Oracle® HRMS for Kuwait

Supplement

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

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

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

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Preface

Intended Audience

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

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

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

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

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

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

Documentation Accessibility

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

Access to Oracle Support

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

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

Structure

Related Information Sources

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

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

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

Guides Related to All Products

Oracle E-Business Suite User's Guide

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

Oracle Application Framework Personalization Guide

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

Guides Related to This Product

Oracle Human Resources Management Systems Enterprise and Workforce Management Guide

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

Oracle Human Resources Management Systems Workforce Sourcing, Deployment, and

Talent Management Guide

Learn how to use Oracle HRMS to represent your workforce. This includes recruiting new workers, developing their careers, managing contingent workers, and reporting on your workforce.

Oracle Human Resources Management Systems Payroll Processing Management Guide

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

Oracle Human Resources Management Systems Compensation and Benefits Management Guide

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

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

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

Oracle Human Resources Management Systems Implementation Guide

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

Oracle Human Resources Management Systems FastFormula User Guide

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

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

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

Oracle Performance Management Implementation and User Guide

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

Oracle Succession Planning Implementation and User Guide

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

Oracle Human Resources Management Systems Deploy Strategic Reporting (HRMSi)

Implement and administer Oracle Human Resources Management Systems Intelligence

(HRMSi) in your environment.

Oracle Human Resources Management Systems Strategic Reporting (HRMSi) User Guide

Learn about the workforce intelligence Discoverer workbooks.

Oracle Human Resources Management Systems Approvals Management Implementation Guide

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

Oracle Human Resources Management Systems Window Navigation and Reports Guide

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

Oracle iRecruitment Implementation and User Guide

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

Oracle Learning Management User Guide

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

Oracle Learning Management Implementation Guide

Implement Oracle Learning Management to accommodate your specific business practices.

Oracle Time and Labor Implementation and User Guide

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

Oracle Labor Distribution User Guide

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

Other Implementation Documentation

Oracle E-Business Suite Maintenance Guide

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

Oracle E-Business Suite Security Guide

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

Oracle E-Business Suite Setup Guide

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

Oracle E-Business Suite Flexfields Guide

This guide provides flexfields planning, setup, and reference information for the Oracle E-Business Suite implementation team, as well as for users responsible for the ongoing maintenance of Oracle E-Business Suite product data. This guide also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

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

Integration Repository

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

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

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

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

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

Because Oracle E-Business Suite tables are interrelated, any change you make using an Oracle E-Business Suite form can update many tables at once. But when you modify Oracle E-Business Suite data using anything other than Oracle E-Business Suite, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle E-Business Suite.

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

1

Enterprise and Workforce Management

Organizations

Key Concepts for Representing Enterprises

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

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

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

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

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

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

See: Organization Classifications, page 1-4

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

Business Group

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

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

- If you use Oracle Payroll

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

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

Operating Company

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

Ultimate Legal Entity

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

Legal Entity/Employer

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

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

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

Consolidated Legal Entity

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

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

Organization Classifications

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

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

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

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

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

All Legislations

All legislations can use the following classifications:

- **Business Group**: Use this classification to group, manage, and control access to data in accordance with the rules and reporting requirements of a country.

- **Operating Company**: An operating company represents a division or line of business within your enterprise that is legally registered for reporting in at least one country.

- **GRE/Legal Entity**: Use this classification to represent the following organizations:

  - **Ultimate Legal Entity**: this represents the enterprise, and typically, the enterprise is the highest (global) level of a business organization.

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

  - **Consolidated Legal Entity**: this organization acts on behalf of multiple operating companies that are not legally registered, or simply on behalf of the enterprise in a country.

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

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

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

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

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

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

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

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

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

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

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

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

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

US Legislation

The US legislation can use the following classifications:

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

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

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

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

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

UK Legislation

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

Canadian Legislation

The Canadian legislation can use the following classifications:

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

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

French Legislation

The French legislation can use the following classifications:

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

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

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

Dutch Legislation

The Dutch legislation can use the following classifications:

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

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

German Legislation

The German legislation can use the following classifications:

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

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

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

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

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

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

Hong Kong Legislation

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

Mexico Legislation

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

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

Saudi Legislation

The Saudi legislation can use the following classifications:

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

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

Hungary Legislation

The Hungary legislation can use the following classifications:

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

Spanish Legislation

The Spanish legislation can use the following classifications:

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

Korea Legislation

The Korean legislation can use the following classification:

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

Indian Legislation

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

The Indian legislation can use the following classifications:

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

account number in the NPS Account Set Up window.

Polish Legislation

The Polish legislation can use the following classifications:

- **PL SII Branch**: Use this classification to represent a local branch of the Social Insurance Institute (SII), a public organization that deals with the social insurance benefits, such as sickness allowance, maternity allowance, and rehabilitation benefits. You use the SII branch information for social insurance reporting.

- **PL Statistic Office**: Use this to represent a local statistic office. You use this information in reports sent to the statistic office.

- **PL Tax Office**: Use this to define the tax office bank accounts for the employer and for the tax collected from the employees. You use this information in statutory reports.

Norwegian Legislation

The Norwegian legislation can use the following classifications:

- **Local Unit**: Use this classification to identify and report on the different work centers, within your enterprise, to which you assign employees.

- **Payee Organization**: Use this classification to define an external organization which receives third party payment from an employee

- **Social Security Office**: Use this to define external social security office organizations.

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

- **Statement Provider**: Use this classification to define an external organization that provides reports on behalf of the legal employer.

- **Tax Office**: Use this classification to define an external tax organization.

Finnish Legislation

The Finnish legislation can use the following classifications:

- **Local Unit**: Use this classification to identify and report on the different work centers, within your enterprise, to which you assign employees.

- **External Company**: Use this to record details of the various types of external organizations with whom your organization deals. Ensure to create organizations with this classification as external organizations.

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

Danish Legislation

The Danish legislation can use the following classifications:

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

Swedish Legislation

The Swedish legislation can use the following classifications:

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

South African Legislation

The South African legislation can use the following classification:

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

UAE Legislation

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

Irish Legislation

The Irish legislation can use the following classifications:

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

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 1-14

For HR organization see: HR Organization, page 1-15

For representative body see: Representative Body, page 1-16

For constituency see: Constituency, page 1-16

For bargaining association see: Bargaining Association, page 1-17

For company cost center see: Company Cost Center, page 1-17

For professional body information see: Professional Body Information, page 1-18

For legal employer see: Legal Employer, page 1-18

See Classification and Additional Information Types, *Oracle HRMS Enterprise and Workforce Management Guide* if you need to check which classification to select.

To enter Business Group additional information:

1. Click on the organization classification for which you want to enter additional information.
2. Choose the Others button to open the Additional Organization Information window.
3. Select one of the following:
   - Business Group Information, see: Entering Business Group Information, *Oracle HRMS Enterprise and Workforce Management Guide*

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

- 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 Enterprise and Workforce Management Guide*

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

- Local Nationality, see: Entering Local Nationality Information, page 1-21

- SOE Details, see: Business Groups: Entering SOE Information, page 1-18 and Business Groups: Entering SOE Detail Information, page 1-19

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 Enterprise and Workforce Management Guide*

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

- Related Organizations Information, see: Entering Related Organizations Information for an HR Organization, *Oracle HRMS Enterprise and Workforce Management Guide*

4. Repeat these steps to enter further information.

To enter representative body additional information:

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

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

3. Select one of the following:

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

   - Constituency information, see: Entering Constituency Information for a Representative Body, *Oracle HRMS Enterprise and Workforce Management Guide*

4. Repeat these steps to enter further information.

To enter constituency additional information:

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

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

3. Select one of the following:

   - Location, see Entering Location Information for Constituencies, *Oracle HRMS Enterprise and Workforce Management Guide*

   - Organization, see Entering Organization Information for Constituencies, *Oracle*

HRMS Enterprise and Workforce Management Guide

- Organization Hierarchy, see Entering Organization Hierarchy information for Constituencies, *Oracle HRMS Enterprise and Workforce Management Guide*
- Grade, see Entering Grade information for Constituencies, *Oracle HRMS Enterprise and Workforce Management Guide*
- Bargaining Unit, see Entering Bargaining Unit information for Constituencies, *Oracle HRMS Enterprise and Workforce Management Guide*
- Job, see Entering Job information for Constituencies, *Oracle HRMS Enterprise and Workforce Management Guide*
- Collective Agreement Grade, see Entering Collective Agreement Grade information for Constituencies, *Oracle HRMS Enterprise and Workforce Management Guide*

4. Repeat these steps to enter further information.

To enter bargaining association information:

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

To enter company cost center information:

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

- Reporting Information, see: Entering Reporting Information for an HR Organization or a Company Cost Center, *Oracle HRMS Enterprise and Workforce Management Guide*

4. Repeat these steps to enter further information.

To enter professional body information:

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

To enter legal employer information:

1. Click on the organization classification for which you want to enter additional information.
2. Click the Others button to open the Additional Organization Information window.
3. Select one of the following:

   Kuwait Legal Employer Details. See: Entering Legal Employer Information, page 1-22

   Kuwait Wage Formula, See Legal Employer: Entering Wage Formula Information, page 1-22

   Contact Details. See

   Legal Employer: Entering Contact Details, page 1-23

   Kuwait Reporting Data. See

   Legal Employer: Entering Social Allowance, page 1-23
4. Repeat these steps to enter further information.

Business Groups: Entering SOE Information

You enter statement of earnings (SOE) information at the business group level to specify what information appears on each region of the statement of earnings. You can enter element set names for earnings, deductions, and any imputed earnings to ensure that the elements within these sets appear on the statement of earnings. You can also supply balance attributes for SOE display.

To enter SOE information:

1. In the Organization window, query the business group if it does not already appear. In the Organization Classifications region, select Business Group, click Others, and select SOE information

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

3. Select the SOE user category. You use this information to restrict the type of users who can view the SOE.

4. Select the Earnings element set in the Elements 1 field. (The set name typically begins with a legislative identifier, and then incorporates SOE EARNINGS as the next part of the name).

5. Select the Deductions element set in the Elements 2 field. (The set name typically begins with a legislative identifier, and then incorporates SOE DEDUCTIONS as the next part of the name).

6. If you have an element set for imputed earnings, select it in the Elements 3 field.

   Note: For South Africa only: You select the ZA SOE Fringe Benefits and Other Non Payments element set in the Elements 3 field.

7. Select the Information element set in the Information 1 field. You create this element set when you set up your statement of earnings.

   See: Setting Up a Global Statement of Earnings, page 4-2

8. Select your predefined balance attributes in the Balances fields (Balance 1, Balance 2 and so on)

9. Save your work.

Business Groups: Entering SOE Detail Information

The statement of earnings (SOE) displays details of earnings, deductions and other payroll-related information for an employee assignment. Oracle HRMS enables you to determine the display name for elements and balances, and the sequence in which they display.

To enter SOE detail information:

1. In the Organization window, query the business group if it does not already appear. In the Organization Classifications region, select Business Group, click Others, and select SOE Detail Information.

2. Click in a field of the Additional Organization Information window to open the SOE Detail Information window.

3. Select the type of SOE details that you want to record, by selecting balance or element.

   - If you select balance, then select the balance, dimension, and balance display name that you want the SOE to display.

   - If you select element, then select the element name, input value, and element display name that you want the SOE to display

4. Save your work.

Identifying Balances for the Payslip

You enter payslip balances information to determine the balances you want to archive and display on the payslip. You can define multiple balances for archive.

Enter the payslip balances information using the Organization window.

To identify balances for the payslip:

1. In the Organization window, query the Business Group if it does not already appear there. In the Organization Classifications region, select Business Group, choose the Others button, and select Payslip Balances.

2. Click in the Additional Organization Information window to open the Payslip Balances window.

3. Select the Balance Name and Balance Dimension. In the Balance Narrative field enter a description of the balance information. This appears on the payslip. The order you define the balances determines the sequence the application picks them up and displays on the payslip.

   > **Note:** Netherlands users: You can select the Social Insurance Type from the list of values, but only if you have selected entries for both the Balance Name and Balance Dimension fields.

4. Save your work.

Identifying Elements for the Payslip

You enter payslip elements information to determine the elements you want to archive and appear on the payslip. You can define multiple element input values for archive.

Enter the payslip elements information using the Organization window.

To identify elements for the payslip:

1. In the Organization window, query the Business Group if it does not already appear there. In the Organization Classifications region, select Business Group, choose the Others button, and select Payslip Elements.

2. Click in the Additional Organization Information window to open the Payslip Elements window.

3. Select the Element Name and Input Value. In the Narrative field enter a description of the element information. This appears on the payslip. The order you define the elements, determines the sequence the application picks them up and displays them on the payslip.

   Note: Netherlands users: You can select the Social Insurance Type from the list of values, but only if you have selected entries for both the Balance Name and Balance Dimension fields.

4. Save your work.

Entering Local Nationality Information

Use the Kuwait Information window to indicate that this business group is used to represent your enterprise's interests within Kuwait. Employees whose nationality matches the one you set here are eligible for Kuwaiti social insurance benefits.

To enter local nationality:

1. In the Organization window, query the organization if it does not already appear there. In the Organization Classifications region, select Business Group, click Others.

2. Select Kuwait Information to display the Additional Organization Information window.

3. Click in the Kuwait Information field and select Kuwaiti as the local nationality. Ensure that your System Administrator has added Kuwaiti to the NATIONALITY lookup before completing this step.

4. Save your work.

Entering Legal Employer Information

Use the Kuwait Employer Details window to record information about the legal employer. The disabled employee report uses the legal employer (the name of the organization as the legal employer) information.

To enter legal employer information:

1. In the Organization window, query the organization if it does not already appear there. In the Organization Classifications region, select Legal Employer, click Others, and select Kuwait Employer Details.

2. Click the Additional Organization Information field to open the Kuwait Employer Details window.

3. Enter the legally recognized name for this company, and select what type of company it is, for example, public sector, private sector, or oil sector.

4. Select a position hierarchy to indicate who is able to act as a signatory for this organization. Any person who fulfils any of the positions in the hierarchy has this authority.

5. Enter the employer's 9-digit social security number. The social insurance reports display the employer's social security number for identification.

6. Enter the enterprise's registration number. Government forms, such as issuance, renewal, and cancellation of an employee's work permit use the enterprise's registration number.

7. Enter the employer's 8-digit civil identifier. This number is to identify the legal employer details.

8. Save your work.

Legal Employer: Entering Wage Formula Information

Use the Kuwait Wage Formula window to attach the formula for the social insurance contributory wage.

The social insurance calculation process uses this contributory wage amount to calculate the social insurance deductions for an employee.

To enter wage formula information:

1. In the Formula window, define the formula to calculate the SI contributory wage.

   See: Writing or Editing a Formula, *Oracle HRMS FastFormula User Guide*

   > **Important:** While defining the formula, use the return variable contributory_wage_reference to store the calculated contributory wage value.

2. In the Organization window, query the organization if it does not already appear there. In the Organization Classifications region, select Legal Employer, click Others, and select Kuwait Wage Formula.

3. Click the Kuwait Wage Formula field to open the Kuwait Wage Formula window.

4. Select the formula to calculate the social insurance contributory wage.

5. Save your work.

Legal Employer: Entering Contact Details

Use the Contact Details window to enter the employer's contact details, such as phone or fax number.

To enter contact details:

1. In the Organization window, query the organization if it does not already appear there.

2. In the Organization Classifications region, select Legal Employer, and click Others.

3. Select Contact Details, and click on any row in the window.

4. Select the type of contact for which you want to enter the details, and then enter the description for the contact type.

5. Enter the contact detail. For example, if you have selected phone as contact type, enter the phone number in this field.

6. Click OK to close the window.

Entering Social Allowance

Use the Social Allowance window to enter the balance dimension that contains the social allowance amount. Oracle HRMS uses the social allowance value from this balance for reporting purposes.

To enter social allowance:

1. In the Organization window, query the organization if it does not already appear there.
2. In the Organization Classifications region, select Legal Employer, and click Others.
3. Select Kuwait Reporting Data, and click in the Kuwait Reporting Data field.
4. Select the balance that you have created for social allowance.
5. Click OK to close the window.

Employment Agreements and Legal Compliance

Occupational Health: Medical Assessments, Disabilities and Work Incidents

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

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

Medical Assessments

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

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

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

Disabilities

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

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

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

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

Work Incidents

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

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

Using the Work Incidents window, you can record:

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

A person can have multiple work incident records.

