

Oracle® HRMS for Norway

Supplement

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Send Us Your Comments

Oracle HRMS for Norway Supplement, Release 12.2

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- Do you need different information or graphics? If so, where, and in what format?
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Preface

Intended Audience

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

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

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

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

- The Oracle Applications graphical user interface

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

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

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Structure

- 1 Enterprise and Workforce Management**
- 2 Workforce Sourcing and Deployment**
- 3 Talent Management**
- 4 Compensation and Benefits Management**
- 5 Payroll Management**
- 6 HR Information Systems**
- 7 Implementing Oracle HRMS**

Related Information Sources

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

Guides Related to All Products

Oracle E-Business Suite User's Guide

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

Oracle Application Framework Personalization Guide

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

Oracle E-Business Suite Maintenance Guide

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

Oracle E-Business Suite Security Guide

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

Oracle E-Business Suite Setup Guide

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

Oracle Applications Manager features, and setting up printers and online help.

Oracle E-Business Suite Flexfields Guide

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

Guides Related to This Product

Oracle Human Resources Management Systems Implementation Guide

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

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

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

Oracle Human Resources Management Systems Enterprise and Workforce Management Guide

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

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

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

Oracle Human Resources Management Systems Payroll Processing Management Guide

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

Oracle Human Resources Management Systems Compensation and Benefits Management Guide

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

Oracle Human Resources Management Systems FastFormula User Guide

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

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

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

Oracle Human Resources Management Systems Window Navigation and Reports Guide

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

Oracle Performance Management Implementation and User Guide

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

Oracle Succession Planning Implementation and User Guide

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

Oracle Human Resources Management Systems Approvals Management Implementation Guide

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

Oracle iRecruitment Implementation and User Guide

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

Oracle Learning Management Implementation Guide

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

Oracle Learning Management User Guide

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

Oracle Time and Labor Implementation and User Guide

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

Oracle Labor Distribution User Guide

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

Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a

complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

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

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

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

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

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

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

Enterprise and Workforce Management

Organizations

Key Concepts for Representing Enterprises

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

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

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

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

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

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

See: Organization Classifications, page 1-4

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

Business Group

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

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

- If you use Oracle Payroll

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

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

Operating Company

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

Ultimate Legal Entity

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

Legal Entity/Employer

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

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

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

Consolidated Legal Entity

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

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

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

Organization Classifications

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

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

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

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

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

All Legislations

All legislations can use the following classifications:

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

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

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

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

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

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

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

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

US Legislation

The US legislation can use the following classifications:

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

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

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

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

UK Legislation

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

Canadian Legislation

The Canadian legislation can use the following classifications:

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

French Legislation

The French legislation can use the following classifications:

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

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

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

Dutch Legislation

The Dutch legislation can use the following classifications:

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

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

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

German Legislation

The German legislation can use the following classifications:

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

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

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

Hong Kong Legislation

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

Mexico Legislation

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

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

Saudi Legislation

The Saudi legislation can use the following classifications:

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

Hungary Legislation

The Hungary legislation can use the following classifications:

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

Spanish Legislation

The Spanish legislation can use the following classifications:

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

Korea Legislation

The Korean legislation can use the following classification:

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

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

Indian Legislation

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

The Indian legislation can use the following classifications:

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

account number in the NPS Account Set Up window.

Polish Legislation

The Polish legislation can use the following classifications:

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

Norwegian Legislation

The Norwegian legislation can use the following classifications:

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

Finnish Legislation

The Finnish legislation can use the following classifications:

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

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

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

Danish Legislation

The Danish legislation can use the following classifications:

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

Swedish Legislation

The Swedish legislation can use the following classifications:

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

South African Legislation

The South African legislation can use the following classification:

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

UAE Legislation

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

Irish Legislation

The Irish legislation can use the following classifications:

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

Standard Employment Information

Standard employment information or employment defaults represent the employment information that is applicable for different levels in the enterprise. For example, you can set employment defaults for shift type, employee type, and payroll period, to name a few.

You can enter employment defaults at various organization levels depending on your enterprise's requirements or at the level to which the defaults most apply. For example, if the employment defaults apply to most of the people working for a legal employer, you can enter the information against the legal employer and make the relevant changes at the appropriate lower organization levels. The employment defaults entered at a lower organization level, such as assignment, override any information entered at a higher level, such as business group. It is recommended that you set the employment defaults at the highest level to which they most apply to minimize the maintenance of this information.

You can enter the employment defaults at the following organization levels:

- **Business Group** You enter the employment defaults at the business group level if this information is applicable to most people in your country. For example, if a majority of the people in your country work in the day shift, you can enter the shift information at the business group level.
- **HR Organization** You enter the employment defaults at the HR organization level if this information is applicable at the enterprise level. For example, if a majority of your employees are blue collar workers, you can enter the employee type information at the HR organization level.
- **Legal Employer** You enter the employment defaults at the legal employer level if this information is applicable to most of the employees working for that legal employer. For example, if most of the employees working for a legal employer are paid on a monthly basis, you can enter the payroll period information at the legal

employer level.

- **Local Unit** You enter the employment defaults at the local unit level if this information is applicable to most of the employees working in that local unit. For example, if most of the employees working in a local unit are permanent employees, you can enter the employment type information at the local unit level.
For Norwegian, Finnish, and Swedish users only: The local unit level is only available to Norwegian, Finnish, and Swedish users.
- **Assignment** You enter the employment defaults at the assignment level for various reporting purposes. For example, if there are five employees who have been assigned different shift timings from the rest of the employees, you can change the shift timing information for these five employees at the assignment level.

Setting up Norwegian Organizations

Set up your organizations in the order shown below. This structure forms the basis for defining the relationship between the employee and the employer – this is important in terms of both legal liability and identifying the breakdown for various statutory reports.

1. Set up a business group and any other non-Norwegian specific organizations required by your enterprise. You can enter employment defaults for a business group or HR organization.
2. Create your local units (A local unit is the particular industry or location to which the branch of the enterprise belongs) and enter their additional information. The employment defaults you enter here override the defaults entered at a higher level.
3. Create your legal employers and enter statutory information and employment defaults for them. The employment defaults you enter here override the defaults entered at a higher level.
4. Link each local unit to a legal employer. You can assign multiple local units to a legal employer. In addition, you can attach the Tax Office and Statement Provider organizational classifications to the legal employer.
5. Create the social security offices to which you and your employees report. Social security office information is used for statutory reporting purposes.

