Oracle® HRMS for Hungary

Supplement

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

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Preface

Intended Audience

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

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

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

  If you have never used Oracle HRMS, Oracle suggests you attend one or more of the Oracle HRMS training classes available through Oracle University
- Oracle Self-Service Web Applications.
- The Oracle Applications graphical user interface.

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

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

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Structure

1 Organization Structures
2 Jobs and Positions
3 Employment Agreements and Legal Compliance
4 People Management
5 Leave and Absence Management
6 Savings and Retirement
7 Talent Management
8 FastFormula
9 Implementation

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

Organization Structures Overview

Oracle HRMS provides you with organization management functionality to represent the operating structures of your enterprise.

Representing Organization Structures Using Oracle HRMS

Using the Configuration Workbench for your implementation, you can configure the Oracle eBusiness Suite of applications to represent the management and operating structures of your enterprise.

The Configuration Workbench delivers an integrated configuration management toolset for HR systems and assists in the evaluation, configuration, deployment, and maintenance of HR applications. The workbench uses a configuration interview, to review the decisions and operational questions you make about setting up your enterprise using Oracle HRMS.

The Configuration Workbench configuration process suggests a combination of business groups and organizations to satisfy your integrated legal, financial, organization and employee management needs using Oracle HRMS. The suggested combination of business groups and organizations uses one of the following configuration models:

- A single operating company working within the legislative rules of a single country.

- A single operating company working within the legislative rules of multiple countries.

- Multiple operating companies working within the legislative rules of a single country.

- Multiple operating companies working within the legislative rules of multiple countries.

These configuration models define the basic information model to represent any enterprise. You can add other location and internal work structures that represent your internal organization or reporting structures for specific legal, personnel, and financial management requirements.

Managing your Work Structures Using Graphical Charting Capabilities

You can plan and implement new working structures ahead of time using graphical charts. The hierarchy diagrammer enables you to create organization and position hierarchies to reflect reporting lines and control access to information in your enterprise. See:

- Organization Hierarchies, *Oracle HRMS Enterprise and Workforce Management Guide*
- Position Hierarchies, *Oracle HRMS Enterprise and Workforce Management Guide*

The hierarchy diagrammers use the same security model as the other windows in Oracle HRMS and access to them is restricted by your responsibility.

Reporting on Organization Structures

Oracle HRMS and Oracle HRMSi enable you to produce several reports to satisfy the statutory requirements for your legislation and meet your business analysis needs. For example:

- Oracle HRMS enables employers in the U.S. to generate reports to comply with the VETS government reporting requirements. The report lists the number of special disabled and Vietnam era veterans a U.S. enterprise employs in each of the nine job categories.
- Oracle HRMS provides you with a standard organization hierarchy report to view the relationships between organizations and their managers within a hierarchy.
- Oracle HRMSi offers the Organization Separation Report to investigate the performance of your best and worst organizations based on the workforce changes in an organization.

Reporting Costs for Your Organization Structures

With the Oracle eBusiness suite of applications, you can automatically create HR organizations to corresponding company cost center combinations that exist in your GL account combinations.

Key Concepts

To effectively use Oracle HRMS for organization management, see:

Key Concepts for Representing Enterprises, page 1-4

Organization Classifications, page 1-6

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

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

Locations, *Oracle HRMS Enterprise and Workforce Management Guide*

Organization Hierarchies, *Oracle HRMS Enterprise and Workforce Management Guide*

Defaults for the Business Group, *Oracle HRMS Enterprise and Workforce Management Guide*

Internal Organizations and Cost Centers, *Oracle HRMS Enterprise and Workforce Management Guide*

Organizations

Key Concepts for Representing Enterprises

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

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

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

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

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

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

See: Organization Classifications, page 1-6

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

Business Group

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

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

- If you use Oracle Payroll

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

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

Operating Company

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

Ultimate Legal Entity

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

Legal Entity/Employer

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

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

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

Consolidated Legal Entity

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

For information on how to model your enterprise using the key organization structures, see: Configuration Models for Your Enterprise Framework, *Oracle HRMS Enterprise and Workforce Management Guide*

Organization Classifications

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

For more information on the key organization structures you use to represent your enterprise, see: Key Concepts for Representing Enterprises, page 1-4

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

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

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

All Legislations

All legislations can use the following classifications:

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

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

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

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

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

- **HR Organization**: Use this classification for all organizations to which you want to assign employees and contingent workers.

- **Payee Organization**: Use this when defining an external organization that is the recipient of a third party payment from an employee, for example a court-ordered payment. You can then select this organization on the Personal Payment Method window when entering a third party payment method.

- **Bargaining Association**: Use this when defining an organization that is involved in negotiating a collective agreement. A bargaining association could be any organization representing the employees in negotiations, for example a trade union. The UK legislation also enables you to select a bargaining association in the Union Processing window to set up a union element.

- **Representative Body**: Use this when defining a representative body. This may be a body defined in legislation, such as a European Works Council, or may be defined by the employer, such as a Sports and Social Club.

- **Disability Organization**: Use this when defining an external organization with which employee disabilities are registered.

- **Medical Service Provider**: Use this when defining an organization that provides any medical services, such as medical assessments, to the people in your enterprise.

- **Constituency**: Use this to define a constituency to group together workers eligible to vote for particular elections.

- **Company Cost Center**: Use this to define organizations in Oracle HRMS that map to cost centers in Oracle GL. You can set up your application so that whenever a cost center is defined in GL, a corresponding organization with this classification is defined automatically.

- **Professional Body Information**: Use this to define an organization that is a professional body. Organizations with this classification are available to assign to people in the Qualifications window.

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

US Legislation

The US legislation can use the following classifications:

- **Reporting Establishment**, **Corporate Headquarters**, or **AAP Organization**: Use these when defining reporting organizations, that is, organizations required for the production of certain reports for government agencies.

- **Parent Entity**: Use this when defining an organization to be included at the top level of an establishment hierarchy. You can then use the hierarchy when producing certain reports for government agencies.

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

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

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

UK Legislation

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

Canadian Legislation

The Canadian legislation can use the following classifications:

- **Provincial Medical Carrier**: Use this to define a medical carrier for a province.

- **Provincial Reporting Establishment**: Use this to represent employees in the province of Quebec.

French Legislation

The French legislation can use the following classifications:

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

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

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

Dutch Legislation

The Dutch legislation can use the following classifications:

- **Dutch UWV Organization**: Use this to indicate if your organization is a social insurance provider. If you enable this classification, you can enter additional information such as the type of provider in the Dutch UWV Organization window.

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

German Legislation

The German legislation can use the following classifications:

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

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

- **German Unemployment Insurance Provider**: Use this to indicate if your organization is a provider of German unemployment insurance. If you enable this classification, you can enter additional information using the German Social Insurance Providers window.

- **German Voluntary Pension Provider**: Use this to indicator if your organization is a provider of German voluntary pensions.

- **German Work Incident Supervising Office**: Use this to indicate if your organization is a work incident supervising office.

- **German Workers' Liability Insurance Providers**: Use this to indicate if your organization is a provider of German workers' liability insurance.

Hong Kong Legislation

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

Mexico Legislation

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

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

Saudi Legislation

The Saudi legislation can use the following classifications:

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

- **Saudi Employment Office**: Use this to represent an office to which the employer reports the status of its disabled employees.

Hungary Legislation

The Hungary legislation can use the following classifications:

- **Draft Agency**: Use this to represent an external defense organization to which you send employee military service details.

- **Company Information**: Use this to represent the organization which is legally entitled to hire employees.

- **Pension Provider**: Use this to indicate an external organization that provides pensions to your employees.

Spanish Legislation

The Spanish legislation can use the following classifications:

- **Work Center**: Use this to define an internal organization that represents a facility within your enterprise. You use these organizations for statutory reporting purposes.

- **Section**: Use this to define an internal organization that represents the place where people work. You use these organizations for internal reporting purposes only.

- **Tax Office**: Use this to indicate if the organization is an external tax office.

- **Tax Administration Office**: Use this to indicate if the organization is an external tax administration office.

- **Social Security Office**: Use this to define a social security office as an external organization. If you enable this classification, you can record the social security office details.

- **Social Security Province Office**: Use this to define an organization as an external social security office. If you enable this classification, you can enter the social security province office details.

- **Health Care Organization**: Use this to define an organization as an external health care organization. If you enable this classification, you can enter the insurance company details.

Korea Legislation

The Korean legislation can use the following classification:

- **Business Place**: Use this classification to define an organization as an employer to which you assign employees. You set up information such as the registration number, representative information, and the health insurance number for the National Tax Service (NTS).

Indian Legislation

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

The Indian legislation can use the following classifications:

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

account number in the NPS Account Set Up window.

Polish Legislation

The Polish legislation can use the following classifications:

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

Norwegian Legislation

The Norwegian legislation can use the following classifications:

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

Finnish Legislation

The Finnish legislation can use the following classifications:

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

organizations with whom your organization deals. Ensure to create organizations with this classification as external organizations.

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

Danish Legislation

The Danish legislation can use the following classifications:

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

Swedish Legislation

The Swedish legislation can use the following classifications:

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

South African Legislation

The South African legislation can use the following classification:

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

UAE Legislation

The UAE legislation can use the **Legal Employer** classification to define and enter additional organization information for your legal employer.

Irish Legislation

The Irish legislation can use the following classifications:

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

- **Pension Provider**: Use this classification to define external pension provider.

Creating an Organization

Use the Organization window to create:

- Business groups

- External organizations (for example, tax offices, pension providers, insurance carriers, disability organizations, benefit carriers, or recruitment agencies)

- Internal organizations (for example, departments, sections or cost centers)

- GREs/Legal Entities

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

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

To create an organization:

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

   Examples of external organizations that may require entry are disability organizations, benefits carriers, insurance carriers, organizations that employees name as beneficiaries of certain employee benefits, and organizations that are recipients of third party payments from employees' pay.

7. Save the basic organization details.

Entering Additional Information

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

For business group see: Business Group, page 1-18

For HR organization see: HR Organization, page 1-19

For representative body see: Representative Body, page 1-20

For constituency see: Constituency, page 1-20

For bargaining association see: Bargaining Association, page 1-21

For company cost center see: Company Cost Center, page 1-21

For professional body information see: Professional Body Information, page 1-22

For company information see: Company Information, page 1-22

See Classification and Additional Information Types, page 1-6 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*

   - Work Day Information, see: Business Groups and HR Organizations: Work Day

Defaults, *Oracle HRMS Enterprise and Workforce Management Guide*

- Benefits Defaults, see: Business Groups: Defining a Default Monthly Payroll, *Oracle HRMS Enterprise and Workforce Management Guide*
- PTO Balance Type, see Business Groups: Selecting a PTO Balance Type, *Oracle HRMS Enterprise and Workforce Management Guide*
- Recruitment Information, see: Business Groups: Entering Recruitment Information, *Oracle HRMS Enterprise and Workforce Management Guide*
- Payslip Information, see: Entering Payslip Information, *Oracle HRMS Payroll Processing Management Guide*
- Self Service Preference Information, see: Entering Self-Service Preference Information, *Oracle SSHR Deploy Self-Service Capability Guide*

4. Repeat these steps to enter further information.

To enter HR organization additional information:

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

   - Select Company Information, seeEntering Company Details , page 1-22

   - Select Draft Agency Reference, see

     Entering Draft Agency Reference, page 1-23

3. Repeat these steps to add further information.

Entering Company Details

Use the Company Details window to enter information about your enterprise. The information you enter here appears in the statutory reports, such as National Defense Report and Employment Certification Report.

To enter company details:

1. From the Organization window, query the organization if it does not already appear there. In the Organization Classifications region, select Company Information, choose the Others button, and select Company Details.

2. Click in a field of the Additional Organization Information window to open the Company Details window.

3. Enter the full name of the employer.

4. Select the bank account number for reports produced electronically and for Private

Pension Fund report.

> **Note:** You can only select the bank account number from the list of values, if you have defined the Organization Payment Method using the Payment Methods.

5. Enter the social security number, tax number, and company statistical number that uniquely identify the enterprise and appear on statutory reports, such as Employment Certification Report.
6. Enter the TEAOR code to identify the sector to which the company belongs. This code identifies the main activity of the company such as public limited, surgical instrumentation, shipping, mining, or finance company.
7. Describe the enterprise's work.
8. Select the type of enterprise such as educational, agricultural, public limited or joint company. This information appears on statutory reports.
9. Enter the regional settlement number used by the Hungarian Central Statistical Office to identify employers.

   > **Note:** If you have defined multiple locations, enter only the regional identification number of the main organization.

10. Select Yes if your enterprise pays social security and family allowance to employees, otherwise select No.
11. Save your work.

Entering Draft Agency Reference

Use the Draft Agency Reference window to record details about the external military draft agency.

To enter Draft Agency Reference:

1. In the Organization window, query the Draft Agency if it does not already appear there. In the Organization Classifications region, select Company Information, choose the Others button, and select Draft Agency Reference.
2. Click the field to open the Draft Agency Reference window.
3. Select the draft agency for reporting the military service information of employees.

Note: You can only select an agency if it exists as a Draft Agency external organization.

4. Save your work.

Locations

Location Extra Information Types

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

> **Note:** To be able to access the predefined EITs, you must link the EIT to your responsibility.
>
> See: Setting Up Extra Information Types For a Responsibility, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

The predefined location EITs are:

- Self Service Preference for Location: Information on preferences for online documents such as the online payslip or online tax forms at the location level. The EIT determines whether the documents are available online or in a printed format, what template you are using for XML Publisher, the stored procedure you want to use, and the date when you want to implement these changes.

  > **Note:** You can also enter this information at the person, business group, or HR organization level.
  >
  > See: Person Extra Information Types, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide* and Entering Self-Service Preference Information, *Oracle SSHR Deploy Self-Service Capability Guide*
  >
  > These information levels are arranged in a hierarchy; if you define self-service preferences at the person level, the settings will override any other settings made at the location, business group, or HR organization level. Similarly, if you define self-service preferences at the location level, the settings override any settings at the business group or HR organization level. Settings at the HR organization level will override settings at the business group level.

- Geographic Hierarchy Node Map: Use this EIT with the calendar events you set up to identify a different geographical entity in the geographic hierarchy. If the calendar event includes the node you select, and then the worker becomes applicable for the event. The node you select here overrides the information at the business group level.

  See: Geographical Precedence, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

If you want to override this node for a specific worker, then you can define the assignment EIT to identify a different geographical entity in the hierarchy.

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

2

Jobs and Positions

Job Management

Job Management

Oracle HRMS's job definition functions can contribute to the efficient management of your business and, where required, help you satisfy statutory reporting requirements. A fully specified job enables you to:

- Select the best candidate for a role.
- Position the job within your industry using standard job evaluation schemes and industry salary surveys.
- Specify privileges or authorities attached to the role.

Candidate Selection

When you define a job in Oracle HRMS, you can specify:

- The competencies the worker must have. You can copy into the job definition competencies you defined as essential for your enterprise, and you can copy the competencies required for a job to the competence profile of the worker. Thus, you can describe competencies consistently at the business, job, and person levels.
- The grades of potential workers.
- Work choices, such as work locations and work schedules, that are suitable or acceptable for the job.

Having specified the job requirements (and also recorded the competencies and work preferences of individual applicants and employees), you can use Oracle HRMS's suitability matching functions to identify candidates for roles and roles for candidates.

Industry Positioning

Enterprises usually need to assess key activities of their organization, such as job evaluation and salary setting, in relation to industry standards. Accordingly, Oracle HRMS enables you to:

- Record job evaluation scores. For a particular job, you select an appropriate job evaluation system and record the job's score.
- Compare the salary for a particular job in your enterprise with those for comparable roles in the industry.

- Specify whether a job is a benchmark job or relates to one. A benchmark job is one that represents multiple similar jobs in reports and salary surveys.

Job Groups

You can define all roles in an enterprise as jobs. Such roles include those associated with the main business of the enterprise, such as sales manager or clerk, as well as those considered supplementary, such as fire warden or safety representative.

Oracle HRMS organizes jobs into job groups. (Some statutory reports require job group as an input value.) For each business group, there is a default job group to which standard HRMS jobs must belong. Supplementary roles, however, must not belong to the default job group. You can define additional job groups for these supplementary roles and for use in Oracle Projects. Job groups you define can apply globally or within a single business group.

Defining a Job

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

You can also enter supplementary roles in the Job window. You can record information about any roles an employee holds which are not part of the employee's contract; for example, fire warden or health and safety representative.

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

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

To define a job:

1. Enter a start date early enough to handle any historical information you want to enter.

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

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

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

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

4. Enter a numerical approval authority value to define an approval level for incumbents of this job. This value is used by Oracle Approvals Management to determine whether a person has sufficient authority to approve a transaction.

5. Indicate whether the job carries any additional employment rights or is a benchmark job. A benchmark job is one that can be used to represent a number of jobs in reports such as salary surveys.

   Save your work and do not complete any further steps, if you are entering a supplementary role.

6. Select a benchmark job, if required.

7. Click the Further Information field to enter additional Hungarian-specific information.

8. Select the statutory job classification.

9. Select the FEOR (Code of Unified Classification of Hungarian Professions) number that classifies this job.

10. Specify if the employee performing this job may be eligible for the following additional statutory leave:

    - Additional Health Holiday - for employees who work underground or are exposed to radiation.

    - Additional Workplace Holiday - for employees who regularly work on public holidays.

    You can use this information in accrual plans to determine an employee's additional holiday entitlement.

11. Save the job. You can now enter further information for the job you have defined. Note that you can only enter some types of further information, such as valid grades or work choices, for jobs defined in the Default HR Job Group.

12. Choose the Evaluation button to enter evaluation information and an overall evaluation score for the job.

    See: Entering Evaluation Information, *Oracle HRMS Workforce Sourcing, Deployment,*

and Talent Management Guide

If you use suitability matching, then enter your competencies using the Competence Requirements window.

See: Defining Competence Requirements, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

Defining Job Requirements

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

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

Other Information

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

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

15. Choose the Work Choices button to enter work choices relevant to the job.

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

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

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

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

    > **Note:** If you have Oracle Projects installed, you can enter further information in the Extra Job Information flexfield.

    See: Implementing Resource Utilization, *Project Resource Management Implementation and Administration Guide.*

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

18. Enter any additional types of job information for your enterprise.

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

3

Employment Agreements and Legal Compliance

Entering Disability Information

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

You use the Disability window to enter this information.

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

See: Entering a New Person (People Window), page 4-2

To enter disability information:

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

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

2. Select the category of disability, for example, Severely Disabled.

3. Enter into the FTE field the full-time equivalent that this person represents towards your enterprise's quota of disabled employees. If no quota scheme exists, then leave

the default value as 1.00.

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

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

4. Select the status of this disability information.

   - Active: This information will be included in reports. You cannot enter an Active status if the record has an end date.

   - Inactive: This information will not be included in reports.

   - Pending: This information is not yet complete because you entered it before you entered the medical assessment confirming this disability (where the consultation result was Disability.)

   - Closed: This information has an end date because the person no longer has this disability.

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

5. Select the reason for the disability, for example, Occupational Incident. If the disability was diagnosed as the result of a medical assessment, select Occupational Assessment.

6. Enter the percentage of disability as determined by the official assessment of this disability.

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

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

8. Select the medical assessment that recorded this disability.

   The list of assessments is limited to assessments that:

   - have a result of Disability

- have a consultation date that is earlier than the current effective date of the disability

- are not already linked to a disability record for this person

- were linked to any incident that you selected in the previous step

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

This field is not datetracked.

Entering Disability Registration Information:

1. Choose the Registration tabbed region to enter the disability registration details.

2. Enter into the ID field the registration number assigned by the disability organization.

3. Select the name of the official disability organization with whom the person's disability is registered.

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

   See: Creating an Organization, page 1-16

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

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

Entering Additional Disability Information:

1. Choose the Other tabbed region to enter additional details about this disability.

2. Enter a description of the disability.

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

3. Enter information about the work restrictions that the employee is subject to as a result of their disability.

4. Enter further information about this disability if the Further Information field has

been set up by your Oracle localization team.

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

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

For Korea users only: Specify the following:

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

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

For Mexican users only: Specify the following:

- Disability ID of any related disabilities

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

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

  Valid values are:

  - General Disease
  - Maternity
  - Risk Incident

- Result of the disability

  The Consequence field provides the following options:

  - None
  - Temporary Disability
  - Provisional Initial Assessment
  - Definitive Initial Assessment
  - Death

    - Relapse
    - Assessment after start date
    - Provisional re-assessment
    - Relapse without medical discharge
    - Definitive re-assessment

- Disability control

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

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

For Japanese users only: Specify the following:

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

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

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

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

5. Save your work.

What Next?

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

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

Maintaining Disability Information

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

4

People Management

People

Person Extra Information Types

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

> **Note:** To be able to access the predefined EITs, you must link the EIT to your responsibility.
>
> See: Setting Up Extra Information Types Against a Responsibility, *Configuring, Reporting, and System Administration in Oracle HRMS*

The predefined person EITs are:

- Passport Details - These include employee's passport number, profession, issue date, expiry date and place of issue.
- Residency Details - These include employee's residency permit number, profession, issue date, expiry date, and place of issue
- Work Permit Details - These include employee's work permit number, profession, issue date, expiry date, and place of issue.
- Driving License - This includes employee's driving license number, the categories of vehicle the employee is eligible to drive, issue date and expiry date.
- Birth Certificate Number - This includes employee's birth certificate number.

Entering a New Person (People Window)

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

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

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

To enter a new person:

1. Set your effective date to the appropriate date for adding the person to the application. If you are entering an employee, this should be their hire date.

2. Enter the person's name and other details in the Name region. Only the last name is required for most legislations, but some legislations require a first name too.

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

   For Romanian users: First and last names are mandatory.

   - In the Title field, select a title such as Mrs. or Doctor.