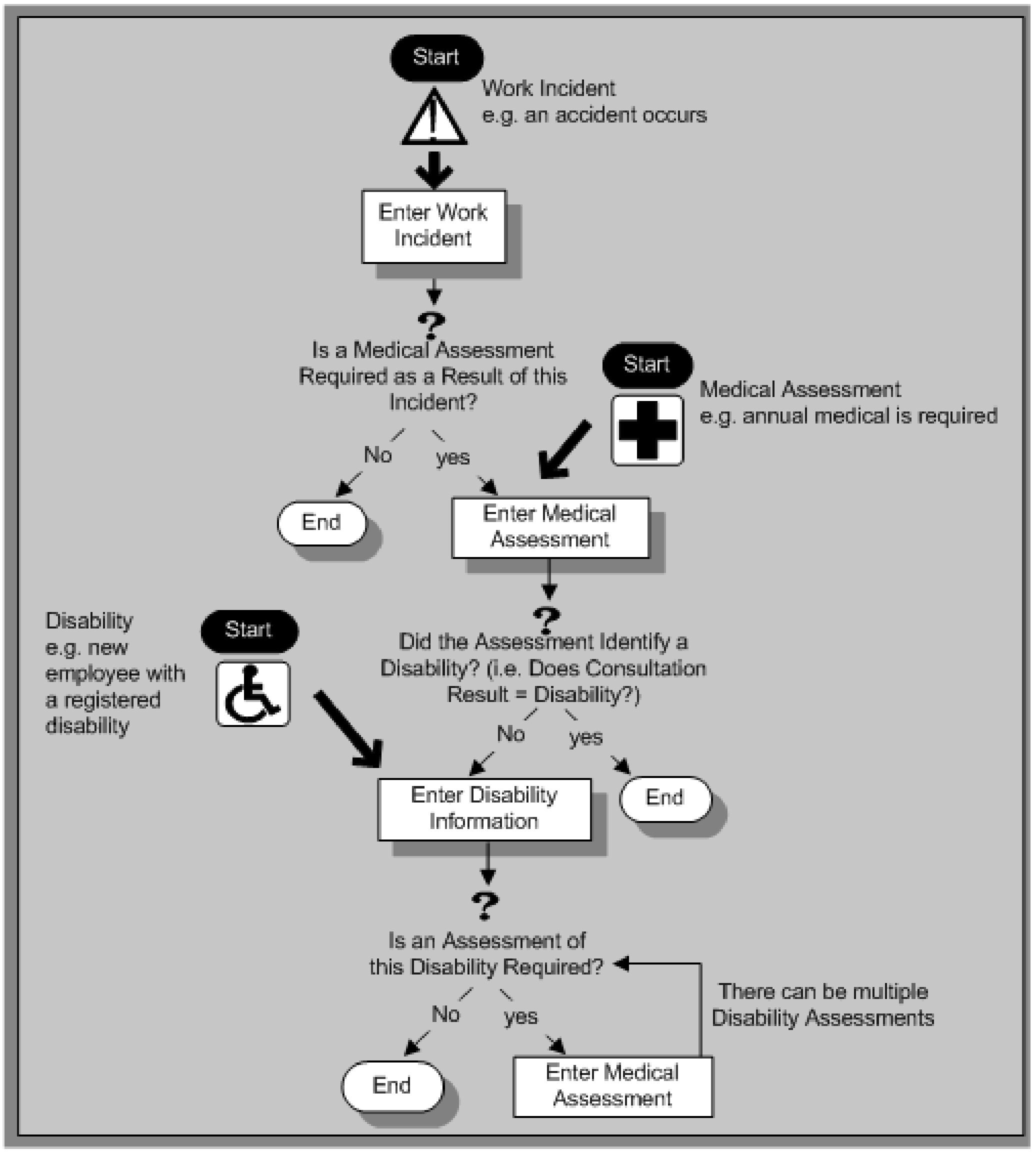
The graphic illustrates the relationship between the medical assessment, disability and work incident tasks. It shows the full process that you could follow if you wanted to record:

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

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

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

Recording a Disability



Entering Work Incident Information

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

To enter work incident information:

1. Enter information about the incident:

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

Incident Description:

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

Incident Reporting:

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

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

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

- Enter the organization to whom the incident was reported, for example, the local fire station or police.

- Enter contact details for anyone who witnessed the incident.

Official Notifications:

1. Choose the Official Notifications tab.

2. Enter the official notification details:

   - Select the name of your organization's health and safety representative and enter the date on which they were notified of the incident

   - Describe any remedial action that was taken (or is planned) as a result of this incident.

   - Select the organization and person that are the representative body for this person and enter the date on which they were notified of the incident

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

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

Medical Details:

1. Choose the Medical Details tab.

2. Enter any medical details:

   - Select the type of injury and/or disease caused by the incident.

   - Enter any further description of the injury or disease.

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

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

Other Information:

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

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

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

   See: Defining a Job, *Oracle HRMS Enterprise and Workforce Management Guide*

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

   - Check the Resulted in Absence? check box if the person was absent from work as a result of this incident.
3. Save your changes.

Further Work Incident Information:

1. Click in the Further Information field to open the Further Work Incident Information window.
2. Enter the date on which the organization stopped the wage of the employee.
3. Enter the unique patient number assigned by the hospital.

4. Enter the hospitalization details including the date on which the employee was admitted to the hospital and the duration of the stay at the hospital.

5. Enter the start date and end date for the employee's period of rest at home.

6. Enter the number of external visits the employee has made to the hospital.

7. Enter information about any medical violation.

8. Enter any details about the violation, such as missed medical appointments, medical advice or prescriptions that the employee did not follow.

9. Enter the total number of days the employee was escorted to the hospital by a family member, a friend or an employee.

10. Enter the date on which the employee resumed work.

11. Save your work.

What Next?

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

Entering Disability Information

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

You use the Disability window to enter this information.

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

See: Entering a New Person (People Window), page 2-13

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, such as Physical Disability, Hearing Impairment, Visual Impairment, or Blind.

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

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

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

4. Select the status of this disability information.

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

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

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

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

5. Select the reason for the disability, for example, select Occupational Disease if the disability of the person is due to long duration at hazardous work area, such as chemical industry. If the person has suffered disability due to an accident at work, then select Work Accident.

6. You can enter either the degree of disability or the range of disability. For example, if the person's disability category states that the disability decreases the work capacity by 50%, then enter 50 as the percentage in the degree field. If the person's disability category states that the disability decreases the work between 40 - 50%, then select 41 - 50 as the range in the range field.

   Additional Information: If you enter the percentage of disability in the Degree field, the application disables the Range of disability field.

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.

9. Enter the details of disability in the reporting description field. This description must not exceed sixty characters and is for reporting purpose.

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, *Oracle HRMS Enterprise and Workforce Management Guide*

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

Entering Additional Disability Information:

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

2. Enter a description of the disability.

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

4. Enter further information about this disability if the Further Information field has been set up by your Oracle localization team.

5. Save your work.

Running the Kuwaiti Disabled Employee Report

You can use the Kuwaiti Disabled Employee Report to generate a report of all the disabled workers in your enterprise. You can then submit the output of this report to the social security organization to fulfill your legal requirements. You can also use it to report on a group of organizations or individual organizations, or on particular disabilities or statuses for your information.

Run the Kuwaiti Disabled Employee Report from the Submit Request window.

To run the Kuwaiti Disabled Employee Report:

1. Select the Kuwaiti Disabled Employee Report in the Name field.

2. Click in the Parameters field to open the Parameters window.

3. Enter the date on which you want to generate the report.

4. Select the organizations that you want to include in the report:

   - Select a business group in the Organization Name field. If you do not select any further criteria, then the report includes all employees in the business group. The report lists disabled employees by legal employer.

   - Select an organization hierarchy to limit the report to certain organizations. The report lists disabled employees by legal employer within the selected organization hierarchy.

   - Select a legal employer to further limit the report. If you have not selected an organization hierarchy, then the report is run for the individual legal employer. If you have selected a hierarchy, then the report includes employees in the selected legal employer and any subordinate organizations.

5. If you want to report on employees with specific disabilities, or disability records with a particular status, then select the type and status.

6. Click the Submit button.

2

Workforce Sourcing and Deployment Workforce Sourcing

Appointment

Appointments and the Hiring Process

The appointment process takes the applicant from the recruitment process to employee administration where the initial tasks include entering terms and conditions and payroll information.

If you are an Oracle US Federal HRMS user, you use the Request for Personnel Action (RPA) to appoint employees.

If you are using Oracle SSHR, you can use the Candidate Offers functionality to generate offer letters.

Hire Dates and Future-Dated Changes

Oracle HRMS enables you to make future-dated changes to a person's details.

If you make future-dated changes to an applicant's details, such as changing their name, and you subsequently hire the person, the earliest hire date you can enter is the day following the date of the last change. The hire date can, of course, be a future date (providing it is at least 1 day after the date of the last change). For example, if you received an application on January 10th and you changed the applicant's details using future dates, say on January 22nd and February 10th, and you subsequently hire the applicant, the earliest hire date you can enter is February 11th (the date of the **last** change plus one day).

Alternatively, you could hire the applicant (change their person type to Employee), and then make the changes to their details with the status of Employee.

Back-to-Back Employment and Placements

Back-to-back employment and placements occur when a previous period of employment or a previous placement ends 1 day before a new period of employment or a new placement begins.

Oracle HRMS supports back-to-back employment and placements even where there is a difference in person types. That is, an ex-employee can begin a placement on the day following termination of their employment, and an ex-contingent worker can begin employment on the day following the end of their placement.

An ex-employee starting new employment or a placement on April 1st must have an actual termination date **and** a final processing date (for payroll processing) for their previous employment of March 31st. (If your enterprise does not have Oracle Payroll, the final processing date automatically defaults from the actual termination date).

An ex-contingent worker starting employment or a new placement on April 1st must have an actual termination date of March 31st for their most recent placement.

> **Note:** You cannot change the hire date of any back-to-back employment. Instead, you must cancel the employment and rehire the employee.

Earliest Hire Dates

- An applicant's earliest hire date is either 1 day after you accept the application or the day after the last of any future-dated changes, whichever is later.
- An ex-employee's earliest hire date is either 1 day after the final process date for the previous employment or the day after the last of any future-dated changes, whichever is later. For back-to-back employment, the final process date must be the actual termination date, and there can be no future-dated changes.

  > **Note:** Australia, Canada, China, Hong Kong, India, Korea, Mexico, New Zealand, Singapore, US, Russia, and South Africa Payroll users can rehire ex-employee before the final process date. See: Rehire Before Final Process Date, page 2-3

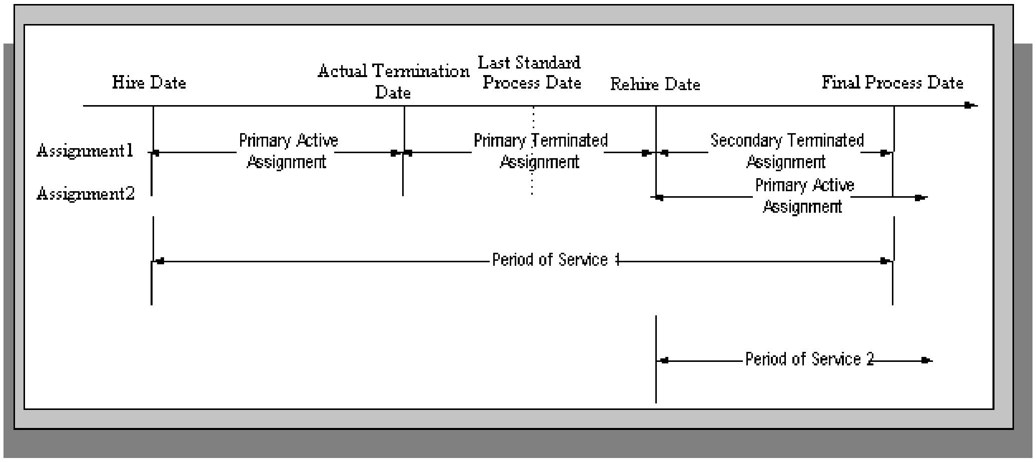
- An ex-contingent worker's earliest hire date is either 1 day after the actual termination date of the most recent placement or the day after the last of any future-dated changes, whichever is later. For back-to-back hiring, there can be no future-dated changes.

Rehire before Final Process Date

> **Note:** Australia, Canada, China, Denmark, Hong Kong, India, Ireland, Korea, Kuwait, Mexico, New Zealand, Norway, Saudi Arabia, Singapore, South Africa, Russia, UK, US, and United Arab Emirates Payroll users can rehire ex-employee before the final process date.See: Rehire Before Final Process Date, page 2-3

Australia, Canada, China, Denmark, Hong Kong, India, Ireland, Korea, Kuwait, Mexico, New Zealand, Norway, Saudi Arabia, Singapore, South Africa, Russia, UK, US, and United Arab Emirates Payroll Only: To provide greater flexibility in the hiring process, Oracle HRMS enables you to rehire a terminated employee before the Final Process (and after the Last Standard Process) date for their previous period of service.

Rehire before Final Process Date



As illustrated in the diagram, when you complete the rehire, the application changes the existing, terminated assignment into a secondary assignment. The new, active assignment becomes the primary. You can then process payments from both assignments during the overlapping periods of service.

> **Note:** When you cancel the rehire, the application changes the secondary terminated assignment back to a primary terminated assignment. The application however retains the date changes to the primary terminated assignment even after a cancellation. For example, if the actual termination date is 20 April, the final process date is 31 April, and you rehire the person on 25 April, the application updates the primary terminated assignment for the period 21 April to 24 April and creates a new one for the period 25 April to 31 April. If you subsequently cancel the rehire, then the application retains the primary terminated assignment for the period 21 April to 24 April as well as the one for the period 25 April to 31 April.

When you rehire before the final process date, the employee has overlapping periods of service between the rehire date and the final process date. The Terminate window displays the service dates for all the overlapping periods of service. The latest period of service appears by default. You can scroll down to view the earlier periods of service.

Valid Person Types for Applicants

You can convert an applicant to an employee but not to a contingent worker. However, an applicant can become a contingent worker (a Contingent Worker.Applicant) while their application for employment remains active. Subsequently, you can either cancel the application, and allow the contingent worker placement to continue, or end the contingent worker placement prior to hiring the applicant.

Hiring an Applicant (People Window and Application Window)

Use the Application and People windows to hire an applicant and to change the applicant's person type to Employee.

To hire an applicant:

If you have the Application window taskflowed from the People window, as in the following procedure, then you should query the person in the People window and then navigate to the Application window from there. This saves you from having to query the person twice. If you do not, then you must first query the person in the Application window, to enable you to update the applicant assignment status, and then requery the person in the People window.

1. Query the applicant in the People window.

2. Navigate to the Application window.

3. Update the applicant assignment status to Accepted and save the change.

4. Set your effective date to the applicant's hire date.

   Note: If future-dated changes exist, the hire date is the date of the last change plus at least one day. If no future-dated changes exist, the minimum hire date is the accepted date, plus one day.

5. Return to the People window.

6. Select a Hire Applicant in the Action Type field, and select a user person type. If only one user person type exists for the action type, it displays automatically.

   - The Latest Hire Date field displays your effective date.

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

     Note: The Date First Hired field is on the Benefits Tab.

7. If the applicant has more than one active applicant assignments, the Active Applicant Assignments window appears. It displays all the accepted and unaccepted assignments for the applicant. You can choose to:

   - Retain all accepted and unaccepted applicant assignments.

- Convert the accepted applicant assignments to secondary assignments.
- End date the unaccepted or other accepted applicant assignments.
- Check the primary check box to indicate which assignment will be the primary employee assignment.

8. Save your work.
9. **Mexico only**: Enter your new employee's previous employment details as defined by their Format 37.

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

Enrolling New Hires in the Compensation Plans:

After you hire iRecruitment applicants, run the iRecruitment Create Enrollment process to enroll new hires in the compensation plans included in their offer letters. For more information, see: Running the iRecruitment Create Enrollment Process, page 2-9

Updating the Assignment:

If you hire an applicant with an existing primary employee assignment, you will be asked if you want to update the primary assignment.

1. If you select Yes, you will be asked: "Do you want to retain the values of the employee primary assignment for the fields that are not defined in the applicant assignment?"
   - If you answer Yes, then only fields that have values entered for them in the applicant assignment will be used to update the primary assignment. Fields that have no value entered in the applicant assignment will remain as they are in the employee assignment. For example, if you have defined Employee A as a supervisor for the employee assignment but not set up a supervisor for the application assignment, when you choose Yes Employee A will remain as the supervisor for the new employee assignment.
     - If you answer No, then all values in the applicant assignment, including the null values, will be used to update the primary assignment. For example, if you have defined Employee A as a supervisor for the employee assignment but not set up a supervisor for the application assignment, when you choose No there will be no supervisor defined for the new employee assignment.
     - If you choose Cancel, the process will be aborted.