For more information on how to create the organizations and additional information described in this topic, see: [Creating an Organization](#), page 1-16 and [Entering Additional Information](#), page 1-18

6. Attach the employee assignment to a local unit. You can select any local unit that has been attached to any legal employer in your organization. See: [Entering Additional Assignment Details](#), page 2-41

7. Attach the organization classification. You can select any organizational classification that has been attached to any legal employer in your organization

Creating an Organization

Use the Organization window to create:

- Business groups
- External organizations (for example, tax offices, pension providers, insurance carriers, disability organizations, benefit carriers, or recruitment agencies)
- Internal organizations (for example, departments, sections or cost centers)
- GREs/Legal Entities

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

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

To create an organization:

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

7. Save the basic organization details.

Entering Additional Information

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

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

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

For legal employer see: Legal Employer, page 1-20

For pension provider see Pension Provider, page 1-26

For local unit see: Local Unit, page 1-20

For social security office see: Social Security Office, page 1-20

For representative body see: Representative Body, page 1-21

For constituency see: Constituency, page 1-21

For bargaining association see: Bargaining Association, page 1-22

For company cost center see: Company Cost Center, page 1-22

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

See Classification and Additional Information Types, page 1-4 if you need to check which classification to select.

To enter Business Group additional information:

1. Click on the organization classification for which you want to enter additional information.
2. Choose the Others button to open the Additional Organization Information window.
3. Select one of the following:
 - Business Group Information, see: Entering Business Group Information, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Budget Value Defaults, see: Business Groups: Entering Budget Value Defaults, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Employment Defaults, see: Entering Employment Defaults, page 1-24
 - 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*
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*
 - Employment Defaults, see: Entering Employment Defaults, page 1-24
 - 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*

4. Repeat these steps to enter further information.

To enter legal employer information:

1. Click on the appropriate organization classification.
2. Click Others to open the Additional Organization Information window.
3. Select one of the following:
 - Employment Defaults, see: Entering Employment Defaults, page 1-24
 - Legal Employer Details, see: Entering Legal Employer Details, page 1-26
 - Local Units, see: Assigning Local Units to a Legal Employer, page 1-27
 - Exemption Limit, see: Entering Exemption Limit Details, page 1-29
4. Repeat these steps to enter further information.

To enter Norwegian local unit information:

1. Click on the appropriate organization classification.
2. Click Others to open the Additional Organization Information window.
3. Select one of the following:
 - Employment Defaults, see: Entering Employment Defaults, page 1-24
 - Local Unit Details, see: Entering Local Unit Details, page 1-25
 - Exemption Limit, see: Entering Exemption Limit Details, page 1-29
4. Repeat these steps to enter further information.

To enter Norwegian social security office information:

1. Click on the appropriate organization classification.
2. Click Others to open the Additional Organization Information window.
3. For entering contact details, see: Entering Social Security Office Contact Details, page 1-27

4. Repeat these steps to enter further information.

To enter representative body additional information:

1. Click on the appropriate organization classification.
2. Click Others 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.

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 5-18
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.

Entering Employment Defaults

Enter the employment defaults from the Additional Organization Information window. You enter employment defaults to assist statutory reporting at the legal employer level. You use this information for reporting on salary statistics.

Enter employment defaults at the level at which the defaults typically apply. For example, enter employment defaults at the business level if these defaults apply to most people in a country. Enter them at lower levels of the organizations if the defaults tend to differ at those levels. The defaults that you enter at a lower level in the organization overrides defaults entered at higher levels.

To enter employment defaults:

1. In the Organization window, query the organization if it does not already appear there. In the Organization Classifications region, select Business Group, HR Organization, Legal Employer, or Norwegian Local Unit, click Others, and select

Employment Defaults.

2. Click in the Employment Defaults field to open the Employment Defaults window.
3. Select the job status, for example, team leader or apprentice.
4. Select whether the employment is full-time or part-time.
5. Select the payroll period. This information is not related to the payroll period that you define as part of your payroll.
6. Select the condition of employment, either permanent or temporary.
7. Select the typical shift pattern your employees work.
8. Enter the agreed number of working hours. You must enter the number of hours as a three-digit number. You must multiply the number of hours by 10. For example, if the agreed working hours are 36.5 hours per week, you must enter the value as 365.
9. Save your work.

Entering Local Unit Details

Enter the local unit details from the Additional Organization Information window. Use the Local Unit Details window to record details about organizations classified as a local unit. The local unit represents the enterprise's particular industry or location. The area of business of the local unit determines the calculation method to be used for employer contribution. Using the Report Separately option, specify if you want the employer contribution and statutory reporting to be done separately, at the local unit level, or at the legal employer level.

To enter local unit details:

1. In the Organization window, query the organization if it does not already appear there. In the Organization Classifications region, select Norwegian Local Unit, click Others, and select Local Unit Details.
2. Click in the Local Unit Details field to open the Local Unit Details window.
3. Enter the local unit's organization number (Bedriftsnummer).
4. Enter the local unit's industry code. You can use this information for internal reporting.
5. Select the confederation code. You can use this information for statistical reporting.
6. Select the industry status or area of business.

7. Select Yes or No for the Report Separately option.
8. Enter the tax municipality number.
9. Save your work.

Entering Legal Employer Details

Enter the legal employer details from the Additional Organization Information window. Use the Legal Employer Details window to record information about the legal employer, such as the various identification numbers that your organization uses. You use this information for tax reporting.

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 Legal Employer Details.
2. Click in the Legal Employer Details field to open the Legal Employer Details window.
3. Enter the legal employer's organization number (Juridisk nummer).
4. Select the tax municipality number.
5. Select the industry status or area of business. This information determines the calculation method to be used for employer's contribution.
6. Enter the legal employer's industry code. You use this information for tax reporting.
7. Select the provincial tax office.
8. Select the statement provider.
9. Save your work.

Entering Pension Provider Details

Enter the pension provider details using the Organization and the Additional Organization Information windows.

1. In the Organization window, enter a name for the pension provider organization.
2. Select Pension Provider as the type.

3. Select External as the location.
4. In the Organization Classifications region, select Pension Provider, click Others and enter the Contact Details. Now, select Pension Provider, click others, and enter the Norway Pension Details. Select the Pension Type. This is a mandatory field.

Assigning Local Units to a Legal Employer

Assign local units to a legal employer from the Additional Organization Information window. Use the Local Units window to assign local units to legal employers. Linking the local units to the legal employer is essential for statutory reporting purposes. For example, for tax reporting, you must link sub-disbursement units to the legal employer as local units.

Note: You can assign multiple local units to a legal employer. You must assign at least one local unit to a legal employer to create a full reporting hierarchy. If there are no local units within your legal employer, then create a local unit with the same name as your legal employer and attach it to the legal employer.

