included in the defined list for this field, you, or your system administrator, need to create additional values for the lookups.

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

   - 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, *Oracle HRMS Enterprise and Workforce Management Guide*

> **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.

Further Information

You can enter additional information in the Further Information field. This information is required for German statutory reports.

> **Note:** The supervising office for reporting work incidents is stored as an external organization in the Additional Organization Information window.

1. Enter information on the employee.
   - Enter the number of children.
   - Enter the employee's job. The default entry is the entry in the Job field of the Assignment window. If necessary, you can overwrite this entry.
   - Enter the start date for the job. This date is the effective date for the job and is taken from the Assignment window. If necessary, you can overwrite this date.
   - Enter the part of the organization to which the employee is assigned. This entry is taken from the Organization field in the Assignment window. If necessary, you can overwrite this entry with another organization from the same Business Group.

- Specify whether the employee is a temporary employee borrowed from another enterprise.

- Specify whether the employee is underage or legally incapable.

  - If the employee is underage or legally incapable, enter the name for the supervising employee.

- If the employee is the business owner or is related to the owner in some way, select the relationship.

2. Enter employment information for the employee

   - Enter the duration of continued payment to the employee by the employer.

   - Enter the date on which the employee stopped work, if applicable.

   - Enter the date on which the employee resumed work, if applicable.

3. Enter information on the employee's doctors

   - Enter the address for the doctor who first saw the employee after the incident.

     Note: You have already entered the doctor's name in the Work Incidents form.

   - Enter the name and address of the employee's regular doctor.

4. Enter specific information about the work incident

   - Enter the work start and end times for the employee on the day of the incident.

   - Enter the make and type of the machine involved, if applicable.

   - Enter the year of construction for the machine.

5. If the work incident has resulted in any additional technical or personal safety action or advice, enter the advice or action taken.

6. Save your changes.

What Next?

If required, you can print a formatted copy of the information you have entered in the Work Incidents window.

See: Running the Work Incidents Report, page 3-11

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.

Running the Work Incidents Report

This report creates a formatted version of the information you have entered in the Work Incidents window.

> **Note:** The supervising office for work incidents is retrieved from the additional information for the employee's organization.
>
> See: Entering Additional Information for German HR Organizations, page 1-11

You run reports from the Submit Requests window.

To run the Work Incidents Report:

1. In the Name field, select Work Incidents Report.

2. Enter the Parameters field to open the Parameters window.

3. Enter the dates for which you want to run the report.

4. Choose Submit.

4

People Management

People

Person Extra Information Types

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

- Military Service Information - stores the start and end date of a person's period of military service.
- Residence Permit - stores administrative information such as the status, validity dates, permit number, and issuing authority for a person's residence permit.
- Work Permit - stores administrative information such as the status, validity dates, permit number, and issuing authority for a person's work permit.
- Child Auto Sequence Generation Indicator - controls whether the child sequence numbers for the person are generated automatically or entered manually.
- Child Details - stores additional information on a person's children. The Extra Information Type stores information on the child's employment status, whether employed abroad, and the child's income. This information used in the formula for generating the child sequence numbers.
- Spouse Details - stores additional information on a person's spouse. The Extra Information Type stores information on the spouse's employer, type of employment, location (region) of employment, and number of working hours. This information is used in the formula for calculating the local cost of living allowance.
- Period of Employment - stores a correcting factor for the length of service calculation. You add this correcting factor to the length of service.

Entering a New Person (People Window)

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

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

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

Your localization may require additional mandatory information for a person. See: Entering Additional Personal Information, page 4-6

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 Salutation field to enter a title such as Mrs. or Mr. 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 Title field to enter a professional title such as Doctor or Professor.

     Note: The Hereditary Title, Previous Prefix, and Suffix fields are on the Further Name tab.

3. If you are entering data for an employee, you must enter the 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 and Date First Hired fields.

      - 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. The Date First Hired field is situated on the Benefits Tab.

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

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

Entering Identification Information

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

1. Enter the person's Social Security Number.

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 form the list.

Entering Personal Details

Enter details for the person as required in the Details at Birth tabbed region:

1. Enter a date of birth. You must do this before you can assign an employee to a payroll.

2. Enter information on the person's name at birth in the Last Name, Hereditary Title, and Prefix fields.

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

   See:Entering Additional Personal Information, page 4-6

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, 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* for further information.