   If you choose Yes where there are future dated assignments:

- You will be warned that future dated assignments exist and that if you continue, the information in these assignments will be overwritten by the information in the new primary assignment. You can either select OK to continue, or Cancel to abort the process and review the assignment changes.

If there are no future dated assignment changes, the primary assignment will be overwritten with the new applicant assignment details.

2. If you select No, and future dated assignments exist:

   - You will be warned that if you proceed, these assignments will be deleted and replaced with the new primary assignment. You can either select OK to continue, or Cancel to abort the process and review the assignment changes.
     - If you select OK, the applicant assignment is converted into the primary employee assignment, and the existing primary employee assignment is converted into a secondary assignment. Any future dated assignments will be deleted.

   If you select No, and no future dated assignments exist, the primary assignment will be converted into a secondary assignment.

Hiring an Ex-Employee or Ex-Contingent Worker

Use the People window to rehire an ex-employee or to hire an ex-contingent worker as an employee.

Oracle HRMS supports back-to-back employment and placements, even when there is a difference in person types. That is:

- An ex-employee can begin a new period of employment on the day following termination of their previous employment.

- An ex-contingent worker can begin employment on the day following the end of their latest placement.

See: Appointments and the Hiring Process, page 2-2

> **Note:** You cannot hire an ex-employee if the final process date for the previous employment is still blank. Enter the final process date in the End Employment window.

US and Russian Payroll Only: You can rehire ex-employees before the final process date for their previous assignment. When you complete the rehire, the application changes the existing, terminated assignment to a secondary assignment, and the new active assignment becomes the primary. You can then process payments from both assignments during the overlapping periods of service.

See: Rehire before the Final Process Date, page 2-3

To rehire an ex-employee or hire an ex-contingent worker:

1. Set your effective date to the new hire date.
2. Query the ex-employee or ex-contingent worker in the People window.
3. In the Action field, select Create Employment.
4. Select a person type. If only one person type is valid for the action, it appears automatically.
5. Save your work.
6. **Mexico only**: Specify the actual date of rehire in the Adjusted Service Date field of the People window (Benefits tab).

   See: Entering Additional Personal Information (People Window), *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide (Mexico)*

Changing the Hire Date

This procedure enables you to alter the effective date in the Hire Date field of the Application Window.

To change the hire date:

1. Query the applicant if it does not already appear there.
2. Change the hire date.
   - It must be within the active period of service.
   - There must be no actual termination date or final payment date for the person.
   - It must be sometime between the last change (person type or attribute change) plus a day, and any future-dated changes (person type or attribute change) minus a day.
   - The change must not break any of the hire or rehire rules.

     Note: Ensure that no Magnetic Tape Report request exists on the current hire date of the employee.

   See: Appointments and the Hiring Process, page 2-2

3. Save your changes.

Cancelling a Hire

Follow this procedure to remove the date entered into the Hire Date field and to change the person type back to Applicant. You cancel a hire using the People window.

> **Note:** You cannot cancel a hire if:

- Oracle Payroll has processed the employee in a payroll run.
    - The person's type has changed since the hire date.
    - New assignments have been created for the person after the hire date.
    - The person was initially entered on the system as an employee and therefore has no previous history as an applicant or contact. In this case you must delete the person's records from the system using the Delete Person window.

      See: Deleting a Person from the System, page 2-21

To cancel a hire:

1. Query the employee in the People window.
2. Select Cancel Hire in the Action field.
3. Save your work.

   The application warns you that any changes made to the person's records after their hire date will be lost. If you continue, all employee records are deleted, and the person type changes to Applicant. The applicant data history is retained.

Running the iRecruitment Create Enrollment Process

In Oracle iRecruitment, when managers or recruiters create offers for applicants they can select the compensation plans for applicants. iRecruitment includes these compensation plans in the offer letters to applicants. As an HR administrator, you can run the iRecruitment Create Enrollment process to automatically enroll new hires in the compensation plans included in their offer letters. This program processes the compensation plans associated with an offer and creates the enrollment records for the employee.

Using this program, you can create enrollment records for:

- An individual person hired for a vacancy.

- All the employees hired for a vacancy.
- All the employees hired in a business group.

You run this process from the Submit Request window.

To run the iRecruitment Create Enrollment process:

1. Select the iRecruitment Create Enrollment Process in the Name field.
2. Click in the Parameters field to open the Parameters window.
3. Select the business group for which you want to run the process. iRecruitment processes the compensation plans for the new hires in this business group and enrolls them into the relevant compensation plans. The business group information is mandatory.
4. Optionally, you can run the process for a specific vacancy or an employee in the business group.

   If you leave these fields blank, then the application creates enrollment records for all the new hires in the business group.
5. Click Submit, and then OK.

What's Next

After you run the process, you can view the enrollments in the View Enrollment Results window. For more information, see: Displaying Enrollment Results, *Oracle HRMS Compensation and Benefits Management Guide*

People

Windows for Maintaining Personal Information

Every enterprise must be able to record personal information for its employees, applicants, and contacts. HRMS enables you to enter and update this information using windows based on templates designed for your own working environment. Your system administrator can configure the predefined templates to match your people management processes.

If the template windows are not set up at your site, you can record personal information for all person types on the People and Assignment windows.

> **Note:** The template windows are an efficient way to perform most basic HR management actions, such as hiring, ending an application, and updating assignments. However, the template windows do not support all DateTrack options, so for complex retroactive changes to history, you may have to use the People and Assignment windows.

Your system administrator can set up task flows from the template windows or the People and Assignment windows to give you access to all the windows in which you can record personal and employment information. 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
- Supplementary role
- Elections
- Previous Employment
- Documents of Record
- Allocated Checklists

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

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

Displaying Personal Information

Oracle HRMS enables you to easily access all the information you enter about people. There are lots of ways to view information about people held in Oracle HRMS. You can select the approach that best fits your needs. For example, you can:

- Use Employee Direct Access to view and update your own personal details using a web browser.
- Use Line Manager Direct Access to view information about people in your organization.
- Use the Find and Summary windows of the People Management templates to display the people who interest you, then 'drill down', by clicking on buttons, to the information you need.

  If the template windows are not set up at your site, you can display the same information using the Find Person window or a People folder.
- Use an inquiry window to view specific information about a person, such as employment or absence history.

  See: Using Inquiry Windows and Folders, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

- Use QuickPaint to design a report incorporating personal, assignment, application, or compensation information.

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

Entering a New Person (People Window)

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

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

The minimum information to enter for all categories of people is name and action type. In addition, for employees you must enter gender, employee number (if your enterprise uses manual number entry), and date of birth (for assignment to a payroll), nationality, religion, and the employee's name details in an alternative language, mainly English.

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 name details in the Name region:

   - Select a title such as His Highness or Prince.

     Kuwaiti and UAE users: Select a title, such as Mrs. or Doctor for formal correspondence.

   - Enter the person's name in the First Name field.

   - Enter the name of person's father name.

   - Enter the name of the person's grandfather.

   - Enter the person's family name.

3. Select a gender.

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.

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 Workforce Sourcing, Deployment, and Talent Management Guide*

Entering Employee Information

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

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

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

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

Entering Identification Information

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

6. 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.

7. Enter the Civil Identity Number (Civil ID).

   Kuwaiti users: This step is not mandatory for applicants.

   UAE Users: Enter the National Identifier for the person.

Entering Personal Details

Enter personal details in the Personal tabbed region.

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

   > **Note:** The Age field displays the age of the person is automatically, on entering the birth date of the person.

9. Enter additional birth information into the Place of Birth, Region of Birth, and Country of Birth fields.

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

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

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

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

13. Save your work.

Multiple Person Record

14. If your data already includes a person with the same civil identity number, or with the same family name 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.

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.

> **Additional Information:** 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 one or more honors or degrees (BA, MBA, or JD, for example) that the person has earned.

3. Enter a preferred name (such as a nickname).

4. If the person was previously used a different name, enter the previous last name.

5. Enter the first part of the person's name, such as van der in the Prefix field. For someone whose last name is van der Zee, you can sort by the last word of the name , Zee. If you enter in the Last Name field, the application sorts name under van.

6. Enter the last part of the person's name, such as Junior or II in the Suffix field.

7. Enter the person's middle name.

To enter medical information for a person:

1. Choose the Medical tabbed region.

2. Select the person's blood type.

3. Select the date of the person's last medical test

4. Enter the name of the physician who performed this test.

To enter other information for a person:

1. Choose the Other tabbed region.

2. Select the type of schedule in the Availability/Schedule field; for example, the days of the week your employee works.

3. Enter the employee's work availability with your company. You select either the full time or part time work availability for the Saudi employees. You need to select Full time option for all the employees.

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.

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

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

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

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

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

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

8. Check the Military Service check box if the person is employed in a military service.

   The value of this field can impact benefits calculations.

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

To enter benefits information:

1. Choose the Benefits tabbed region.

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

   > **Additional Information:** 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 alternate names:

1. Choose the Alternate Names tabbed region to enter name details in a different language, such as English. The passport office uses this information.

2. Enter the person's name in the First Name field.

3. Enter the name of the person's father.

4. Enter the name of the person's grandfather.

5. Enter the person's family name.

6. Save your work.

To enter additional information:

1. Choose the Additional Information tabbed region.
2. Select your employee's nationality. This information enables you to calculate your employee's social insurance and other compensation benefits.
3. Enter the nationality number for Kuwaiti nationals. This is a numeric sequence number that the government allots to each national.
4. Enter an alphanumeric value as the article number for the person.
5. Select the date on which the person acquired Kuwait nationality.
6. Select your employee's religion. This information can affect your employee's leave entitlements.
7. Select your employee's former nationality. For example if your non-Kuwaiti employee is an American citizen, and has migrated from Spain, then you enter American as their nationality and Spanish as their previous nationality.
8. Save your work.

Deleting a Person from the System (People and Delete Person Windows)

If you mistakenly save information in the People window, you can remove the person by selecting Delete Record from the Edit menu. You are prevented from performing this action if you have entered information about that person in other windows.

If you want to remove all records of a person, use the Delete Person window. However, you cannot use this window to remove the records of an employee or ex-employee whom Oracle Payroll processed in any payroll runs.

Contacts

When you delete a person from the system anybody entered as a contact is also deleted if:

- The contact only has basic details set up.
- The contact is not used by another person.

If the contact is used by another person or has other information set up (for example, assignment or applicant information) the contact is not deleted. However, Oracle HRMS removes the record of their relationship to the deleted person.

If you use the Delete Person window to delete a person set up as a contact, Oracle

HRMS removes all records of that contact and any relationships.

To delete all records of a person:

1. Query the person in the Delete Person window and choose the Delete Person button.

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.

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:

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:

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 use the Reason field to record promotions for your employees. You define valid reasons as values for the lookup types Reason for Change to Employee Assignment (EMP_ASSIGN_REASON) for employees and Contingent Worker Assignment Reasons (CWK_ASSIGN_REASON) for contingent workers.

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

5. 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. 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 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.

To enter special ceiling information for an 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 salary information for an employee:

1. Choose the Salary Information tabbed region.

2. Select a salary basis for the employee.

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

   > **Warning:** If you change an employee's salary basis to one that uses a different salary element, the employee's existing salary element entry ends. Using the Salary Administration window, you should make a new salary entry for the employee, 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 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 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 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 name of the supplier and the supplier site for the contingent worker.

3. Enter supplier IDs for the contingent worker and the assignment, if available. These values identify the worker and the assignment to the supplier.

If you are using Oracle Services Procurement:

1. Choose the Supplier tabbed region.

2. Select a purchase order number for this assignment.

3. If only one purchase order line exists, it appears in the Purchase Order Line field. Otherwise, select a purchase order line. Note that the Purchase Order Line field is enabled only when you select a purchase order.

4. Information from the purchase order appears automatically in the Supplier Name and Supplier Site fields. If the purchase order line includes a job value, it replaces any value in the Job field.

5. Enter supplier IDs for the contingent worker and the assignment, if available. These values identify the worker and the assignment to the supplier.

To enter General Organization for Social Insurance (GOSI) or Public Pension Agency (PPA) details:

1. Choose the GOSI/PPA tabbed region.

2. Select the name of the employer.

3. Enter the employee's GOSI or PPA Number. If your employee does not have either number, then leave the field blank.

4. Specify whether your organization makes GOSI or PPA Annuities for Saudi employees. The default value is Yes.

   Additional Information: You cannot specify GOSI or PPA Annuities for non-Saudi employees. For non-Saudi employees, the default value is No.

5. If you selected Yes in the Annuities field, enter the Annuities join date.

6. In the Hazards field, specify if your organization provides GOSI or PPA Hazards deductions on behalf of the employees. The Hazards field default is Yes for all employees.

7. Edit the Hazards join date, if required.

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 employment details information for an employee:

Kuwaiti users only: Social security reports use this information.

1. Choose the Employment Details tabbed region.

2. Select the employer. Social security reports displays the name of the employer.

3. Enter a valid 11-digit social security number for your Kuwaiti employees.

    Additional Information: If this person is a Kuwaiti national, then the social security number is mandatory. The application checks the nationality of the person against the local nationality set for the business group, which should always be set to Kuwait.

4. Select the date of commencement of subscription to the complementary or supplementary insurance scheme.

Entering a New Employee

Two 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.

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:

Using enter employee template you enter the following:

Employee Details:

1. Choose the Employee Details tabbed region.
2. If the application does not display the new window, click the New icon in the toolbar. Select New Employee.
3. Enter the personal details for the new employee. You must enter:
   - First Name
   - Family Name
   - Gender
   - Nationality
   - Civil Identity Number (Civil ID)
   - Person Type
   - Start Date
   - Organization name

   All other personal information is optional.
4. Save your work.

Additional Name Details:

Use the Additional Name Details tab region to enter name details in a different language, such as English.

1. Choose the Additional Name Details tabbed region.
2. Enter your employees' name in the Alternate First Name field.
3. Enter the name of your employee's father.
4. Enter the name of your employee's grandfather.
5. Enter the family name of your employee.
6. Enter the following details, if your employee is non-Kuwaiti:
   - Enter the last name of your employee such as Junior or II in the Suffix field.
   - Enter the first name of your employee in the Prefix field.

- Enter the Middle Name of your employee.

7. Save your work.

Employment Details:

1. Choose the Employment Details tabbed region.

2. Select the employer.

3. Enter your employee's 11-digit social security number.

   Additional Information: If this person is a Kuwaiti national, then the social security number is mandatory. The application checks the nationality of the person against the local nationality set for the business group, which should always be set to Kuwait.

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 (person name, father's name, grandfather's name, and family name)
   - Type
   - Gender
   - Nationality
   - Civil Identity Number (Civil ID)

   All other personal information is optional.

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

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. Choose the Additional Name Details tab to enter person's details in an alternative language.

9. Choose the Employment Details tab to enter the employee level details.

10. 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 2-15

Entering Addresses (Address Window)

You can enter as many addresses as necessary for each person, using the Address window.

> **Note:** You cannot enter or update address information in the Address window for a contact who is also an employee or contingent worker. Instead, update the relevant employee or contingent worker record.

To enter an address for a person:

1. Select a national address style and click in the Address field.

   If a local address style exists for your country, it is displayed as the default. Otherwise, the international style is displayed.

   Australia Users: There is a choice of Australia address style and Australia (International) address style. If you want change from Australia (International) address style to Australia address style, you can by running the Upgrade Australia Address Style process. This is an optional step.

   Finnish Users: To display the postal code and post office on the same row in line with the Finnish Address standard, the application displays them in the same field, separated by a space. If you are not using Finnish postal codes upload functionality, you must enter postal codes and post offices manually. See: Entering Postal Codes, *Oracle HRMS for Finland Supplement*

Dutch Users: When you record foreign addresses, ensure you use the Dutch International address style. This address style enables you to report the address in the wage report in the required format.

US and Canadian Users: There is a choice of US address style and International address style if you have Vertex geocode data installed. If you are not maintaining DTW4 data and do not want to enforce the strict tax validation, then you can disable this using the HR:Enable DTW4 Defaults profile option.

US Payroll Users: If the Address Validation Using Vertex Web Services feature is enabled, then Vertex Web Services validates addresses in the Address window. See: Address Validation Using Vertex Web Services, *Oracle HRMS Implementation Guide (US)*

Singapore Users: When you record addresses for local employees, ensure you use the Singapore (Formatted) address style. This address style enables you to report the Primary address in the IRAS reports in the required format.

> **Note:** You can change existing address styles or create new ones if required. See: Changing Default National Address Styles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

A window opens with the address format for the country you select.