To assign a local unit to a legal employer:

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 Local Units.
2. Click in the Local Units field to open the Local Units window.
3. Select the local unit to assign it to the legal employer.
4. Repeat steps 2 and 3 to assign more local units to the legal employer. You can assign a local unit to only one legal employer.
5. Save your work.

Entering Social Security Office Contact Details

Enter the social security office contact details from the Additional Organization Information window. Use the Contact Details window to record information about your social security office. You require this information to coordinate medical reimbursements for employees who take sick leave.

To enter contact details for a social security office:

1. In the Organization window, query the social security office if it does not already appear there. In the Organization Classifications region, select Norwegian Social Security Office and click Others.
2. Click in the Contact Details field to open the Contact Details window.
3. Select the type of contact, for example, contact person or phone number. You can enter more than one contact for the social security office.
4. Enter the description for the contact, for example, manager or home phone.
5. Enter the further detail about the contact, for example, if the contact type is contact person, then you enter the name of the person.
6. Save your work.

Entering Third Party Information

Enter third-party information from the Additional Organization Information window. You require this information to make grouped payments to third-party organizations. You can use grouped payment to pay the third party a consolidated sum after grouping the deductions from individual employees

Important: You must create the source and destination organization payment methods before you enter the third-party information.

To enter third party information:

1. In the Organization window, query the organization if it does not already appear there. In the Organization Classifications region, select Payee Organization, and click Others.
2. Click in the Third Party Details field to open the Third Party Details window.
3. Select the source bank account. This is your organization's payment method.
4. Select the destination bank account. This is the third party organization's payment method.
5. You can enter the payer and payee reference numbers. You can use this information to identify and keep track of your transactions with the third-party organization.
6. Save your work.

Restrictions

Third Party Payments

Currently, the third-party payment method for Norway is not supported.

Entering Exemption Limit Details

Enter the exemption limit details from the Additional Organization Information window. Typically, you enter exemption limit details to assist employer's contribution calculation at the legal employer or local unit level according to the employer's industry type. You also use this information for statutory reporting.

Note: When entering the local unit details, if you select the Report Separately option as Yes, then the exemption limit input, employer contribution calculation, and reporting takes place at the local unit organization level itself. The application overrides the legal employer details for this local unit. If you select the option as No, then all calculations and reporting take place using the status of the legal employer under which you create the local unit.

See: Entering Local Unit Details, page 1-25

To enter exemption limit details:

1. In the Organization window, query the organization if it does not already appear there. In the Organization Classifications region, select Legal Employer or Norwegian Local Unit, click Others, and select Exemption Limit.
2. Click in the Exemption Limit field to open the Exemption Limit window.
3. Enter the exemption limit applicable for the industry type.
4. Enter the start and end dates of the exemption-limit period.

Note: The exemption limit start and end dates must correspond to a bimonthly period. You can enter as long a period as you want, but the period must always correspond to the bimonthly reporting periods, for example, JAN 1 to DEC 31 or MAR 1 to AUG 31.

5. Click OK.

Job Management

Job Management

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

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

Candidate Selection

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

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

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

Industry Positioning

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

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

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

Job Groups

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

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

Defining a Job

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

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

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

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

To define a job:

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

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

the Supplementary Roles window and the Elections window.

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

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

4. Enter a numerical approval authority value to define an approval level for incumbents of this job. This value is used by Oracle Approvals Management to determine whether a person has sufficient authority to approve a transaction.
5. Indicate whether the job carries any additional employment rights or is a benchmark job. A benchmark job is one that can be used to represent a number of jobs in reports such as salary surveys.

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

6. Select a benchmark job, if required.
7. Enter further information about this job through the Further Job Information window.
 1. Select the SSB position code. You define the relevant position codes in the lookup HR_NO_POSITION_CODES.
 2. Enter an appropriate work title description for the corresponding SSB position code. This information provides you with more details during internal communication.
8. Save the job. You can now enter further information for the job you have defined. Note that you can only enter some types of further information, such as valid grades or work choices, for jobs defined in the Default HR Job Group.
9. Choose the Evaluation button to enter evaluation information and an overall evaluation score for the job.

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

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

See: Defining Competence Requirements, *Oracle HRMS Enterprise and Workforce Management Guide*

Defining Job Requirements

10. Choose the Requirements button to enter job requirements, such as required

qualifications or valid experience, to help you match people to roles.

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

Other Information

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

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

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

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

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

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

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

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

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

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

See: Oracle HRMS Intelligence, *Oracle HRMS Strategic Reporting (HRMSi) User Guide*

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

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

Occupational Health

Occupational Health: Medical Assessments, Disabilities and Work Incidents

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

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

Medical Assessments

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

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

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

Disabilities

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

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

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

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

Work Incidents

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

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

Using the Work Incidents window, you can record:

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

A person can have multiple work incident records.

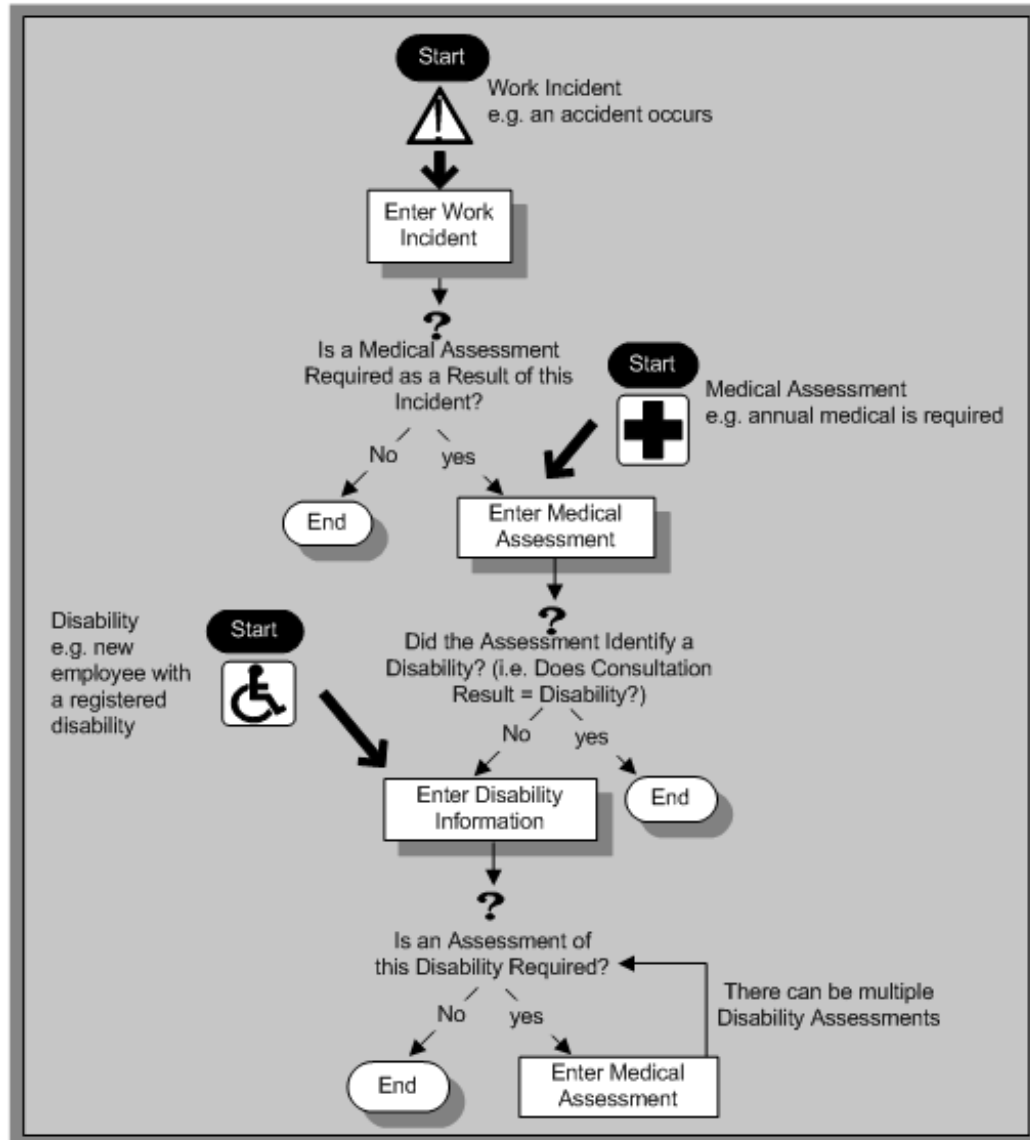
The graphic illustrates the relationship between the medical assessment, disability and work incident tasks. It shows the full process that you could follow if you wanted to record:

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

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

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

Recording a Disability



Entering Work Incident Information

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

To enter work incident information:

1. Enter information about the incident:

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

Incident Description:

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

Incident Reporting:

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

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

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

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

Official Notifications:

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

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

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

Medical Details:

1. Choose the Medical Details tab.
2. Enter any medical details:
 - Select the type of injury and/or disease caused by the incident.
 - Enter any further description of the injury or disease.
 - Check the box if the person received medical attention as a result of this incident. Then enter the name of the physician and/or the contact details for the hospital that was consulted or that provided treatment.

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

Other Information:

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

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

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

See: Defining a Job, page 1-31

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. In the Further Information field, enter the dates you reported the work incident to the social security office and to the Norwegian Labor Inspection Authority.
 4. Save your changes.

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.

Workforce Sourcing and Deployment

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

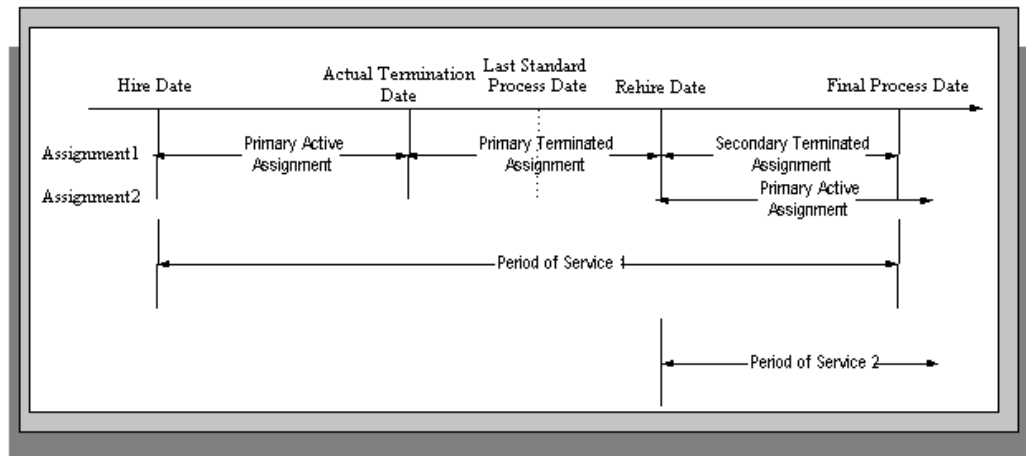
- An ex-contingent worker's earliest hire date is either 1 day after the actual termination date of the most recent placement or the day after the last of any future-dated changes, whichever is later. For back-to-back hiring, there can be no future-dated changes.

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.

Canceling 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 2-23

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). Your localization may require additional mandatory information.

To enter a new person:

1. Set your effective date to the appropriate date for adding the person to the application. If you are entering an employee, this should be their hire date.
2. Enter the person's name and other details in the Name region. Only the last name is required for most legislations, but some legislations require a first name too.

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

For Romanian users: First and last names are mandatory.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

See: *Changing Person Type Usage and Deleting OAB Person Type Usage, Oracle*

Entering Employee Information:

Enter the following information if the person is an employee.

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

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

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

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

Entering Identification Information:

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

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

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

2. Enter the national identifier for your country. For example, enter the National Insurance number in the UK, the Social Security number in the US, the Fiscal Code

in Italy, the IRD Number in New Zealand, the Social Security Code (TAJ) in Hungary, the Individual Tax Payer's Number (INN) in Russia or the ID number in South Africa.

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

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

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

Entering Personal Details:

Enter personal details in the Personal tabbed region.

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

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

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

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

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

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

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

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

For Japanese users only: Enter the country of birth.

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

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

7. Select a nationality.

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

8. **For Russian users only:** Enter the employee's statutory Pension Insurance Fund identifier. It is the employee's ID in the Statutory Pension Insurance Fund.

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

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

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

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

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

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

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

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

Multiple Person Records:

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

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

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

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

Do one of the following four tasks:

- If the person you are entering already exists, but in a different business group, then select that person from the list of values. The person you are entering is saved in your current business group and linked to the existing person record to indicate they are the same person. If your application has person synchronization enabled, then the personal information entered for the new person is copied across to existing records in other business groups. If existing records have values for fields that the new record leaves blank, then these values appear in the new record. See: *Person Record Synchronization, Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*
- If the person already exists in your current business group then select that person from the list of values. The application retrieves the existing record and cancels the save you were trying to make, as one business group cannot contain two records for the same person. Close the new record and scroll down to display the existing record.

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

- If the person already exists in TCA, but not in HRMS, then select that person

from the list of values. The person you are entering is saved in your current business group and linked to the existing person record to indicate they are the same person. The information held for the person in TCA is updated with that entered in HRMS. See: *People in a Global Enterprise, Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

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

What Next?:

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

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

Entering Additional Personal Information (People Window)

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

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

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

To enter information for an applicant:

1. Choose the Applicant tabbed region.
2. If the applicant's resume is on file, check the Exists check box.
3. If the applicant's resume is on file, select the date indicating when the resume was

last updated.