   - You can use the Prefix field to enter the first part of the person's name, such as van der. In the case of someone whose last name is van der Zee, you can sort by the last word of the name, that is Zee. If the whole name van der Zee is entered in the Last Name field, the name is sorted under van.

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

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

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

   - The Suffix field holds part of the last name, such as Junior or II. You can report on the suffix separately, as required in some government-mandated reports.

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

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

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

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

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

Identification Number) supplies the gender information.

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

4. In the Action field, select an action type (such as Create Employment) and a person type. The person type you select displays immediately in the Person Type for Action field before you save it. If only one user person type exists for the action type, it displays automatically in the Person Type for Action field.

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

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

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

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

Entering Employee Information:

Enter the following information if the person is an employee.

1. If desired, change the Latest Start Date field.

   - The Latest Start Date field displays your effective date.

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

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

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

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

Entering Identification Information:

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

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

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

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

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

   If you are an Australian user, leave the National Identifier field blank. For Finland, the PIN (Personal Identification Number) supplies the values for gender, date of birth, and age.

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

Entering Personal Details:

Enter personal details in the Personal tabbed region.

1. Enter a date of birth. You must do this before you can assign an employee to a payroll. For Poland, the PESEL supplies the date of birth. For Finland, the PIN (Personal Identification Number) supplies the date of birth.

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

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

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

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

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

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

4. **For Finnish and Romanian users only**: Enter the place of residence. The place of residence influences the regional membership. You use the place of residence and regional membership to calculate income tax and other statutory deductions. Romanian users can optionally specify whether the person is a resident of Romania, a non resident non European Union, or a non resident European Union.

   For Japanese users only:Enter the country of birth.

5. If the Work Telephone field is displayed, enter a work telephone number. Otherwise, use the Phone Numbers window to enter this information.

6. In the Status field, select a marital status.

7. Select a nationality.

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

8. **For Russian users only**: Enter the employee's statutory Pension Insurance Fund

identifier. It is the employee's ID in the Statutory Pension Insurance Fund.

9. **For Russian, Swedish, and Romanian users only**: Select the person's citizenship. In Russia, you require this information for some statutory reporting to migration authorities. In Sweden, you can use this information to track persons who are not Swedish citizens, since the taxation and pension insurance schemes differ from those for Swedish citizens. For Romania, you can optionally specify whether the person is a Romanian, European Union, or other citizen.

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

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

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

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

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

11. **For Dutch users only**: Select Yes in the Work Abroad Exceeding One Year field, if your employee has worked abroad for more than a year.

12. **For Belgian users only**: enter the person's preferred correspondence language in the Other region.

13. Save your work.

Multiple Person Records:

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

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

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

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

Do one of the following four tasks:

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

- If the person already exists in your current business group then select that person from the list of values. The application retrieves the existing record and cancels the save you were trying to make, as one business group cannot contain two records for the same person. Close the new record and scroll down to display the existing record.

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

- If the person already exists in TCA, but not in HRMS, then select that person from the list of values. The person you are entering is saved in your current business group and linked to the existing person record to indicate they are the same person. The information held for the person in TCA is updated with that entered in HRMS. See: People in a Global Enterprise, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

- If the person you are entering does not match any of the records displayed, then select No Match in the lookup. Your new person record is saved.

What Next?:

Optionally, you can enter additional information for people in the tabbed regions.

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

Entering Additional Personal Information (People Window)

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

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

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

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

To enter information for an applicant:

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

To enter background check information:

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

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

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

To enter further name information:

1. Choose the Further Name tabbed region.
2. Enter the birth name of the employee.
3. Enter the mother's maiden name to identify the employee in statutory reports such as National Defense and Employment Certification Report. The application also uses this information to identify the employee while providing a tax refund.
4. Enter the name the person prefers (can be a nickname).
5. Enter any honors or degrees (BA, MBA, or JD, for example) that the person has earned.

To enter medical information for a person:

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

To enter other information for a person:

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

terms of pension plan in German.

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

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

   Date of death defaults to the person's termination date if:

   - in the Terminate window you enter the termination reason of deceased, but
     - you do not provide the actual termination date, and
     - you have not yet entered a date of death

6. Select the current student status, if the person is a student.

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

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

To enter benefits information:

1. Choose the Benefits tabbed region.

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

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

2. Enter a benefit group for your employee or applicant. Benefit groups help determine a person's eligibility for a plan or set benefit rates. For example, benefit groups can address mergers and acquisitions where eligibility is complicated, or assist in grandfathering a person into a very old plan.

3. Enter what kind of tobacco (cigarettes, pipe, cigar, or chewing, for example) your employee uses, if any.

4. Enter the medical plan number, which is the policy or group plan number of an externally provided medical plan.

5. Enter the adoption date, if the employee has adopted a child. This information, with the child's date of birth, can determine dependent eligibility. You can enter the adoption date only if you have entered a date of birth for the person. The adoption date must be the date of birth or later.

6. Enter the date you received the death certificate of a deceased employee. You can enter this only after you have entered the date of death in the Other Information region. The receipt of the death certificate must be after or equal to the date of death.

7. Enter an adjusted service date for your employee. Benefits can use this date, rather than the date first hired, to determine the length of service for eligibility, enrollment, and rates. The adjusted service date can credit service for former employers, grandfathered benefits, or in the case of mergers and acquisitions.

8. Change the date first hired. For employees who have previously worked for your enterprise, the Date First Hired field displays the start date of the employee's earliest, previous period of service. This date must be on or before the start date of the earliest period of service.

9. Check the Other Coverage check box, if the employee or applicant has externally provided coverage.

10. Check the Voluntary Service check box, if your employee or applicant is volunteering, for example as a missionary.

To enter employment information:

1. Choose the Employment tabbed region.

2. Enter the tax identification number for an employee or a contingent worker for pay slips and social security reports.

3. Enter the personal identity number for an employee or a contingent worker for statutory reports.

4. Enter the pensioner registration number, if the person receives a pension.

5. If you are entering information about a contact who is working, enter the name of their employer.

6. Enter the social security start and end dates, if these are different from the hire and termination dates of an employee. The Social Security System uses this information to calculate and process the taxes and benefits for an employee.

To enter military information:

1. Choose the Military tabbed region to record military service information of Hungarian male employees for the National Defense report.

2. If the employee has already performed military service, select Yes. If the employee did not complete the service, enter the reason in the Reason Not Completed field.

3. Enter the dates when the employee started and completed their service.

4. Select the code given by the Draft Agency to indicate if the employee leaves or stays within the company during war.

5. Enter the date of permission given by the Draft Agency for leaving or staying within the company during war.

6. Select the type of command, command color, and enter the command number given by the Draft Agency. The type of command determines if the person has completed the military training and is ready for military activity.

7. Select the military rank given to the employee by the Ministry of Defense on completing their service.

To enter civil defense information:

1. Choose the Civil tabbed region to record the civil defense information for Hungarian citizens.

2. Enter the position the employee holds within the civil defense hierarchy.

3. Select the organization to which the employee belongs to indicate if the employee is a member of the civil defense or self-defense organization.

4. Select the department to which the employee belongs to indicate the type of service they perform such as operating logistics or maintaining stocks.

5. Select the local sub-department to which the employee belongs to indicate the type of operation they perform , such as supplying or transporting goods.

6. Select the group and sub-group to which the employee belongs to indicate the task they perform, such as rescue, provide relief, or supply materials.

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.

   For Romanian users: Enter the contract number in this field.
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.
7. Enter further information about this contract if your Oracle localization team has set up the Further Contract Information window.

   For Hungarian users only: If the duration of the contract is fixed, enter the expiry date as some reports list the contract end date.
8. Save your changes.

   You can attach an electronic copy of any written contract that accompanies the record using the Attachments button.

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

Maintaining Contracts

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

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

Deleting Contracts

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

> **Note:** Contracts cannot be date effectively end dated.

To delete a contract:

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

Employees

Employment Information

As well as recording personal information about employees you also need to record how they work for your enterprise. HRMS enables you to manage all your employment information and track the changes in employment information for each employee over the lifetime of their employment.

Oracle HRMS enables you to efficiently manage change in your enterprise for appropriate groups of people:

- Where a change affects a group, you can effect that change for every individual in the group according to a set of rules.
- Where a change affects only a few individuals, you can enter changes for just those individuals.

In Oracle HRMS, you manage these changes through the *employee assignment*:

- The assignment connects employees to your enterprise's work structures and policies, so that changes to the structures and policies are reflected in the employee's records.
- You can query groups of employees with similar assignments (such as all assignments on grade C2) and make changes for each employee in these groups.

Also, Oracle HRMS provides a number of predefined inquiry windows and reports for employment information. You can create your own inquires and reports using QuickPaint or other reporting tools.

For more information see: Information Access, *Oracle HRMS Configuring, Reporting, and System Administration Guide*.

Summary of Employment Information

The following table shows the employment information typically held for an employee in Oracle HRMS and how you enter it.

Employment information summary table:

Employment Information	Method of Entering
Job Title or Position	Assign the employee to work structures in the

Employment Information	Method of Entering
Department	Assignment window.
Location	
Grade	
Grade Step Placement	Enter in the Grade Step Placement window. Enter any special ceiling in the Assignment window.
Name of manager or position to report to	Use a position hierarchy or enter the supervisor`s name in the Assignment window.
Salary	Assign to a salary basis in the Assignment window; enter amount in the Salary Administration window.
Benefits	Enroll the employee in a Flex Program, Non-flex Program, Savings Plan, or Miscellaneous Plan.
Pay Frequency	Assign to a payroll in the Assignment window.
Pay Method	Accept the default from the Payroll to which the employee is assigned or select a method in the Personal Payment Method window.
Full time/part time status	Assign to an employment category.
Standard Work Day	Enter in the Assignment window or accept the default from the organization or position to which the employee is assigned.
Overtime rules	Define an element, using links to define eligibility rules, and element entry defaults or validation to control the values given.
Vacation Entitlement	Define absence types and set up increasing or decreasing balances for the employee; enroll employee in appropriate accrual plans.
Sickness Entitlement	

Employment Information	Method of Entering
Maternity Entitlement	
Notice Period Disciplinary procedure	You should hold full text procedures and regulations outside the system. You can associate groups of people with different rules or procedures using the People Group key flexfield.
Costing	Enter cost codes for the assignment in the Costing window, or accept the default from the organization to which the employee is assigned.
Probation Period	Enter in the Assignment window.
Collective Agreement	Enter a collective agreement in the Collective Agreements window and then select it in the Assignment window.
Collective Agreement Grades	Link the collective agreement to a grade structure and enter reference grades for it in the Agreement Grades window. Then, select the grade structure in the Assignment window and enter a combination of valid grade factors for it.
Supplementary Roles	Enter supplementary roles in the Supplementary Roles window.

Working Shift Patterns

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

Shifts and Shift Patterns

You can store information about:

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

- Shift patterns - a shift pattern is a sequence of consecutive shifts

A Shift Pattern of Five Days

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

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

How Oracle Payroll Represents Shift Patterns

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

You can apply shift patterns to an employee assignment and then calculate the hours worked within a given period.

Entering Previous Employment Details

You enter previous employment information in the Previous Employment Information window.

The Previous Employment Information window is divided into three regions with each region recording separate information about an employees previous employment. The three regions in the Previous Employment Information window are:

- Previous Employer
- Previous Job
- Assignment - Previous Job Mappings

To enter previous employment details:

1. Enter the previous employer name.

2. Enter an address.

3. Select a country.

4. Select the type of business.

5. Select a subtype for the business type selected at step 4.

6. Enter a description for the employer.

7. Enter start and end dates for the employee's period of employment. The dates entered automatically calculate the period of service in years, months and days.

8. You can override the period of service calculation by entering your own period of service in the Years, Months and Days fields.

9. Use the Further Information flexfield to enter any additional information defined by your localization team.

   For Hungarian users only If the employee joined your enterprise mid-year, specify the number of sickness days they have already taken with their previous employer. You can use this information in an accrual plan to calculate their sickness entitlement for the rest of the year.

10. Select the All Assignments check box to specify that the service period is taken into account for all assignments.

    > **Note:** The All Assignments check box can only be selected if there are no further previous job usages defined in the Assignment region. Once the All Assignments check box is selected no further previous job usages can be defined.

11. Save your work.

12. **Mexico only**: Specify the employee's previous employment details in the Person EIT.

    See: Person Extra Information Types, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

To enter previous job details:

1. Select an empty row in the Previous Job region or place you cursor within an

existing row and choose the New button to add a new row.

2. Enter start and end dates for the previous job. The job entered must be associated with the employer and period of service entered at steps 1 to 11. The dates entered automatically calculate the period of service in years, months and days.

3. Enter a job title.

4. Select an employee category.

5. You can override the period of service calculation by entering your own period of service in the Years, Months and Days fields.

6. Enter a description for the previous job.

7. Select the All Assignments check box to specify that the previous job period is taken into account for all assignments.

   Note: The All Assignments check box can only be selected if there are no further previous job usages defined in the Assignment region. Once the All Assignments check box is selected no further previous job usages can be defined.

8. Use the Further Information flexfield to enter any additional information defined by your localization team.

   See: Entering Further Previous Job Information.

9. Choose the Extra Information button to open the Previous Job Extra Information window.

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

10. Save your work.

To map previous jobs to an assignment:

1. Select an empty row in the Assignment region or place you cursor within an existing row and choose the New button to add a new row.

2. Select an assignment to map to a previous job specified in the To enter previous job details section.

3. Select a job to map to the assignment. Selecting a job automatically displays the Start Date and End Date fields as specified for the job in the Previous Job region.

4. You can override the period of service calculation by entering your own period of service in the Years, Months and Days fields.

5. Use the Further Information flexfield to enter further previous job usage details.

6. Save your work.

Setting Up Shifts and Shift Patterns

Use the Table Values window to set up shift patterns.

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

You can then use these details to calculate:

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

To set up shift patterns:

1. Query the table PQP_COMPANY_WORK_PATTERNS.

2. Define a new column for each new work pattern.

3. Give the new column a header which is the same as the work pattern name.

4. Create a new row value for each day that you want to include in the work pattern. For example, if your work pattern contains seven days, then create seven new rows.

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

Assigning Working Shift Patterns to an Employee

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

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

To assign a working shift pattern to an employee:

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

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.

> **Note:** To be able to access the predefined EITs, you must link the EIT to your responsibility.
>
> See: Setting Up Extra Information Types Against a Responsibility, *Configuring, Reporting, and System Administration in Oracle HRMS*

The predefined assignment EIT is:

- Hungary Assignment Category - You can attach multiple categories to an assignment such as labour relation, private contractor.

Entering Additional Assignment Details (Assignment Window)

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

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

To enter salary information for an employee:

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

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

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

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

To enter supplier information for a contingent worker:

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

If you are not using Oracle Services Procurement:

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

If you are using Oracle Services Procurement:

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

To enter supervisor information for an employee or contingent worker:

1. Choose the Supervisor tabbed region.

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

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

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

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

To enter probation period and notice information for an employee:

The probation period defaults from the employee's position.

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

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

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

1. Choose the Standard Conditions tabbed region.
2. Amend the standard work day information for your employee or contingent worker assignment, if required.
3. This step is for employees only. For benefit administration, enter whether the assignment is hourly or salaried.

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

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

1. Choose the Miscellaneous tabbed region.

2. Enter the internal address details (such as the floor or office number), if required. The system adds the details to the location address.

3. Select a reason for adding or changing the assignment. For example, you can record promotions for your employees. You define valid reasons as values for the lookup types Reason for Change to Employee Assignment (EMP_ASSIGN_REASON) for employees and Contingent Worker Assignment Reasons (CWK_ASSIGN_REASON) for contingent workers.

4. Select the Manager box if the assignment is at manager level and you want to include this worker in the Organization Hierarchy Report as a manager. (You can select Manager for a contingent worker assignment only if the HR: Expand Role of Contingent Worker user profile option is set to Yes.)

5. By default, the first assignment entered is the primary assignment, and the Primary box is automatically checked. If you are now entering a secondary assignment, you must ensure that the Primary box is unchecked.

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

   See: Changing Primary Assignments, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

6. Select Yes to indicate if the employee received the railway benefit. This information will appear on the Employment Certification Report issued to employee on leaving the enterprise.

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

To enter special ceiling information for an employee:

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

1. Choose the Special Ceiling tabbed region.

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

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

1. Choose the Project Information tabbed region.

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

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

3. Enter a project title.

To enter grade ladder information for an employee:

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

1. Choose the Grade Ladder tabbed region.

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

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

1. Choose the Bargaining Unit tabbed region.

2. Enter a bargaining unit code for your employee's assignment. This is usually the legally recognized collective negotiating organization.

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

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

To enter employment terms for an employee:

1. Choose the Employment Terms tabbed region.

2. Select the contract to be referenced by the assignment. The list of contracts is limited to those entered for the employee that have start dates on or before the assignment

start date.

3. Select the agreement grade structure for the collective agreement. A window shows the grade factors for that grade structure.

4. Enter values for the grade factors. Or, choose the Combinations button and enter search criteria for one or more grade factors to display the reference grades that meet those criteria.

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

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

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 the social security code (TAJ) for the contact.
   - Enter the date of birth, age, and gender. This information is used for processing payroll and for recording absences as employees may be eligible to receive additional holiday and family tax benefits.
   - 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.

     > **Additional Information:** If the contact is working, enter the name of the contact's employer using the Employment tab on the Person window as the tax office uses this information.

Important: You must record the mother's maiden name of the contact using the Further Name tab on the Person window. See: Entering Additional Personal Information, page 4-9

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

To enter contact relationships:

1. Select the contact relationship, for example child or spouse.

2. Enter the start and end date (if known) of the relationship.

3. If you use Oracle Advanced Benefits or Standard Benefits, select a start and end reason for the relationship.

4. Select whether the contact:

   - Is the primary contact.

   - Is the recipient of a third party payment (for example, from a court-ordered deduction/wage attachment).

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

   - Shares the same residence as the employee.

   - Has a personal relationship with the employee. This identifies whether the third party should be considered as a possible dependent and/or beneficiary.

   - Is a beneficiary or dependent. You can only enter these fields if you do not use Standard or Advanced benefits.

5. You can enter a sequence number for the contact relationship. This must be a unique number for each contact the employee has. However, because sequence numbers are employee based, these numbers only need to be unique within the employee's record.

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

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

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

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

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

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

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

To enter Further Contact Relationship Information

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

   Enter the following information if the contact is a child dependent:

2. Select Yes if the employee receives family tax, family allowance, and holiday benefit for the child. Select No if the employee's spouse receives the family tax, the family allowance, and holiday benefit for the child.

7. Save your work. If a person already exists on your application with the same surname and a first name that is either the same or not entered, then a list of values is displayed that shows all the people who share the details. See: Multiple Person Records, page 4-7

What Next?

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

Using People Management Templates

Entering Employees Window

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

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

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

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

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

Entering a New Employee

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

- **Enter Employees** - This is intended to be used by users who are only interested in entering new employees onto the system, for example data entry clerks. It only uses the Maintain window and includes all the fields required to set up an employee.

- **Maintain Employees** - This enables users to enter employees onto the system, and also to maintain existing records. It uses the Find, Summary and Maintain window to enable users to control a large amount of information relating to employees and their assignments.

- **Enter and Maintain Employees (HR Foundation)** - This template is included on the HR Foundation menu, but can also be used by people who have a full Oracle HR license. It uses the Find and Maintain windows and includes all the fields required to enter and maintain an employee. It has a very simple user-interface and does not have any date-track functionality enabled.

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

To enter a new employee using the Enter Employees template:

1. If the New window is not displayed choose the New icon in the toolbar. Select New Employee.

2. Enter the personal details for the new employee. You must enter:

   - name

   - type

   - gender

   - employee number and hire date

   - date of birth (for assignment to a payroll)

   - BSN/SOFI number (Netherlands users only). By default this field is mandatory, however, you can change it to optional by setting the HR: Make National Identifier Optional profile option to Yes.

   - Social Security Code (Hungarian users only)

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

All other personal information is optional.

3. Enter the assignment details for the new employee. You must enter:
   - organization (this defaults to the current Business Group)
   - professional category and contribution group (Spanish users only)

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

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

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

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

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

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

   If you are a UAE user, you must enter the following information:
   - Nationality on the Additional Information tab

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

   - Legal employer name on the Employment Details tab

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

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

to enter it before the new record is saved.

To enter a new employee using the Maintain Employees template:

1. Display the Summary window of the Maintaining Employees form.

2. Choose the New icon in the toolbar or right-click on People By Name in the Data Organizer and choose New from the right mouse menu.

3. Select New Employee and choose OK.

   The Personal tab is displayed for you to start entering information about the employee.

4. Set your effective date to the date when you want the assignment to begin, such as the hire date You can enter a date in the Date field next to the timeline bar and choose Go.

5. Enter personal information for the employee. You must enter:

   - name
   - type
   - gender
   - employee number and hire date
   - date of birth (for assignment to a payroll)
   - BSN/SOFI number (Dutch users only)
   - Mother's maiden name, tax identification number, and social security code (Hungarian users only)
   - NIF number (Spanish users only)
   - Marital status, nationality, and legal-employer name (Polish users only)
   - Family name and nationality (UAE users only)

   All other personal information is optional.

6. Choose the Communication tab if you want to enter contact information, such as addresses and phone numbers.

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

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

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

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

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

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

   If a person already exists on your application with the same national identifier, or with the same surname and a first name and date of birth that is either the same or not entered, then a list of values is displayed that shows all the people who share the details. See Multiple Person Records, page 4-7

Entering Employment Information

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

To update employee information:

1. In the Summary window, use the Data Organizer to select the employee and choose Show Details.

2. Set your effective date to the date the information should change.

3. Choose the Assignment tab. If the employee has multiple assignments you can select a different assignment from the drop-down list.

4. Select the organization to which you want to assign the employee. By default, the employee has an assignment either to the Business Group, or to the organization to which he or she was an applicant.

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

6. Select a grade for information or to use grade rates or grade scales to determine the appropriate compensation levels for the employee.