2. Enter your address information in this window.

> **Note: India Users**:If the city is Delhi, New Delhi, Mumbai, Bombay, Kolkata, Calcutta, Chennai, or Madras, the application sets the metro status to Yes, else it is set to No.

> **Note:** Use the Phone Numbers window instead of this window to record telephone numbers otherwise you will be maintaining two lists of numbers.

Kuwaiti Users: You must select the Governorate (Muhafazat) for payroll processing.

UK Users: If you enter the employee's address, then the first line is mandatory and the remaining lines are optional. If you enter the post code, then you must also enter the first line of the employee's address. If you enter the country in the first line, then you must enter the employee's address.

Romanian Users: If you enter the county name, then you must ensure to enter the street information.

See: Adding Telephone Information, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

Russian Users: Ensure you enter the zip code for the Residential address category so that the code appears in statutory reports.

3. Choose the OK button. This returns you to the Address window.

4. Select an address type, such as home, or weekend, or business. You can only have one address of each type at any time.

   Singapore Users: If you use company quarters, be sure to choose this address type, so it appears in the A8A report.

5. Check the Primary checkbox to identify the person's main address. Otherwise, leave blank. By default, the first address you enter is the Primary address.

   Dutch Users - Use the Population Register Address type to record an additional address. The NSI reports use this information to report to the Dutch population register.

   Only one address at any time can be a person's Primary address.

   Singapore Users: If you use the Singapore (Formatted) address, you must enter the block number or address number, the street name, and the postal code values within the address to ensure that the IRAS process validates correctly. If you enter the Unit Number, you must enter the Level (Floor) number in the XXX-XXXXX format.

6. Save your work.

To update the primary address:

1. Enter an end date for the existing primary address.

   Do not save.

2. Create the new primary address starting the next day and check the Primary Checkbox.

   > **Note:** An employee must always have a primary address, but you cannot enter more than one primary address for the same time period.

3. Save the new primary address.

To change from an international to a local address style:

1. To change from a global (international) address style to a local address style, choose Change Global Style to Local. This button appears only when the current style is international.

The Personal Address Information window appears showing the new address structure. Values in fields common to both styles appear in the new structure.

If you choose Change Global Style to Local when there is no local style, Oracle HRMS displays an explanatory message and the style remains unchanged.

2. Complete the address definition, as appropriate.

3. Choose OK.

4. Save your work.

Entering Contracts

You enter and maintain contracts in the Contracts window.

To enter a new contract:

1. Set your effective date to the start date of the contract.

2. Enter the reference code for the contract. The code for each contract attached to a person must be different, though more than one person can use the same contract reference code.

3. Select the status that indicates the contract is active. The period of service dates will also be displayed if a corresponding period of service exists.

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

4. Select the type of contract.

5. Select the status reason of the contract, such as contract still going-on and contract finishing. You must set up status reason using user defined Lookup Type CONTRACT_STATUS_REASON.

6. Enter the description of the contract.

7. Select the document 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.

8. Enter the date the document status of the contract changed.

   Note: The document status is not DateTracked.

9. You can enter start and end reason information of the contract.

10. Enter the duration and the units of the contract, such as days, months, and weeks.

> **Note:** On entering the duration for a fixed-term contract, Oracle HRMS displays the expiry date of the contract. The expiry date is calculated only for the specified period. If required, you can change the expiry date of the contract.

The expiry date field is disabled for the unlimited contract.

11. Enter the profession of the employee.

12. Enter the details about the parties that are involved in the contract.

13. You enter information about the extension of the contract in the extension period, number of extensions, and extension reason fields.

14. Select the employment status. This is used to calculate the compensation benefits for the employee.

15. 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.

3

Compensation and Benefits Management

Elements

Predefined Elements

The following table lists the predefined elements provided with Oracle HRMS for Kuwait.

Element Name	Description
Social Insurance	Holds information for initiating the social insurance processing.
Contributory Wage	Holds the employee's reference salary for social insurance deductions.
Contributory Wage Override	Used as reference for all social insurance calculations.
Contributory Wage Adjustment	Holds the amount to change in the contributory wage during the year.
Basic Social Insurance	Holds the contributory wage to calculate basic social insurance.
Supplementary Social Insurance	Holds the contributory wage to calculate supplementary social insurance.
Employees Basic Social Insurance	Holds the deductible basic social insurance for an employee.
Employees Supplementary Social Insurance	Holds the deductible supplementary social insurance for an employee.
Employers Basic Social Insurance	Holds the contribution amount from the employer towards the basic social insurance.
Employers Supplementary Social Insurance	Holds the contribution amount from the employer towards the supplementary social insurance.
Employees Basic Social Insurance Arrears	Stores the outstanding basic social insurance liability of the employee.

Element Name	Description
Employees Basic Social Insurance Arrears Payment	Stores the payment by employee to reduce the basic social insurance arrears.
Employees Supplementary Social Insurance Arrears	Holds the outstanding supplementary social insurance liability of the employee.
Employees Supplementary Social Insurance Arrears Payment	Holds the payment by employee to reduce the supplementary social insurance arrears.
Additional Social Insurance	Holds the additional contribution of the employee towards social insurance.
Additional Social Insurance Information	Holds the value deductible towards additional social insurance for an employee.
Additional Social Insurance Arrears	Holds the outstanding additional social insurance liability of the employee.
Additional Social Insurance Arrears Payment	Holds the payment by the employee to reduce the additional social insurance arrears.
Employees Pension Fund	Holds information about employee's contribution in Report 166.
Employers Pension Fund	Holds information about employer's contribution in Report 166.
Loan Recovery	Holds the information for loan processing.
Loan Repayment Information	Holds loan information, which is used internally for loan processing.
Loan Outstanding Information	Holds the outstanding loan amount.

Survey of the Classifications

The survey of classifications identifies a list of classifications for predefined elements.

Predefined Elements Classification

This table shows the predefined secondary classifications that the implementers use to create new elements. You cannot update or delete these predefined classifications.

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

Primary Classification	Secondary Classifications	Default
Balance Initialization	(None)	N/A
Information	Subject To Social Insurance: Information	N/A
Direct Payment	(None)	N/A
Absence	Subject To Social Insurance: Absence	N/A
Earnings	Attachable Earnings	N/A
	Subject To Social Insurance: Earnings	N/A
Employer Charges	(None)	N/A
Pre Social Insurance Deductions	Attachable Pre Social Insurance	N/A
Social Insurance	(None)	N/A
Voluntary Deductions	(None)	N/A

Making Manual Element Entries

You enter compensation and basic benefits for employee assignments in the **Element Entries** window. If employees are assigned to a salary basis, you enter their salaries in the Salary page.

You can use the **Element Entries** window to make entries or to query existing entries. Use the **Period** field, **Classification** field, and **Processing Types** option buttons to restrict the entries you see when making inquiries.

Several Oracle HRMS features, such as Absence Management, RetroPay, and Salary Administration, create element entries automatically. You cannot update these element entries on the Element Entries window. You must update the source record (such as the absence or salary record) to change the element entry.

The **Processed** check box shows if Oracle Payroll has processed the entry in the current pay period. Notice that you can change an entry that has been processed. This enables you to correct entries for retropay processing. Changing the entry does not alter the payroll run results so you can consult these for a complete record of payroll processing and payments.

See: Setting Up RetroPay, page 6-19

> **Note:** Your system administrator might have restricted the elements you can enter in this window by element set, classification or processing type.

To enter an element for an employee assignment:

1. If necessary, change your effective date to:

   - The correct start date for a recurring element entry
   - Any date in the correct pay period for a nonrecurring element entry

   If the pay period is closed at your effective date, you cannot enter any nonrecurring elements that process in payroll runs. If a current or future pay period is closed, you cannot enter any recurring elements that process in payroll runs.

2. To reduce the list of elements to choose from, select a classification, a processing type, or both in the first region.

3. In the **Element Name** field, select an element.

   > **Note:** Elements this employee is eligible for by means of a standard link appear automatically.

   The system displays a warning message if the employee fails to meet any qualifying conditions of age or length of service.

4. If the Costing field is enterable, you can enter cost codes, for example to indicate the cost center the employee's time should be charged to.

5. You can select a reason for an element entry you make or update. As part of your system setup, you can enter valid reasons for the Lookup Type ELE_ENTRY_REASON.

6. You can check the Override check box to create an entry that overrides all other entries of this element in the current period. You cannot create an override entry if one already exists, or if any of the entries of this element have been adjusted.

7. If you want to create a one-time entry of a recurring element, check the **Additional**

check box.

An Additional entry is valid only for the current pay period, shown in the **Effective Dates** fields.

You can only check Additional if:

- The element definition allows additional entries, and
- An additional entry does not already exist for the assignment in this period, and
- The employee is assigned to a payroll
- There is a payroll period defined at your effective date

8. Choose the **Entry Values** button to open the **Entry Values** window.
9. Enter values in the **Entry Values** fields. Notice that:
   - Entry to some fields may not be permitted.
   - Some fields may be required.
   - Some fields may have a list of values; others may be validated as you leave the field. You will receive a message if your entry is not a valid value.
   - Some fields may contain default values. If the default value is in quotation marks, it is a "hot default".

     Important: You should consider carefully before overriding a hot default. If you override it, then any subsequent changes to the default value on the element or element link definition will *not*affect the element entry. However, you can clear your entry if you want the default value to come back into effect.

For Kuwait users only: To enter information about the elements with deduction classification, click on Further Entry Information and enter the following:

- Reference number, which is the sequence number used while setting up the deduction type
- Authority for the deduction account
- Select the type of deduction
- Total deduction amount for the element

- Start and end date for the deduction. The deduction process depends on the start and end dates that you select for the element. Oracle HRMS uses these dates for reporting purpose.

10. **For Mexico users only**: To report disability subsidy payments for applicable employees in the CFDI payslip, enter the disability information for Earnings and Supplemental Earnings elements. For these elements, click **Further Entry Information** and select an appropriate value in the **Disability Registration ID** field.

    See Setting Up Information for the CFDI Payroll Payslip XML Interface, *Oracle HRMS Payroll Processing Management Guide (Mexico)* and Running the CFDI Payroll Payslip XML Extract, *Oracle HRMS Payroll Processing Management Guide (Mexico)* for more information.

11. For a non-recurring element, optionally select a date within the current payroll period in the Date Earned field. The entry will not be processed until this date (that is, the Date Earned of the Payroll Run must be on or after this date).

12. To enter information about a third party recipient of a payment resulting from a deduction element, use the **Payee Details** field. Select the name of the third party payment method set up for this payment.

13. To determine the processing sequence of multiple entries in the payroll run, enter a subpriority number in the Processing Priority field. Lower priority numbers process first.

    > **Note:** The Processing Priority field is not available to HR-only users. For more information on user types and the HR:User Type profile option, see: User Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*.

14. Save your work.

Other Payroll Earnings and Deductions

Proration

Oracle HRMS enables you to calculate proportionate earnings amounts whenever payroll-relevant data is changed during a payroll period, for example, if an employee joins or leaves the company during a payroll period or if an employee's pay grade changes during a payroll period. Oracle HRMS performs a proration calculation to ensure that the employees' earnings are calculated correctly after taking account of these changes.

If you want to prorate an earnings element, such as basic salary, assign a proration **event group** to it. You can create an event group to group together all proration points (events) that affect an employee's salary, for example. The events might include:

- An employee joining or leaving the enterprise
- Changes to pay grades or grade rates
- Changes to pay scales and progression points
- Changes to hourly or annual pay rates
- Changes to working hours
- Changes to allowances or deductions

You then process the element using a formula that handles proration. You can either use a payroll formula that handles proration, or create a separate proration formula that runs after the main payroll formula only in payroll periods when a proration event occurs.

See:Writing Proration Formulas, *Oracle HRMS Fast Formula User Guide*

Setting Up Proration or Retro-Notification

Follow these steps if you want to set up your system for proration or retro-notification.

To complete basic setup for proration or retro-notification:

1. In the Table Event Updates window, ensure that the events you want to use are already included in the required tables. Enter the table name. The lower half of the screen displays the fields that trigger proration or retro-notification if their values are changed.

   If the table has already been defined but the required event is missing, create either an Update, Delete, or Insert event and enter the table row or column to which the event refers. You can only enter a column name if you are creating an Update event. Select the change type defined by the event.

> **Note:** The Table Event Update window is not available in all localizations.

See: Making Table Event Updates, *Oracle HRMS Payroll Processing Management Guide*

2. If the events you require have not been defined in the Table Event Update window, set up the dynamic triggers for proration or retro-notification in the Dynamic Trigger Generation window. The triggers you need depend on the method you use to compensate your employees. For example, the tables required for compensation using Salary Administration are different from those required for compensation using pay grades. The tables you are likely to use are:

   - PER_ALL_ASSIGNMENTS_F
   - PER_ALL_PEOPLE_F
   - PAY_ELEMENT_ENTRIES_F
   - PAY_ELEMENT_ENTRY_VALUES_F
   - PER_SPINAL_POINT_PLACEMENTS_F
   - PER_GRADE_RULES_F

   See: Defining Dynamic Triggers, *Oracle HRMS Payroll Processing Management Guide*

   > **Note: French users**: Ensure you enable the dynamic triggers for PAY_ELEMENT_ENTRIES_F and PER_ALL_ASSIGNMENTS_F.

3. Create an event group for your proration or retro-notification events. You must create the event groups before you can create your elements.

   See: Defining Event Groups, page 3-11

4. Select the Incident Register functional area in the Functional Area Maintenance window. Make sure that your triggers are included in this functional area. If your triggers are not included, insert them.

   You must also activate the triggers according to legislation or business group. For more information, see: Grouping Dynamic Triggers into Legislative Functional Areas, *Oracle HRMS Payroll Processing Management Guide*

   Setup for retro-notification should now be complete, meaning you can proceed to running the appropriate report. However, if you are setting up proration continue with the next steps.

See: Running the Retro-Notifications Report, *Oracle HRMS Payroll Processing Management Guide*

To set up the elements for proration:

1. Create your proration element. **US and Mexico users**: Initiate the earnings type or deduction, then query the generated element in the Element window to add a proration group and, optionally, a proration formula.
   - Make sure that you select a proration group for each element
   - Select a proration formula if you are using a separate proration formula to handle proration events (rather than enabling your payroll formula to handle proration)
   - Select Actual Termination as the termination processing rule
2. Define the input values for the element. For example, if you were using the sample payroll formulas that are enabled for proration, you would create the following input values:
   - Amount for a salary management element
   - Date Worked for a spinal point/pay scale element
   - Annual Deduction for a deduction or allowance

   See: Defining an Element's Input Values, *Oracle HRMS Compensation and Benefits Management Guide*
3. Link the element to a specific payroll or payrolls. If you want the element to be used automatically each time the payroll is assigned, select the Standard check box. If you do not select this check box, you must enter the element for each assignment.

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

To create the formula:

1. Check that the database items to be used in your formula are available. If the required database items are not available, create them.
2. Create the proration formula or write a payroll formula that is enabled for proration.

   To create a proration formula, see: Writing Proration Formulas, *Oracle HRMS*

FastFormula User Guide

UK users: For examples of payroll formulas enabled for proration, see: Sample Payroll Formulas Enabled for Proration, *Oracle HRMS FastFormula User Guide*

For more information on writing formulas, see: Writing or Editing a Formula, *Oracle HRMS FastFormula User Guide* and Writing Payroll Formulas for Elements, *Oracle HRMS FastFormula User Guide*

3. Link the formula to your element in the Formula Result Rules window.

   See: Defining Formula Processing and Result Rules, *Oracle HRMS FastFormula User Guide*

4. Attach the element to the salary basis if the salary is relevant for proration. Select the input value you created (such as Amount) in the Input Value Name field of the Salary Basis window.

   See: Defining a Salary Basis, *Oracle HRMS Compensation and Benefits Management Guide*

Defining Event Groups

You define an event group from the Table Event Group window. You use an event group to group together all proration or retro-notification points that affect an employee's salary, such as salary increases.

To define an event group:

1. Enter a name for your event group.

2. Select one of the following event group types:

   Proration for a proration event group

   Retro for a retro-notification event group

3. Select the proration or retro period.

4. Save your entries.

5. Select the events that can trigger proration or retro-notification in the Datetracked Events region. To do this, select the update type, the table containing the data, and the table column.

6. Save your work.

Loans

Loan Processing

If an employee has taken an approved loan, you can use Oracle HRMS to process the loan recovery. You can provide information about the type of loan, the repayable amount and the number of installments in which employees complete the repayment.