4. Select a final date a file is to be maintained for this applicant.

To enter further name information:

1. Choose the Further Name tabbed region.
2. Enter one or more honors or degrees (BA, MBA, or JD, for example) that the person has earned.
3. Enter the name (perhaps a nickname) by which the person prefers to be known.
4. If the person was previously known by a different name, enter the previous last name.

To enter other information for a person:

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

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

5. If the person has died, enter the date of death.
Date of death defaults to the person's termination date if:
 - In the Terminate window you enter the termination reason of deceased, but
 - You do not provide the actual termination date, and
 - You have not yet entered a date of death
6. Select the current student status, if the person is a student.

7. In the Date Last Verified field, you can enter the date the person last checked this personal information for accuracy.
8. Check the Military Service check box if the person is employed in a military service. The value of this field can impact benefits calculations.
9. Check the Second Passport Exists check box if the person possesses multiple passports.

To enter benefits information:

1. Choose the Benefits tabbed region.

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

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

2. Enter a benefit group for your employee or applicant. Benefit groups help determine a person's eligibility for a plan or set benefit rates. For example, benefit groups can address mergers and acquisitions where eligibility is complicated, or assist in grandfathering a person into a very old plan.
3. Enter the medical plan number, which is the policy or group plan number of an externally provided medical plan.
4. 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.
5. 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.
6. 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, grand-fathered benefits, or in the case of mergers and acquisitions.
7. 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.

8. Check the Other Coverage check box, if the employee or applicant has externally provided coverage.
9. Check the Voluntary Service check box, if your employee or applicant is volunteering, for example as a missionary.

To enter social security office information:

1. Choose the Social Security Office tabbed region.
2. Select the social security office to coordinate reimbursements whenever the employee takes sick leave, maternity leave, or leave due to work accidents.

To enter qualification information:

1. Choose the Qualification tabbed region.

Note: For Norway users only: Qualification information is optional, and is not used for reporting purposes.

2. Enter the employee's most recent educational qualification.
3. Enter the NUS-2000 code. You use this information for internal reporting purposes.
4. Enter the employee's grade point average.
5. Enter the number of credits held by the employee. You use this information later to query the employee's level of education.

You use both the grade point average and the number of credits as additional internal information about the employee's education.

Note: You can also enter the qualification information through the Qualifications window. See: Entering Qualifications, page 3-4

To enter absence payment information:

1. Choose the Absence Payment Details tabbed region.
2. Select whether the absence calculations should be based on hourly pay or salary.
- 3.

Select whether the social security daily rate should be used for calculating the absence payment.

4. Select whether the employee is entitled to self-certification.
5. Select whether the employer pays maximum 6G to the employee.
6. Select whether the employee is exempt from the employers period.
7. Select whether reclaimable pay to the employee is maximum 6G
8. Select whether the employee receives advance reclaimable pay from social security.
9. Select whether holiday must be accrued during absence.
10. Select whether daily rate must be calculated during absence.
11. Select whether the holiday pay accrual must be restricted to 6G during absence.

To enter holiday payment information:

1. Choose the Holiday Payment Details tabbed region.
2. Select the type of holiday entitlement.
3. Select the basis of holiday pay calculation.
4. Select whether you need to process the holiday pay in the fixed period.
5. Select whether you need to process the holiday pay in the fixed period for an employee aged 60 or above.
6. Select whether you need to adjust the pay.
7. Select whether holiday must be restricted to 6G for employees who are aged 60 or above.

To enter reporting information:

1. Choose the Reporting Information tabbed region.
2. Select whether the employee must be excluded from absence statistics.

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.

Contracts

Contracts

Using Oracle HRMS you can record contractual information for your employees and employee applicants. Information relating to the contract reference, contract status, and contract type must all be entered. This information can then be used for reporting purposes, or to produce a hard copy of the contract to send to the person for reference and signing.

Once a contract is entered for a person you can refer an assignment to it using the Assignment window. Each person may have multiple contracts, but an assignment may refer only to one contract.

German public sector users can use contracts to control the values of certain fields in the Assignment window. Once you refer an assignment to a contract then fields such as Position, Grade, Employment Category, and Collective Agreement display the values set for the contract, and cannot be updated in the Assignment window. To update these values you must make changes to the contract.

To give your managers access to more complete records for their direct reports, you can display details of their current contracts of employment, as well as any historical contract information, in the My Employee Information pages in SSHR.

You can also display contract details to the My Information pages so that your employees can also view their own information whilst accessing SSHR.

There are a number of rules that relate to the creation and maintenance of contracts:

- A contract cannot exist without a person. Therefore, if a person who has a contract attached to them is deleted, the contract will also be deleted.
- Contract statuses are set up depending on the needs of your enterprise. If you have any queries about contract statuses, please contact your system administrator.
- If the alteration of a hire date for an employee results in the start date for the contract being before the hire date, the contract start date is automatically amended to the new hire date.

Tip: If the alteration of a hire date results in future-dated changes being before the contract start date, the changes are deleted.

- If the alteration of a hire date for an employee results in the start date for the contract being after the start date of the referencing assignment, the contract start date is automatically amended to the new hire date.

- A contract cannot be deleted if an assignment currently refers to it, irrespective of the assignment status.
- When you are selecting a contract to reference to an assignment you will only be able to select from contracts that have start dates on or before the assignment start date.

Entering Contracts

You enter and maintain contracts in the Contracts window.

To enter a new contract:

1. Set your effective date to the start date of the contract.
2. Enter the reference code for the contract. The code for each contract attached to a person must be different, though more than one person can use the same contract reference code.
3. Select the status that indicates the contract is active. The period of service dates will also be displayed if a corresponding period of service exists.

See: *Creating Contract Statuses, Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*
4. Select the contract type.
5. Select the status of the contract, such as pending, opened, printed and so on. You must set up document statuses using the user extensible Lookup Type DOCUMENT_STATUS. Enter the date the document status of the contract changed.

Note: The document status is not DateTracked.

6. You can enter any remaining information relating to the contract such as start reason, duration, or contractual job title.
7. Enter further information about this contract using the Further Contract Information window.

Entering Further Contract Information

8. Click in the More Information field to open the Further Contract Information window.
9. Enter the contract end date. You use this information to track employees who are nearing the end of their contract so that you can give them notice prior to the

completion of their contract.

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

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

Deleting Contracts

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

Note: Contracts cannot be date effectively end dated.