7. If a location is defined for the Business Group or other organization, it appears as a default. Change this, if required.

8. Check the Manager check box if the assignment is at manager level.

9. Enter an assignment number to uniquely identify the assignment. By default, this number is the same as the employee number, for the employee's first assignment.

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

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

11. Select the employment category, for example part-time or full time.

12. Select the name and employee number of the employee's personal supervisor.

13. Choose the Compensation tab to enter a payroll, salary basis, or salary. The salary basis is the duration for which salary is quoted, such as per month or per year.

14. Choose the Schedule tab to enter information about normal working hours or probation period for the assignment.

15. Choose the Military tab to enter information about the military service the employee performed.

16. Choose the Civil tab to enter the civil defense information for employees.

17. Choose Correction or Update. Remember to choose Correction if you are correcting information that was created by default.

18. Save your work.

Reporting on the Workforce

The Workforce Headcount Report Set

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

The Workforce Count Reports

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

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

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

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

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

Management Guide

The Head Count Detail Report

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

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

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

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

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

Setting Up the Employment Certification Report

Before you can create an Employment Certification for a terminated employee, you must complete the following setup steps.

1. Set up Web ADI to create your data source and report template layout. You upload and link the data source and template to create the report format that you want. Once you have created the report format to meet your requirements, you can use it whenever you need to create an Employment Certification.

    > **Note:** Once you have set up the Web ADI to meet your requirements, you can use it whenever you need to run the Employment Certification Report. You do not need to repeat this step each time you want to run the report.

    See: Setting Up Web ADI for the Employment Certification Report, page 4-43

2. Run the Employment Certification Report Generator.

    See: Running the Employment Certification Report Generator, page 4-45

3. Run the Employment Certification Report using the Hungarian Web ADI Reports menu attached to your responsibility. See: Running the Employment Certification Report, page 4-45

Setting Up Web ADI for the Employment Certification Report

You must complete the following steps to set up Web ADI, prior to running the Employment Certification Report. You must use the Hungarian Web ADI Reports menu attached to your responsibility to run the Employment Certification Report. You can now perform the following steps using this menu.

1. Create a data source.

2. Create a report layout template.

3. Upload the document.

4. Link the documents.

To create a data source:

1. Select Create Document on the Hungarian Web ADI Reports menu.

2. In the Viewer list, select Word 2000 and select Reporting.

3. In the Integrator list, select Employment Certification Report Generator.

4. In the Layout list, select Employment Certification Report.

5. In the Content list, select Employment Certification Content.

6. In the Generator Request ID, select the HU Employment Certification Report Generator ID.

7. In the Mapping list, select Employment Certification Mapping.

8. Review the information selected in the previous steps. Click Create Document.

9. Select Document to download the document to provide the data source.

10. Save the document to a temporary directory.

To create a report layout template:

1. Open Microsoft Word.

2. Use the previously downloaded data source to create the report layout template. Use the Microsoft Word Mail Merge facility to create the format you want.

3. Select the required fields using the Mail Merge toolbar to include in the report layout template.

4. Save the report layout template to a temporary directory.

To upload the document:

1. Upload the report template Word document to the database.

2. Use the HR ADI Document Upload page.

3. Choose Upload New Document on the Document Manager page.

4. Browse to select the data source.

5. Select the category as Termination.

To link the documents:

1. Select Manage Document Links.

2. Select Integrator as HU Employment Certification - click Go.

3. Click the Link icon next to the layout you want to link to your report template. A list of documents that have been uploaded to the database appears (you can restrict the list of documents by using the Search feature).

4. Select the template.

Running the Employment Certification Report Generator

You run the Employment Certification Report Generator as part of the process for creating the Employment Certification for terminated employees.

Run the Employment Certification Generator in the Submit Request window.

To run the Employment Certification Report Generator:

1. Select HU Employment Certification Report Generator in the Name field.

2. If the Parameters window does not open automatically, click in the Parameters field.

3. Enter the start and end dates. The process lists all employees whose actual termination date falls within the specified dates.

4. Optionally, select the Payroll. If you enter the payroll, all employees associated with the payroll are listed.

5. Choose the Submit button.

Running the Employment Certification Report

You run this report to create the Employment Certification for terminated employees. The report lists an employee's personal, job and pension information. This includes :

- Employee name and birth name

- TAJ Code (social security code)

- Place and date of birth
- Hire and termination Dates
- Sickness holiday information
- Lump sum settlement paid and MAV 50% Railway benefit taken (if applicable)
- Private Pension and Voluntary Pension Fund information

Use the Hungarian Web ADI Reports menu to run the report.

To run the Employment Certification Report :

1. Select Create Document Link on the Hungarian Web ADI Reports menu.
2. In the Viewer list, select Word 2000 and select Reporting.
3. In the Integrator list , select HU Employment Certification Report Generator.
4. In the Layout list select Employment Certification Report.
5. In the Content list, select Employment Certification Content.
6. In the Generator Request ID list, select the HU Employment Certification Report Generator process ID.
7. In the Mapping list, select Employment Certification Mapping.
8. Review the information selected in the previous steps. Click Create Document.
9. Select Document to download the Employment Certification Report for terminated employees.

Running the National Defense Report

Employers provide yearly updates to the Draft Agency about the employees permitted to stay or leave the organization during war. The Draft Agency uses this information to approve the list of mandated employees. Run the National Defense Report to generate a list of employees permitted for National Defense.

The National Defense Report displays the name and address of the organization and the Draft Agency that you report. It includes personal information of the employees such as:

- Full Name
- Date of Birth

- Mother's Maiden Name
- Job
- Address

You run this report only for employees who have an active primary assignment and whose mandate code is I (mandated). You can sort the report using the employee's full name.

You run reports from the Submit Request window.

To run the National Defense Report:

1. In the Name field, select National Defense Report.
2. Click in the Parameters field to open the Parameters window.
3. Enter the effective date for which you want to see the report.
4. Enter the name of your organization.
5. Choose the Submit button.

5

Leave and Absence Management

Absence and Accrual Plan Administration

Absence Recording

When you record an absence for an employee using the Absence Detail window or self-service, you must always select an absence type.

Dates and Times

In the Absence Detail window you can conveniently record start and end dates and times of a particular type of absence, as well as the date you receive notification of the absence.

You can enter either projected or actual dates and times. When an actual absence occurs in accordance with projected absence information already entered, you record this by simply clicking a button.

Oracle HRMS records an employee's absences using the employee's payroll calendar, so all employees for whom you record absence information must have a payroll component in their primary assignment.

Some absence types are associated with nonrecurring elements. For these types, the absence is not recorded on the employee's element entries until you enter the absence end date. You cannot change the absence start date so that it is outside the original payroll period--you must delete the absence and create a new one.

> **Note:** For Oracle Payroll users in some localizations: some absence types may be associated with recurring elements. For these types, the absence is recorded in element entries when you enter an actual start date. If you change the start date, the element entry is deleted and a new one created. When you enter or change the end date, the element entry's end date is date effectively updated.

Absence Duration

To calculate the duration of an absence automatically, you can either use the schedule and calendar event features from Oracle HRMS and Common Application Components (CAC), or use a formula that calculates absence duration from the absence start and end dates.

For the first method, the application calculates the duration of the absence based on the worker's schedule and applicable calendar events for their primary assignment. To use these features, set the HR: Schedule Based Absence Calculation profile option to Yes.

You set up availability information such as shifts, schedules, and calendar events, and assign them to various levels in your work structures.

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

For the second method, you write a formula to calculate absence duration from the start and end dates and times entered for an absence. Your localization team may have written a formula that the application uses by default.

See: Writing Formulas To Calculate Absence Duration, *Oracle HRMS FastFormula User Guide*

To control whether the formula automatically recalculates and overwrites the absence duration when a user updates the end date or time, set the user profile option HR: Absence Duration Auto Overwrite to Yes or No. For example, if you do want the duration to be updated when the end date changes, set the profile option to Yes.

When you enter an absence, the application warns you if:

- Duration is greater than the person's net entitlement recorded in a PTO accrual plan
- A decreasing absence balance becomes negative
- Duration is not equal to the value calculated by the absence duration formula. Or, if there is no absence duration formula, duration is not equal to <end date/time - start date/time>. Here, the application calculates the hours using the standard hours recorded for the assignment (or for the business group if the assignment contains no record).

Authorization and Replacement

When recording a projected or actual absence in the Absence Detail window, you can select both the name of an employee authorizing the absence, and of an employee replacing the absent worker.

Absence Cases

If an employee has multiple absences that result from the same cause or are associated in another way that you want to record in Oracle HRMS, you can enter an *absence case* for the employee. For example, if an employee takes two periods of sick leave due to a back injury sustained at work, you can create an absence case, associate the two absences with the case, and link the case to the work incident.

Batch Entry of Accrued Time Taken

For fast batch entry, you can use BEE, instead of the Absence Detail window, to enter sick or vacation time recorded together with other timecard data. You can enter the absence start and end dates, as well as any input values defined for the element. If you leave the date fields blank, they both default to the effective date for a nonrecurring absence element; only the start date defaults for recurring elements. Note that the batch line produces an error if you enter a duration but no end date for a recurring element.

Self-Service Entry of Absences

If you have licensed Oracle SSHR, you can delegate the responsibility for recording absences to individual employees or their line managers. They can enter proposed or actual absences and submit them for approval by their supervisors (or any other approvers in a workflow).

Additionally, using self-service, employees can view their accrued leave details, and managers can view the same for employees in their team.

See: Accrual Balances Maintained by SSHR, *Oracle Self-Service Human Resources Deploy Self-Service Capability Guide*

See: Leave and Absence Management Overview, *Oracle HRMS Compensation and Benefits Management Guide*

See: How do we track and analyze absences and net accrual entitlement: Leave and Absence Management, *Oracle HRMS Compensation and Benefits Management Guide*

See: Leave and Absence Management:Self-Service Functionality, *Oracle Self-Service Human Resources Deploy Self-Service Capability Guide*

Viewing and Reporting on Absence Information

For monitoring and analyzing recorded employee absences, use the:

- View Absence History window, *Oracle HRMS Compensation and Benefits Management Guide*
- List Employees by Absence Type window, *Oracle HRMS Compensation and Benefits Management Guide*
- Absences Report, *Oracle HRMS Compensation and Benefits Management Guide*

For reviewing PTO plan participants' accrued time earned and taken, use the Accruals window, *Oracle HRMS Compensation and Benefits Management Guide*.

Entering Absences

Enter projected or actual absences for an employee using the Absence Detail window.

Because the calendar holding absence records for an employee is the same as that of the employee's payroll, the primary assignments of employees for whom you enter absence information must include an assignment to a payroll. For absence types based on nonrecurring elements, the effective start date of this assignment must be no later than the start of the current payroll period.

To enter absences for an employee:

1. Select the absence type.

   The following information appears:

   - The category of the type.

     Note: For Denmark users only: Enter absence information, as required, in the descriptive flexfields associated with the Absence Categories.

   - The occurrence of the new absence record you are entering. For example, if the employee has already incurred two absences of this type, the occurrence of the new record is 3.

   - The running total of hours or days absent for all the absence types associated with the element. For absence types with increasing balances, this is the number of days or hours absent with an end date on or before your effective date. For any types with decreasing balances, this is the number of hours or days remaining to be taken.

   - The number of days absence recorded for the absence type in the current calendar year.

   - The name of the element that maintains each employee's time taken or time remaining for this absence type.

   Note: For Denmark, Finland, Norway, and Sweden users only: When you create an absence, Oracle HRMS enters the absence element for all the employee's assignments including the primary assignment. You can decide whether each assignment requires the element entry and better track absences for multiple assignments. You can also edit element entries to change the absence details for a specific assignment.

   Note: For Denmark users only: You can override absence details in the Absence Details window by entering the override element in the Element Entries window. Use the same start and end dates for the override element that you use in the Absence Details window.

   See: Making Manual Element Entries, *Oracle HRMS Compensation and Benefits Management Guide*

2. If the Further Information field is visible for your localization, click in the field and

select a context value relevant to your localization.

- **Canada HRMS**: Specify the ROE Reason and ROE Comments. You enter a ROE Reason and ROE Comments for an employee in the Additional Absence Detail Information window. The ROE Reason appears in Block 16 of the ROE. The ROE Comments appear in Block 18 of the ROE.

- **Dutch HRMS**: If you have a category of sickness selected, you can enter a percentage sick by selecting the NL_S context value.

  Select No in the Non SI/Pension Absence field to count an absence as a real social insurance day. Selecting Yes excludes the absence from counting as a real social insurance day.

- **Denmark HRMS:** When you set up employees for Maternity/Adoption leave, you can choose whether or not to accrue holiday during the absence. Use the Absence category descriptive flexfield, to indicate if you use the accrual or not.

- **Hungary HRMS**: If your absence category is Maternity, enter the expected and actual birth dates (and other dates if applicable). If your absence category is Paternity, enter the child's birth date.

- **Mexico HRMS**: Specify your type of disability:

  - General Disease

  - Maternity

  - Risk Incident

  The list of available Disability IDs depend on if you have assigned this disability with a Causal Incident (in the case of Risk Incident disabilities) or no Causal Incident (in the case of Maternity or General Disease disabilities).

- **Norway HRMS**: Click the descriptive flexfield to select the absence type and display the Additional Absence Details window. Enter additional information about the absence type:

Absence Type	Additional Absence Details
Maternity	Partial maternity or paternity leave
Sickness	Doctors certificate
Vacation Absence	Part time unpaid leave

Absence Type	Additional Absence Details
Lay off recording	For lay offs.

- **Russia HRMS**: If your absence category is Maternity Leave, enter the number of children and the new born child's date of birth. If the absence category is Child Rearing Leave, enter the new born child's date of birth. If you select the absence type as Temporary Disability with Sickness Allowance Payment, then select the disability details.

- **Finland HRMS**: If your absence category is Annual Holiday, Layoff, Labour Dispute, or Unauthorized, enter the details of a similar absence taken by the employee. For the absence category Sickness, select the doctor's certificate and contract details. For the Accident category, select the work incident and doctor's certificate details. If your absence category is Family Leave, enter the child and maternity leave details.

- **UK HRMS**: For an OSP or OMP scheme and an absence that is, or contains, a part of a day, select a unit of measure - days or hours - for measuring part days. For a days-based scheme, select Day and select full or half day . For an hours based scheme, select Hours and select the number of hours absent. Select the appropriate value for the start date, end date, or both. If the entire absence is less that a full day, select the value in the Start Date field.

3. Do one of the following:

   - Enter *projected* dates for the absence. You can copy these later to the Actual Date fields by choosing Confirm Projected Dates.

   - Enter *actual* dates and duration as days or hours, according to the units of the balance. If you enter an end date, you must also enter the duration.

     If you want the application to automatically calculate the duration of the absence, then you can either use the schedules and calendar events features from Oracle HRMS and Common Application Components (CAC) or use a formula.

     See: Absence Duration, page 5-2

4. You can also select:

   - Reasons for the absence

   - The employee authorizing the absence

- The employee who replaces the absent employee for the duration of the absence

5. Save your work.

   Note: If this absence is related to another absence (for example, they both result from the same cause), you can associate the absences using the Absence Case page.

6. If you entered an absence type that is eligible under an absence benefit plan, you can choose Enroll Absences to run the Participation Process in Absence mode. This process assesses the person's eligibility for the absence plan. If they are eligible, the process changes the status of the potential absence life event to Processed, and evaluates any standard rates linked to the plan.

   Alternatively, you can run this process for a group of employees from the Submit Requests window. See: Running the Participation Process: Absence, *Oracle HRMS Compensation and Benefits Management Guide*.

   Note: UK Users: The Evidence and Statutory Payments buttons display, if you opened this window from an SSP menu. Please note that these buttons are only relevant to statutory absence types (sickness, maternity, paternity, and adoption).

Viewing Accruals for Plans Associated with the Absence Type

If the employee is enrolled in an accrual plan, the Accruals button is available. Choose this button to display the Associated Accrual Plans window, where you can see information about any accrual plans associated with the type of absence you are entering.

To view accruals:

1. Enter or query an absence in the Absence Detail window, and choose Accruals.

2. If nothing is displayed, run a query in the Associated Accrual Plans window to display the name and category of any accrual plans associated with the absence type.

   For each plan, three net accrual amounts are displayed:

   The **Net Entitlement** figures on the This Absence tab show the effect of the absence displayed in the Absence Detail window.

   - The **Before Absence** figure is the net accrual calculated on the day before the absence.

   - The **After Absence** figure is calculated on the start date of the absence.

In most cases these figures will differ by the length of the absence you are entering. However, if the absence happens to start on the day that this period's PTO entitlement is accrued, the new accrual is also shown in the After figure. Similarly, if any other time (such as time bought or sold) is debited or credited to the accrual on that day, it is reflected in the After figure.

Projected Entitlement on the End of Plan tab shows the projected net accrual at the end of the current accrual plan term, taking account of any future absences already entered on the system. If the employee has future-dated assignment changes that affect his or her accrual entitlement, these are taken account of in the calculation.

> **Note:** This figure does not take account of absences with a *projected* start date. It only includes absences that have an actual start date.

Example

Suppose Ms. Shah is enrolled on a vacation plan that runs each calendar year starting 1 January, with a gross accrual of 2 days per month. Ms. Shah did not carry over any entitlement from last year and has taken no absences before May.

Net entitlement is calculated for the last complete accrual period (that is, the period that ends on or before the start of the absence being entered). This absence is only included in the calculation if it starts on the last day of an accrual period.

The following table shows the accrual amounts (net entitlement) that would display if you enter four absences in the sequence shown.

Absences:	2 - 4 May	31 May - 3 June	12 - 15 Aug	15 June
Before absence	8	5	7	3
After absence	5	3	3	2
End of plan term	21	17	13	12

Setting Up the Hungarian Absence Report

Follow the steps described in this process to ensure that the Hungarian Absence Report contains an accurate summary of your employees' absence information.

1. Set up the absence elements, payroll, and absence type for the holiday types - Base Holiday, Additional Holiday for bringing up children, Other Additional Holiday and Sickness Holiday. See: Setting Up Absence Management, *Oracle HRMS*

Compensation and Benefits Management Guide

2. Create one or more accrual plans for each holiday type. We recommend that you refer to the Hungarian-specific sample accrual formulas provided for recording the different holiday types, such as Base Holiday, Additional Holiday, Other Additional Holiday, and Sickness Holiday. See: Setting Up PTO Accrual Plans, *Oracle HRMS Compensation and Benefits Management Guide* Hungarian Sample Accrual Formulas, page 8-2 and Writing Formulas for Accrual Plans, *Oracle HRMS Compensation and Benefits Management Guide*

3. Map the accrual plans to the holiday types using the user defined table, HU_ABSENCE_REPORT_ACCRUAL_PLAN_MAPPINGS to enable the report to include the appropriate accrual plans. For example, if your enterprise has three accrual plans for Base Holiday, ensure that each plan maps to the Base Holiday holiday type. See: Mapping Accrual Plans to Holiday Types, page 5-10

   > **Warning:** You must ensure that you have mapped all the relevant accrual plans that you want to include in the report, or the output will be incorrect.

4. Ensure that you have a work pattern assigned to an employee. See: Setting Up Shifts and Shift Patterns, page 4-23

5. Run the Hungarian Absence Report Generator for selecting the relevant holiday type entitlement information. You can run the generator process any number of times. See: Running the Hungarian Absence Report Generator, page 5-12

6. Set up Web ADI to create your data source and report template layout. You upload and link the data source and template to create the report format that you want. See: Setting Up Web ADI for the Absence Report, page 5-13

   > **Note:** Once you have set up the Web ADI to meet your requirements, you can use it whenever you need to run the Hungarian Absence Report. You do not need to repeat this step each time you want to run the report.

7. Run the Hungarian Absence Report using the Hungarian Web ADI Reports menu attached to your responsibility. See: Running the Hungarian Absence Report, page 5-14

Mapping Accrual Plans to Holiday Types

You must use accrual plans to calculate your employees' statutory holiday entitlements and any carried over holiday. You must map these accrual plans to one of the reported holiday types before you can run the Hungarian Absence Report successfully.

You can create as many accrual plans as you want for recording the different holiday types. Then you must map them to the holiday type using the user defined table, HU_ABSENCE_REPORT_ACCRUAL_PLAN_MAPPINGS.

If there are no accrual plans mapped on the user defined table, and the user defined table is empty, the report generator fails and generates a message.

If you have at least one accrual plan entered on the user defined table and mapped to a holiday type, you can run the report. However, the report displays zeroes against the holiday types with no accrual plans. If an employee has no accrual plans mapped to the holiday types, a log file records the employees names and numbers so you can check accrual plan enrollments for these employees.

Use the Table Structure window to set up the HU_ABSENCE_REPORT_ACCRUAL_PLAN_MAPPINGS table. Use the Table Values window to map the accrual plans to the holiday types.

To set up the HU_ABSENCE_REPORT_ACCRUAL_PLAN_MAPPINGS table:

1. Query the HU_ABSENCE_REPORT_ACCRUAL_PLAN_MAPPINGS table.
2. In the Rows region, enter the accrual plans you have created, in the Exact field.
3. Save your work.

To map accrual plans to holiday types:

1. Enter your effective date.
2. Query the HU_ABSENCE_REPORT_ACCRUAL_PLAN_MAPPINGS table.
3. In the Column region, select Holiday Type in the Name field.
4. In the Values region, map the accrual plan to the holiday types:
    - Select an accrual plan you created in the Exact field.
    - Enter the following holiday types in the Value field. You must enter a valid holiday type against each accrual plan.
        - For Base Holiday, enter HU1
        - For Additional Holiday for bringing up children, enter HU2
        - For Other Additional Holiday, enter HU3
        - For Sickness Holiday, enter HU4

Warning: You must enter the holiday types exactly as shown above, or the Hungarian Absence report will not run successfully.