- 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, page 4-6

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

Entering Additional Personal Information (People Window)

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

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

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

1. Choose the Office Details tabbed region.
2. Enter the office number 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 applicable, enter a hereditary title for the person.
5. You can use the Suffix field to hold part of the person's last name, such as Junior or II.
6. If the person was previously known by a different name, enter the previous last name.
7. If the person previously used a name prefix, enter the previous prefix.

To enter medical information for a person:

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

To enter other information for a person:

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

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

5. If the person has died, enter the date of death.

    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. If the employee has a social insurance number from a different EU member state, enter the social insurance number.

    Note: The employee will have an EU social insurance number if he or she was born in a different EU state. You must enter this number even if the employee is now living and working in Germany.

7. Select the current status of the student, if your employee is a student.

8. In the Date Last Verified field, you can enter the date the person last checked this personal information for accuracy.

9. Check the Second Passport Exists check box if the person possesses multiple passports.

To enter personal information:

1. Choose the Personal tabbed region.

2. Select the marital status.

3. Enter the date of marriage.

4. Select the nationality.

To enter benefits information:

1. Choose the Benefits tabbed region.

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

2. Enter a benefit group for your employee or applicant. Benefit groups are used to determine a person's eligibility for a plan or for setting benefit rates. For example, benefit groups can be used for mergers and acquisitions where eligibility is complicated. They can also be used where a person is grandfathered into a very old plan.

3. Enter what kind of tobacco your employee uses, if any. For example, cigarettes, pipe, cigar or chewing. This is used within benefits to determine the eligibility and rates for particular plans.

4. Enter a medical plan number. This is the policy or group plan number of an externally provided medical plan. This is used to determine eligibility to participate in some plans.

5. Enter the adoption date, if the employee whose record you are updating has adopted a child. This information, with the child's date of birth, is used to determine whether a dependant is covered by a plan. You can only enter the adoption date if you have entered a date of birth for the person. The adoption date must be greater or equal to the date of birth.

6. Enter the date you received the death certificate, if your employee has died. You can only enter this once you have entered the date of death in the Other Information

region. The receipt of the death certificate must be after or equal to the date of death.

7. Enter an adjusted service date for your employee. This date is used within benefits, in place of the date first hired, to determine the length of service for eligibility, enrollment and rates. The adjusted service date may be used to credit service for former employers, grand-fathered benefits or in the case of mergers and acquisitions.

8. 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.

9. Check the Other Coverage checkbox, if your employee or applicant has externally provided coverage. This determines a person eligibility for certain plans.

10. Check the Voluntary Service checkbox, if your employee or applicant is volunteering, for example as a missionary. This determines eligibility to continue or receive coverage from certain plans.

Entering Information for the Local Cost-of-Living Allowance

You enter the relevant information for the calculation of the local cost-of-living allowance in several different Oracle HRMS windows. Follow these steps to make sure you have entered all required information.

To set up the tariff contract hierarchy:

1. Use the User Types and Statuses window to enable the Local Cost of Living hierarchy type.

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

2. Use the Local Cost of Living hierarchy type in the Generic Hierarchy form to create a generic hierarchy for tariff contract, tariff class, tariff group, and pay grade.

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

3. Reset the Allow Duplicate Name and System Flag indicators in the User Types and Statuses form.

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

To enter contracts information for the employee:

1. Use the Contracts window to enter information on the employee's contract and collective agreement.

   See: Entering Contracts, page 4-14

To enter spouse information for the local cost-of-living allowance:

1. Enter the spouse information in the Contacts window.

   See: Entering Next of Kin and Other Contacts, page 4-26

2. Enter additional information for the spouse in the Person Extra Information Type called German Public Sector Spouse Details.

   Note: To enter information at the person level for the spouse, query the spouse's name in the Person window.

   See: Person Extra Information Types, page 4-2

To enter child information for the local cost-of-living allowance:

1. Specify whether you want the system to calculate the child sequence number automatically.

   Note: Enter this information at the Parent level (for the employee).

   See: Person Extra Information Types, page 4-2

2. Enter the child information in the Contacts window.

   See: Entering Next of Kin and Other Contacts, page 4-26

3. Enter additional information for the child in the Person Extra Information Type called German Public Sector Child Details.

   Note: To enter information at the person level for the child, query the child's name in the Person form.

   See: Person Extra Information Types, page 4-2

4. If applicable, enter military service information for the child in the Person Extra Information Type called German Military Service.

   See: Person Extra Information Types, page 4-2

5. If the child has a disability, enter the information in the Disability form.

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

6. If the child is over 18 years of age and still in full-time education or vocational training, enter the required training information in the Qualifications form.