If you enter loan details for an employee using the Loan Recovery element, Oracle Payroll uses a predefined formula to deduct the loan amount and maintain the Loan Outstanding balance.

You can use the following predefined elements for loan recovery process:

- Loan Recovery - To hold the information for loan processing
- Loan Repayment Information - To hold information used internally for loan processing
- Loan Outstanding Information - To hold information about outstanding loan

Oracle HRMS provides three balances to hold loan information:

- Loan repaid balance - To hold the loan amount that the employee repays
- Loan installments paid - To hold the total number of installments that the employee pays
- Loan outstanding to hold the outstanding loan amount

Processing Loans

To process the loan recovery amount, you must complete several steps.

1. Attach the element Loan Recovery to the employee, who has taken the loan, to calculate the loan repayment amount.

   See: Making Manual Element Entries, page 3-4

2. Enter the details of loan repayment, such as Loan Type, Loan Amount, Approved Date, Repayment Start Date, Monthly Repayment, and Installments.

   See: Making Manual Element Entries, page 3-4

   Additional Information: You must enter values either for Monthly Repayment Amount or Total Number of Installments. If you enter both these values, the loan processing formula will use the monthly repayment amount to calculate the repayment amount.

3. For any particular month, if you want to put the loan deduction on hold for an employee for any reason, then set Hold Amortization to Yes.

4. Run the payroll process.

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

4

Payroll Management

Payroll Payment and Distributions Overview

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

Payroll Payment and Distributions in Oracle HRMS

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

Key Concepts

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

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

Reporting on Payroll Payment and Distributions

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

Setting Up a Global Statement of Earnings

Oracle HRMS enables you to view the online statement of earnings (SOE). To enable the correct display of values on your statement of earnings, you must complete each of these setup steps.

To set up the global statement of earnings:

1. Create a user category through the lookup SOE_USER_CATEGORY.

   See: Creating User Types and Statuses, *Oracle HRMS Enterprise and Workforce Management Guide*

2. Set the value of the user category that you created as the profile value for the profile PAY: Statement of Earnings User Category.

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

3. Add the predefined element sets for your earnings and deductions to the SOE Information EIT at the business group level.

   For Canadian and US users only: SOE Information functionality is not available for Canadian and US legislations.

   Swedish users only: Ensure that you have enabled your elements to display a code. You do this at the business group level by entering Extra Element Details for each element. When you select the EIT, you can make a further selection of Element Name, and specify a code for your selected element. This ensures that your SOE displays the element code in the earnings, deductions, and information regions.

   See: Business Group: Entering SOE Information, page 1-18

4. Create an element set containing all the elements that you want to see displayed in the information region of the SOE.

   For South Africa only: The Information region has been renamed to Fringe Benefits and Other Non Payments region. You use the predefined ZA SOE Fringe Benefits and Other Non Payments element set to display information in that region. You enter this element set in the Elements 3 field when you define your SOE Information at business group level.

   The South African localization does not use balance attribution.

   Users should now restart the Apache server as instructed in the final step.

5. Complete the SOE Detail Information EIT by adding the elements in your element set, and the SOE display balances to the EIT at the business group level.

   See: Business Group: Entering SOE Detail Information, page 1-19

6. Link the predefined SOE balance attribute to your business group. The attribute name is likely to have a leading localization code followed by the stem _SOE_BALANCE_ATTRIBUTES.

7. Define the attributes for your SOE balances.

8. Restart the Apache server and then check the SOE to ensure that the SOE displays the requirements that you selected.

Running the Enable or Disable Global SOE Process

You use this process to determine how your statements of earnings are displayed. You have a choice of the forms-based SOE, or the global SOE which is framework-based and readily customizable. You can either:

- Enable the global SOE if you want to override the forms-based default

- Disable the global SOE if you prefer to continue using the old forms-based format.

You run the Enable or Disable Global SOE process from the Submit Request window.

To run the Enable or Disable Global SOE:

1. Select the Enable or Disable Global SOE process in the name field.

2. Enter whether you want to Disable or Enable the Global SOE in the parameters window.

3. Click OK and choose the Submit button.

Viewing Statement of Earnings

Oracle Payroll enables you to view an employee's statement of earnings (pay advice) without having to run the Pay Advice report.

You do this using the Statement of Earnings window.

There are various ways to access statement of earnings information. The information displayed may vary depending on whether you have run the PrePayments process or just a payroll run.

The information displayed in the Statement of Earnings window reflects the information in the printed pay advice.

The payroll run generates four types of Statement of Earnings (SOE):

- Master Assignment Action SOE for each employee and shows aggregate Year to Date balances

- Regular Payroll Run SOE for each employee and shows Period to Date and Year to Date balances
- Separate Check SOE only if employee has an element with Separate Check input value set to Yes
- Tax Separate Run SOE if employee has an element(s) with any of the following input values:
  - Separate Check set to Yes
  - Tax Separately set to Yes
  - Deduction Processing is set to other then All

Canada only: The Payroll Run SOE displays one "Master Assignment Action" master record and multiple records with second and third layer run types.

If you are processing Multiple Assignment Payments, then the PrePayment Statement of Earnings displays consolidated earnings and deductions information. The header information displayed on the Statement of Earnings is obtained from the primary assignment; however, if this assignment is not processed, then the header information is taken from the first assignment processed in the PrePayment process.

To view the last payroll with PrePayments run against it:

Perform one of the following:

- Select View | Statement of Earnings.
- From the Assignment window, choose Others and select Statement of Earnings.
- Choose the Statement of Earnings window in Fastpath.

To view the most recently run QuickPay results:

1. From the Assignment window, choose Others and select QuickPay.
2. Choose View Results, and select Statement of Earnings from the View Results window.

To view the statement of earnings information without running PrePayments:

See Viewing Assignment Process Results for an Assignment or Viewing Assignment Process Results for a Payroll Assignment.

5

Payroll Statutory Deductions and Reporting

Payroll Statutory Deductions and Reporting Overview

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

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

Reporting on Payroll Statutory Deductions

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

Oracle Payroll and Employer/Employee Deductions

Social Insurance Calculation

Oracle HRMS enables you to record and process the Public Institution for Social Security (PIFSS) social insurance schemes for employees. Additionally, you can record and process additional social insurance deductions to meet PIFSS requirements.

You can calculate the following components of social insurance (SI):

- Basic Social Insurance Scheme - Basic social insurance is applicable on SI contributory salary, which includes various elements such as monthly basic salary, housing allowance, transport allowance, and social allowance.

- Supplementary Social Insurance Scheme - Supplementary social insurance is applicable on additional wage elements specified by the social insurance board.

- Additional Social Insurance Contributions - In addition to basic or supplementary contributions, the Social Insurance Board can authorize further contributory deductions. The authorization letter from the Social Insurance board confirms the total deductable amount, the starting date for deducting the amount, and the deductable amount per month.

Oracle HRMS enables you to manage pension contributions for terminated or suspended employees. If the employer terminates the service of an employee during a month, then no pension is deductible during the month of termination. If an employee is suspended from work because of any legal matter, then the employer will continue to deduct the pension from the employee's salary as a regular employee.

Calculating Social Insurance

Oracle HRMS enables you to record and process the Public Institution for Social Security (PIFSS) social insurance schemes for employees. To calculate the social insurance deductions, you must complete several tasks.

1. Specify the business group as the employees whose nationality matches the business group are eligible for social insurance.

   See: Entering Local Nationality Information, page 1-21

2. Attach the formula for determining SI contributory wage.

   See: Legal Employer: Entering Wage Formula Information, page 1-22

3. Attach the predefined element Social Insurance to the employee for initiating the Social Insurance processing.

See: Making Manual Element Entries, page 3-4

Running PIFSS Report

Oracle HRMS enables you to generate the payment due for SI, write the data to a file on magnetic tape, and generate a magnetic file containing the monthly contributions and deductions for PIFSS.

To run the PIFSS report, you must complete several steps.

You run this report from the Submit Request window.

1. Run the payroll process.

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

2. Select Kuwait PIFSS Report in the Name field to open the Parameters window.

3. Select the sector for generating the electronic file.

4. Select the key for the employer who needs to generate the file.

5. Enter the ID as identifier for the file.

6. Enter the month and year for which to generate the file.

7. Click Submit.

Running Report 166

Report 166 is a summary report that reflects the monthly contribution of the employer and employee to PIFSS.

> **Additional Information:** Report 166 displays complete monthly contributions to PIFSS irrespective of arrears. Therefore, even if the employee is unable to pay any of the social insurances, the report displays the amount that should have been paid.

You run Report 166 from the Submit Request window.

To run Report 166:

1. In the Name field, select Kuwait Report 166 to open the Parameters window.

2. Select the legal employer within the business group for which you want to run the report.

3. Select the contribution month for social insurance.
4. Enter the reporting year of the contribution month for social insurance.
5. Enter the basic scheme other amount that the employer should pay, such as arrears, to PIFSS.
6. Enter the supplementary scheme other amounts that the employer should pay.
7. Enter the pension contributions other amounts that the employer should pay.
8. Enter the report 167 other amounts that the employer should pay.
9. Enter the supplementary insurance installments paid before 1/12/1997.

   Note: If you are running this report for the period prior to October 2012, then specify parameters mentioned in Steps 2-5. Ensure to leave the remaining parameters blank, since Basic Scheme Other Amount is same as the earlier parameter Other Amount. You can enter all the parameters if you run the report from 1st October 2012 onwards.

10. Click the Submit button.

Running Report 167

Report 167 displays the details of the additional social insurance installments that PIFSS requests employers to deduct from employees. Run this report for an individual employer to identify the employees who contribute towards Additional Social Insurance.

You run Report 167 from the Submit Request window.

To run Report 167:

1. In the Name field, select Kuwait Report 167 to open the Parameters window.
2. Select the legal employer within the business group for which you want to run the report.
3. Select the contribution month for social insurance.
4. Enter the reporting year of the contribution month for social insurance.
5. Click the Submit button.

Running Report 168

Report 168 displays the employee's movements during a month. The report lists the employees who joined the service, left the service, or moved to a higher salary grade, during the month. Run this report for an individual employer.

Additional Information: Salary refers to the amount on which Social Insurance is applicable. The contributory amount can be different from salary because the contributory amount is set at the start of the year whereas the salary can change during any month throughout the year.

You run Report 168 from the Submit Request window.

To run Report 168:

1. In the Name field, select Kuwait Report 168 to open the Parameters window.
2. Select the legal employer within the business group for which you want to run the report.
3. Select the contribution month for social insurance.
4. Enter the reporting year of the contribution month for social insurance.
5. Click the Submit button.

Running Statutory Social Insurance Reports

You can generate the following statutory social insurance reports from the Submit Request window for submission to PIFSS:

Report	Explanation	Report Name in Submit Request Window
Report 55	Detailed annual statement of the insured employees and their salaries in the private and oil sectors	Kuwait Report 55

Report 56	Notice of commencement or termination of subscription of an employee for complementary or supplementary insurance	Kuwait Report 56
Report 103	Notice of commencement or termination of service of an insured employee	Kuwait Report 103

To run these reports:

1. Select the report that you want to generate in the Name field.
2. Select the legal employer within the business group for which you want to run the report.
3. Select the month and the year for which you want to generate the report. For report 55, the month is not required.
4. For report 56 or 103, enter the ID of the employee.
5. Click Submit to generate the report.

6

Payroll Processing and Analysis

Payroll Processing and Analysis Overview

Using Oracle HRMS you can run a payroll, perform post processing on a successful payroll, and also make changes and corrections for a payroll that has not completed successfully.

Payroll Processing and Analysis in Oracle HRMS

You can run your payroll as:

- A batch process if you want to include all employees or a group of employees in the same run
- A QuickPay process if you want to run a payroll for an individual employee

You can perform all the necessary post processing to generate payment for your employees once you are satisfied that your payroll run results are correct:

- The PrePayments Process enables you to allocate employee payments between the payment methods that you have defined.
- The Payments Processes enable you to make automated payments to a bank account, generate cheques/checks and report on the amounts paid to your employees. You can also verify that cheques/checks have been cashed.
- The External/Manual Payments Process enables you to make cash payments or to pay employees from external sources.

You can analyze your payroll run results to get early notification of possible discrepancies:

- The Payroll Exception report enables you to identify overpayments or underpayments.

- The Void Cheque/Check Payments Process allows you to cancel a cheque/check that was produced in error.
- Employee Run Results give you a list of all results created for this payroll run.

You can use these processes for correcting a payroll run:

- Correction of Run Results: Retries. Retries enable you to correct a payroll run before post-processing has occurred.
- Correction of Run Results: Reversals. Reversals enable you to correct a payroll run when post-processing has already occurred.
- Correction of Run Results: Rollbacks. Rollbacks enable you to correct a payroll run without keeping any record of the original run.

You can run these processes to make accurate provision for current payments backdated from a previous pay period, or current payments received in advance for a future pay period:

- The RetroPay process enables you to retrospectively distribute current payments to the period in which they were earned.
- For non-North American legislations, the Advance Pay process enables you to pay employees in advance for an absence recognized by your legislation.

Key Concepts

To enable you to process and analyze payrolls, you need to understand these concepts:

- QuickPay, *Oracle HRMS Payroll Processing Management Guide*
- Continuous Calculation, *Oracle HRMS Payroll Processing Management Guide*

  Note: You can use this if it is enabled for your localization.

- Running the PrePayments Process, *Oracle HRMS Payroll Processing Management Guide*
- Retries, *Oracle HRMS Payroll Processing Management Guide*
- Reversals, *Oracle HRMS Payroll Processing Management Guide*
- Rollbacks, *Oracle HRMS Payroll Processing Management Guide*
- RetroPay, page 6-8

- For non-North American legislations: Advance Pay, *Oracle HRMS Payroll Processing Management Guide*

Reporting on Payroll Processing and Analysis

See Reports and Processes in Oracle HRMS, *Oracle HRMS Window Navigation and Reports Guide*

Payroll Process and Analysis

Post-Processing for a Payroll

PrePayments Process

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

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

Cheque/Check Writer Process

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

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

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

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

> **Note:** Your System Administrator can enable the HR: Default Check/Cheque Number Method profile which enables you to use the automatic check/cheque numbering process.

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

Void Cheque/Check Payments Process

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

Check Writer - Override Payment Date Process

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

External/Manual Payments Process

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

Setting Up Electronic File Transfer

Oracle HRMS enables you to submit employee and payment details to the bank in the form of a bank transfer file. To process the electronic file transfer, you must complete several steps.

1. Create a formula for each section of the EFT file: Header, Details, and Footer, to write the appropriate record in the specific format. You can use the following three sample formulas to create your own formula:

   - KW_EFT_HEADER_CUSTOMER
   - KW_EFT_BODY_CUSTOMER
   - KW_EFT_FOOTER_CUSTOMER

   See: Writing or Editing a Formula, *Oracle HRMS FastFormula User Guide*

2. Record the formula details to the payment method.

   See:Defining a Payment Method, *Oracle HRMS Payroll Processing Management Guide*

3. Enter the values for Bank codes in the user extensible lookup KW_BANK_CODES.

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

4. Run the payroll process.

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

5. Run the pre-payment process.

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

6. Submit the EFT request using the Submit Request window.

   See: Running the Payment Output File, page 6-6

7. View the output of the EFT file.

Running the Payment Output File

You run the Payment Output File from the Submit Request window.

To run the payment output file:

1. Select the payment output file in the Name field.

2. In the Parameters window, optionally enter the payroll name.

   > **Note:** You can restrict the processing of assignments to the specified payroll on the effective date.

3. Select the consolidation set.

4. Enter a start date for any prepayments to the employee.

5. Enter the effective date.

6. Select a payment method.

7. Enter the process date or date of transfer.

8. Click Submit.

Running the Payroll Register Report

You can review payroll run results for each employee by running the Payroll Register report. This report helps you validate employee earnings and deductions, and identify any exceptions for further investigation. Payroll Register report is also useful for auditing. For example, auditors can refer to this report to verify that all listed employees exist and are at work or that the employer is following the updated pay rates to pay the employees. For best advantage, run the payroll register report once a month after the main payroll run and before the actual payment to employees.

You can run the payroll register report for either an organization or a payroll. If you run the payroll register for an organization, the application runs the report for all the payslip archives in the specified period. If you run the payroll register for a payroll, the application reports any payslip archives processed for that particular payroll in the selected period.

You run this report from the Submit Request window.

To run the payroll register report:

1. In the Name field, select one of the following to open the Parameters window:
   - For UAE - UAE Payroll Register
   - For Kuwait - Kuwait Payroll Register
2. Select the entity to run the report for organization or payroll.

   If you select Organization, you can also select the organization hierarchy and version, or the name of the organization for this payroll report.