5. Repeat the steps 1 to 4 until each accrual plan that you need to report maps to a holiday type.

   Note: If you have multiple accrual plans for a holiday type and want to include these plans in the report, then you must map all the accrual plans to the holiday type. For example, if you created multiple accrual plans for recording Base Holiday, select each plan in the Exact field and enter HU1 in the Value field.

6. Save your work.

Running the Hungarian Absence Report Generator

You run the Absence Report Generator as part of the process for creating the statutory Hungarian Absence Report for employees. This statutory report summarizes the normal and sickness holiday amounts that an employee is entitled to annually.

If you want to report on the absences an employee or all employees have taken, then you must run the core Absences Report from the Submit Request window. See: Running the Absences Report, *Oracle HRMS Compensation and Benefits Management Guide*

Run the Hungarian Absence Report Generator in the Submit Request window.

To run the Hungarian Absence Report Generator:

1. Select HU Absence Report Generator in the Name field.

2. If the Parameters window does not open automatically, click in the Parameters field.

3. Enter the effective date for which you want to see the report. You can run the report on 1st January of the current year or on the employee's hire date.

4. Optionally, select the Payroll, the Assignment Set and the Employee, if you want to restrict the report to the specified values.

5. Choose the Submit button.

What's Next

You can now set up the Web ADI and then run the Hungarian Absence Report using the Hungarian Web ADI Reports menu.

Setting Up Web ADI for the Hungarian Absence Report

You must complete the following steps to set up Web ADI prior to running the Hungarian Absence Report. You must use the Hungarian Web ADI Reports menu to run the Hungarian Absence Report. You can perform the following steps:

1. Create a data source.
2. Create a report layout template.
3. Upload the document.
4. Link the documents.

To create a data source:

1. Select Create Document on the Hungarian Web ADI Reports menu.
2. In the Viewer list, select Word 2000 and select Reporting.
3. In the Integrator list, select Absence Report Generator.
4. In the Layout list, select Absence Report.
5. In the Content list, select Absence Content.
6. In the Generator Request ID, select the HU Absence Report Generator ID.
7. In the Mapping list, select Absence Mapping.
8. Review the information selected in the previous steps. Click Create Document.
9. Select Document to download the document to provide the data source.
10. Save the document to a temporary directory.

To create a report layout template:

1. Open Microsoft Word.
2. Use the previously downloaded data source to create the report layout template. Use the Microsoft Word Mail Merge facility to create the report template.

3. Select the required fields using the Mail Merge toolbar to include in the report layout template.

4. Save the report layout template to a temporary directory.

To upload the document:

1. Upload the report template Word document to the database.

2. Use the HR ADI Document Upload page.

3. Choose Upload New Document on the Document Manager page.

4. Browse to select the data source.

5. Select the category as Absence.

To link the documents:

1. Select Manage Document Links.

2. Select Integrator as HU Absence - click Go

3. Click the Link icon next to the layout you want to link to your report template. A list of documents that have been uploaded to the database appears (you can restrict the list of documents by using the Search feature).

4. Select the template.

Running the Hungarian Absence Report

You run this report to show an employee's annual normal and sickness holiday entitlement.

The report includes the entitlement for the following holiday types:

- Base Holiday

- Additional Holiday for bringing up children

- Other Additional Holiday

- Sickness Holiday

The Hungarian Absence Report reports the accrual value, carryover value, and normal paid holiday eligibility for an employee. You can run the report any time during the leave year.

The carry over expiry date will impact your Absence report results if you run the report after that date. (No carry over information for the current year is reported after the expiry date.) For example, consider an employee who has 5 days carry over from the previous year and the carry over expiry date is set to 30th June. When you run the report with an effective date on or prior to 30th June, the carry over value reported is 5 days. However, when you run the report after 30th June, the carry over value reported is 0 as the carry over expires on 30th June.

Use the Hungarian Web ADI Reports menu to run the report.

To run the Hungarian Absence Report:

1. Select Create Document Link on the Hungarian Web ADI Reports menu.
2. In the Viewer list, select Word 2000 and select Reporting
3. In the Integrator list, select HU Absence Report.
4. In the Layout list, select Absence Report Layout.
5. In the Content list, select Absence Report Content.
6. In the Generator Request ID list, select the HU Absence Report Generator process ID.
7. In the Mapping list, select PER_HU_ABSENCE_REPORT_V Mapping.
8. Review the information selected in the previous steps. Click Create Document.
9. Select Document to download the HU Absence Report for employees.

6

Savings and Retirement

Savings and Retirement Overview

In most countries, deductions for savings and retirement receive favorable tax treatment and special rules apply. You set up these deductions within the appropriate element classification, such as Pre-tax or Voluntary Deductions.

In some localizations, you can use a template to generate all the components you require for your pension or savings schemes, such as elements, balances, and formulas. There are predefined pension extract definitions to assist you to extract the data you may require to send to third parties. You can run these predefined extracts or use them as a model for designing your own.

For Hungarian users:

In Hungary, use Oracle HRMS to set up pension schemes available for your employees. By setting up pension providers as external organizations you collect employee and employer contributions and allocate the money to a particular pension. You can also specify payment to the provider should be made through a third party.

You can set up as many pension schemes as required within the following categories - Private Pension Fund, Voluntary Pension Fund, and Supplementary Health Care Fund. Both employees and employers can contribute either a percentage of pay or a flat rate amount to each of these funds, depending on the scheme rules. Employees and employers can also choose to make additional voluntary contributions, up to a maximum of 10% towards these funds. You can override the default contribution values at the assignment level.

For Irish users:

Use Oracle HRMS to set up pension schemes available for your employees. You can set up pension providers as external organizations to collect employee and employer contributions and allocate the money to a particular pension. You can set up as many pension schemes as required within the following categories – Retirement Benefit Scheme, Retirement Benefit Scheme Additional Voluntary Contribution, Personal Retirement Savings Account, Personal Retirement Savings Account Additional

Voluntary Contribution, and Retirement Annuity Contract. Both employees and employers can contribute either a percentage of pay or a flat rate amount to these funds, depending on the scheme rules.

For UK users:

In the UK education sector, you can use predefined system extract definitions to create the reports required by the Teachers Pension Agency in England and Wales. Similarly, in the local government sector, you can use predefined system extract definitions to create files for transfer to Lynx Heywood pension administration systems (Class CPX and AXIS).

For US Users:

In the US you can generate all the elements, balances, and formulas you require to process deferred compensation plans and tax-sheltered annuities. For each plan you specify whether employees can make after-tax contributions as well as pre-tax deductions. You also specify whether employees can make Catch-up contributions (to continue contributing when they have reached the base plan contribution limit).

You can also set up State Retirement System plans, by initiating deductions in the categories "Defined Benefit Plan" or "Defined Contribution Plan".

You can use predefined system extract definitions to report on retirement plans and contributions to deferred compensation plans and tax-sheltered annuities (401K, 403b and 457 plans). You can also make copies of the seeded pension extracts and modify them to add your own data elements and layout as required by each of the pension providers.

For Netherlands Users:

In the Netherlands use Oracle HRMS to set up the pension and savings schemes available to your employees. For employees in the government and education sectors, you can set up pension schemes offered by ABP (Algemeen Burgerlijk Pensioenfonds).

A pension provider is an organization that collects contributions provided by employees to their employer and then allocates the money to a particular pension or savings scheme. In Oracle HRMS you can assign as many pension types as you require to each pension provider, then select these for your employer organizations. The pension type defines how contributions are calculated, and this information is datetracked.

Oracle HRMS supplies a predefined report to extract the data required for the monthly notification on ABP pensions. You could also use or adapt predefined global pension extracts to report on other pensions and savings data, as required. By default the NL HRMS Reports & Process request set does not include the global extract processes, but you can add them.

Pensions

Pensions Overview

In Oracle HRMS, you can set up pension schemes within the following categories:

- Private Pension Fund
- Voluntary Pension Fund
- Supplementary Health Care Fund

Description of Pension Categories

This section briefly describes each of the categories listed above.

Private Pension Fund

Employees contribute towards a Private Pension Fund and may be eligible for tax benefits. Employees and employers contribute either a percentage of pay or a flat rate amount to this fund.

Voluntary Pension Fund

Employees can be member of a Voluntary Pension Fund in addition to a Private Pension Fund. Employees and employers contribute either a percentage of pay or a flat rate amount to this fund.

Supplementary Health Care Fund

Employee can also be member of the supplementary health care fund. Employees and employers contribute towards the fund either as a percentage or a fixed amount.

Pension Providers, Types, and Schemes

In Oracle HRMS, you can set up as many *pension types* as you require, within the categories described above. For each pension type, you can enter default values for contribution rates.

You can also set up *pension providers*, which are external organizations that collect the contributions provided by employees and allocate the money to a particular pension. For each provider, you specify a name, location, and the pension types it offers. You can specify that the payment to the provider should be made through a third party. This classifies the organization as a Payee Organization as well as a Pension Provider.

You set up specific *pension schemes* within a pension type, detailing all the information required for reporting. You can specify if the employer contributes to the scheme.

Contributions

Contributions are either a fixed rate or a percentage of pay, depending on the scheme rules. These can be overridden at the assignment level. Employees and employers can choose to make voluntary contributions to the Private or Voluntary Pension Fund as Employee and Employer Supplements. These supplements can have a maximum contribution of 10%.

Legal Records

Employers record the information such as employees' names, reason for joining, employer reference number, contribution amounts for employer and employee, and the date contributions start, change, or cease. This information appears on the Employment Certificate Report given to the employee on termination.

Setting Up Pension Schemes

Follow these steps if you want to set up pension schemes, enroll employees in the relevant schemes, and process contributions in the payroll run. Use the Pension pages to create pension schemes and types.

1. **UK only:** If you are setting up an occupational pension scheme, ensure you have recorded the employer's contracted out number (ECON) in the Tax Details References window for the business group. See: Business Groups: Entering Tax Details, *Oracle HRMS Enterprise and Workforce Management Guide*

2. Create a location for each pension provider. See: Setting Up Locations, *Oracle HRMS Enterprise and Workforce Management Guide*

3. Enter your pension types. Choose the Pensions option in the Navigator then click on the Pension Types tab.

4. Enter your pension providers and assign pension types to the providers. Choose the Pensions option in the Navigator then click on the Pension Providers tab.

    Important: Use the Pension pages - *not* the Organization window - to create pension providers, and assign pension types to each provider. The pages provide the required validation.

5. Generate the payroll objects required for your pension schemes. Choose the Pensions option in the Navigator then click on the Schemes tab.

6. Link the generated elements. The names of all generated elements begin with the scheme prefix you entered on the Schemes tab.

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

7. Review the generated formula(s). Formula names begin with the scheme prefix you entered on the Schemes tab. You can configure the formula(s) and the generated formula(s) result rules, if required.

8. If you have set up the pension provider as a Payee organization, create a third party organizational payment method, enter it as a valid payment method against your payrolls, and select it as a personal payment method for your employees. In the Personal Payment Method window, you select the pension provider as the Payee for this payment method. See: Entering Payment Methods for an Employee Assignment, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

9. If you are using element link criteria to establish eligibility for pension schemes, your setup is complete and you are ready to enroll employees using BEE or the Element Entries window.

   UK only: If you are using eligibility profiles to establish eligibility, you must set up a pension plan, and related items, following the usual procedures for Standard and Advanced Benefits.

10. **Ireland only:**Before you use your Pension elements and run the Payroll, ensure you specify the balance feeds for the IE Pensionable Pay seeded balance.

Enrolling Employees in Pension Schemes

You enroll employees in pension schemes by entering the appropriate elements as element entries.

Use the Element Entries window (or Batch Element Entry).

To enroll a person in pension scheme:

1. Set your effective date to the day when the person's enrollment in the scheme should begin.

2. In the Element Name field, select the element for this pension scheme. Its name will take the form <base name> Employee Pension Information.

3. Choose the Entry Values button to open the Entry Values window.

4. Enter the following:

   - For a percentage-based scheme, this value defaults from the percentage entered while creating the pension type. The employee pays this percentage. You can override the default.

- For a flat amount scheme, this value defaults from the value entered while creating the pension type. The employee pays this amount. You can override the default.

5. Save your work.

To enable employer contributions to a scheme:

1. Set your effective date to the day when the person's enrollment in the scheme should begin.

2. In the Element Name field, select the employer contribution element for this pension scheme. Its name will take the form <base name> Employer Pension Contribution.

3. Enter the following:

   - For a percentage-based scheme, this value defaults from the percentage entered while creating the pension type. The employer pays this percentage. You can override the default.

   - For a flat amount scheme, this value defaults from the value entered while creating the pension type. The employee pays this amount. You can override the default.

4. Save your work.

To enable employee and employer supplements:

1. Set your effective date to the day when the person's enrollment in the scheme should begin.

2. In the Element Name field, select the employee's or employer's supplement element. Its name will take the form <base name> Employee Supplement or <base name>Employer Supplement.

3. Do one of the following

   - For a percentage-based scheme, this value defaults from the percentage entered while creating the pension element. The employer or employee pay this percentage as a supplement.

   - For a flat amount scheme, this value defaults from the value entered while creating the pension element. The employer or employee pay this flat amount scheme as a supplement.

4. Save your work

7

Talent Management

Competencies

Competencies Overview

In Oracle HRMS, a competency is any measurable behavior or ability that is required by the enterprise and that a worker demonstrates in the work context. For example, a competency can be:

- Knowledge (such as knowledge of consumer-protection or taxation laws)
- A skill (such as negotiation or critical thinking)
- An attitude (such as tenacity or commitment)
- An attribute (such as absence of color blindness or perfect pitch)

Competency definitions are the basis of many talent-management activities. In particular, you can define:

- A *competency profile* for each worker showing the worker's level of proficiency in various competencies

  See: Competency Profiles, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

- The *competency requirements* of a business group, organization, job, or position to enable you to identify suitable candidates for vacancies and assess workers against these requirements.

  See: Competency Requirements, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

Global and Local Competencies

You can define competencies that are available to a particular business group. Alternatively, you can create global competencies, which are available throughout the enterprise, provided that your system administrator has identified a global competence key flexfield structure on the HR:Global Competence Flex Structure profile option.

Global competencies are most useful if your enterprise operates in multiple countries but you want to use the same competency definitions in all legislations.

Competency Measurement

The HRMS competency functions enable you to set performance expectations for your workers that are consistent and objective.

During appraisal activities, HRMS enables you to assess the degree to which a worker possesses a competency. For example, for the negotiation skills competency, a worker's proficiency level could be 3 on a scale of 1 through 5, where 5 indicates the greatest expertise.

See: Competency Measurement, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

Defining Competencies

You can define competencies individually in the Competencies window. Alternatively, you can upload multiple global competencies from third-party suppliers using the Oracle HRMS Web ADI interface. This approach may be useful to enterprises implementing competency support for the first time.

See: Defining Competencies, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide* and Uploading Third-Party Competency Information, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

Unit Standard Competencies

Some legislations identify a special type of competency known as a *unit standard competency*. (A Unit Standard is typically a nationally registered document that describes performance standards for a competency. Industry representatives define and maintain the Unit Standard.)

A formal qualification results from the achievement of one or more unit standard competencies. Such qualifications are registered with a national Qualifications Framework, which identifies, for example, the number of credits attached to the qualification and to its constituent competencies, the awarding body, and the field of learning to which the qualification belongs.

Competency Types

If your enterprise defines many competencies, you may find it helpful to classify them by type. For example, you can define a competency type of Language Skills to include any language competency that your enterprise values (such as written Spanish, spoken Spanish, written Japanese, spoken Japanese, and so on). You can then retrieve competency definitions by type.

See: Competency Types, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

Setting Up Language Skills

Follow these steps to set up the rating scale and competency, to enter language skills held by your employees and contingent workers, and to apply the values defined to employees and contingent workers.

1. Create the rating scale to measure the language skill. For example, create a rating scale entitled "Language Scale", whose type is Proficiency, with levels of 1- Basic (A) - oral, 2 - Basic (B) - written, up to the highest level of proficiency, 9 - Advanced (C) - oral and written, See: Defining Rating Scales, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

2. Create the competency for each language skill you want to record, and attach the rating scale to the competency. For example, create a competency if you want to record "German" language skill for employees. Attach the rating scale to record the level of proficiency. See: Defining Competencies, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

3. Assign the competency to an employee using the Competency Profile window. For example, select the employee for whom you want to record the language skill and level of proficiency. See: Creating a Competency Profile, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

   Note: The user can use the Certification Date field to record their Certification Completion Year information.

4. To enable you to record Certification Numbers against each competency, define a free-text segment Certification Number using the Additional Competence Element Details flexfield.

   See: Defining Descriptive Flexfields, *Oracle Applications Flexfields Guide*

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 record your workers' qualifications when they join the enterprise and on completion of subsequent training courses. Oracle HRMS also updates a worker's qualification record automatically when:

- A worker has achieved all unit standard competencies that contribute to a Qualifications Framework qualification.

- The worker's manager has approved the award of the qualification.

> **Note:** If the person for whom you are entering qualifications has person records that are linked together in more than one business group, then you will be able to see, but not update, any qualifications entered for them in other business groups.

Use the Qualifications window, accessed from the People window, to enter and update qualifications.

To enter qualifications:

1. Select the type of qualification this person possesses and the title of the qualification.

   If you need to set up additional qualification types, see: Defining Qualification Types, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

2. Select the status of the qualification, for example, whether training is ongoing or completed.

3. Enter the grade at which the person holds the qualification, if appropriate.

4. Select the establishment at which the person gained the qualification.

   If you need to set up additional establishments, see: Defining Schools and Colleges, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

5. Optionally, enter the awarding body that bestowed the qualification. If you recorded this value in the qualification types record, it appears here automatically.

6. Enter the dates between which the qualification is gained. You must enter a Start date but you can leave the End date blank (if the qualification is still incomplete).

7. Optionally, enter the date the qualification was awarded.

8. Enter the projected completion date the qualification is awarded, if relevant.

9. Enter the ranked position within the class, if relevant.

10. Optionally, enter any comments, for example, what percentage of the award was course work or examination.

To enter Further Qualification Information

1. Click in the Further Information field to open the Further Qualification Information window.

   2. Select the institute the person qualified from, for example industrial school or technical school.

   3. Enter the highest qualification the person earned, for example Postgraduate qualification.

11. Save your work.

12. You can now:

    - Enter tuition fees for reimbursement, page 7-7
    - Enter training details, page 7-7
    - Enter license details, page 7-8
    - Enter professional membership details, page 7-8
    - View Qualifications Framework details, page 7-8
    - Enter subject details, page 7-8

To enter tuition fees for reimbursement:

1. In the Tuition Details tabbed region, enter the amount and select the currency to reimburse the person.

2. Select the method of tuition, for example, day release.

3. Enter the method of reimbursement, for example, bank transfer to be paid when qualification is awarded.

4. Save your changes.

To enter training details:

1. Choose the Training Details tabbed region.

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.

4. Enter the units in which the training is measured, for example, days.

To enter license details:

1. Choose the License Details tabbed region.
2. Enter the license number, for example, a driving license number.
3. Enter any restrictions, for example, license not valid in certain states.
4. Enter the license expiry date.

To enter professional membership details:

1. Choose the Professional Membership tabbed region.
2. Select the professional body to whom the person belongs. The list of available organizations is limited to those given the classification of Professional Body.
3. Enter the membership number and select the membership category for the person.

   The membership categories available depend on the user defined table that has been selected to be used to calculate subscription rates for the professional body. This is used to calculate the amount that should be deducted 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:

1. Choose the Qualifications Framework Details tabbed region.
2. If the selected qualification is a Qualifications Framework qualification, its details are displayed. For example, you can see its ID, the field of learning with which it is associated, and the number of credits earned. You cannot update this information.

   If the selected qualification is not a Qualifications Framework qualification, the fields in this region are blank.

To enter subject details:

1. Enter the first subject the qualification comprises.
2. Select the status at which the subject is awarded, for example, whether training in the subject is ongoing.
3. Enter the dates between which the subject is studied. You must enter a Start date but you can leave the End date blank (if the subject is still incomplete).

4. If the subject forms a major part of the qualification, check the Major box.
5. Optionally, enter the grade at which the subject is studied.
6. Continue to enter further subjects until you have entered them all for the qualification, then save your changes.

8

FastFormula

Legislative Formulas

Sample Accrual Formulas for Absence (Hungary)

This topic provides four sample accrual formulas for calculating the employee's holiday entitlements as required for the Hungarian Absence Report. You can record and report the entitlement amounts for the following holiday types:

- Base Holiday
- Additional holiday for bringing up children
- Other Additional Holiday
- Sickness Holiday

The following table lists the sample accrual formulas that you can use, as supplied, or use them as models to create your own, incorporating the rules required for your accrual plans.

Hungarian Sample Formulas

Holiday Type	Formula	Description
Base Holiday	HU_BASE_HOLIDAY MULTIPLIER	This formula calculates the accrual rate for base holiday in a specific period. See: Sample Formula for Base Holiday, page 8-3
Additional Holiday for bringing up children	HU_ADD_CHILD_CARE_HOLIDAY_MULTIPLIER	This formula calculates the Additional Holiday for bringing up children. See: Sample Formula for Additional Holiday, page 8-12
Other Additional Holiday	HU_OTHER_ADD_HOLIDAY_MULTIPLIER	This formula calculates the Other Additional Holiday such as Youthful holiday and Additional Health Holiday. See: Sample Formula for Other Additional Holiday, page 8-24

Holiday Type	Formula	Description
Sickness Holiday	HU_SICKNESS_HOLIDAY_ MULTIPLIER	This formula calculates the Sickness Holiday. See: Sample Formula for Sickness Holiday, page 8-31

You can use the Carry Over Formula, HU_ABS_CARRYOVER_FORMULA to calculate any carry over for the above holiday entitlements. See: Sample Formula for Carry Over Absence, page 8-39

Sample Formula for Base Holiday (Hungary)

Oracle HRMS provides the HU_BASE_HOLIDAY MULTIPLIER sample formula to calculate the accrual rate for Base Holiday in a specific period as required for the Hungarian Absence Report. The sample formula is for an accrual plan with the following rules:

- Entitlement for Base Holiday depends on the employee's age.
- Entitlement depends on the number of days worked in a week and takes in to account any work pattern changes within the leave year.
- Base holiday for new hires begins on their hire date.
- The formula calculates proportionately if the employee's birthday falls within the current year.