   See: Entering Qualifications, page 5-2

7. Run the Child Sequence Generator process to automatically generate the child sequence number.

   See: Running the Child Sequence Generator Process, page 4-34

What Next?

When you have entered all required information for the local cost-of-living allowance, you can run payroll with the delivered recurring element (Local Cost of Living). The formula attached to the element calculates the local cost-of-living allowance for all employees in the payroll run.

See: Starting a Payroll Run, *Oracle HRMS Payroll Processing Management Guide*

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.

Employees

Validation Rules for Social Insurance

The people class key classifies employees for social insurance and is required for the DEUEV (data transmission regulations). When you select a people class key in the Social Insurance form for an employee, the system checks that the selected key is permitted for the combination of contribution key and Betriebsnummer using a number of validation rules.

The following table shows the validation rules that apply to the People Class key.

Validation Rules

Rule
If the employer's Betriebsnummer starts with 985 or 987, the people class key must be 102, 107, or 111
If the people class key is 140, 141, 142, or 143 (sailors), the employer's Betriebsnummer must start with 090, 990, 991, or 992
If the people class key is 110, the contribution key must be 0000.
If the people class key is 108, the 1st digit of the contribution key must be 0, 3, 4, or 9
If the people class key is 108, the 2nd digit of the contribution key must be 0, 1, or 2
If the people class key is 108, the 3rd digit of the contribution key must be 0
If the people class key is 108, the 4th digit of the contribution key must be 0, 1, or 2
If the people class key is 109, the 3rd digit of the contribution key must be 0
If the people class key is 116, the 1st digit of the contribution key must be 0, 3, or 9
If the people class key is 116, the 2nd digit of the contribution key must be 0. 1, or 2
If the people class key is 116, the 3rd digit of the contribution key must be 0
If the people class key is 116, the 4th digit of the contribution key must be 0. 1, or 2

Rule
If the people class key is 119, the 2nd digit of the contribution key must be 3 or 4

Entering Tax Information for Employees

You store the tax details for employees in the German Taxation Information window.

In this window, you enter the tax information as printed on the employee's tax card. You must create a new Tax Details record for each employee for each tax year, however, if there is tax information for the employee for the current year, you can carry over the tax information to the next tax year. If this option is available, a message is displayed when you access the Taxation Information form. If you choose to copy over the employee's tax information, you must save the retrieved information before you can continue to maintain new tax information.

To display the Tax Information window, query the employee assignment and choose the Tax Information button.

To enter tax details for an employee:

1. Select the tax class for the employee.
2. Enter the tax card number.
3. Select the tax office.

   Note: If there are no tax offices in the list, you must define new tax offices in the Organization window and assign them to your organization in the Additional Organization Info window.

   See: Entering Additional Organization Details for HR Organizations, page 1-11

To enter income tax details for an employee:

1. Choose the Income Tax Details tabbed region.
2. Select the tax status for the employee.
3. Enter the number of children.

   Note: If necessary, you can enter values such as 0.5 if the child tax allowance is split between both parents.

4. Enter any tax allowances that are entered on the employee's tax card. If the employee has tax allowances, you must enter both the monthly and yearly allowances.

To enter church tax information for an employee:

1. Choose the Church Details tabbed region.
2. Select the employee's church code and, if required, the select the spouse's church code.
3. Select the Bundesland for the church.

To enter tax exemptions for an employee:

> **Note:** You can only enter tax exemptions for employees whose tax class is not between l and Vl.

1. Choose the Exemptions button from the Tax Information form.
2. Enter the exemption information for the employee.

   > **Note:** The tax exemption information is only valid for the period between the start and end dates you have entered which must be within the current tax year. Tax exemptions cannot be carried forward to a subsequent tax year.

Entering Social Insurance Information for Employees

You enter social insurance information for employees in the Social Insurance window.

To enter social insurance information for an employee:

1. Enter the contribution using one of the following methods:
   - Enter the contribution key directly in the Contribution field, for example, 0000. The corresponding individual contributions are automatically displayed in the Health, Pension, Unemployment, and Special Care fields.
     - Select the contribution from the lists of values in the Health, Pension, Unemployment and Special Care fields. The corresponding contribution key is automatically displayed in the Contribution field.
2. Select the health insurance provider.

3. Select the pension provider.

4. Select the unemployment insurance provider.

5. Select the special care insurance provider.

   > **Note:** If no organizations are displayed in the Health, Pension, Unemployment, or Special Care fields, you must return to the Additional Organization Information form and define the social insurance providers for your organization.