To delete a contract:

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

Employees

The Employee Assignment

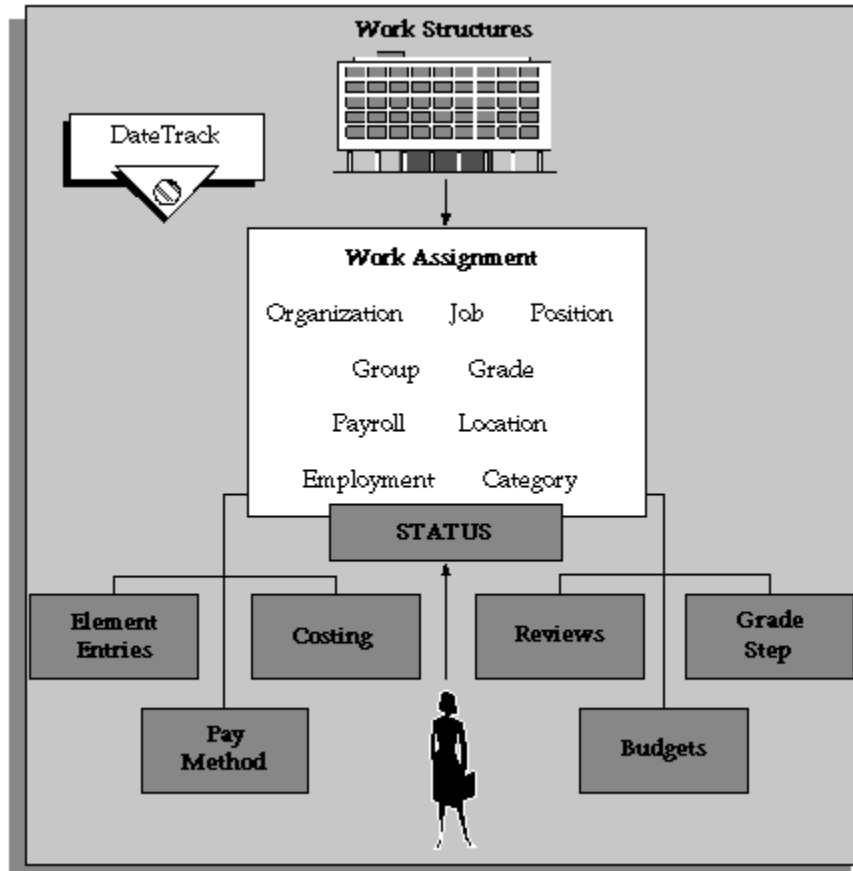
The assignment is the central concept that relates employees to the structures in which they work, and the compensation and benefits for which they are eligible.

In Oracle HRMS, many of the activities you undertake in human resource management, such as vacancy management and budget planning, are based around assignments and not people. In particular, you enter all earnings, deductions, and other pay-related elements for the employee assignment, rather than the employee. This makes it possible to give an employee two or more assignments when this is necessary.

For example, if an employee has more than one role within your enterprise, he or she can have a separate assignment for each role.

Note: The assignment is datetracked to maintain a work history as the employee moves through your enterprise.

Employee Assignment



When you hire an employee, Oracle HRMS automatically creates a default assignment for that employee. This is because an employee must have a current assignment at all times. You then record relocations, promotions, transfers and so on as changes to the existing assignment. These changes are datetracked so that you can make future-dated changes in advance and view the history of changes to an assignment.

Components of the Assignment

At a minimum, an assignment defines the Business Group for which an employee works, the date the assignment began, and its current status, such as active or suspended.

You can use the assignment to define more precisely the place of the employee in the enterprise, including their job, position, organization, location, grade, and supervisor. You can also assign the employee to any of the employee groups you set up using the People Group key flexfield, such as pension groups or unions.

Mexico only: HRMS also uses the assignment to associate employees to their Social Security GRE.

You can assign employees to an employment category, such as Part Time - Regular or Full Time - Temporary. Your startup data includes four categories, and you can add others for the Lookup Type EMP_CAT.

You can assign employees to a *salary basis* and maintain their salaries or wages using the Salary Administration procedure. See: Salary Administration Overview, *Oracle HRMS Compensation and Benefits Management Guide*

Multiple Assignments

If your enterprise permits employees to work in two or more different capacities at once and thereby become eligible for different benefits, you can enter multiple assignments for them. An employee can have multiple assignments, but only one is the primary assignment. Any others are *secondary*.

Relocations, transfers, promotions and so on go on record as datetracked changes to employees' existing assignments. You do not enter new assignments for changes like these.

Managing Multiple Assignments

Oracle HRMS separately manages each assignment, together with its associated compensation and benefits. When an employee has more than one assignment, one assignment is designated as the primary assignment. When you hire an employee (by entering a person as an employee, or by changing the person type to employee), Oracle HRMS automatically creates a primary assignment for that employee. (The Primary box is automatically checked in the Miscellaneous tabbed region of the Assignment window).

If you then enter an additional assignment, the Primary box is automatically unchecked for that secondary assignment.

You can end all assignments except the primary assignment by entering a status change in the Assignment window. However to end an employee's primary assignment, you must terminate the employee, using the Terminate window.

To show that an assignment is part time, you use the employment categories Part Time - Regular or Part Time - Temporary. You could also set up a Full Time Equivalent budget, and weight each assignment as a fraction of a full time equivalent for the calculation of actual values. For more information about budgeting see: Budgeting Overview, *Oracle HRMS Enterprise and Workforce Management Guide*

Notice that when employees split their time between two departments performing the same job, or fulfill two different roles in one organization, you do not need to define two separate assignments to maintain accurate costing records. You can set up cost allocation to distribute proportions of one assignment's payroll costs to different cost centers.

For more information, see: Data Costed at the Organization and Assignment Levels, *Oracle HRMS Enterprise and Workforce Management Guide*

Managing Changes in Assignment Information

When an employee experiences changes such as a promotion or transfer, or moves from full time to part time, you change a component of the assignment. A change to any of the assignment components produces the DateTrack prompt.

- If you choose *Correction*, Oracle HRMS overwrites the existing assignment information back to the last effective from date.
- If you choose *Update*, Oracle HRMS records the date and change, and retains the original information.

By changing your effective date on the system, you can see the employee's assignment at any point in time. You can also view the changes made to the assignment over time using DateTrack History.

DateTrack History shows the changes made to one assignment. Use the Assignment History window to view the history of all the employee's assignments, both currently and in any previous periods of service.

Mass Assignment Update

When an organization changes its business rules, it is often necessary to update a large amount of employee assignment information. The mass assignment update process can now be managed by one window.