The following table lists the Base Holiday entitlements for employees based on their age and a five day work pattern.

Base Holiday entitlements

Employee's Age	Base Holiday entitlement
Until age 24	20 working days holiday
From age 25	21 working days holiday
From age 28	22 working days holiday
From age 31	23 working days holiday

Employee's Age	Base Holiday entitlement
From age 33	24 working days holiday
From age 35	25 working days holiday
From age 37	26 working days holiday
From age 39	27 working days holiday
From age 41	28 working days holiday
From age 43	29 working days holiday
From age 45	30 working days holiday

The following formula HU_BASE_HOLIDAY MULTIPLIER considers the employee's age and a five-day work pattern for employees to calculate the Base Holiday entitlement. The HU_BASE_HOLIDAY MULTIPLIER formula repeatedly calls another formula in a loop, HU_BASE_HOLIDAY_PERIOD_ACCRUAL to calculate the accrual for each period. You use the above formulas along with the carry over formula HU_ABS_HOLIDAY_CARRY_OVER. See: Sample Formula for Carry Over Absence, page 8-39

The top-level formula HU_BASE_HOLIDAY_MULTIPLIER and the looping formula HU_BASE_HOLIDAY_PERIOD_ACCRUAL are given below.

```
/* ---------------------------------------------------------------------
  NAME : HU_BASE_HOLIDAY_MULTIPLER
  This formula calculates the total accrued base holiday for a
  specific period
  -------------------------------------------------------------------*/

DEFAULT FOR ACP_INELIGIBILITY_PERIOD_TYPE IS 'CM'
DEFAULT FOR ACP_INELIGIBILITY_PERIOD_LENGTH IS 0
DEFAULT FOR ACP_CONTINUOUS_SERVICE_DATE IS '4712/12/31 00:00:00' (date)
DEFAULT FOR ACP_ENROLLMENT_END_DATE IS '4712/12/31 00:00:00' (date)
DEFAULT FOR ACP_TERMINATION_DATE IS '4712/12/31 00:00:00' (date)
DEFAULT FOR ACP_ENROLLMENT_START_DATE IS '4712/12/31 00:00:00' (date)
DEFAULT FOR ACP_SERVICE_START_DATE IS '4712/12/31 00:00:00' (date)

INPUTS ARE Calculation_Date (date)

Accruing_Frequency  = ' '
Accruing_Multiplier = 0

E = SET_DATE('CALCULATION_DATE',Calculation_Date)

/* ---------------------------------------------------------------------
   Set the payroll period, accruing frequency, and accruing multiplier
   based on the payroll.
   ------------------------------------------------------------------*/
Payroll_period = HU_PAYROLL_PERIODS(Calculation_Date
                                   ,Accruing_Frequency
                                  ,Accruing_Multiplier)

E = SET_TEXT('ACCRUING_FREQUENCY', Accruing_Frequency)
E = SET_NUMBER('ACCRUING_MULTIPLIER', Accruing_Multiplier)

Beginning_Of_Calculation_Year =
                      TO_DATE('0101'||TO_CHAR(Calculation_Date,'YYYY')
                              ,'DDMMYYYY')

IF Beginning_Of_Calculation_Year > Calculation_Date THEN
(
  Beginning_of_Calculation_Year =
                        ADD_MONTHS(Beginning_Of_Calculation_Year, -12)
)

/* ---------------------------------------------------------------------
  Set the start and end dates of the first accrual period in the
  calculation year
  -------------------------------------------------------------------*/

E = SET_DATE('BEGINNING_OF_CALCULATION_YEAR'
                                     , Beginning_Of_Calculation_Year)

E = GET_PERIOD_DATES(Beginning_of_Calculation_Year,
                     Accruing_Frequency,
                     Beginning_Of_Calculation_Year,
                     Accruing_Multiplier)

First_Period_SD = GET_DATE('PERIOD_START_DATE')
First_Period_ED = GET_DATE('PERIOD_END_DATE')

/* ---------------------------------------------------------------------
   Set the Calculation_Date to the Termination Date if not null
   ------------------------------------------------------------------*/

IF NOT (ACP_TERMINATION_DATE WAS DEFAULTED) OR
        NOT (ACP_ENROLLMENT_END_DATE WAS DEFAULTED) THEN
 (
  Early_End_Date = least(ACP_TERMINATION_DATE, ACP_ENROLLMENT_END_DATE)
```

```
  IF (Early_End_Date < Calculation_Date) THEN
   (
    Calculation_Date = Early_End_Date
   )
 )

/* ----------------------------------------------------------------
   Get the last whole period prior to the Calculation_Date and ensure
   that it is within the year (if the Calculation_Date is the end of
   a period then use that period)
   ----------------------------------------------------------------*/

E = GET_PERIOD_DATES(Calculation_Date
                    ,Accruing_Frequency
                    ,Beginning_of_Calculation_Year
                    ,Accruing_Multiplier)

Calculation_Period_SD  = GET_DATE('PERIOD_START_DATE')
Calculation_Period_ED  = GET_DATE('PERIOD_END_DATE')

/* ----------------------------------------------------------------
   Set the Continuous Service Global Variable, whilst also
   ensuring that the continuous service date is before the Calculation
   Period
  -----------------------------------------------------------------*/

IF (ACP_CONTINUOUS_SERVICE_DATE WAS DEFAULTED) THEN
    (
    E = SET_DATE('CONTINUOUS_SERVICE_DATE', ACP_SERVICE_START_DATE)
    )
ELSE IF(ACP_CONTINUOUS_SERVICE_DATE > Calculation_Period_SD) THEN
   (
    E = SET_DATE('CONTINUOUS_SERVICE_DATE'
                                        , ACP_CONTINUOUS_SERVICE_DATE)
   )
ELSE
   (
    E = SET_DATE('CONTINUOUS_SERVICE_DATE'
                                        , ACP_CONTINUOUS_SERVICE_DATE)
   )

Continuous_Service_Date = GET_DATE('CONTINUOUS_SERVICE_DATE')

First_Eligible_To_Accrue_Date  = Continuous_Service_Date

/*-----------------------------------------------------------------
   Determine the date on which accrued PTO may first be registered,
   i.e. the date on which the Ineligibility Period expires
   ----------------------------------------------------------------*/

Accrual_Ineligibility_Expired_Date = First_Eligible_To_Accrue_Date

IF (ACP_INELIGIBILITY_PERIOD_LENGTH > 0) THEN
   (
   IF ACP_INELIGIBILITY_PERIOD_TYPE = 'BM' THEN
      (
      Accrual_Ineligibility_Expired_Date =
                         ADD_MONTHS(Continuous_Service_Date,
                                    ACP_INELIGIBILITY_PERIOD_LENGTH*2)
      )
   ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'F' THEN
      (
      Accrual_Ineligibility_Expired_Date =
                          ADD_DAYS(Continuous_Service_Date,
                                   ACP_INELIGIBILITY_PERIOD_LENGTH*14)
      )
```

```
ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'CM' THEN
      (
      Accrual_Ineligibility_Expired_Date =
                           ADD_MONTHS(Continuous_Service_Date,
                                      ACP_INELIGIBILITY_PERIOD_LENGTH)
      )
   ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'LM' THEN
      (
      Accrual_Ineligibility_Expired_Date =
                          ADD_DAYS(Continuous_Service_Date,
                                   ACP_INELIGIBILITY_PERIOD_LENGTH*28)
      )
   ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'Q' THEN
      (
      Accrual_Ineligibility_Expired_Date =
                         ADD_MONTHS(Continuous_Service_Date,
                                    ACP_INELIGIBILITY_PERIOD_LENGTH*3)
      )
   ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'SM' THEN
      (
      Accrual_Ineligibility_Expired_Date =
                         ADD_MONTHS(Continuous_Service_Date,
                                    ACP_INELIGIBILITY_PERIOD_LENGTH/2)
      )
   ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'SY' THEN
      (
      Accrual_Ineligibility_Expired_Date =
                         ADD_MONTHS(Continuous_Service_Date,
                                    ACP_INELIGIBILITY_PERIOD_LENGTH*6)
      )
   ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'W' THEN
      (
      Accrual_Ineligibility_Expired_Date =
                           ADD_DAYS(Continuous_Service_Date,
                                    ACP_INELIGIBILITY_PERIOD_LENGTH*7)
      )
   ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'Y' THEN
      (
      Accrual_Ineligibility_Expired_Date =
                        ADD_MONTHS(Continuous_Service_Date,
                                   ACP_INELIGIBILITY_PERIOD_LENGTH*12)
      )

   IF Accrual_Ineligibility_Expired_Date > First_Eligible_To_Accrue_Date
   AND Calculation_Date < Accrual_Ineligibility_Expired_Date THEN
    (
     First_Eligible_To_Accrue_Date = Accrual_Ineligibility_Expired_Date
    )
   )

/* ---------------------------------------------------------------------
   Get the first full period following the
   First_Eligible_To_Accrue_Date
   (if it falls on the beginning of the period then use that period)
---------------------------------------------------------------------*/

IF First_Eligible_To_Accrue_Date > Beginning_Of_Calculation_Year THEN
(
  E = GET_PERIOD_DATES(First_Eligible_To_Accrue_Date
                      ,Accruing_Frequency
                      ,Beginning_Of_Calculation_Year
                      ,Accruing_Multiplier)

  First_Eligible_To_Accrue_Period_SD  = GET_DATE('PERIOD_START_DATE')
  First_Eligible_To_Accrue_Period_ED  = GET_DATE('PERIOD_END_DATE')
```

```
  IF (First_Eligible_To_Accrue_Period_SD > Calculation_Period_ED) THEN
     (
       Total_Accrued_PTO = 0
       E = PUT_MESSAGE('HR_52793_PTO_FML_ASG_INELIG')
    )
)
ELSE
(
  First_Eligible_To_Accrue_Period_SD  = First_Period_SD
  First_Eligible_To_Accrue_Period_ED  = First_Period_ED
)
/* -----------------------------------------------------------------
   Determine the date on which PTO actually starts accruing based on
   Hire Date, Continuous Service Date and Plan Enrollment Start Date.
    -----------------------------------------------------------------
*/

IF Continuous_Service_date = ACP_CONTINUOUS_SERVICE_DATE THEN
(
  Actual_Accrual_Start_Date = Continuous_service_Date
)
ELSE
(
  Actual_Accrual_Start_Date = GREATEST(Continuous_Service_Date,
                                       ACP_ENROLLMENT_START_DATE,
                                       First_Period_SD)
)
/* -----------------------------------------------------------------
   Determine the actual start date and end date of the first accrual
   period to use in the accrual calculation. Get the start date and
   end dates of the accrual period in which the Actual Accrual
   Start Date falls.
   ----------------------------------------------------------------*/
IF (Actual_Accrual_Start_Date > First_Period_SD AND
    Actual_Accrual_Start_Date > First_Eligible_To_Accrue_Period_SD) THEN
    (
     E = GET_PERIOD_DATES(Actual_Accrual_Start_Date,
                          Accruing_Frequency,
                          Beginning_Of_Calculation_Year,
                          Accruing_Multiplier)

     Accrual_Start_Period_SD = GET_DATE('PERIOD_START_DATE')
     Accrual_Start_Period_ED = GET_DATE('PERIOD_END_DATE')


/* -----------------------------------------------------------------
   If the Actual Accrual Period is after the Calculation Period then
   end the processing.
   ----------------------------------------------------------------*/
IF (Accrual_Start_Period_SD > Calculation_Period_ED) THEN
            (
            Total_Accrued_PTO = 0
            E = PUT_MESSAGE('HR_52797_PTO_FML_ACT_ACCRUAL')
            )
     )

ELSE IF (First_Eligible_To_Accrue_Period_SD > First_Period_SD) THEN
     (
          Accrual_Start_Period_SD = First_Eligible_To_Accrue_Period_SD
          Accrual_Start_Period_ED = First_Eligible_To_Accrue_Period_ED
     )
ELSE
     (
          Accrual_Start_Period_SD = First_Period_SD
          Accrual_Start_Period_ED = First_Period_ED
    )
```

```
 /* -----------------------------------------------------------------
    Now set up the information that will be used in when looping
    through the periods and call the accrual sub formula.
    ---------------------------------------------------------------*/
IF Calculation_Period_ED >= Accrual_Start_Period_ED THEN
(
    E = set_date('PERIOD_SD',Accrual_Start_Period_SD)
    E = set_date('PERIOD_ED',Accrual_Start_Period_ED)
    E = set_date('LAST_PERIOD_SD',Calculation_Period_SD)
    E = set_date('LAST_PERIOD_ED',Calculation_Period_ED)
    E = set_number('TOTAL_ACCRUED_PTO',0)

    E = LOOP_CONTROL('HU_BASE_HOLIDAY_PERIOD_ACCRUAL')

    Total_Accrued_PTO = ROUND(get_number('TOTAL_ACCRUED_PTO'))
)

IF Accrual_Start_Period_SD <= Calculation_Period_SD THEN
(
    Accrual_end_date = Calculation_Period_ED
)

Effective_Start_Date = Accrual_Start_Period_SD
Effective_End_Date   = Calculation_Period_ED

IF Effective_Start_Date >= Effective_End_Date THEN
(
    Effective_Start_Date = Effective_End_Date
)

RETURN Total_Accrued_PTO
      ,Effective_start_date
      ,Effective_end_date
      ,Accrual_end_date
```

Looping Formula

```
/* ---------------------------------------------------------------
  NAME : HU_BASE_HOLIDAY_PERIOD_ACCRUAL
  This formula calculates the number of base holiday accrued for a
  particular period.
  --------------------------------------------------------------*/

/*---------------------------------------------------------------
    Get the global variable to be used in this formula
  --------------------------------------------------------------*/

DEFAULT FOR ACP_TERMINATION_DATE IS '4712/12/31 00:00:00' (date)
DEFAULT FOR EMP_HIRE_DATE IS '4712/12/31 00:00:00' (date)
DEFAULT FOR person_dob  IS '4712/12/31 00:00:00' (date)

Continuous_Service_Date = GET_DATE('CONTINUOUS_SERVICE_DATE')
Total_Accrued_PTO       = GET_NUMBER('TOTAL_ACCRUED_PTO')
Period_SD               = GET_DATE('PERIOD_SD')
Period_ED               = GET_DATE('PERIOD_ED')
Last_Period_SD          = GET_DATE('LAST_PERIOD_SD')
Last_Period_ED          = GET_DATE('LAST_PERIOD_ED')
Accruing_Frequency      = GET_TEXT('ACCRUING_FREQUENCY')
Accruing_Multiplier     = GET_NUMBER('ACCRUING_MULTIPLIER')
Beginning_of_Calculation_Year
                        = GET_DATE('BEGINNING_OF_CALCULATION_YEAR')
Calculation_Date        = GET_DATE('CALCULATION_DATE')

Accrual_Rate = 0

/* ---------------------------------------------------------------
   Get the person date of birth and compute the age.
   -------------------------------------------------------------*/

Person_dob = HU_PERSON_DOB(Calculation_Date)

Age        = FLOOR(MONTHS_BETWEEN(Period_ED,Person_dob)/12)

/* ---------------------------------------------------------------
   Set the payroll period, accruing frequency and accruing multiplier
   based on the payroll.
   -------------------------------------------------------------*/

Payroll_period = HU_PAYROLL_PERIODS(Calculation_Date
                                   ,Accruing_Frequency
                                ,Accruing_Multiplier)
/* ---------------------------------------------------------------
   Set period start date and period end date as employee hire date and
   employee termination date if the hire date and termination date
   falls with in the calculation period.
   -------------------------------------------------------------*/

IF EMP_HIRE_DATE > Period_SD AND EMP_HIRE_DATE < Period_ED THEN
   Period_SD = EMP_HIRE_DATE

IF ACP_TERMINATION_DATE > Period_SD
                            AND ACP_TERMINATION_DATE < Period_ED THEN
   Period_ED =  ACP_TERMINATION_DATE

DOB = TO_DATE(TO_CHAR(Person_dob,'DD/MM/')
              ||TO_CHAR(PERIOD_SD,'YYYY'),'DD/MM/YYYY')

/* ---------------------------------------------------------------
   Set the accrual rate based on the age of the employee and on five
   day work pattern.
   -------------------------------------------------------------*/

IF   (DOB >= PERIOD_SD   AND DOB <= PERIOD_ED) AND
```

```
(AGE = 25 OR AGE = 28 OR AGE = 31 OR AGE = 33 OR AGE = 35  OR
      AGE = 37 OR AGE = 39 OR AGE = 41 OR AGE = 43 OR AGE = 45) THEN
(
    X = HU_ABS_GET_WORKING_DAYS(PERIOD_SD,ADD_DAYS(DOB,-1))
    Y = HU_ABS_GET_WORKING_DAYS(DOB,Period_ED)

    IF  Age = 25 THEN
        Accrual_Rate = ((20/260)* X +(21/260)* Y)
    ELSE IF Age = 28 THEN
        Accrual_Rate = ((21/260)* X +(22/260)* Y)
    ELSE IF Age = 31 THEN
        Accrual_Rate = ((22/260)* X +(23/260)* Y)
    ELSE IF Age = 33 THEN
        Accrual_Rate = ((23/260)* X +(24/260)* Y)
    ELSE IF Age = 35 THEN
        Accrual_Rate = ((24/260)* X +(25/260)* Y)
    ELSE IF Age = 37 THEN
        Accrual_Rate = ((25/260)* X +(26/260)* Y)
    ELSE IF Age = 39 THEN
        Accrual_Rate = ((26/260)* X +(27/260)* Y)
    ELSE IF Age = 41 THEN
        Accrual_Rate = ((27/260)* X +(28/260)* Y)
    ELSE IF Age = 43 THEN
        Accrual_Rate = ((28/260)* X +(29/260)* Y)
    ELSE IF Age = 45 THEN
        Accrual_Rate = ((29/260)* X +(30/260)* Y)
    )
ELSE
(
    X = HU_ABS_GET_WORKING_DAYS(PERIOD_SD,PERIOD_ED)

    IF  Age <= 24 THEN
        Accrual_Rate = ((20/260)*X)
    ELSE IF (Age >= 25 AND Age < 28) THEN
        Accrual_Rate = ((21/260)*X)
    ELSE IF (Age >= 28 AND Age < 31) THEN
        Accrual_Rate = ((22/260)*X)
    ELSE IF (Age >= 31 AND Age < 33) THEN
        Accrual_Rate = ((23/260)*X)
    ELSE IF (Age >= 33 AND Age < 35) THEN
        Accrual_Rate = ((24/260)*X)
    ELSE IF (Age >= 35 AND Age < 37) THEN
        Accrual_Rate = ((25/260)*X)
    ELSE IF (Age >= 37 AND Age < 39) THEN
        Accrual_Rate = ((26/260)*X)
    ELSE IF (Age >= 39 AND Age < 41) THEN
        Accrual_Rate = ((27/260)*X)
    ELSE IF (Age >= 41 AND Age < 43) THEN
        Accrual_Rate = ((28/260)*X)
    ELSE IF (Age >= 43 AND Age < 45) THEN
        Accrual_Rate = ((29/260)*X)
    ELSE
        Accrual_Rate = ((30/260)*X)
)

Period_Accrued_PTO = Accrual_Rate

E = SET_NUMBER('TOTAL_ACCRUED_PTO', Total_Accrued_PTO
                                      +Period_Accrued_PTO)

/* ------------------------------------------------------------------
    Establish whether the current period is the last one, if so end
    the processing, otherwise get the  next period.
   ------------------------------------------------------------------*/

IF Period_SD >= Last_Period_SD THEN
```

```
(
    Continue_Processing_Flag = 'N'
    )
ELSE
   (
    E = GET_PERIOD_DATES(ADD_DAYS(Period_ED,1),
                         Accruing_Frequency,
                         Beginning_of_Calculation_Year,
                         Accruing_Multiplier)

    E = SET_DATE('PERIOD_SD', GET_DATE('PERIOD_START_DATE'))
    E = SET_DATE('PERIOD_ED', GET_DATE('PERIOD_END_DATE'))

   Continue_Processing_Flag = 'Y'
   )

Return Continue_Processing_Flag
```

Sample Formula for Additional Holiday (Hungary)

Oracle HRMS provides the HU_ADD_CHILD_CARE_HOLIDAY_MULTIPLIER sample formula to calculate the accrual rate for Additional Holiday for bringing up children in a specific period as required for the Hungarian Absence Report. The sample formula is for an accrual plan with the following rules:

- Entitlement depends on the age and number of children (given in the table below)
- Both parents work and share the entitlement. This eligibility is based on the value in the Holiday for Child Care field in the Further Contact Relationship Info on the Contact window.
- Additional Holiday for bringing up children for new hires depends on Hire Date.
- Entitlement begins from the birth date of the child, if a child is born during the leave year.

The following table lists the Additional Holiday entitlements for employees based on the number of children.