   See: Entering Social Insurance Providers for HR Organizations

6. Check the Privately Insured check box if the employee has private health insurance.

7. Enter the legal area.

To enter occupation group information for an employee:

1. Enter the occupation group using one of the following methods:

   - Enter the occupation key. The corresponding job is automatically displayed in the Job field.

     - Select the job from the available list. The corresponding occupation key is automatically displayed in the Occupation field.

2. Select the profession.

3. Select the education level.

4. Select the people class.

   > **Note:** The people class is subject to a number of validation rules. For a list of the validation rules, see Validation Rules for Social Insurance.

5. Save your work.

To enter information on private health care or special care:

> **Note:** This tab is only enabled if you have checked the Privately insured check box for the employee.

1. Select the private health care provider.

> **Note:** If no organizations are displayed in the Private Health Provider field, you must return to the Additional Organization Information form and define the social insurance providers for your organization.

See: Entering Additional Information for German HR Organizations, page 1-11

2. Save your work.

To enter information on a voluntary pension:

1. Select the voluntary pension provider and enter the membership number.
2. Specify whether the pension contribution is transferred by the employer or the employee.
3. Enter the contribution amount.
4. Save your work.

To enter information on a second pension:

1. Select the insurance provider.
2. Optionally, enter the membership number.
3. Select the membership status.
4. Optionally, enter the start and end dates for membership.
5. If you specify a membership end date, you must select a membership end reason in the End Reason field.
6. Save your work.

Workforce Information Management

Assignment Extra Information Types

You can define as many Extra Information Types (EITs) as you require to hold information about assignments. There are also some predefined assignment EITs. These are:

- Length of Service Types - you use this EIT to specify which length of service calculations are valid for a particular assignment status.

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.

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.

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 Employment Terms

Entering Statutory Information

The statutory information stores information about the workers' liability insurance provider for the employee. You only need to enter information here if the details for the employees' workers' liability insurance differ from those for the organization to which they are assigned. For example, an employee may have exemption or have a different risk class.

To enter workers' liability insurance information:

1. Choose the Statutory Information tabbed region.

2. If the employee is exempt from workers' liability insurance, flag the Exempt check box.

3. Select a workers' liability insurance provider.

4. Enter a risk class.

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.

To enter special ceiling information for an employee:

1. Choose the Special Ceiling tabbed region.

2. Enter a special ceiling if the employee is assigned to a grade, and a grade scale is defined for this grade. This special ceiling overrides the ceiling defined for the grade scale.

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

Entering a Billing Title (Oracle Projects only)

Note: This tabbed region displays only 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 on project customer invoices. You can override this information using Project Accounting.
3. Enter a project title.

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.

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.

   > **Note:** This sequence number is not the same as the child sequence number for calculating the local cost-of-living allowance.

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.

Entering Further Contact Information

1. Click the Further Contact R'ship Information field to open the Further Contact R'ship window.

   If you are entering contact information for a child, enter the following information:

   - Whether someone else is entitled to receive benefits for the child
   - Whether the child is entitled to benefits
   - Whether the child is entitled to the local cost-of-living allowance

   If you have chosen to enter the child sequence number manually (in other words, if the Child Auto Sequence Generation Indicator EIT is set to No at the parent level), enter the child sequence number for the local cost-of-living allowance.

   > **Note:** If you enter the child sequence number manually and then change the EIT so that the child sequence number is generated automatically, the value in the Child Sequence Number field in the Further Contact R'ship Information window will be overwritten by the automatically generated number.

   See: Person Extra Information Types, page 4-2

   If you are entering contact information for a spouse, enter the following information, if applicable:

   - The amount of alimony per month paid to the spouse, if divorced.

2. Save your work. If a person already exists on your application with the same surname and a first name that is either the same or not entered, then a list of

values is displayed that shows all the people who share the details.

See: Multiple Person Records, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

What Next?

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

Reporting on the Workforce

Period of Service Reports

Oracle HRMS provides a series of reports to calculate various periods of service based on previous employment and other criteria. The reports calculate different periods of service using rules defined in tariff contracts.

The period of service calculations are particularly important within Public Sector organizations as the calculations often determine an employee's remuneration and benefits such as leave entitlement or bonus payments.

Oracle HRMS currently provides the following period of service calculations:

- General length of service with current employer
- Length of service in the Public Sector
- Length of service in grade
- Length of service in step
- Length of service in assignment
- Length of service for jubilee money
- Length of service for BDA allowance

Run the period of service reports using the Report: Period of Employment self service function.