The Mass Assignment Update feature enables you to:

- Alter employee assignment information for past, present or future dates within a Business Group.
- Define search criteria to match the type of employee your organization needs to update.
- Add further information updates to individual employees.
- Filter assignment change information using folder forms.

The Mass Assignment Update feature gives your organization more control over which employees are updated, and when the employees are updated.

Effects of Changing an Assignment

Changing any assignment component can have the following effects:

- The employee may lose eligibility for some compensation types, benefits or deductions, and gain eligibility for others. You receive a warning that the system automatically ends any unprocessed element entries for which the employee is no

longer eligible.

- The employee may have a different level of access to Oracle HRMS, since the system's security is based on assignment to work structures.
- If you change the employee's grade when a grade step placement exists for the assignment, you receive a warning message that the placement will be date effectively ended and any future placements will be deleted. Also, the special ceiling point field is cleared.
- **Mexico only:** Changing assignments may result in a change of GRE. In this case, you must justify the separation to the Social Security agencies. Document a Social Security Leaving Reason in the Social Security Affiliation tabbed region of the Assignment window.

Note: If an assignment change causes the system to change element entries, you may not be able to save the change if a current or future pay period is closed. You must reopen the period or change your effective date to make the change.

Ending Assignments and Terminating Employees

Oracle HRMS does not permit an employee to exist in the system without an assignment. That is, an employee must always have at least one assignment at any point in time. This means that for an employee with just one assignment, the only way to end the assignment is to terminate the employee, using the Terminate window.

For employees with more than one assignment, you can end all but one of their assignments by selecting an assignment status of End or Terminate in the Assignment window. At sites using Oracle Payroll, the choice of End or Terminate controls the ability to include the assignment in a payroll run after the date the assignment ends. Sites not using Oracle Payroll can use these two statuses to provide information. For example, End may mean that further pay processing cannot occur for the assignment, while Terminate may mean that further processing can occur. Alternatively, these sites can simply use the status End.

Accessing Ex-Employee and Future-Dated Employee Records

Oracle HRMS provides the HR: Access Non-Current Employee Data profile option to enable access to ex-employee and future-dated employee records. You can enable this profile option for HR users to:

- Access ex-employee records, for example, to manage retirement benefits.
- Update future-dated records.

Oracle HRMS displays only those ex-employees who do not have future-dated records as of the system date. For example, you terminate an employee as on January 31st, 2007 and rehire the person as on March 1st, 2007. When you search for this person's record, as of the system date of February 15th Oracle HRMS will not display the ex-employee's record because a future-dated record exists for the ex-employee.

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

Entering Previous Employment Details

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

Note: If your localization currently uses the Employment History window see: Entering Employment History, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

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

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

To enter previous employment details:

1. Enter the previous employer name.
2. Enter an address.
3. Select a country.
4. Select the type of business.
5. Select a subtype for the business type selected at step 4.
6. Enter a description for the employer.
7. Enter start and end dates for the employee's period of employment. The dates entered automatically calculate the period of service in years, months and days.
8. You can override the period of service calculation by entering your own period of service in the Years, Months, and Days fields.

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

For Norwegian users only: To record absence details, record the number of child minder days and holidays that the employee has availed in the previous organization.

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

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

11. Save your work.

To enter previous job details

12. Select an empty row in the Previous Job region or place your cursor within an existing row and choose the New button to add a new row.
13. Enter start and end dates for the previous job. The job entered must be associated with the employer and period of service entered at steps 1 to 11. The dates entered automatically calculate the period of service in years, months and days.
14. Enter a job title.
15. Select an employee category.
16. You can override the period of service calculation by entering your own period of service in the Years, Months, and Days fields.
17. Enter a description for the previous job.
18. Select the All Assignments check box to specify that the previous job period is taken into account for all assignments.

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

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

For Norwegian users only: Record the number of seniority months that the employee has worked for previous employers. You use this information to manually calculate the employee's period of service with their current employer.

For Finnish users only: Select the job experience classification; for example collective agreement level or current employment level. You use this information to calculate salary increments as well as pension.

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

20. Save your work.

To map previous jobs to an assignment:

21. Select an empty row in the Assignment region or place your cursor within an existing row and choose the New button to add a new row.
22. Select an assignment to map to a previous job specified at steps 12 to 19.
23. Select a job to map to the assignment selected at step 21. Selecting a job automatically displays the Start Date and End Date fields as specified for the job in the Previous Job region.
24. You can override the period of service calculation by entering your own period of service in the Years, Months, and Days fields.
25. Use the Further Information flexfield to enter further previous job usage details.
26. Save your work.

Workforce Information Management

Assignment Statuses

Statuses enable you to track the progress of your applicants, employees, and contingent workers through your enterprise. If you use Oracle Payroll, they also control how employee assignments are used during a payroll run. Oracle HRMS is installed with a number of predefined system statuses, for which you can set up multiple user statuses.

Note: You do not process contingent workers in a payroll run.

Primary Statuses

There are four system statuses for assignments:

- **Active Assignment:** For employees and contingent workers you use this status to show that the person is working in accordance with his or her usual conditions of working.
- **Suspend Assignment:** For employees you use this status to show that an employee is on leave of absence, but remains an employee with your enterprise. Similarly for contingent workers the suspend assignment indicates that a contingent worker is not currently working in the assignment they are allocated to. For example, the contingent worker may have taken an unauthorized absence or the assignment may have been suspended due to an internal review.
- **Terminate Assignment:** Use this to show that your enterprise no longer employs the person in that assignment. It can still be possible to make payments through Oracle Payroll for assignments at this status. This status is not available for use with contingent workers.
- **End:** Use this to end any assignment except the primary assignment for an employee or contingent worker with multiple assignments. This status is not recorded on the assignment; it causes the assignment to end. For employees all payroll processing for the assignment is complete and the assignment becomes an historical record.

For information about system statuses for applicants see: Applicant Assignment Statuses, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*.

User Statuses

On your system, you can give these statuses different *user statuses* appropriate to your enterprise. Each system status can have several user statuses related to it. For example, for the system status Suspend Assignment, you could define the user statuses Paternity

Leave, Disability Leave, or Education Leave. When you use Oracle HRMS, you only see the user statuses.

Note: Each system status has a predefined user status of the same name.

Primary user statuses help you track the current working circumstances of your employees and contingent workers. You can also define secondary user statuses having no associated system statuses. You can use these for reporting purposes.

Note: The User Statuses you define provide the list of values for Status in the Assignment window. If you want to change any of the predefined default values you must overwrite the User Name.

Using Assignment Statuses to Control Compensation

When you define user statuses, consider how you will use them in reports, inquiries, and processing.

When you use a validation formula to validate entries to element input values, you can make the valid values for an entry dependent on the assignment status.