Additional Holiday entitlements

Number of Children	Additional Holiday entitlement
After 1 child	2 working days
After 2 children	4 working days
After more than 2 children	7 working days

The HU_ADD_CHILD_CARE_HOLIDAY_MULTIPLIER formula calls another formula

HU_ADD_CHILD_CARE_HOLIDAY_PERIOD_ACCRUALcalculate the accrual for each period. You use the sample formulas along with the carry over formula HU_ABS_HOLIDAY_CARRY_OVER. See: Sample Formula for Carry Over Absence, page 8-39

The sample HU_ADD_CHILD_CARE_HOLIDAY_MULTIPLIER and the looping HU_ADD_CHILD_CARE_HOLIDAY_PERIOD_ACCRUAL formula are given below:

```
/* ----------------------------------------------------------------
    NAME : HU_ADD_CHILD_CARE_HOLIDAY_MULTIPLIER

    This formula calculates the total accrued additional child care
    holiday for a specific period.
   ----------------------------------------------------------------*/

DEFAULT FOR ACP_INELIGIBILITY_PERIOD_TYPE IS 'CM'
DEFAULT FOR ACP_INELIGIBILITY_PERIOD_LENGTH IS 0
DEFAULT FOR ACP_CONTINUOUS_SERVICE_DATE IS '4712/12/31 00:00:00'(DATE)
DEFAULT FOR ACP_ENROLLMENT_END_DATE IS '4712/12/31 00:00:00' (DATE)
DEFAULT FOR ACP_TERMINATION_DATE IS '4712/12/31 00:00:00' (DATE)
DEFAULT FOR ACP_ENROLLMENT_START_DATE IS '4712/12/31 00:00:00' (DATE)
DEFAULT FOR ACP_SERVICE_START_DATE IS '4712/12/31 00:00:00' (DATE)

INPUTS ARE
Calculation_Date (DATE)

Accruing_Frequency = ' '
Accruing_Multiplier = 0

/* ----------------------------------------------------------------
   Set the payroll period, accruing frequency, and accruing multiplier
   based on the payroll.
   ----------------------------------------------------------------*/

No_of_Payroll_Periods = HU_PAYROLL_PERIODS (Calculation_Date
                                           ,Accruing_Frequency
                                           ,Accruing_Multiplier)

E = SET_TEXT('ACCRUING_FREQUENCY', Accruing_Frequency)
E = SET_NUMBER('ACCRUING_MULTIPLIER', Accruing_Multiplier)

/* ----------------------------------------------------------------
  Calculate the start and end dates of the current leave year.
  ----------------------------------------------------------------*/


Beginning_Of_Calculation_Year=TO_DATE('0101'||to_char(Calculation_Date
                                     ,'YYYY'),'DDMMYYYY')
End_Of_Calculation_Year = TO_DATE('3112'||to_char(Calculation_Date
                                                ,'YYYY'),'DDMMYYYY')

/* ----------------------------------------------------------------
  Set the start and end dates of the first accrual period in the
  calculation year.
  ----------------------------------------------------------------*/

IF Beginning_Of_Calculation_Year > Calculation_Date THEN
(
  Beginning_of_Calculation_Year =
                       ADD_MONTHS(Beginning_Of_Calculation_Year, -12)
)

E = SET_DATE('BEGINNING_OF_CALCULATION_YEAR'
            ,Beginning_Of_Calculation_Year)

E = GET_PERIOD_DATES(Beginning_of_Calculation_Year
                    ,Accruing_Frequency
                    ,Beginning_Of_Calculation_Year
                    ,Accruing_Multiplier)

First_Period_SD = GET_DATE('PERIOD_START_DATE')
First_Period_ED = GET_DATE('PERIOD_END_DATE')

E = GET_PERIOD_DATES(End_Of_Calculation_Year
```

```
,Accruing_Frequency
                    ,Beginning_Of_Calculation_Year
                    ,Accruing_Multiplier)

Last_Period_SD = GET_DATE('PERIOD_START_DATE')
Last_Period_ED = GET_DATE('PERIOD_END_DATE')

/* ------------------------------------------------------------------
   Set the Calculation_Date to the Termination Date if not null
   -----------------------------------------------------------------*/

IF NOT (ACP_TERMINATION_DATE WAS DEFAULTED) OR
   NOT (ACP_ENROLLMENT_END_DATE WAS DEFAULTED) THEN
(
  Early_End_Date = LEAST(ACP_TERMINATION_DATE,ACP_ENROLLMENT_END_DATE)

  IF (Early_End_Date < First_Period_SD) THEN
  (
    Total_Accrued_PTO = 0
    E = PUT_MESSAGE('HR_52794_PTO_FML_ASG_TER')
   )
  IF (Early_End_Date < Last_Period_ED) THEN
  (
    E = GET_PERIOD_DATES(Early_End_Date
                        ,Accruing_Frequency
                        ,Beginning_Of_Calculation_Year
                        ,Accruing_Multiplier)

    Last_Period_SD = GET_DATE('PERIOD_START_DATE')
    Last_Period_ED = GET_DATE('PERIOD_END_DATE')
   )
  IF (Early_End_Date < Calculation_Date) THEN
  (
    Calculation_Date = Early_End_Date
  )
)

/* ------------------------------------------------------------------
   Get the last whole period prior to the Calculation Date and ensure
   that it is within the  Year (if the Calculation Date is the End of
   a Period then use that period)
   -----------------------------------------------------------------*/

E = GET_PERIOD_DATES(Calculation_Date
                    ,Accruing_Frequency
                    ,Beginning_of_Calculation_Year
                    ,Accruing_Multiplier)

Calculation_Period_SD  = GET_DATE('PERIOD_START_DATE')
Calculation_Period_ED = GET_DATE('PERIOD_END_DATE')

IF (Calculation_Period_ED < First_Period_SD) THEN
   (
    Total_Accrued_PTO = 0
    E = PUT_MESSAGE('HR_52795_PTO_FML_CALC_DATE')
    )

/* ------------------------------------------------------------------
   Set the Continuous Service Global Variable, whilst also
   ensuring that the continuous service date is before the Calculation
   Period
  ------------------------------------------------------------------*/

IF (ACP_CONTINUOUS_SERVICE_DATE WAS DEFAULTED) THEN
(
    E = SET_DATE('CONTINUOUS_SERVICE_DATE', ACP_SERVICE_START_DATE)
```

```
)
ELSE IF(ACP_CONTINUOUS_SERVICE_DATE > Calculation_Period_ED) THEN
(
    Total_Accrued_PTO = 0
    E = PUT_MESSAGE('HR_52796_PTO_FML_CSD')
    E = SET_DATE('CONTINUOUS_SERVICE_DATE'
                ,ACP_CONTINUOUS_SERVICE_DATE)
)
ELSE IF(ACP_CONTINUOUS_SERVICE_DATE > First_Period_SD) THEN
(
    E = GET_PERIOD_DATES(ACP_CONTINUOUS_SERVICE_DATE
                        ,Accruing_Frequency
                        ,Beginning_Of_Calculation_Year
                        ,Accruing_Multiplier)

    First_Period_SD = GET_DATE('PERIOD_START_DATE')
    First_Period_ED = GET_DATE('PERIOD_END_DATE')
)
ELSE
(
    E = SET_DATE('CONTINUOUS_SERVICE_DATE'
                , ACP_CONTINUOUS_SERVICE_DATE)
)

Continuous_Service_Date = GET_DATE('CONTINUOUS_SERVICE_DATE')

First_Eligible_To_Accrue_Date  = Continuous_Service_Date

/*-------------------------------------------------------------------
   Determine the date on which accrued PTo may first be registered,
   i.e the date on which the   Ineligibility Period expires
   -----------------------------------------------------------------*/

Accrual_Ineligibility_Expired_Date = First_Eligible_To_Accrue_Date

IF (ACP_INELIGIBILITY_PERIOD_LENGTH > 0) THEN
(
   IF ACP_INELIGIBILITY_PERIOD_TYPE = 'BM' THEN
   (
      Accrual_Ineligibility_Expired_Date =
                      ADD_MONTHS(Continuous_Service_Date
                                ,ACP_INELIGIBILITY_PERIOD_LENGTH*2)
   )
   ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'F' THEN
   (
      Accrual_Ineligibility_Expired_Date =
                      ADD_DAYS(Continuous_Service_Date
                              ,ACP_INELIGIBILITY_PERIOD_LENGTH*14)
   )
   ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'CM' THEN
   (
      Accrual_Ineligibility_Expired_Date =
                      ADD_MONTHS(Continuous_Service_Date
                                ,ACP_INELIGIBILITY_PERIOD_LENGTH)
   )
   ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'LM' THEN
   (
      Accrual_Ineligibility_Expired_Date =
                      ADD_DAYS(Continuous_Service_Date
                              ,ACP_INELIGIBILITY_PERIOD_LENGTH*28)
   )
   ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'Q' THEN
   (
      Accrual_Ineligibility_Expired_Date =
                      ADD_MONTHS(Continuous_Service_Date
                                ,ACP_INELIGIBILITY_PERIOD_LENGTH*3)
```

```
)
   ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'SM' THEN
   (
      Accrual_Ineligibility_Expired_Date =
                      ADD_MONTHS(Continuous_Service_Date
                                ,ACP_INELIGIBILITY_PERIOD_LENGTH/2)
   )
   ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'SY' THEN
   (
      Accrual_Ineligibility_Expired_Date =
                      ADD_MONTHS(Continuous_Service_Date
                                ,ACP_INELIGIBILITY_PERIOD_LENGTH*6)
   )
   ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'W' THEN
   (
      Accrual_Ineligibility_Expired_Date =
                      ADD_DAYS(Continuous_Service_Date
                              ,ACP_INELIGIBILITY_PERIOD_LENGTH*7)
   )
   ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'Y' THEN
   (
      Accrual_Ineligibility_Expired_Date =
                      ADD_MONTHS(Continuous_Service_Date
                                ,ACP_INELIGIBILITY_PERIOD_LENGTH*12)
   )

   IF Accrual_Ineligibility_Expired_Date
                > First_Eligible_To_Accrue_Date
      AND Calculation_Date
                < Accrual_Ineligibility_Expired_Date THEN
  (
      First_Eligible_To_Accrue_Date =
                                Accrual_Ineligibility_Expired_Date
  )
)

/* ----------------------------------------------------------------------
 Get the first full period following the First_Eligible_To_Accrue_Date
 (if it falls on the beginning of the period then use that period)
---------------------------------------------------------------------- */

IF First_Eligible_To_Accrue_Date > Beginning_Of_Calculation_Year THEN
(
   E = GET_PERIOD_DATES(First_Eligible_To_Accrue_Date
                       ,Accruing_Frequency
                       ,Beginning_Of_Calculation_Year
                       ,Accruing_Multiplier)

   First_Eligible_To_Accrue_Period_SD  = GET_DATE('PERIOD_START_DATE')
   First_Eligible_To_Accrue_Period_ED  = GET_DATE('PERIOD_END_DATE')

   IF (First_Eligible_To_Accrue_Period_SD > Calculation_period_ED)THEN
   (
      Total_Accrued_PTO = 0
       E = PUT_MESSAGE('HR_52793_PTO_FML_ASG_INELIG')
   )
)
ELSE
(
   First_Eligible_To_Accrue_Period_SD  = First_Period_SD
   First_Eligible_To_Accrue_Period_ED  = First_Period_ED
)
/* ----------------------------------------------------------------------
   Determine the date on which PTO actually starts accruing based on
   Hire Date, Continuous Service Date and plan Enrollment Start Date.
    --------------------------------------------------------------------
```

```
*/

IF Continuous_Service_date = ACP_CONTINUOUS_SERVICE_DATE THEN
(
  Actual_Accrual_Start_Date = Continuous_service_Date
)
ELSE
(
  Actual_Accrual_Start_Date = GREATEST(Continuous_Service_Date,
                                       ACP_ENROLLMENT_START_DATE,
                                       First_Period_SD)
)

/* ----------------------------------------------------------------
       Determine the actual start of the accrual calculation
------------------------------------------------------------------*/
IF (Actual_Accrual_Start_Date > First_Period_SD AND
    Actual_Accrual_Start_Date > First_Eligible_To_Accrue_Period_SD)
THEN
(
     E = GET_PERIOD_DATES(Actual_Accrual_Start_Date
                         ,Accruing_Frequency
                         ,Beginning_Of_Calculation_Year
                         ,Accruing_Multiplier)

     Accrual_Start_Period_SD = GET_DATE('PERIOD_START_DATE')
     Accrual_Start_Period_ED = GET_DATE('PERIOD_END_DATE')

   /*-------------------------------------------------------------
   If the Actual Accrual Period is after the Calculation Period then
   end the processing.
   -------------------------------------------------------------- */
     IF (Accrual_Start_Period_SD > Calculation_period_ED) THEN
     (
         Total_Accrued_PTO = 0
         E = PUT_MESSAGE('HR_52797_PTO_FML_ACT_ACCRUAL')
     )
)
ELSE IF (First_Eligible_To_Accrue_Period_SD > First_Period_SD) THEN
(
    Accrual_Start_Period_SD = First_Eligible_To_Accrue_Period_SD
    Accrual_Start_Period_ED = First_Eligible_To_Accrue_Period_ED
)
ELSE
(
    Accrual_Start_Period_SD = First_Period_SD
    Accrual_Start_Period_ED = First_Period_ED
)

/*-----------------------------------------------------------------
  Now set up the information that will be used in when looping through
  the periods
  -------------------------------------------------------------- */
IF Last_period_ED >= Accrual_Start_Period_ED THEN
(
   E = SET_DATE('PERIOD_SD',Accrual_Start_Period_SD)
   E = SET_DATE('PERIOD_ED',Accrual_Start_Period_ED)
   E = SET_DATE('LAST_PERIOD_SD',Calculation_period_SD)
   E = SET_DATE('LAST_PERIOD_ED',Calculation_period_ED)
   E = SET_NUMBER('TOTAL_ACCRUED_PTO',0)

   E = LOOP_CONTROL('HU_ADD_CHILD_CARE_HOLIDAY_PERIOD_ACCRUAL')

   Total_Accrued_PTO = ROUND(GET_NUMBER('TOTAL_ACCRUED_PTO'))
)
```

```
IF Accrual_Start_Period_SD <= Calculation_period_ED THEN
(
  Accrual_end_date = Calculation_period_ED
)

Effective_Start_Date = Accrual_Start_Period_SD
Effective_End_Date = Calculation_period_ED

IF Effective_Start_Date >= Effective_End_Date THEN
(
  Effective_Start_Date = Effective_End_Date
)

RETURN Total_Accrued_PTO
      ,Effective_start_date
      ,Effective_end_date
      ,Accrual_end_date
```

Looping Formula

```
/* ----------------------------------------------------------------------
    NAME : HU_ADD_CHILD_CARE_HOLIDAY_PERIOD_ACCRUAL
    This formula calculates the amount of PTO accrued for a particular
    period
   -------------------------------------------------------------------*/

/*----------------------------------------------------------------------
    Get the global variable to be used in this formula
 --------------------------------------------------------------------*/

DEFAULT FOR ACP_TERMINATION_DATE IS '4712/12/31 00:00:00' (DATE)
DEFAULT FOR ACP_SERVICE_START_DATE IS '4712/12/31 00:00:00' (DATE)

Continuous_Service_Date = GET_DATE('CONTINUOUS_SERVICE_DATE')
Total_Accrued_PTO = GET_NUMBER('TOTAL_ACCRUED_PTO')
Period_SD = GET_DATE('PERIOD_SD')
Period_ED = GET_DATE('PERIOD_ED')
Last_Period_SD = GET_DATE('LAST_PERIOD_SD')
Last_Period_ED = GET_DATE('LAST_PERIOD_ED')
Termination_date = GET_DATE('ACP_TERMINATION_DATE')
Hire_date = GET_DATE('ACP_SERVICE_START_DATE')

Accruing_Frequency = GET_TEXT('ACCRUING_FREQUENCY')
Accruing_Multiplier = GET_NUMBER('ACCRUING_MULTIPLIER')
Beginning_of_Calculation_Year =
                           GET_DATE('BEGINNING_OF_CALCULATION_YEAR')

First_Child_Date_of_birth = TO_DATE('01-01-4712','dd-mm-yyyy')
Second_Child_Date_of_birth = TO_DATE('01-01-4712','dd-mm-yyyy')
Third_Child_Date_of_birth = TO_DATE('01-01-4712','dd-mm-yyyy')

/* ----------------------------------------------------------------------
   Set the payroll period, accruing frequency, and accruing multiplier
   based on the payroll.
   -------------------------------------------------------------------*/

No_of_Payroll_Periods = HU_PAYROLL_PERIODS (Period_SD
                                          ,Accruing_Frequency
                                          ,Accruing_Multiplier)

No_Of_Children_less_16 = 0
No_Of_Children_16 = 0

/* ----------------------------------------------------------------------
  Retrieve child information for the current employee.
  ----------------------------------------------------------------- */

E = HU_ABS_GET_CHILD_INFO(Period_SD, Period_ED
                         ,No_Of_Children_less_16
                         ,No_Of_Children_16
                         ,First_Child_Date_of_birth
                         ,Second_Child_Date_of_birth
                         ,Third_Child_Date_of_birth)

Total_children = No_Of_Children_less_16 + No_Of_Children_16
Period_Accrued_PTO = 0

Total_days = DAYS_BETWEEN(Period_ED , Period_SD)
days_valid = DAYS_BETWEEN(Period_ED , Period_SD)
Accrual_Rate = 0

/* ----------------------------------------------------------------------
  Set accrual rate based on number of children and their age.
  ----------------------------------------------------------------- */

IF Total_children = 1 THEN
```

```
(  Accrual_Rate = 2 )
ELSE IF Total_children = 2 THEN
(  Accrual_Rate = 4  )
ELSE IF Total_children > 2 THEN
(  Accrual_Rate = 7)

Accrual_rate_per_period = Accrual_Rate/No_of_Payroll_Periods

/* --------------------------------------------------------------------
   Days worked prorated based on hire date and termination date of
   employee.
  ------------------------------------------------------------------*/

IF Hire_date >= Period_SD
   AND Hire_date <= Period_ED
   AND Termination_date >= Period_SD
   AND Termination_date <= Period_ED THEN
(
   days_valid = DAYS_BETWEEN(Termination_date,Hire_date)
)
ELSE IF Hire_date >= Period_SD
    AND Hire_date <= Period_ED  THEN
(
   days_valid = DAYS_BETWEEN(Period_ED,Hire_date)
)
ELSE IF Termination_date >= Period_SD
    AND Termination_date <= Period_ED THEN
(
   days_valid = DAYS_BETWEEN(Termination_date,Period_SD)
)
Accrual_rate_per_period = Accrual_rate_per_period
                          *(days_valid/ Total_days)


/* --------------------------------------------------------------------
    Calculate the Amount Accrued this Period-
   -----------------------------------------------------------------*/
IF No_Of_Children_16 = 0 or No_Of_Children_less_16 > 2 THEN
(
  Period_Accrued_PTO = Accrual_rate_per_period
)
ELSE
(
  IF No_Of_Children_16 = 1 THEN
  (
     days_valid = DAYS_BETWEEN(First_Child_Date_of_birth,Period_SD)

     Period_Accrued_PTO =  Accrual_rate_per_period
                               *(days_valid / Total_days )
     IF No_Of_Children_less_16  = 1 THEN
     (
       Period_Accrued_PTO = Period_Accrued_PTO
                             +(2*((Total_days-days_valid)/Total_days))
                             /No_of_Payroll_Periods
     )
     IF No_Of_Children_less_16 = 2 THEN
     (
       Period_Accrued_PTO = Period_Accrued_PTO
                             +(4*((Total_days-days_valid)/Total_days))
                             /No_of_Payroll_Periods
     )
   )
   ELSE IF No_Of_Children_16 = 2 THEN
   (
     IF No_Of_Children_less_16 > 1 THEN
     (
```

```
days_valid = DAYS_BETWEEN(Second_Child_Date_of_birth,Period_SD)

        Period_Accrued_PTO =  Accrual_rate_per_period
                             *(days_valid / Total_days)
        Period_Accrued_PTO = Period_Accrued_PTO
                             +(4*((Total_days-days_valid)/Total_days))
                             /No_of_Payroll_Periods
     )
     ELSE IF No_Of_Children_less_16 > 0 THEN
     (
       days_valid = DAYS_BETWEEN(First_Child_Date_of_birth,Period_SD)

       Period_Accrued_PTO =  Accrual_rate_per_period
                              * (days_valid / Total_days)

        days_valid = DAYS_BETWEEN(Second_Child_Date_of_birth
                                 ,First_Child_Date_of_birth)

        Period_Accrued_PTO = Period_Accrued_PTO
                             +(4 *(days_valid / Total_days))
                             /No_of_Payroll_Periods

        days_valid = DAYS_BETWEEN(Period_ED
                                 ,Second_Child_Date_of_birth)

        Period_Accrued_PTO = Period_Accrued_PTO
                             +(2 *(days_valid / Total_days))
                             /No_of_Payroll_Periods
     )
     ELSE IF No_Of_Children_less_16 = 0 THEN
     (
       days_valid = DAYS_BETWEEN(First_Child_Date_of_birth,Period_SD)

       Period_Accrued_PTO =  Accrual_rate_per_period
                              *(days_valid / Total_days)

        days_valid = DAYS_BETWEEN(Second_Child_Date_of_birth
                                 ,First_Child_Date_of_birth)

        Period_Accrued_PTO = Period_Accrued_PTO +
                           (2 * (days_valid / Total_days))
                           /No_of_Payroll_Periods
      )
   )
   ELSE IF No_Of_Children_16 = 3 THEN
   (
     IF No_Of_Children_less_16 > 1 THEN
     (
 days_valid = DAYS_BETWEEN(Third_Child_Date_of_birth,Period_SD)

        Period_Accrued_PTO =  Accrual_rate_per_period
                              *(days_valid / Total_days)
        Period_Accrued_PTO = Period_Accrued_PTO
                             +(4*((Total_days-days_valid)
                             / Total_days))
                             /No_of_Payroll_Periods
      )
      ELSE IF No_Of_Children_less_16 > 0 THEN
      (
       days_valid = DAYS_BETWEEN(Second_Child_Date_of_birth
                                 ,Period_SD)
        Period_Accrued_PTO = Accrual_rate_per_period
                            *(days_valid / Total_days)

        days_valid = DAYS_BETWEEN(Third_Child_Date_of_birth
                                 ,Second_Child_Date_of_birth)
```

```
        Period_Accrued_PTO = Period_Accrued_PTO
                             +(4 * (days_valid / Total_days))
                             /No_of_Payroll_Periods

 days_valid = DAYS_BETWEEN(Period_ED,Third_Child_Date_of_birth)


        Period_Accrued_PTO = Period_Accrued_PTO
                             +(2 * (days_valid / Total_days))
                             /No_of_Payroll_Periods
      )
      ELSE IF No_Of_Children_less_16 = 0 THEN
      (
 days_valid = DAYS_BETWEEN(First_Child_Date_of_birth,Period_SD)

 Period_Accrued_PTO =  Accrual_rate_per_period
                              *(days_valid / Total_days)

        days_valid = DAYS_BETWEEN(Second_Child_Date_of_birth
                                 ,First_Child_Date_of_birth)

        Period_Accrued_PTO = Period_Accrued_PTO
                             +(4 * (days_valid / Total_days))
                             /No_of_Payroll_Periods

       days_valid = DAYS_BETWEEN(Third_Child_Date_of_birth
                                 ,Second_Child_Date_of_birth)

        Period_Accrued_PTO = Period_Accrued_PTO
                             +(2 * (days_valid / Total_days))
                             /No_of_Payroll_Periods
      )
    )
 )


/*---------------------------------------------------------------------
    Set the Running Total
  -------------------------------------------------------------------*/

E = SET_NUMBER('TOTAL_ACCRUED_PTO'
              ,Total_Accrued_PTO + Period_Accrued_PTO)


/* --------------------------------------------------------------------
    Establish whether the current period is the last one, if so end
    the processing, otherwise get the  next period
   ------------------------------------------------------------------*/

IF Period_SD >= Last_Period_SD THEN
(
    Continue_Processing_Flag = 'N'
)
ELSE
(
    E = GET_PERIOD_DATES(ADD_DAYS(Period_ED,1)
                        ,Accruing_Frequency
                        ,Beginning_of_Calculation_Year
                        ,Accruing_Multiplier)

    E = SET_DATE('PERIOD_SD'
                ,GET_DATE('PERIOD_START_DATE'))
    E = SET_DATE('PERIOD_ED'
                ,GET_DATE('PERIOD_END_DATE'))

   Continue_Processing_Flag = 'Y'
```

```
)
RETURN Continue_Processing_Flag
```

Sample Formula for Other Additional Holiday (Hungary)

Oracle HRMS provides the HU_OTHER_ADD_HOLIDAY_MULTIPLIER formula to calculate the Other Additional Holiday as required for the Hungarian Absence Report. The Other Additional Holiday comprises of Youthful Holiday and Additional Health Holiday. The sample formula is for an accrual plan with the following rules:

- Employee under 18 years of age entitled to an additional 5 days holiday.
- Blind employee entitled to an additional 5 days holiday. This eligibility is based on the information recorded on the Blind field on the Disabilities window.
- Employee working underground or exposed to radiation entitled to an additional 5 days holiday. This eligibility is based on the information recorded on the Additional Health Holiday field on the Further Job Info in the Job window.
- Entitlement depends on the number of days worked in a week. The formula takes into account any work pattern changes.
- Entitlement begins or ends from the date of change, if the shift or disability change during the leave year.
- Other Additional Holiday for new hires begins on their Hire Date.