   If you select Payroll, select the payroll name for the business group.
3. Select the end date for archived payrolls. If you do not select an end date, the application selects an end date closest to the date of the last archive.
4. Select a sort order for the report. You can choose up to three sort parameters. If you do not choose a sort order, the application sorts the records by employee number.
5. Click the Submit button.

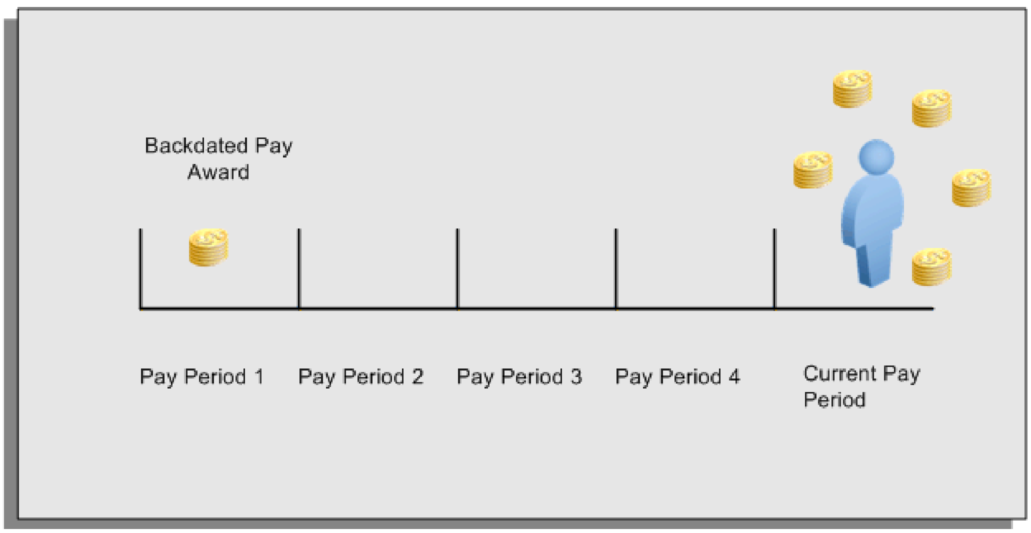
RetroPay Processing

Overview of RetroPay Processing

Purpose of the RetroPay Process

Run the RetroPay process to ensure that your payroll run for the current period reflects any backdated payments or deductions. Backdated adjustments can occur when:

- An employee receives a pay award that is backdated to a previous pay period.
- The payroll department makes a retrospective correction for an error that occurred in a previous pay period

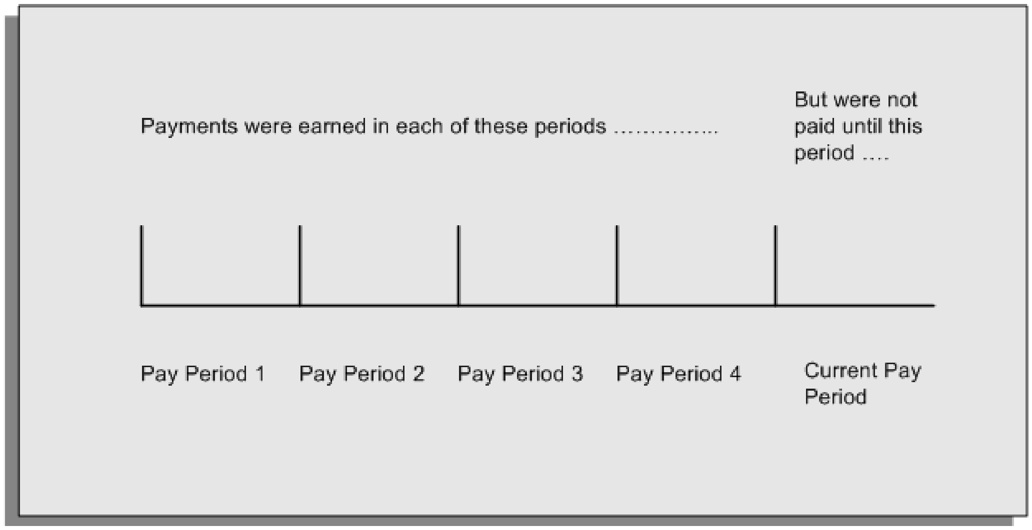


For example, at the start of the current pay period, this employee has a pay award backdated to pay period 1. The employee has not yet received any payments for this award. In the current pay period the employee is entitled to payments that represent the backdated amounts for:

- Each of the preceding payroll periods (pay periods 1 to 4)
- The current pay period

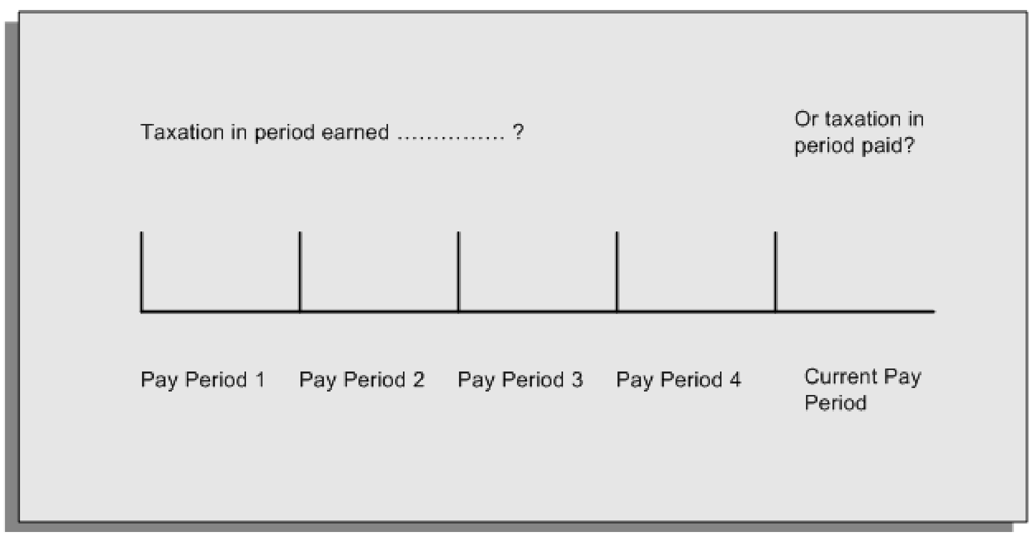
You run your RetroPay process to ensure that the employee receives correct payment when you next run the payroll.

Period Earned is Distinct from Period Paid



When backdated payments occur, the accuracy of your subsequent payroll processing depends on distinguishing between:

- The period in which the payment was earned
- The period in which the payment was made

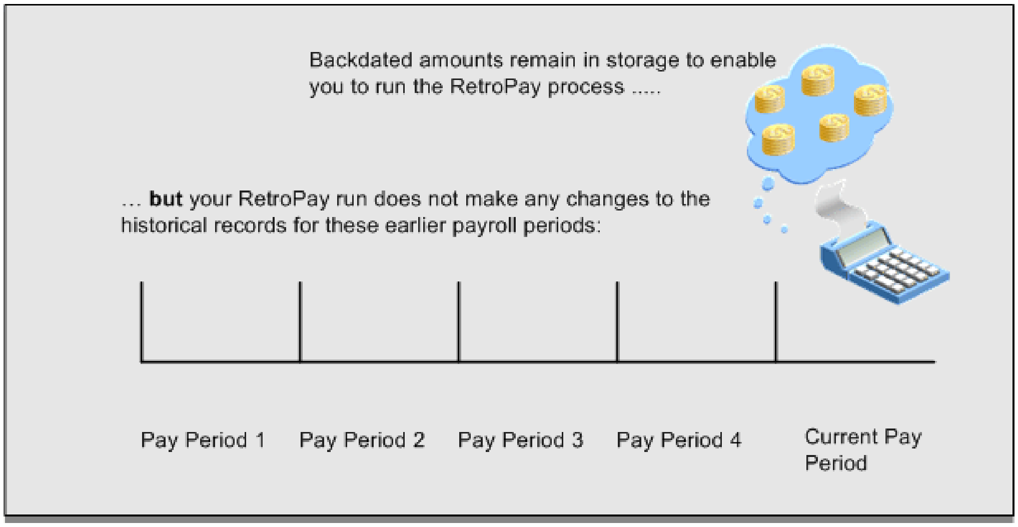


For example, the taxation implications are different for:

- A pay award backdated to period 1 and not paid until the current period. You may want to tax this award in the current period.

- A correction to an underpayment in period 3 which is paid to the employee in the current period. You may want to tax this correction in period 3 rather than in the current period.

The RetroPay Process Does Not Overwrite Your Historical Payment Records



You never overwrite historical payroll data when you run RetroPay. Although you recalculate all periods that have retroactive changes whenever you run a RetroPay, you never modify the stored results for these periods. Instead, you create one or more RetroPay entries to receive the process results.

Think of the RetroPay process as a calculator holding results in memory so that it can process a final set of results. The RetroPay process uses your historical results to calculate the changes for the current period. The results for your current period change, but your historical records remain unchanged.

Process RetroPay with Overlapping Periods

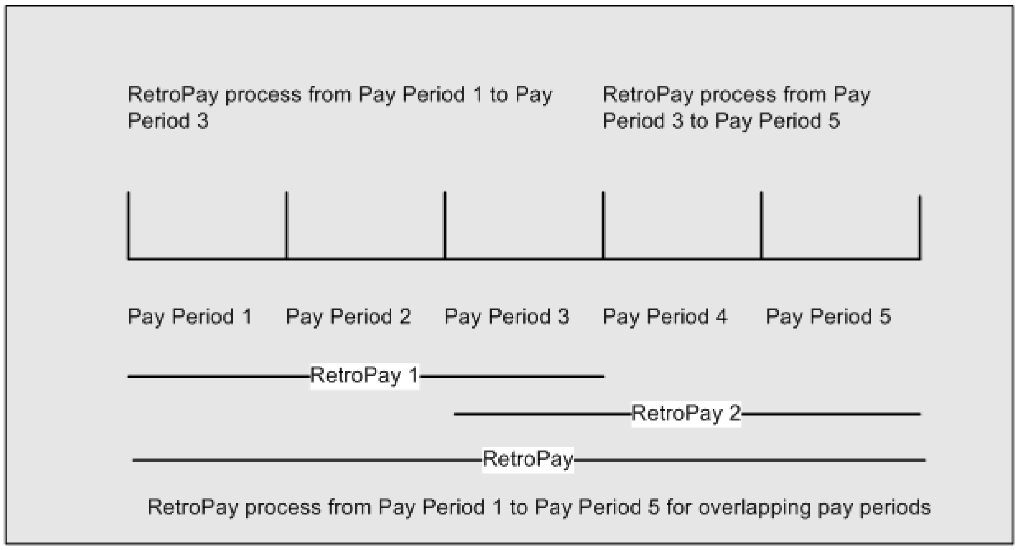
The RetroPay process recalculates payroll runs, balance adjustments and reversals from a particular date onwards, the start date of the recalculations. When you have retroactive changes overlapping another retroactive change, the application resets the start date to the earliest start date of the RetroPay processes and recalculates.

For example, you perform a RetroPay (RetroPay 1)for an assignment in period 3, with Payroll Runs being recalculated from a start date of period 1. In period 5, you perform another RetroPay (RetroPay 2) for the assignment with a start date of Period 3. The second RetroPay detects an overlap of RetroPays and sets the start date to the earliest start date.

In this case, the application sets the start date as Period 1. An overlapping override occurs to ensure that the balances are correct for the RetroPay process.

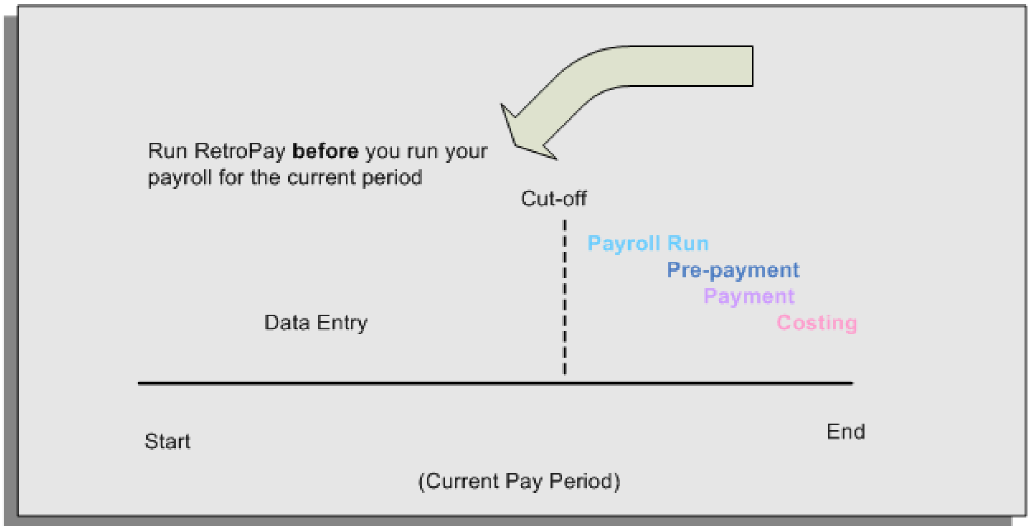
The processing of overlapping RetroPay results in an overall increase in time to process the RetroPay. If there are multiple overlaps, the increase in time is excessive.

> **Additional Information:** RetroPay Overlap is not available by default for all localizations. To use this feature, localizations must need to enabled it.
>
> For more information on RetroPay Overlap , refer to RetroPay Overlap - A Technical White Paper Note ID 842307.1 on My Oracle Support



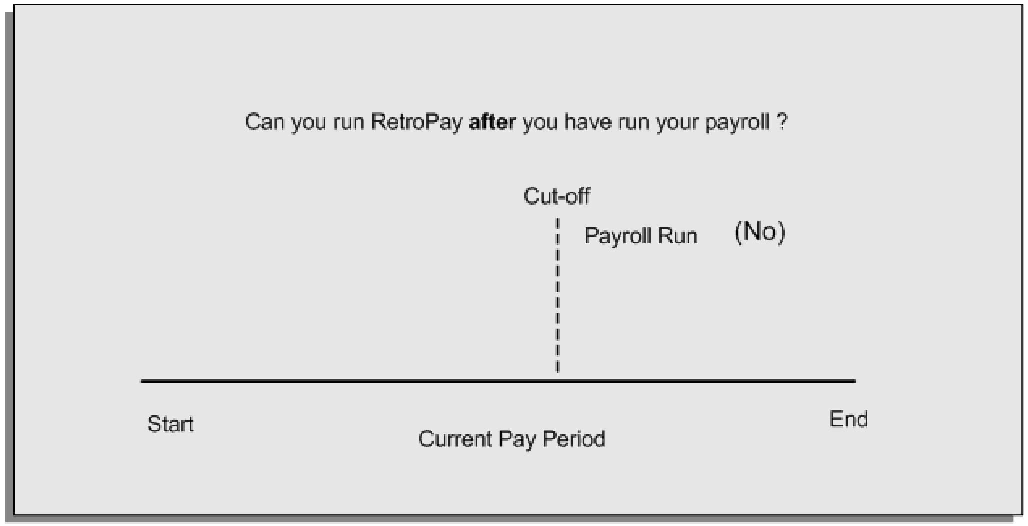
When to Run the RetroPay Process

The RetroPay Process and the Payroll Cycle



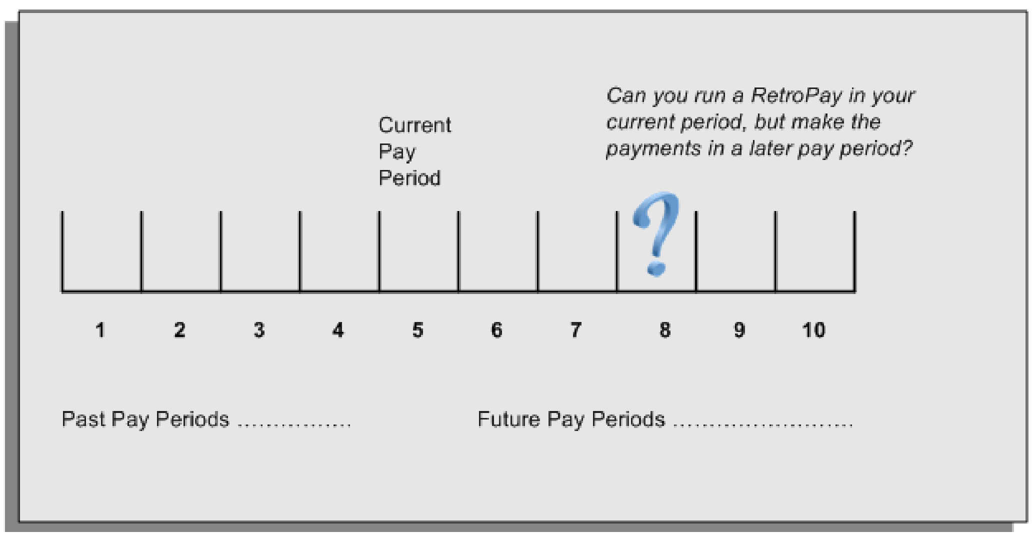
It is important to run your RetroPay process at the correct point in the payroll cycle. Always run RetroPay immediately before you run a payroll, and, for greatest accuracy, as close to the cut-off date as possible. The cut-off date is the point at which all data entry for the payroll is complete.