Situations and Situation Types

Situations are events or breaks in an employee's service. For example, you may create situations for parental leave or unpaid leave. Particular situations may have an impact on the calculation of lengths of service. For example, parental leave may be counted in one length of service calculation, but not in another. You define these situations under the following situation types:

- Absence
- Assignment Status
- Military Service
- Previous Employment

- Person Information

For example, you would create the parental leave and unpaid leave situations in the Absence situation type. The parental leave situation could be included in the Length of Service in Grade calculation but excluded from the Length of Service for Jubilee Allowance calculation.

When you define situations, you enter the following information:

- Length of service calculation
- Employee type
- Entitlement - whether the situation has any effect on the length of service calculation
- Entitlement value - if the entitlement has a particular value in the length of service calculation, for example, 50%

Valid Length of Service Calculations

Some assignment statuses are not valid for length of service calculations. For example, if an assignment has the status Terminate Assignment, it could be the case that the assignment should not be counted in length of service calculations.

You specify which length of service calculations are valid for an assignment using the Length of Service Types assignment extra information type.

See: Assignment Extra Information Types, page 4-20

Previous Employment Data

You enter information on an employee's previous employment using the Previous Employment form.

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

Correcting Factors

In some cases, it may be necessary to define a correcting factor to calculate an accurate length of service. You record the correcting factors at the person level using the Period of Employment person extra information type.

See: Person Extra Information Types, page 4-2

Running the Tax Batch Update Process

This report enables you to update the tax details for employees who have not submitted their tax card for the current tax year. If employees do not submit their tax card by a specified date, you can update their tax details to reflect less favorable tax calculation criteria. The rules for these changes are defined by German tax regulations. You make these changes in a batch process.

You can run the report in two modes. The first mode identifies the employees who would be affected by the process and the second mode identifies the employees and updates their tax details. Both modes generate a report.

You run reports from the Submit Requests window.

To run the Tax Code Update Process:

1. In the Name field, select Tax Batch Update.
2. Enter the Parameters field to open the Parameters window.
3. Enter the date from which the changes are applicable.
4. Select the people groups for whom you want to run the process. Choose one of the following options:
   - Select an organization hierarchy
   - Select a top organization
   - Select an assignment set

     Note: If you do not make any entry in any of these fields, the report uses the business group and all subordinate organizations.

   If you make an entry in both the Assignment Set and Organization fields, the process uses only the assignment set to generate the report.

   You can only enter a top organization if you specify the Organizational Hierarchy.
5. Select the Report Action for the process. You can choose one of the following actions:
   - Report only - the process generates a list of potential changes
   - Update and report - the process updates the employees' tax records
6. Specify how the process should deal with the tax class. Specify whether the process should change the tax class to VI or leave the value unchanged.
7. Specify how the process should deal with the remaining tax data. For each of the following parameters, specify whether the process should reset the value to zero or leave the value unchanged.

- Number of children
- Tax-free income
- Additional taxable income

8. Choose Submit.

9. To view the report, return to the Requests window and choose View Output.

Running the Child Sequence Generator Process

You use the Child Sequence Generator process to automatically update the sequence number for children entered as contacts for public sector employees.

You run the Child Sequence Generator process from the Submit Requests window.

To run the Child Sequence Generator report:

1. In the Name field, select Child Sequence Generator.
2. Enter the Parameters field to open the Parameters window.
3. Select the business group for which you want to run the process.
4. Enter the effective date for the process.
5. Choose Submit.

5

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.

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.

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.

5. Enter the license type, for example, the degree type.

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).

5. Enter the date on which the employee received an allowance to start the education.

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. Optionally, enter the grade for the written and oral parts of the degree in the Further Information field. You can also enter any additional comments here.
8. Enter further subjects, as appropriate.
9. Save your work.

6

Implementation

Additional Implementation Steps for Germany

If you are implementing Oracle HR for Germany you must also complete the following additional implementation steps.

Additional Implementation Steps

Step 1: Define Element Links

You must define the element links for tax and social insurance.

You define the links in the Element Links window.

1. Select Social Insurance in the Element Name field.
2. Select an effective date that is prior to the system date, for example, 01 Jan 2001.
3. Save your work.
4. Repeat the above steps for the Tax Information and Tax Exemption Information elements.

Step 2: Specify a Preferred Organization Hierarchy

When you define your business group, you must specify which hierarchy is the preferred, or named, hierarchy. For example, you could choose the primary hierarchy or a different hierarchy. The named hierarchy defines how the additional information entered for your organizations is inherited by the child organizations.

You select the hierarchy in the Organization window.

See: Entering German Business Group Information, page 1-11.

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