The top level formula, HU_OTHER_ADD_HOLIDAY_MULTIPLIER calls another formula called HU_OTHER_ADD_HOLIDAY_PERIOD_ACCRUAL calculate the accrual for each period. You use the formulas along with the carry over formula HU_ABS_HOLIDAY_CARRY_OVER. See: Sample Formula for Carry Over Absence, page 8-39

The top-level formula, HU_OTHER_ADD_HOLIDAY_MULTIPLIER and the looping formula HU_OTHER_ADD_HOLIDAY_PERIOD_ACCRUAL are given below.

```
/* ---------------------------------------------------------------
   NAME : HU_OTHER_ADD_HOLIDAY_MULTIPLIER

   This formula calculates the total accrued other additional holiday
   for a specific period.
   ----------------------------------------------------------------*/
DEFAULT FOR ACP_INELIGIBILITY_PERIOD_TYPE IS 'CM'
DEFAULT FOR ACP_INELIGIBILITY_PERIOD_LENGTH IS 0
DEFAULT FOR ACP_CONTINUOUS_SERVICE_DATE IS '4712/12/31 00:00:00'(date)
DEFAULT FOR ACP_ENROLLMENT_END_DATE IS '4712/12/31 00:00:00' (date)
DEFAULT FOR ACP_TERMINATION_DATE IS '4712/12/31 00:00:00' (date)
DEFAULT FOR ACP_ENROLLMENT_START_DATE IS '4712/12/31 00:00:00' (date)
DEFAULT FOR ACP_SERVICE_START_DATE IS '4712/12/31 00:00:00' (date)

INPUTS ARE Calculation_Date (date)
Accruing_Frequency = ' '
Accruing_Multiplier = 0
E = SET_DATE('CALCULATION_DATE',Calculation_Date)

/* ---------------------------------------------------------------
   Set the payroll period, accruing frequency, and accruing multiplier
   based on the payroll.
   ----------------------------------------------------------------*/

Payroll_period = HU_PAYROLL_PERIODS(Calculation_Date
                                    ,Accruing_Frequency
                       ,Accruing_Multiplier)


E = SET_TEXT('ACCRUING_FREQUENCY', Accruing_Frequency)
E = SET_NUMBER('ACCRUING_MULTIPLIER', Accruing_Multiplier)

/* ----------------------------------------------------------------
  Calculate the start and end dates of the current leave year
  -----------------------------------------------------------------*/

Beginning_Of_Calculation_Year =
                     TO_DATE('0101'||TO_CHAR(Calculation_Date,'YYYY')
                            ,'DDMMYYYY')

IF Beginning_Of_Calculation_Year > Calculation_Date THEN
(
  Beginning_of_Calculation_Year =
                     ADD_MONTHS(Beginning_Of_Calculation_Year, -12)
)

E = SET_DATE('BEGINNING_OF_CALCULATION_YEAR'
            , Beginning_Of_Calculation_Year)

E = GET_PERIOD_DATES(Beginning_of_Calculation_Year
                    ,Accruing_Frequency
                    ,Beginning_Of_Calculation_Year
                    ,Accruing_Multiplier)

First_Period_SD = GET_DATE('PERIOD_START_DATE')
First_Period_ED = GET_DATE('PERIOD_END_DATE')

/* ----------------------------------------------------------------
   Set the Calculation_Date to the Termination Date if not null
   ----------------------------------------------------------------*/

IF NOT (ACP_TERMINATION_DATE WAS DEFAULTED) OR
    NOT (ACP_ENROLLMENT_END_DATE WAS DEFAULTED) THEN
(
    Early_End_Date = LEAST(ACP_TERMINATION_DATE
                          ,ACP_ENROLLMENT_END_DATE)
```

```
    IF (Early_End_Date < Calculation_Date) THEN
    (
        Calculation_Date = Early_End_Date
    )
)

/* ---------------------------------------------------------------------
   Get the last whole period prior to the Calculation Date and ensure
   that it   is within the Year (if the Calculation Date is the End
   of a Period then use that period)
   -----------------------------------------------------------------*/

E = GET_PERIOD_DATES(Calculation_Date
                    ,Accruing_Frequency
                    ,Beginning_of_Calculation_Year
                    ,Accruing_Multiplier)

Calculation_Period_SD  = GET_DATE('PERIOD_START_DATE')
Calculation_Period_ED  = GET_DATE('PERIOD_END_DATE')

/* ---------------------------------------------------------------------
   Set the Continuous Service Global Variable, whilst also
   ensuring that the continuous service date is before the
   Calculation Period
  ------------------------------------------------------------------*/

IF (ACP_CONTINUOUS_SERVICE_DATE WAS DEFAULTED) THEN
(
    E = SET_DATE('CONTINUOUS_SERVICE_DATE', ACP_SERVICE_START_DATE)
)
ELSE IF(ACP_CONTINUOUS_SERVICE_DATE > Calculation_Period_SD) THEN
(
    E = SET_DATE('CONTINUOUS_SERVICE_DATE'
                ,ACP_CONTINUOUS_SERVICE_DATE)
)
ELSE
(
    E = SET_DATE('CONTINUOUS_SERVICE_DATE'
                ,ACP_CONTINUOUS_SERVICE_DATE)
)

Continuous_Service_Date = GET_DATE('CONTINUOUS_SERVICE_DATE')

First_Eligible_To_Accrue_Date  = Continuous_Service_Date

/*----------------------------------------------------------------------
   Determine the date on which accrued PTO may first be registered,
   i.e the date on which the Ineligibility Period expires
  ------------------------------------------------------------------*/

Accrual_Ineligibility_Expired_Date = First_Eligible_To_Accrue_Date

IF (ACP_INELIGIBILITY_PERIOD_LENGTH > 0) THEN
(
    IF ACP_INELIGIBILITY_PERIOD_TYPE = 'BM' THEN
    (
        Accrual_Ineligibility_Expired_Date =
                    ADD_MONTHS(Continuous_Service_Date
                               ,ACP_INELIGIBILITY_PERIOD_LENGTH*2)
    )
    ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'F' THEN
    (
        Accrual_Ineligibility_Expired_Date =
                    ADD_DAYS(Continuous_Service_Date
                            ,ACP_INELIGIBILITY_PERIOD_LENGTH*14)
    )
```

```
ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'CM' THEN
    (
        Accrual_Ineligibility_Expired_Date =
                    ADD_MONTHS(Continuous_Service_Date
                              ,ACP_INELIGIBILITY_PERIOD_LENGTH)
    )
    ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'LM' THEN
    (
        Accrual_Ineligibility_Expired_Date =
                    ADD_DAYS(Continuous_Service_Date
                            ,ACP_INELIGIBILITY_PERIOD_LENGTH*28)
    )
    ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'Q' THEN
    (
        Accrual_Ineligibility_Expired_Date =
                    ADD_MONTHS(Continuous_Service_Date
                              ,ACP_INELIGIBILITY_PERIOD_LENGTH*3)
    )
    ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'SM' THEN
    (
        Accrual_Ineligibility_Expired_Date =
                    ADD_MONTHS(Continuous_Service_Date
                              ,ACP_INELIGIBILITY_PERIOD_LENGTH/2)
    )
    ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'SY' THEN
    (
        Accrual_Ineligibility_Expired_Date =
                    ADD_MONTHS(Continuous_Service_Date
                              ,ACP_INELIGIBILITY_PERIOD_LENGTH*6)
    )
    ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'W' THEN
    (
        Accrual_Ineligibility_Expired_Date =
                    ADD_DAYS(Continuous_Service_Date
                            ,ACP_INELIGIBILITY_PERIOD_LENGTH*7)
    )
    ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'Y' THEN
    (
        Accrual_Ineligibility_Expired_Date =
                    ADD_MONTHS(Continuous_Service_Date
                              ,ACP_INELIGIBILITY_PERIOD_LENGTH*12)
    )

    IF Accrual_Ineligibility_Expired_Date >
                                        First_Eligible_To_Accrue_Date
     AND Calculation_Date < Accrual_Ineligibility_Expired_Date THEN
     (
        First_Eligible_To_Accrue_Date =
                                   Accrual_Ineligibility_Expired_Date
     )
)

/* ---------------------------------------------------------------
   Get the first full period following the
   First_Eligible_To_Accrue_Date(if it falls on the beginning of the
   period then use that period)
 --------------------------------------------------------------*/

IF First_Eligible_To_Accrue_Date > Beginning_Of_Calculation_Year THEN
(
  E = GET_PERIOD_DATES(First_Eligible_To_Accrue_Date
                      ,Accruing_Frequency
                      ,Beginning_Of_Calculation_Year
                      ,Accruing_Multiplier)

  First_Eligible_To_Accrue_Period_SD  = GET_DATE('PERIOD_START_DATE')
```

```
First_Eligible_To_Accrue_Period_ED  = GET_DATE('PERIOD_END_DATE')


  IF (First_Eligible_To_Accrue_Period_SD > Calculation_Period_ED) THEN
  (
    Total_Accrued_PTO = 0
    E = PUT_MESSAGE('HR_52793_PTO_FML_ASG_INELIG')
  )
)
ELSE
(
  First_Eligible_To_Accrue_Period_SD  = First_Period_SD
  First_Eligible_To_Accrue_Period_ED  = First_Period_ED
)
/* ---------------------------------------------------------------------
   Determine the date on which PTO actually starts accruing based on
   Hire Date, Continuous Service Date and plan Enrollment Start Date.
   -------------------------------------------------------------------*/

IF Continuous_Service_date = ACP_CONTINUOUS_SERVICE_DATE THEN
(
  Actual_Accrual_Start_Date = Continuous_service_Date
)
ELSE
(
  Actual_Accrual_Start_Date = GREATEST(Continuous_Service_Date
                                      ,ACP_ENROLLMENT_START_DATE
                                      ,First_Period_SD)
)

/* ---------------------------------------------------------------------
   Determine the actual start of the accrual calculation
   -----------------------------------------------------------------*/
IF (Actual_Accrual_Start_Date > First_Period_SD AND
  Actual_Accrual_Start_Date > First_Eligible_To_Accrue_Period_SD) THEN
(
    E = GET_PERIOD_DATES(Actual_Accrual_Start_Date
                        ,Accruing_Frequency
                        ,Beginning_Of_Calculation_Year
                        ,Accruing_Multiplier)

     Accrual_Start_Period_SD = GET_DATE('PERIOD_START_DATE')
     Accrual_Start_Period_ED = GET_DATE('PERIOD_END_DATE')


/* ---------------------------------------------------------------------
   If the Actual Accrual Period is after the Calculation Period then
   end the processing.
   -----------------------------------------------------------------*/
    IF (Accrual_Start_Period_SD > Calculation_Period_ED) THEN
    (
        Total_Accrued_PTO = 0
        E = PUT_MESSAGE('HR_52797_PTO_FML_ACT_ACCRUAL')
     )
)

ELSE IF (First_Eligible_To_Accrue_Period_SD > First_Period_SD) THEN
(
    Accrual_Start_Period_SD = First_Eligible_To_Accrue_Period_SD
    Accrual_Start_Period_ED = First_Eligible_To_Accrue_Period_ED
)
ELSE
(
    Accrual_Start_Period_SD = First_Period_SD
    Accrual_Start_Period_ED = First_Period_ED
)
```

```
/* ---------------------------------------------------------------

   Now set up the information that will be used in when looping
   through the periods.
   ---------------------------------------------------------------*/
IF Calculation_Period_ED >= Accrual_Start_Period_ED THEN
(
    E = SET_DATE('PERIOD_SD',Accrual_Start_Period_SD)
    E = SET_DATE('PERIOD_ED',Accrual_Start_Period_ED)
    E = SET_DATE('LAST_PERIOD_SD',Calculation_Period_SD)
    E = SET_DATE('LAST_PERIOD_ED',Calculation_Period_ED)
    E = SET_NUMBER('TOTAL_ACCRUED_PTO',0)

    E = LOOP_CONTROL('HU_OTHER_ADD_HOLIDAY_PERIOD_ACCRUAL')

    Total_Accrued_PTO = ROUND(GET_NUMBER('TOTAL_ACCRUED_PTO'))
)

IF Accrual_Start_Period_SD <= Calculation_Period_SD THEN
(
    Accrual_end_date = Calculation_Period_ED
)

Effective_Start_Date = Accrual_Start_Period_SD
Effective_End_Date   = Calculation_Period_ED

IF Effective_Start_Date >= Effective_End_Date THEN
(
    Effective_Start_Date = Effective_End_Date
)

RETURN Total_Accrued_PTO
      ,Effective_start_date
      ,Effective_end_date
      ,Accrual_end_date
```

Looping Formula

```
/* ----------------------------------------------------------------------
  NAME : HU_OTHER_ADD_HOLIDAY_PERIOD_ACCRUAL

  This formula calculates the amount of PTO accrued for a particular
  period.
  --------------------------------------------------------------------*/

DEFAULT FOR PER_DATE_OF_BIRTH IS '4712/12/31 00:00:00' (date)
DEFAULT FOR ACP_TERMINATION_DATE IS '4712/12/31 00:00:00' (date)
DEFAULT FOR EMP_HIRE_DATE IS '4712/12/31 00:00:00' (date)
DEFAULT FOR Person_dob IS '4712/12/31 00:00:00' (date)

Continuous_Service_Date = GET_DATE('CONTINUOUS_SERVICE_DATE')
Total_Accrued_PTO = GET_NUMBER('TOTAL_ACCRUED_PTO')
Period_SD = GET_DATE('PERIOD_SD')
Period_ED = GET_DATE('PERIOD_ED')
Last_Period_SD = GET_DATE('LAST_PERIOD_SD')
Last_Period_ED = GET_DATE('LAST_PERIOD_ED')
Payroll_Year_SD = GET_DATE('PAYROLL_YEAR_SD')
Accruing_Frequency = GET_TEXT('ACCRUING_FREQUENCY')
Accruing_Multiplier = GET_NUMBER('ACCRUING_MULTIPLIER')
beginining_year = GET_DATE('BEGINNING_OF_CALCULATION_YEAR')
Calculation_Date=GET_DATE('CALCULATION_DATE')

/* ----------------------------------------------------------------------
   Get the person date of birth and compute the age.
   -------------------------------------------------------------------*/

Person_dob = HU_PERSON_DOB(Calculation_Date)
Age = FLOOR(MONTHS_BETWEEN(Period_ED, Person_dob)/12)

/* ----------------------------------------------------------------------
   Set the payroll period, accruing frequency, and accruing multiplier
   based on the payroll.
   -------------------------------------------------------------------*/

P= HU_PAYROLL_PERIODS(Calculation_Date
                     ,Accruing_Frequency
                     ,Accruing_Multiplier)
Accrual_Rate =0
st_date=beginining_year
ed_date=TO_DATE('3112'||TO_CHAR(beginining_year,'YYYY'),'DDMMYYYY')

IF EMP_HIRE_DATE > Period_SD AND EMP_HIRE_DATE < Period_ED THEN
(
 Period_SD= EMP_HIRE_DATE
)
IF ACP_TERMINATION_DATE > Period_SD AND
   ACP_TERMINATION_DATE < Period_ED THEN
(
 Period_ED=ACP_TERMINATION_DATE
)

DOB=TO_DATE(TO_CHAR(Person_dob,'DD/MM/')||TO_CHAR(PERIOD_SD,'YYYY')
           ,'DD/MM/YYYY')

/* ----------------------------------------------------------------------
  Set accrual rate based on age and working pattern.
  --------------------------------------------------------------------*/

IF Age = 18 and DOB>=PERIOD_SD and DOB<=PERIOD_ED THEN
(
 x1 = HU_ABS_GET_WORKING_DAYS(PERIOD_SD,ADD_DAYS(DOB,-1))
 Accrual_Rate  = (5/260*x1)
)
ELSE IF Age<18 THEN
```

```
(
    x1 = HU_ABS_GET_WORKING_DAYS(PERIOD_SD,PERIOD_ED)
    Accrual_Rate =5/260*x1
)
ELSE
(
 Accrual_Rate =0
)
Period_Accrued_PTO=Accrual_Rate
/* ------------------------------------------------------------------
   Checking for Blind Days
   ----------------------------------------------------------------*/
Accrual_Rate =0
Accrual_Rate =HU_ABS_GET_BLIND_DAYS(Period_SD,Period_ED)*5/260

Period_Accrued_PTO=Period_Accrued_PTO+Accrual_Rate

/* ------------------------------------------------------------------
  Checking the additional health of employees.
  -----------------------------------------------------------------*/

Accrual_Rate = 0
Accrual_Rate = HU_ABS_GET_JOB_DAYS(Period_SD,Period_ED)*5/260
Period_Accrued_PTO = Period_Accrued_PTO + Accrual_Rate

/*-------------------------------------------------------------------
    Set the Running Total for Total_Accrued_PTO
  -----------------------------------------------------------------*/
E = SET_NUMBER('TOTAL_ACCRUED_PTO',Total_Accrued_PTO
              + Period_Accrued_PTO)


/* ------------------------------------------------------------------
    Establish whether the current period is the last one, if so end
    the processing, otherwise get the     next period
-------------------------------------------------------------------*/
IF Period_SD >= Last_Period_SD THEN
(
    Continue_Processing_Flag = 'N'
)
ELSE
(
    E = GET_PAYROLL_PERIOD(ADD_DAYS(Period_ED,1))
    E = SET_DATE('PERIOD_SD',GET_DATE('PAYROLL_PERIOD_START_DATE'))
    E = SET_DATE('PERIOD_ED',GET_DATE('PAYROLL_PERIOD_END_DATE'))
    Continue_Processing_Flag = 'Y'
)

RETURN Continue_Processing_Flag
```

Sample Formula for Sickness Holiday (Hungary)

Oracle HRMS provides the HU_SICKNESS_HOLIDAY_MULTIPLIER to calculate the Sickness Holiday as required for the Hungarian Absence Report. The sickness holiday is based on the following rules:

- Annual sickness holiday of fifteen days.
- Entitlement depends on the number of days worked in a week. The formula calculates proportionately if the work pattern changes within the leave year.

- Entitlement depends on the sickness holiday the employee has taken in the previous employment.

The HU_SICKNESS_HOLIDAY_MULTIPLIER calls another formula, HU_SICKNESS_HOLIDAY_PERIOD_ACCRUAL to calculate the accrual within a specific period. There is no carry over formula for Sickness Holiday.