The RetroPay Process Always Precedes a Payroll Run



The RetroPay process cannot occur after your payroll run. If you run your payroll and then discover further backdated adjustments you must hold them over until a later payroll period and run the RetroPay process in that subsequent payroll period.

Backdated Adjustments Are Always Paid in the First Open Payroll Period



When you run a RetroPay process in your current payroll period, any backdated adjustments are always paid in your current payroll period. So, a RetroPay process in period 5 calculates any backdated adjustments from periods 1 to 4, and marks them for payment in period 5.

You cannot stipulate that a RetroPay process in period 5 should withhold any resulting payments until a future pay period. For example, you cannot stipulate that a RetroPay run in period 5 should withhold payments until period 8.

If you want to use a future payroll period such as period 8 to make payments of backdated amounts for periods 1 to 4, then you must wait until period 8 before you run your RetroPay process.

Troubleshooting RetroPay

The most common RetroPay problems occur when the RetroPay process completes, but produces unexpected results.

Consult these tables for quick reference on common RetroPay difficulties and their solutions. The problem description links or refers to extra information where you need more details to solve a problem.

- Troubleshooting Enhanced RetroPay and Retro-Notification, page 6-14

Troubleshooting Enhanced RetroPay and Retro-Notification

Problem Description	What to Do
View RetroPay Status does not display some of my expected choices	Contact your System Administrator. The configuration of View RetroPay Status is determined at setup. If the legislation rule RETRO_STATUS_USER_UPD is set to Y, then you have a choice when you view RetroPay status. You can either exclude the assignment from RetroPay processing (you select Deferred), or include it (you select Confirmed Awaiting Processing). However, if RETRO_STATUS_USER_UPD is set to N, then the assignment is automatically included in the next RetroPay run (it displays in View RetroPay Status as Included Awaiting Processing).

Problem Description	What to Do
After setting up Enhanced RetroPay,the Enhanced RetroPay run does not produce any results. US only :the Retro-Notification report (Enhanced) does not record a salary change for an employee unless you add the changed details from View RetroPay Status.	In both cases: Navigate to the Element window and ensure that the Default Component check box is checked. The United States has one component only (RetroPay) and one reprocess type (Reprocess) - you must check the Default Component check box for the element.
RetroPay Element field is missing when Enhanced RetroPay is enabled.	This is intended behavior. The RetroPay Element field is hidden when Enhanced RetroPay is enabled. You now add your RetroPay elements from the Retro Components button available from the Recalculation tab of the Elements window.

Troubleshooting RetroPay

Problem Description	What To Do
RetroPay process element entry not generated for one or more assignments.	Check that the element links exist, then check your RetroPay setup., page 6-16
Unexpected value returned.	Check your RetroPay setup., page 6-17
Start and end times ignored.	Check for a previous RetroPay run that overlaps with your current run. If there is an overlap, rerun a new RetroPay with dates that fully include the period processed by the earlier RetroPay.
RetroPay Warning: *Process Log shows zero employees in error - did not create element entries for processed employees.*	Check that you are using the correct balance in the RetroPay set. If you are processing RetroPay within a single calendar year, choose a balance that represents gross pay for year to date. If your RetroPay spans two years, do not select a balance with the _YTD dimension.

Problem Description	What To Do
Cannot use the Element Entries window to delete RetroPay generated elements.	Roll back the RetroPay process, remove the unwanted assignments from the assignment set and then rerun RetroPay. **Note:** The RetroPay process does not permit use of the Element Entries window to make these changes. This is expected behavior rather than an error.
RetroPay Error: *APP-6370 Cannot create an entry past the termination rule date.*	The setup of your RetroPay element (specifically, the termination rule) does not enable you to process terminated employees. Remove the assignments of terminated employees from your assignment set and then rerun RetroPay.

Detailed Problem Resolutions

This section provides step-by-step solutions for more complex problems.

Check that the Element Links Exist, and then Check Your RetroPay Setup

If the RetroPay process does not generate a RetroPay element for one or more assignments, follow this sequence to correct the problem,:

1. Check that there is a valid, current element link for each assignment in the RetroPay set. If the links do not exist, the RetroPay process can still calculate a retro-payment but cannot attribute the calculation results to an assignment.

2. Check that RetroPay entries exist for this assignment. Do this by inspecting the log file for the HR_HRPROC_EE_NOT_CRE message and searching for the text *Warning RetroPay has detected no change*. This text indicates that RetroPay entries do not exist. There are no differences between the original payroll run and the RetroPay run.

3. Check that your RetroPay setup correctly defines all the required balances. The RetroPay process always uses a balance to track the difference between an original entry and a retro entry. If retro-payments do not specifically feed your RetroPay balances, then the RetroPay process cannot identify that a retro-payment has occurred.

   Example (from U.K. Payroll)

If you specify an NI balance in your RetroPay setup and then make changes to element entries that are not subject to tax or NI, your run results will be different when you compare the original run and the retro-paid run. However, the RetroPay element does not include these changes because it can only report on those differences that affect the NI balance.

4. Confirm that your RetroPay element has a classification of Earnings. The Earnings classification ensures that you can pay the amounts identified by the RetroPay process. Other classifications, such as Information, do not allow you to make payments.

5. Find out whether your RetroPay definition includes any Year to Date (_YTD) balances. If you run a RetroPay process that spans the end of year, you could see unexpected results if you are using _YTD balances. Errors occur because the payroll run clears the_YTD balance at the end of year in preparation for the next year.

6. Check that there is a correct end date for the payment of RetroPay entries. Do this by View | Lists | Employees by Element to see whether the entry was created for an unexpected period. If this is the case, set the end date to the first date of the payroll period in which the RetroPay entry should be paid. For example, if you run RetroPay for June to September 2004 to pay back pay in October 2004, your start date should be 01-JUN-2005 and your end date 01-OCT-2005.

Check Your RetroPay Setup

If the RetroPay process returns an unexpected value follow this sequence to correct the problem,:

1. Check the logic of the RetroPay setup to determine that you are feeding the correct balance and confirm that you are not feeding the correct balance more than once.

2. Find out whether your RetroPay definition includes any Year to Date (_YTD) balances. If you run a RetroPay process that spans the end of year, you may see unexpected results if you are using _YTD balances. Errors occur because the payroll run clears the_YTD balance at the end of year in preparation for the next year.

3. Establish whether there are changes elsewhere in the application that might impact the value of a balance. This can be a difficult area to identify because anything that feeds the balance specified in the RetroPay definition can potentially affect the RetroPay.

   In particular:

   - Balances like Gross Pay can reflect multiple changes to an assignment. These changes can affect the recalculated value of that assignment.

   - Generic changes such as updates to a formula can affects the results of associated elements, and introduce balance value changes that subsequently affect RetroPay values.

Setting Up the Retro-Notifications Report

You use the Retro-Notifications report to identify any changes that have a retrospective effect for payrolls that you have already run. You can define the relevant types of change by setting up an event group to specify the changes. Follow these steps to set up the Retro-Notifications report:

To enable dynamic triggers:

1. Navigate to the Dynamic Triggers window.

2. Enable any dynamic triggers that the application generates. It is important to enable these triggers to ensure your payroll processing updates each database table correctly. The recommended minimum list of triggers to enable for the Retro-Notifications report is as follows:

Table Name	Trigger Type
PAY_ELEMENT_ENTRY_VALUES_F	Update
PAY_ELEMENT_ENTRIES_F	Update
PAY_ELEMENT_ENTRIES_F	Insert
PAY_ELEMENT_ENTRIES_F	Delete

To define an event group:

1. Navigate to the Table Event Group window.

2. Enter a name for your Event Group, for example, Retro-Notification Events.

3. Select Retro as your event groups type.

4. Save your entries.

5. Select the events that will produce notification if retrospective changes occur. Specify the following information to identify the type of update and the database table to which it applies:

   - Update Type

- Base Table Name
- Column Name

For example:

Update Type	Table	Column Name
DateTrack Correction	PAY_ELEMENT_ENTRY_VALUES_F	SCREEN_ENTRY_VALUE
DateTrack Update	PAY_ELEMENT_ENTRIES_F	EFFECTIVE_START_DATE
DateTrack Update	PAY_ELEMENT_ENTRIES_F	EFFECTIVE_END_DATE
DateTrack End Date	PAY_ELEMENT_ENTRIES_F	
DateTrack Insert	PAY_ELEMENT_ENTRIES_F	
DateTrack Delete	PAY_ELEMENT_ENTRIES_F	

To enable the Incident Register:

1. Navigate to the Functional Area Maintenance window.
2. Query the Incident Register and ensure that you have triggers defined.
3. Decide whether to capture the triggers by legislation, business group, or payroll. Navigate to each tab to make your selection.

Setting Up Enhanced RetroPay with Component Usages and Element Time Spans

You can decide whether each retrospective payment requires:

A full reprocessing in which you recalculate all amounts for the current payroll. This option is typical when you are processing backdated payments, or when you want to deduct tax for backdated amounts in the period when it was earned, rather than in the current payroll period.

A limited reprocessing in which you recalculate only some of the amounts for the current payroll. This option is typical when you are processing corrections, or when you want to deduct tax for retrospective changes in the current payroll period rather than in the period when it was earned.

Components for RetroPay

Oracle Payroll describes each different type of RetroPay run as a component. You set up RetroPay component usages to define how RetroPay will process the component. For example, you could set up a component Earnings Correction for the element Basic Salary. A component always has:

- A name (for example, Earnings Correction)
- A reprocess type (Static, Partial, Reprocess) to determine how to process the component

Element Time Spans for RetroPay

For each of these components, you define an element time span to specify the start and end dates of the retro processing, and which RetroPay element applies for each time span. If you are creating RetroPay elements manually, you must follow the process given below to set up retro components and element spans to process RetroPay correctly.

> **Tip:** Check if your Localization has components and time spans predefined that you can use to process retropay.

> **Additional Information:** Check if your localization has any upgrade processes enabled if you are upgrading your current elements.

Setting Up Retropay Component Usages:

Retropay component usages assign the components to the elements you created, ensuring all the elements recalculate with the latest values.

1. Query your defined element, in the Element window.
2. Select the Recalculation tab, and check the Retro Components button.

   > **Note:** South African users: Select the predefined ZA Statutory Updates event group from the list of values in the Recalculation Events field. Alternatively, you can create and attach an event group of your choice

3. In the Retropay Components region of the Retropay Element window, choose the component field, and an appropriate component from the list of values.

Note: Do not enable the Retro Component of the elements that are themselves being used to process retropay for another element.

4. Select the Reprocess Type. If you select Static, then Retropay will not process any changes to the element when running the relevant component. Opting for the Reprocess Type ensures the element changes process.

5. Save your work.

6. You can now enter the element time spans.

Setting Up Element Span Usages for Elements:

The element time span usages defines the start and end dates for retropay processing. Most elements have the standard time span of Start of Current Year to End of Time already assigned, to cover any changes made in the current year. For each earnings element, or imputed earnings element with a defined retropay component usage, you must define two element span usages. These element span usages cover the earnings for both the current and the previous year, defining not only how far back processing should cover, but also up to where a particular retropay element carries forward the retro changes. You must define your retropay elements and components before defining the element time spans.

Set up the Element Span Usages in the Retropay Elements window.

1. Query your defined element in the Element window.

2. Select the Recalculation tab, and check the Retro Components button.

3. In the Retropay Elements region, select the appropriate time spans from the From and To fields, to define the time period the retropay element is covering.

4. Select the retropay elements you created from the Retropay Element field.

5. Save your work.

Setting Up Overlapping RetroPay Using Balance Adjustments

If you have overlapping periods for making retro payments, ensure that the Retro Overlap feature is enabled. This process recalculates from the latest reprocess date and uses Balance Adjustments. Follow these steps to set up the Retro Overlap feature :

To set up Retro Overlap using Balance Adjustments:

1. Run the corresponding concurrent program to enable the retro overlap feature for your localization, for e.g. Enable Retro Overlap for all UK Business Group.

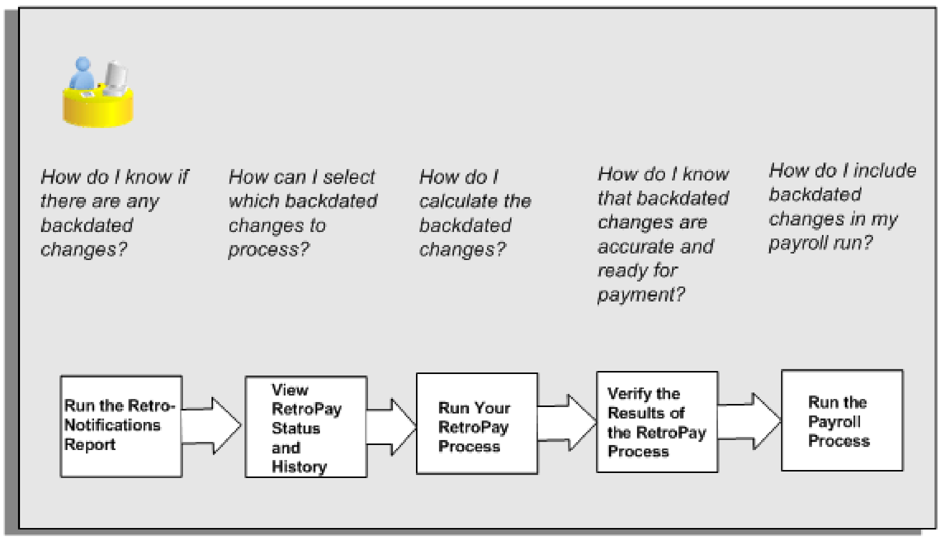
2. Set up all the Retro Element Types and associate them with their corresponding elements.

3. Define a retro element for every element that feeds a balance. The Balance Adjustment process uses the retro entries created in future periods to do adjustments.

4. Enable the 'Do Not Process' check box for any new retro elements used for retro balance adjustments.

Understanding the Sequence of Your RetroPay Activities

Given below is the sequence of retropay activities.



Follow this sequence to:

1. Identify outstanding backdated adjustments

2. Monitor and control the processing of backdated adjustments

3. Include backdated adjustments in your next payroll run.

1. **Run the Retro-Notifications Report**

   Run the Retro-Notifications report to identify any backdated changes that have not been included in a payroll run.

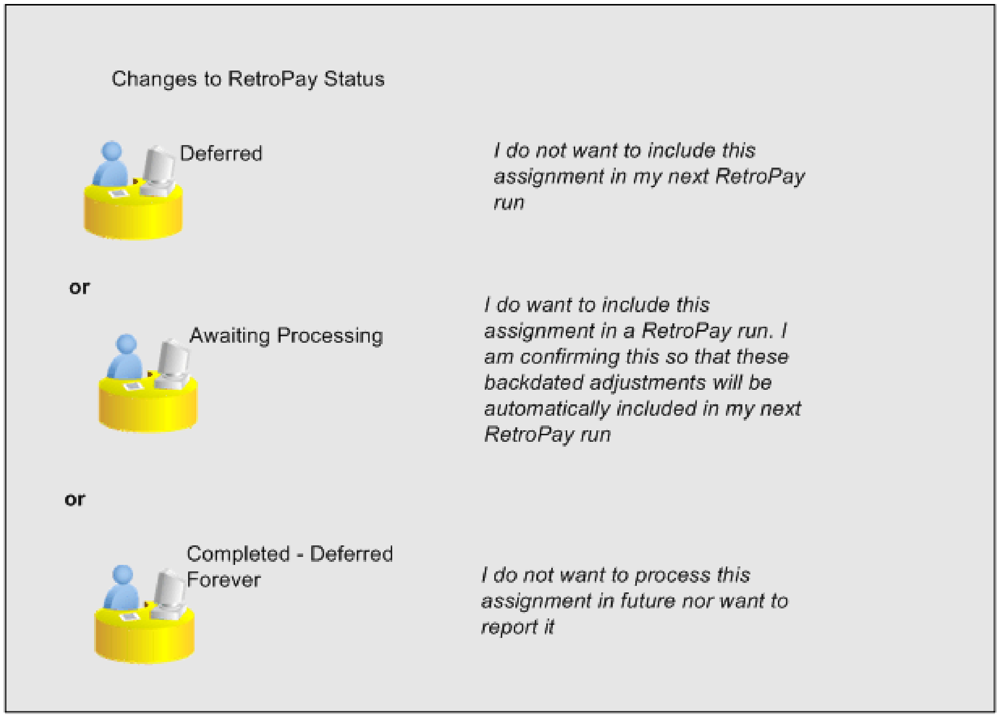
   You can save your summary of backdated changes into an event group.

   Once you have identified the retrospective changes, you can then decide whether to include them in your RetroPay process.

   The Enhanced Retro-Notifications report uses the Payroll Events Model to identify what changes have occurred to your underlying data. If these changes correspond to the retrospective types of change that you want to be notified about, then these changes appear on the Retro-Notifications report.

2. **View RetroPay Status and History**

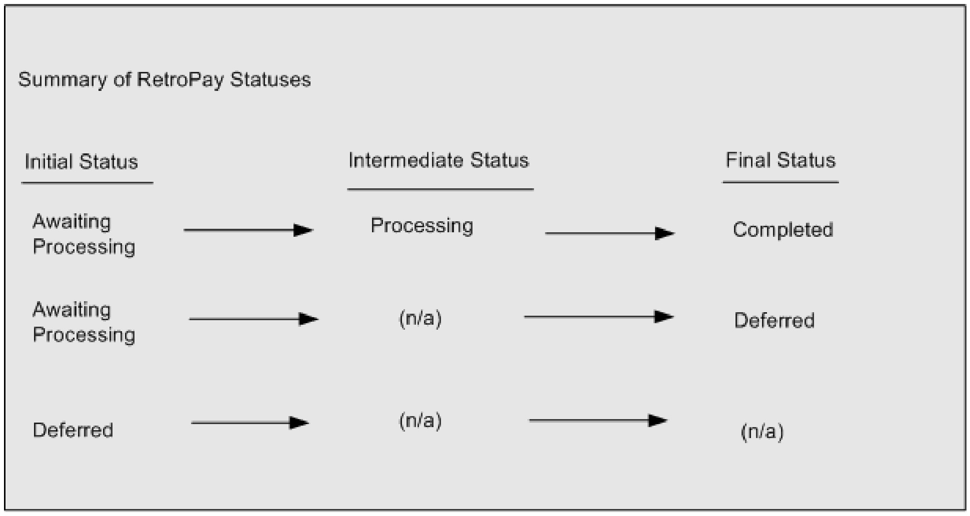
   Once you have identified unprocessed retrospective payments, you can determine how you want to process these changes.



   The Retro-Notifications report identifies the assignments with backdated adjustments. If you defer, then the assignment is not included when you next run RetroPay.

   You can also include additional assignments that the Retro-Notifications report did not identify. This typically occurs when you discover additional backdated adjustments that were not known about when you ran the Retro-Notifications report.

   The following diagram shows the sequence of statuses for each RetroPay status:



Once RetroPay processing begins, the initial status changes to an intermediate status of Processing.

You can query all retro assignments that are at the initial (outstanding) status, and all retro assignments at the final (completed) status.

The following diagram shows what statuses are included when your query All Outstanding, and All Completed:

See: Viewing RetroPay Status and History, page 6-25

3. **Run the RetroPay Process**

   You enable Oracle Payroll to make retrospective adjustments for the combination of changes identified on the Retro-Notifications report, and subsequently modified when viewing RetroPay status.

4. **Verify Your RetroPay Results**

   When you have run the RetroPay process, verify your results and correct any errors.

5. **Run Your Payroll**

   Finally, run your payroll to reflect the adjustments that you have made for the retrospective payments.

Viewing RetroPay Status and History

You use the RetroPay Status window to control how you want to process changes that have a retrospective impact. You typically find outstanding retrospective changes where changes are entered in Self-Service HRMS independently of Oracle Payroll.

Use the RetroPay Status window to:

- Identify any assignments that have changes implying retrospective processing.
- Specify how you would like to process any outstanding retrospective changes.
- Confirm that your application has processed the specified requests.
- Create or update multiple retro assignments for status as Awaiting Processing or Deferred.

You can still use the Retro-Notifications report to identify all outstanding retrospective changes that have not been applied, and group them into an assignment set ready for processing.

However, the advantage of using the RetroPay Status window is that you can identify what you want to process, or exclude from processing, and then mark your selections for completion.

To search for assignments that have retrospective changes:

1. Select the search criteria for assignments that you want to view. If you do not select any criteria, then your search returns all assignments that have retrospective changes. You can search for any of these criteria:

   Name: Specify a name, or search for all names.

   Assignment Number: Specify an assignment or search for all assignments.

   Recalculation Date: Use this start date and end date to determine the period for retrospective changes.

   Status: Select the status that you want to identify.

   - All Completed. This status displays all assignments with retrospective implications that are already processed.

- All Outstanding. This status displays all assignments with retrospective implications that are not yet processed.
- Awaiting Processing. This status indicates that this assignment has cleared for processing and that the processing will occur in the next payroll run.
- Completed. This status indicates that this assignment has now been processed.
- Completed – Deferred Forever. This status indicates that the retro assignments created by the system are deferred forever. The action of the retro assignment (RETRO_ASSIGNMENT_ACTION_ID) is to changed to –1. The retro assignments are not processed in the future nor reported with the new status.
- Deferred. This status indicates that an assignment was scheduled for processing, but that the processing was deferred and will not occur until you change the status.
- Processing. This status indicates that an assignment is being processed.

Recalculation Reason: This criterion indicates why retrospective processing is necessary and enables you to search particular categories of retrospective change to process them independently of other retrospective changes.

2. Click Go when you have selected all your search criteria.

To change the status of an assignment:

You typically change the status of an assignment when you want to defer processing that was previously scheduled, or to indicate that you have already processed this change even though it was automatically scheduled.

1. Select the assignment that you want to change.
2. Select the new status for the assignment from the Change Status list of values.
3. Click Change Status.

To view the elements included on each assignment:

1. Select the assignment name in the Name column.
2. View the elements for this assignment, and the Recalculation Reason for each element.

To update or delete elements for each assignment:

1. Select the assignment name.

2. Click Update to add an element to the assignment.

3. Click Delete to remove an element from the assignment.

To confirm that your specified requests have been processed:

1. Query the individual assignment, but leave the status field blank.

2. Alternatively, query all assignments with a status of All Completed or All Outstanding and check the details for your individual assignment.

To create multiple retro lines:

1. Select the Create Retro Lines button.

2. A spreadsheet opens.

3. In the spreadsheet that appears, enter new records with a status of Awaiting Processing or Deferred.

4. Click on Upload. You can select Commit All Rows or Each Row option, if you want the application to validate all records and commit or validate each record prior to uploading the details to the database. If you select Each Row option, then all successful records will be uploaded and error records will not be uploaded. Only on successful validation, the application makes changes to the database.

   If you select the Upload All Rows or Each Row, then the application does not validate the details prior to uploading.

To update the multiple retro lines:

1. Query the assignments with Awaiting Processing or Deferred.

2. Click on Download to Spreadsheet check box and click Go.

3. In the spreadsheet that opens, you can update the status. You cannot modify any employee or assignment information but can only change the status of the assignment or you can delete the retro entry or update the reprocess date of the retro entry.

   > **Note:** In the Entry Delete/ Update column, ensure to select the applicable value if there are any entry changes made. If you do not select any value the application does not make any changes to the database.

4. Click on Upload. You can select Commit All Rows or Each Row option, if you want

the application to validate all records and commit or validate each record prior to uploading the details to the database. If you select the Each Row option, then all successful records will be uploaded and error records will not be uploaded. Only on successful validation, the application makes changes to the database.

If you select the Upload All Rows or Each Row, then the application does not validate the details prior to uploading.

Viewing RetroPay Enhanced Results

You can query the assignment actions of the Retropay Enhanced process and review the corresponding retro entries created.

> **Note:** Oracle Payroll delivers the "RetroPay Enhanced Results" (PAY_WS_RETRO_RESULTS) function to view the RetroPay enhanced results and this function is also associated with the global View menu (GLB_HRMS_VIEW_INFO). By default, this function is available in the US (US_HRMS_VIEW_INFO) and Canada (CA_HRMS_VIEW_INFO) menus. For the Mexico localization, the seeded "MX HRMS Navigator" menu includes the global GLB_HRMS_VIEW_INFO menu. Therefore, the "RetroPay Enhanced Results' function will be available to all responsibilities associated with the seeded "MX HRMS Navigator" menu.
>
> If required, system administrators must add the "RetroPay Enhanced Results" function to other localization seeded menus and custom menus.

To view the RetroPay Enhanced Results:

1. Click the View Results on the Assignment Process Results window to view the results for a particular the Retropay Enhanced assignment action.

2. Query the Assignment Actions of the Retropay Enhanced process effective between the specified dates for a given assignment or payroll. You can enter any of the following to query the retro assignment actions

   - assignment number
   - full name
   - effective date from and effective date to
   - payroll name
   - status of the assignment action

3. Click on the following details of the Retropay Enhanced assignment actions matching the search criteria to display the appropriate information:
   - Full Name – Click on the Full Name to get the list of Retro Entries created by the selected action.
   - Assignment Number
   - Action Status - If the action is in Error status, then click on the status to review the error messages.
   - Effective Date – View the effective date of the Retropay Enhanced assignment action.
   - Reprocess Date – Date provided by the Retropay Notification Report or the Retro Status Page.
   - Overlap Date – Overlap Date calculated by the Retropay Enhanced process internally. During the process, the run actions are rolled back and re-run from this date for the assignment.
4. In the Retropay Entries section, you can view the following information:
   - retro element
   - effective start date
   - effective end date
   - retro component
   - base element - the element for which the retro element is created
   - original date earned
   - Details – Click on the icon in the Details column to display the input values of the retro element created with a comparison of the run result values from the original period. The table also displays the retro element entries with their input values from the same source in previous periods. The comparison assumes that the base element and retro element have the same set of input values with the same order of display sequence.

Running the Retro-Notifications Report (Enhanced and Enhanced PDF)

After you have defined the components and element time spans, you can check the retrospective changes occurred. Oracle Payroll provides two types of retro notification reports that you can use report to identify all retrospective changes that have occurred since the last payroll run. This information is particularly useful when changes with retrospective impact are entered in Self Service HRMS independently of the Payroll department.

Oracle Payroll enables you to produce the report either in a text format or as PDF format. You can choose to run the report depending on your requirement:

- Retro -Notifications (Enhanced) Report – run this report to generate the output in text format

- Retro -Notifications (Enhanced PDF) Report - run this report to generate the output in PDF format that you can further customize to meet your requirements.

The Retro-Notifications report does not perform any RetroPay processing. It only identifies element entries that have changed. You must still run your RetroPay process separately to process these changes. After you have run the Retro-Notifications report, you can

- Run your RetroPay process on all assignments

- Edit the event group to remove or add assignments and then run your RetroPay process.

- Take no retrospective action on any of the assignments.

You can use the RetroPay Status window to schedule processing.

You run the Retro-Notifications (Enhanced) or the Retro-Notifications (Enhanced PDF) report from the Submit Processes and Reports window.

To run the Retro-Notifications (Enhanced) report:

1. Select the payroll. You can only run this report for a single payroll

2. If you want to see the retro-notifications for a particular event group, select an overriding event group.

3. If you want a report, select Yes in the Generate Report parameter.

4. Click OK, and submit.

To run the Retro-Notifications (Enhanced PDF) report:

1. Select the payroll. You can only run this report for a single payroll

2. If you want to see the retro-notifications for a particular event group, select an overriding event group.

3. If you are running the PDF-enabled version of this report, select a template for your

PDF output.

4. If you want a report, select Yes in the Generate Report parameter.

5. Click OK and submit.

Running Enhanced RetroPay

Use the Enhanced RetroPay process to distribute backdated amounts or corrections that you have identified from the Retro-Notifications report.

You run the Enhanced RetroPay process from the Submit Requests window.

To run the Enhanced RetroPay process:

1. Enter an effective date to indicate the date from which you want to create the retrospective elements for Enhanced RetroPay process.

2. Select the payroll.

3. If you want to create retrospective entries in a different pay period other than effective date, enter an entry creation date. The application creates retrospective entries in the pay period in which the Entry Creation Date occurs.

   If you leave this field blank, the application creates the default retrospective entries as of Effective Date.

4. Click Submit

Running Quick RetroPay

Run Quick RetroPay to process any retrospective payments for a single assignment. You run the Quick RetroPay process from the Submit Requests window.

> **Note:** It is not mandatory to run the Retro-Notifications Report for QuickRetropay process.

To run the Quick RetroPay process:

1. Enter a date on which you want to create the derived retro element entries. This is mandatory.

2. Select the assignment number of the assignment for which you want to run the backdated change. This is mandatory.

3. If you want the retro entries to get created in a different payroll period than that of

Effective Date, then you specify an Entry Creation Date. This is optional.

4. Enter an earliest date from which you want to reprocess the assignment backdated changes. If you do not specify any date, then the application calculates it internally. This is optional.

5. If you want the retro-notifications for a particular event group, select an overriding event group.

6. Click Submit.

7

HR Information Systems

Payroll Management Information Systems

Online Payslip (Australia, Hong Kong, Korea, Singapore, New Zealand, India, Kuwait)

The Online Payslips for the above localizations are localized versions of the generic payslip and have been designed to meet local requirements. For example, the Australian online payslip displays hourly rate information for the number of hours worked and the exact rate paid for those hours.

For information on the generic payslip functionality, see Online Payslip, *Oracle HRMS Deploy Self-Service Capability Guide*.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Employee Self-Service	Payslip

See: Defining Menus for SSHR, *Oracle HRMS Deploy Self-Service Capability Guide*

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable FlexFields

Not applicable

Configurable Profile Options

Profile	Configurable Level	Values	Default
HR:View Payslip From Date for WEB (MM/DD/YYYY)	User specification	Date	01/01/1997

HR:View Payslip From Date for WEB

This profile option determines how many payroll periods a user can view in the online payslip. If the profile option is not set, an error message is displayed when the user attempts to view the online payslip.

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

Additional Configuration Options

1. Optionally define additional information to be displayed in the Other Information section of the payslip using the Payslip Balances and Payslip Elements additional organization information.

    - Payslip Balances

      See: Entering Payroll Balances, *Oracle HRMS Enterprise and Workforce Management Guide*

    - Payslip Elements

      See: Entering Payroll Elements, *Oracle HRMS Enterprise and Workforce Management Guide*

2. Set the document viewing and printing preferences using the Self Service Preferences additional organization information.

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

3. Run the Prepayments process.

   See: Running the Prepayments Process, *Oracle HRMS Payroll Processing Management Guide*

4. Run the payment processes (for example, the Chequewriter process).

5. Run the Payslip Archive process for the appropriate legislation to enable SSHR users to view their payslip.

8

Implementation

Additional Implementation Steps for Kuwait

If you are implementing Oracle HRMS for Kuwait, then you must also complete the following additional implementation steps.

Additional Implementation Steps

Step 1: Set up the Social Insurance Calculations *Required Step*

To record and process the Public Institution for Social Security (PIFSS) social insurance schemes for employees, you must complete the setup for social insurance calculations. See: Calculating Social Insurance, page 5-2

Step 2: Set up the Statement of Earnings *Required Step*

You need to set up the online statement of earnings before you can see the values correctly. See: Setting Up a Global Statement of Earnings, page 4-2

> **Note:** When entering SOE information at the Business Group level, select the predefined element sets KW_SOE_EARNINGS_ELEMENTS and KW_SOE_DEDUCTIONS_ELEMENTS and the predefined balance attribute KW_SOE_BALANCE_ATTRIBUTES.

Step 3: Set Up Electronic File Transfer *Required Step*

To process the electronic file transfer, you must complete several tasks. See: Setting Up Electronic File Transfer, page 5-2

Step 4: Set up the Loan Process *Required Step*

To run the loan process, you must complete the following tasks:

1. Add the required loan types, such as car loan or house loan, as values to the lookup KW_Loan_Type. See: Adding Lookup Types and Values, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

2. Link the Loan Recovery element to the payroll. See: Defining Element Links, *Oracle HRMS Compensation and Benefits Management Guide*

Also see: Processing Loans, page 3-12

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