The top-level formula, HU_SICKNESS_HOLIDAY_MULTIPLIER, and the looping formula HU_SICKNESS_HOLIDAY_PERIOD_ACCRUAL are given below.

```
/* ---------------------------------------------------------------------
NAME : HU_SICKNESS_HOLIDAY_MULTIPLIER
This formula calculates the total accrued sickness holiday for a
specific period.
----------------------------------------------------------------*/

DEFAULT FOR ACP_INELIGIBILITY_PERIOD_TYPE IS 'CM'
DEFAULT FOR ACP_INELIGIBILITY_PERIOD_LENGTH IS 0
DEFAULT FOR ACP_CONTINUOUS_SERVICE_DATE IS '4712/12/31 00:00:00'(DATE)
DEFAULT FOR ACP_ENROLLMENT_END_DATE IS '4712/12/31 00:00:00' (DATE)
DEFAULT FOR ACP_TERMINATION_DATE IS '4712/12/31 00:00:00' (DATE)
DEFAULT FOR ACP_ENROLLMENT_START_DATE IS '4712/12/31 00:00:00' (DATE)
DEFAULT FOR ACP_SERVICE_START_DATE IS '4712/12/31 00:00:00' (DATE)

INPUTS ARE Calculation_Date (DATE)

Accruing_Frequency = ' '
Accruing_Multiplier = 0

/* ---------------------------------------------------------------------
Set the payroll period, accruing frequency, and accruing multiplier
based on the payroll.
----------------------------------------------------------------*/
No_of_Payroll_Periods = HU_PAYROLL_PERIODS (Calculation_Date
                                           ,Accruing_Frequency
                                           ,Accruing_Multiplier)

E = SET_TEXT('ACCRUING_FREQUENCY', Accruing_Frequency)
E = SET_NUMBER('ACCRUING_MULTIPLIER', Accruing_Multiplier)

/* ---------------------------------------------------------------------
Calculate the start and end Dates of the current leave year
-----------------------------------------------------------------*/
Beginning_Of_Calculation_Year = TO_DATE('0101'
                                        ||TO_CHAR(Calculation_Date
                                                 ,'YYYY')
                                        ,'DDMMYYYY')
End_Of_Calculation_Year = to_DATE('3112'||TO_CHAR(Calculation_Date
                                                 ,'YYYY')
                                 ,'DDMMYYYY')

IF Beginning_Of_Calculation_Year > Calculation_Date THEN
(
  Beginning_of_Calculation_Year = ADD_MONTHS
(Beginning_Of_Calculation_Year
                                            , -12)
)

E = SET_DATE('BEGINNING_OF_CALCULATION_YEAR'
            , Beginning_Of_Calculation_Year)

E = GET_PERIOD_DATES(Beginning_of_Calculation_Year
                    ,Accruing_Frequency
                    ,Beginning_Of_Calculation_Year
                    ,Accruing_Multiplier)

First_Period_SD = GET_DATE('PERIOD_START_DATE')
First_Period_ED = GET_DATE('PERIOD_END_DATE')

E = GET_PERIOD_DATES(End_Of_Calculation_Year
                    ,Accruing_Frequency
                    ,Beginning_Of_Calculation_Year
                    ,Accruing_Multiplier)

Last_Period_SD = GET_DATE('PERIOD_START_DATE')
Last_Period_ED = GET_DATE('PERIOD_END_DATE')
```

```
/* ---------------------------------------------------------------------
   Set the Calculation_Date to the Termination Date if not null
--------------------------------------------------------------------*/

IF NOT (ACP_TERMINATION_DATE WAS DEFAULTED) OR
NOT (ACP_ENROLLMENT_END_DATE WAS DEFAULTED) THEN
(
  Early_End_Date = LEAST(ACP_TERMINATION_DATE
                        ,ACP_ENROLLMENT_END_DATE)
  IF (Early_End_Date < First_Period_SD) THEN
  (
    Total_Accrued_PTO = 0
    E = PUT_MESSAGE('HR_52794_PTO_FML_ASG_TER')
  )
  IF (Early_End_Date < Last_Period_ED) THEN
  (
    E = GET_PERIOD_DATES(Early_End_Date
                      ,Accruing_Frequency
                      ,Beginning_Of_Calculation_Year
                      ,Accruing_Multiplier)
    Last_Period_SD = GET_DATE('PERIOD_START_DATE')
    Last_Period_ED = GET_DATE('PERIOD_END_DATE')
  )
  IF (Early_End_Date < Calculation_Date) THEN
  (
    Calculation_Date = Early_End_Date
  )
)

/* ---------------------------------------------------------------------
Get the last whole period prior to the Calculation Date and ensure
that it is within the Year (if the Calculation Date is the End of a
Period then use that period)
-------------------------------------------------------------------- */

E = GET_PERIOD_DATES(Calculation_Date
                    ,Accruing_Frequency
                    ,Beginning_of_Calculation_Year
                    ,Accruing_Multiplier)

Calculation_Period_SD  = GET_DATE('PERIOD_START_DATE')
Calculation_Period_ED  = GET_DATE('PERIOD_END_DATE')

IF (Calculation_Period_ED < First_Period_SD) THEN
(
  Total_Accrued_PTO = 0
  E = PUT_MESSAGE('HR_52795_PTO_FML_CALC_DATE')
)
/* ---------------------------------------------------------------------
Set the Continuous Service Global Variable, whilst also
ensuring that the continuous service date is before the
Calculation Period
------------------------------------------------------------------ */

IF (ACP_CONTINUOUS_SERVICE_DATE WAS DEFAULTED) THEN
(
  E = SET_DATE('CONTINUOUS_SERVICE_DATE', ACP_SERVICE_START_DATE)
)
ELSE IF(ACP_CONTINUOUS_SERVICE_DATE > Calculation_Period_ED) THEN
(
  Total_Accrued_PTO = 0
  E = PUT_MESSAGE('HR_52796_PTO_FML_CSD')
  E = SET_DATE('CONTINUOUS_SERVICE_DATE'
              , ACP_CONTINUOUS_SERVICE_DATE)
)
ELSE IF(ACP_CONTINUOUS_SERVICE_DATE > First_Period_SD) THEN
```

```
(
  E = GET_PERIOD_DATES(ACP_CONTINUOUS_SERVICE_DATE,
                       Accruing_Frequency,
                       Beginning_Of_Calculation_Year,
                       Accruing_Multiplier)
  First_Period_SD = GET_DATE('PERIOD_START_DATE')
  First_Period_ED = GET_DATE('PERIOD_END_DATE')
)
ELSE
(
  E = SET_DATE('CONTINUOUS_SERVICE_DATE'
            , ACP_CONTINUOUS_SERVICE_DATE)
)

Continuous_Service_Date = GET_DATE('CONTINUOUS_SERVICE_DATE')
First_Eligible_To_Accrue_Date  = Continuous_Service_Date

/*-------------------------------------------------------------------
Determine the date on which accrued PTo may first be registered,
i.e the date on which the Ineligibility Period expires
 ----------------------------------------------------------------- */
Accrual_Ineligibility_Expired_Date = First_Eligible_To_Accrue_Date

IF (ACP_INELIGIBILITY_PERIOD_LENGTH > 0) THEN
(
  IF ACP_INELIGIBILITY_PERIOD_TYPE = 'BM' THEN
  (
    Accrual_Ineligibility_Expired_Date =
                  ADD_MONTHS(Continuous_Service_Date
                            ,ACP_INELIGIBILITY_PERIOD_LENGTH*2)
  )
  ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'F' THEN
  (
    Accrual_Ineligibility_Expired_Date =
                 ADD_DAYS(Continuous_Service_Date
                         ,ACP_INELIGIBILITY_PERIOD_LENGTH*14)
  )
  ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'CM' THEN
  (
    Accrual_Ineligibility_Expired_Date =
               ADD_MONTHS(Continuous_Service_Date
                         ,ACP_INELIGIBILITY_PERIOD_LENGTH)
  )
  ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'LM' THEN
  (
    Accrual_Ineligibility_Expired_Date =
              ADD_DAYS(Continuous_Service_Date
                      ,ACP_INELIGIBILITY_PERIOD_LENGTH*28)
  )
  ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'Q' THEN
  (
    Accrual_Ineligibility_Expired_Date =
               ADD_MONTHS(Continuous_Service_Date
                         ,ACP_INELIGIBILITY_PERIOD_LENGTH*3)
  )
  ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'SM' THEN
  (
    Accrual_Ineligibility_Expired_Date =
              ADD_MONTHS(Continuous_Service_Date
                        ,ACP_INELIGIBILITY_PERIOD_LENGTH/2)
  )
  ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'SY' THEN
  (
    Accrual_Ineligibility_Expired_Date =
             ADD_MONTHS(Continuous_Service_Date
                       ,ACP_INELIGIBILITY_PERIOD_LENGTH*6)
```

```
)
  ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'W' THEN
  (
    Accrual_Ineligibility_Expired_Date =
                   ADD_DAYS(Continuous_Service_Date
                           ,ACP_INELIGIBILITY_PERIOD_LENGTH*7)
  )
  ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'Y' THEN
  (
    Accrual_Ineligibility_Expired_Date =
                  ADD_MONTHS(Continuous_Service_Date
                             ,ACP_INELIGIBILITY_PERIOD_LENGTH*12)
  )
  IF Accrual_Ineligibility_Expired_Date > First_Eligible_To_Accrue_Date
  AND Calculation_Date < Accrual_Ineligibility_Expired_Date THEN
  (
    First_Eligible_To_Accrue_Date = Accrual_Ineligibility_Expired_Date
  )
)

/* ----------------------------------------------------------------------
Get the first full period following the
First_Eligible_To_Accrue_Date (if it falls on the beginning of the
period then use that period)
------------------------------------------------------------------- */

IF First_Eligible_To_Accrue_Date > Beginning_Of_Calculation_Year THEN
(
  E = GET_PERIOD_DATES(First_Eligible_To_Accrue_Date
                       ,Accruing_Frequency
                       ,Beginning_Of_Calculation_Year
                       ,Accruing_Multiplier)
  First_Eligible_To_Accrue_Period_SD  = GET_DATE('PERIOD_START_DATE')
  First_Eligible_To_Accrue_Period_ED  = GET_DATE('PERIOD_END_DATE')

  IF (First_Eligible_To_Accrue_Period_SD > Calculation_period_ED) THEN
  (
    Total_Accrued_PTO = 0
    E = PUT_MESSAGE('HR_52793_PTO_FML_ASG_INELIG')
  )
)
ELSE
(
  First_Eligible_To_Accrue_Period_SD  = First_Period_SD
  First_Eligible_To_Accrue_Period_ED  = First_Period_ED
)

/* ----------------------------------------------------------------------
Determine the date on which PTO actually starts accruing based
on Hire Date,Continuous Service Date and plan Enrollment Start
Date.
------------------------------------------------------------------- */

IF Continuous_Service_date = ACP_CONTINUOUS_SERVICE_DATE THEN
(
  Actual_Accrual_Start_Date = Continuous_service_Date
)
ELSE
(
  Actual_Accrual_Start_Date = GREATEST(Continuous_Service_Date
                                      ,ACP_ENROLLMENT_START_DATE
                                      ,First_Period_SD)
)

/* ----------------------------------------------------------------------
    Determine the actual start of the accrual calculation
```

```
-----------------------------------------------------------------*/

IF (Actual_Accrual_Start_Date > First_Period_SD AND
    Actual_Accrual_Start_Date > First_Eligible_To_Accrue_Period_SD) THEN
(
  E = GET_PERIOD_DATES(Actual_Accrual_Start_Date
                      ,Accruing_Frequency
                      ,Beginning_Of_Calculation_Year
                      ,Accruing_Multiplier)
  Accrual_Start_Period_SD = GET_DATE('PERIOD_START_DATE')
  Accrual_Start_Period_ED = GET_DATE('PERIOD_END_DATE')
  /*-------------------------------------------------------------
  If the Actual Accrual Period is after the Calculation Period then
  end the processing.
  ------------------------------------------------------------ */

  IF (Accrual_Start_Period_SD > Calculation_period_ED) THEN
  (
    Total_Accrued_PTO = 0
    E = PUT_MESSAGE('HR_52797_PTO_FML_ACT_ACCRUAL')
  )
)
ELSE IF (First_Eligible_To_Accrue_Period_SD > First_Period_SD) THEN
(
  Accrual_Start_Period_SD = First_Eligible_To_Accrue_Period_SD
  Accrual_Start_Period_ED = First_Eligible_To_Accrue_Period_ED
)
ELSE
(
  Accrual_Start_Period_SD = First_Period_SD
  Accrual_Start_Period_ED = First_Period_ED
)

/*-------------------------------------------------------------------
Retrieve sickness information for previous employment
----------------------------------------------------------------- */

Previous_employment = 'N'
Prev_Sickness_Leave = 0

IF TO_CHAR(ACP_SERVICE_START_DATE,'yyyy') = TO_CHAR
   (Calculation_Date,'yyyy') THEN
(
  Prev_Sickness_Leave = HU_ABS_GET_PREV_EMP_SICKNESS_LEAVE
                             (TO_CHAR(Calculation_Date,'yyyy')
                             ,Previous_employment)
)
Accrued_PTO = 0

/* -----------------------------------------------------------------
Now set up the information that will be used in when looping
through the periods
------------------------------------------------------------------ */

IF Last_period_ED >= Accrual_Start_Period_ED THEN
(
  E = SET_DATE('PERIOD_SD',Accrual_Start_Period_SD)
  E = SET_DATE('PERIOD_ED',Accrual_Start_Period_ED)
  E = SET_DATE('LAST_PERIOD_SD',Calculation_period_SD)
  E = SET_DATE('LAST_PERIOD_ED',Calculation_period_ED)
  E = SET_NUMBER('TOTAL_ACCRUED_PTO',Accrued_PTO)
  E = LOOP_CONTROL('HU_SICKNESS_HOLIDAY_PERIOD_ACCRUAL')
  Total_Accrued_PTO = ROUND(GET_NUMBER('TOTAL_ACCRUED_PTO'))
  IF Previous_employment = 'Y' AND  Total_Accrued_PTO >
                         15 - Prev_Sickness_Leave THEN
  (
```

```
Total_Accrued_PTO = 15 - Prev_Sickness_Leave
    E = SET_NUMBER('TOTAL_ACCRUED_PTO',Total_Accrued_PTO)
  )
)

IF Accrual_Start_Period_SD <= Calculation_period_ED THEN
(
  Accrual_end_date = Calculation_period_ED
)

Effective_Start_Date = Accrual_Start_Period_SD
Effective_End_Date = Calculation_period_ED
IF Effective_Start_Date >= Effective_End_Date THEN
(
  Effective_Start_Date = Effective_End_Date
)

RETURN Total_Accrued_PTO, Effective_start_date
       , Effective_end_date, Accrual_end_date
```

Looping formula

```
/* ----------------------------------------------------------------------
NAME : HU_SICKNESS_HOLIDAY_PERIOD_ACCRUAL
This formula calculates the amount of PTO accrued for a particular
period
----------------------------------------------------------------------*/

/*----------------------------------------------------------------------
  Get the global variable to be used in this formula
----------------------------------------------------------------------*/

DEFAULT FOR ACP_TERMINATION_DATE IS '4712/12/31 00:00:00' (DATE)
DEFAULT FOR EMP_HIRE_DATE IS '4712/12/31 00:00:00' (DATE)
DEFAULT FOR ACP_SERVICE_START_DATE IS '4712/12/31 00:00:00' (DATE)
Continuous_Service_Date = GET_DATE('CONTINUOUS_SERVICE_DATE')
Total_Accrued_PTO = GET_NUMBER('TOTAL_ACCRUED_PTO')
Period_SD = GET_DATE('PERIOD_SD')
Period_ED = GET_DATE('PERIOD_ED')
Last_Period_SD = GET_DATE('LAST_PERIOD_SD')
Last_Period_ED = GET_DATE('LAST_PERIOD_ED')

/* -------------------------------------------------------------------
Set the payroll period, accruing frequency, and accruing multiplier
based on the payroll.
-------------------------------------------------------------------*/

Accruing_Frequency = GET_TEXT('ACCRUING_FREQUENCY')
Accruing_Multiplier = GET_NUMBER('ACCRUING_MULTIPLIER')
Beginning_of_Calculation_Year =
                           GET_DATE('BEGINNING_OF_CALCULATION_YEAR')

Period_Accrued_PTO = 0
IF ACP_SERVICE_START_DATE >= Period_SD
  AND ACP_SERVICE_START_DATE <= Period_ED
  AND ACP_TERMINATION_DATE  >= Period_SD
  AND ACP_TERMINATION_DATE <= Period_ED THEN
(

  Days_valid = HU_ABS_GET_WORKING_DAYS(ACP_SERVICE_START_DATE
                                      ,ACP_TERMINATION_DATE)
)
ELSE IF ACP_SERVICE_START_DATE >= Period_SD AND
        ACP_SERVICE_START_DATE <= Period_ED THEN
```

```
(
  Days_valid = HU_ABS_GET_WORKING_DAYS(ACP_SERVICE_START_DATE
                                      , Period_ED)
)
ELSE IF ACP_TERMINATION_DATE  >= Period_SD AND
        ACP_TERMINATION_DATE <= Period_ED THEN
(
 Days_valid = HU_ABS_GET_WORKING_DAYS(Period_SD
                                     , ACP_TERMINATION_DATE)
)
ELSE
(
 Days_valid = HU_ABS_GET_WORKING_DAYS(Period_SD,Period_ED)
)

/* ----------------------------------------------------------------
 Calculate the Amount Accrued this Period
-----------------------------------------------------------------*/
Period_Accrued_PTO = 15 * (Days_valid/260)

/*-----------------------------------------------------------------
Calculate any absence or bought/sold time etc. to be accounted for in
this period.
-------------------------------------------------------------------*/
Absence = GET_ABSENCE(Period_ED, Beginning_of_Calculation_Year)
CarryOver = GET_CARRY_OVER(Period_ED, Beginning_of_Calculation_Year)
Other = GET_OTHER_NET_CONTRIBUTION(Period_ED
                                  ,Beginning_of_Calculation_Year)
Period_Others = CarryOver + Other - Absence

/*-----------------------------------------------------------------
    Set the Running Total
------------------------------------------------------------------*/

E = SET_NUMBER('TOTAL_ACCRUED_PTO'
              ,Total_Accrued_PTO + Period_Accrued_PTO)

/* ----------------------------------------------------------------
Establish whether the current period is the last one, if so end
the processing, otherwise get the next period
-----------------------------------------------------------------*/

IF Period_SD = Last_Period_SD THEN
(
  Continue_Processing_Flag = 'N'
)
ELSE
(
  E = GET_PERIOD_DATES(ADD_DAYS(Period_ED,1)
                      ,Accruing_Frequency
                      ,Beginning_of_Calculation_Year
                      ,Accruing_Multiplier)
  E = SET_DATE('PERIOD_SD', GET_DATE('PERIOD_START_DATE'))
  E = SET_DATE('PERIOD_ED', GET_DATE('PERIOD_END_DATE'))
  Continue_Processing_Flag = 'Y'
)

RETURN Continue_Processing_Flag
```

Sample Formula for Carry Over Absence (Hungary)

Oracle HRMS provides the HU_ABS_CARRYOVER_FORMULA to calculate their unused Base Holiday, Additional Holiday for bringing up children, and Other

Additional Holiday except Sickness Holiday. Employees can carry over these holidays up to 30th June of the following year or, if the collective agreement permits, up to 31st December of the following year. The formula considers 30th June as the carry over expiry date.

You can use the sample formula HU_ABS_CARRYOVER_FORMULA to calculate the above entitlements. The sample formula is given below:

```
/*====================================================================
Formula Title : HU_ABS_HOLIDAY_CARRY_OVER
Description   : This Formula carries over the holidays remaining to
                next period.
====================================================================*/
DEFAULT FOR ACP_CONTINUOUS_SERVICE_DATE IS '4712/12/31 00:00:00' (date)
DEFAULT FOR ACP_SERVICE_START_DATE IS '4712/12/31 00:00:00' (date)

INPUTS ARE  Calculation_Date (date)
           ,Accrual_Term     (text)

IF  ACP_CONTINUOUS_SERVICE_DATE WAS DEFAULTED THEN
(
  Continuous_Service_Date = ACP_SERVICE_START_DATE
)
ELSE
(
  Continuous_Service_Date = ACP_CONTINUOUS_SERVICE_DATE
)
calculation_period_end_date  =
         TO_DATE('3112'|| TO_CHAR(Calculation_Date,'YYYY'),'DDMMYYYY')

IF  Accrual_Term = 'PREVIOUS' THEN
(
  Effective_Date = ADD_YEARS(calculation_period_end_date, -1)
)
ELSE
(
Effective_Date = calculation_period_end_date
)

Expiry_Date = ADD_MONTHS(effective_date, 6)
Years_service = FLOOR(MONTHS_BETWEEN(ADD_DAYS(Effective_date,1)
                                    , Continuous_Service_Date) / 12)

IF  (GET_ACCRUAL_BAND(Years_service) = 0) THEN
(
  Max_carryover = GET_NUMBER('MAX_CARRY_OVER')
)
ELSE
  Max_carryover  = 30

Process = 'YES'

RETURN Max_Carryover, Effective_date, Expiry_Date, Process
```

9

Implementation

Additional Implementation Steps for Hungary

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

Please see the implementation section in *Implementing Oracle HRMS* for all other implementation steps that are not specific to Hungary.

Additional Implementation Steps

Step 1: Set Up Language Skills

If your enterprise records information about the language skills held by its employees, you can set up a rating scale and competence to define this information, then assign the profile to an employee. You can configure the Additional Competence Element Details flexfield to hold the Certification Number. See: Setting Up Language Skills, page 7-3

Step 2: Set Up Shift Patterns

Set up work patterns to record shift details for your employees. See: Setting Up Shift and Shift Patterns, page 4-23

Step 3: Set Up Pension Schemes

Set up pension schemes and enroll employees. See: Setting Up Pension Schemes, page 6-4

Step 4: Set Up the Employment Certification Report

Before you can run the Employment Certification Report, you must configure the report using Web ADI and then run the report generator. See: Setting Up the Employment Certificate Report, page 4-43

Step 5: Set Up the Hungarian Absence Report

Before you can run the Hungarian Absence Report, you must configure the report using Web ADI and then run the report generator. See: Setting Up the Hungarian Absence Report, page 5-9