To use the statuses to control whether the payroll run processes an employee assignment, you choose a Payroll user status of Process or Do not Process for each user status. Additionally, in Oracle Payroll you can set up your pay calculation formulas so that a status change also changes the formula used to calculate the employee's pay. For example, an employee could receive half pay while on Military Leave.

Secondary Assignment Statuses

For analysis and reporting purposes, you can set up and use *secondary* assignment statuses, for employee, applicant and contingent worker assignments. These statuses have no effect on assignment processing.

For example, suppose your primary status Maternity Leave applies to employees both when a child is born and when one is adopted, and you want to study its use in these two cases. To accomplish this you can set up the secondary statuses Maternity Birth and Maternity Adopt, and enter them for employees taking maternity leave.

You enter secondary statuses in the Secondary Statuses window.

To enter reasons for giving secondary statuses to assignments, define valid reasons as values for the Lookup Type EMP_SEC_ASSIGN_REASON (for employee assignments), CWK_SEC_ASSIGN_REASON (for contingent workers), and APL_SEC_ASSIGN_REASON (for applicant assignments).

Setup To Allow Processing After Termination

To enable payroll processing for employees after they leave your enterprise, in your system setup you must do the following:

- Set the Termination Rule to *Final* on the element definition of all elements you want to process after the actual leaving date.

If you use Oracle Payroll and have a Payroll responsibility, you can set the Termination Rule to *Last Standard Process* for elements whose entries should close down after the last normal payroll run. Set the Termination Rule to *Final* for elements you want to process as late payments after the last normal payroll run.

- Use the Assignment Statuses window to make sure your system has a user status that corresponds to:
 - the HR system status of *Terminate Assignment*
 - the Payroll system status of *Process*

Your startup data includes the user status *Terminate Process Assignment*, which matches this definition. Use this status (or your own equivalent status) when you terminate employment or end an assignment.

Entering an Assignment (Assignment Window)

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

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

To enter an assignment:

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

8. Select the people group and enter information defined in your people group flexfield. This is optional.
9. Select a payroll if you are paying an employee using Oracle Payroll, or if you intend to record for the employee certain types of compensation and benefits (represented on the system by *nonrecurring elements*).

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

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

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

See: Assignment Statuses, page 2-36

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

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

You can calculate values based on a collective agreement only for an employee's primary assignment.
14. Select an assignment category, for example part-time or full-time.

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

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

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

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

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

Russia only: This field is mandatory to enable you to use them for reporting purposes. Use only the four values available for this field. For these values, the suffix Regular refers to an assignment with an indefinite period (permanent). The suffix Temporary refers to an assignment having a limited term.

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

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

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

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

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

See: Entering Additional Assignment Details, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

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

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

Entering Additional Assignment Details (Assignment Window)

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

To enter salary information for an employee:

Using the Salary Administration window, you can enter a proposed salary change for

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

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

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 must 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 supplier information for a contingent worker:

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

If you are not using Oracle Services Procurement:

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

If you are using Oracle Services Procurement:

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

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

To enter supervisor information for an employee or contingent worker:

1. Choose the Supervisor tabbed region.
2. Select the name and number of the worker's personal supervisor. If your organization uses assignment-based supervisor hierarchies, also enter the assignment number for the supervisor assignment. If you have already entered the supervisor name, the application displays a context-sensitive list of available assignments for the supervisor.

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

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

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

To enter probation period and notice information for an employee:

The probation period defaults from the employee's position.

1. Choose the Probation and Notice Period tabbed region.
2. Amend the default probation period for your employee's assignment, if required.
3. Enter the notice period for the assignment, if required.
4. Enter the notice issue date for the assignment, if required. You use this information along with the notice period to find the employee's last working day in the assignment.

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

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

1. Choose the Standard Conditions tabbed region.
2. Amend the standard work day information for your employee or contingent

worker assignment, if required.

3. This step is for employees only. For benefit administration, enter whether the assignment is hourly or salaried.

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

To enter statutory information:

1. Choose the Statutory Information tabbed region.
2. Select the local unit. You must assign an employee to a local unit.

Note: Reassigning the employee to a different local unit under a different legal employer, at a later date, is a significant change. It may affect your payroll balances.

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

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

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

See: *Changing Primary Assignments, 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 special ceiling information for an employee:

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

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

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

1. Choose the Project Information tabbed region.

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

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

To enter grade ladder information for an employee:

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

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

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

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

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

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

To enter employment terms for an employee:

1. Choose the Employment Terms tabbed region.
2. Select the contract to be referenced by the assignment. The list of contracts is limited to those entered for the employee that have start dates on or before the assignment start date.
3. Select the agreement grade structure for the collective agreement. A window shows the grade factors for that grade structure.
4. Enter values for the grade factors. Or, choose the Combinations button and enter search criteria for one or more grade factors to display the reference grades that meet those criteria.

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

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

To enter work title information:

1. Choose the Work Title tabbed region.
2. Select the SSB position code. You define the relevant position codes in the lookup HR_NO_POSITION_CODES.

3. Enter an appropriate work title description for the corresponding SSB position code. The work title can describe the employee's assignment.

Note: If you have entered work title information for the job corresponding to this assignment, then this automatically appears here. You can overwrite this, if required.

To enter employment information:

You use the employment information for statistical reporting. You capture the following information for the assignment record:

1. Choose the Employment Information tabbed region.
2. Select the job status.
3. Select whether the employment is full-time or part-time.
4. Select the payroll period. This information is different from the payroll period you define for an assignment.
5. Select the condition of employment.
6. Select the type of shift your employee is working.
7. Enter the agreed number of working hours. You must enter the number of hours as a three-digit number. You must multiply the number of hours by 10. For example, if the agreed working hours are 36.5 hours per week, enter the value as 365.

To enter retirement information:

You can use the retirement information you enter here for employees nearing their retirement.

1. Choose the Retirement tabbed region.
2. Enter the employee's expected retirement age.
3. Enter the retirement inquiry date to specify when you have sent a formal inquiry to an employee nearing retirement.
4. Enter the expected retirement date once the employee confirms the date.

To enter holiday payment information:

1. Choose the Holiday Payment Details tabbed region.
- 2.

Select the type of holiday entitlement.

3. Select the basis of holiday pay calculation.
4. Select whether you need to process the holiday pay in the fixed period.
5. Select whether you need to process the holiday pay in the fixed period for an employee aged 60 or above.
6. Select whether you must adjust the employee's pay.

Contact Information

Contact Information Overview

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

Entering People as Contacts

You enter people as contact records to identify:

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

Entering Contact Information

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

Uploading the Postal Code File

The post office information identifies the place in Norway where the employee is located. You need to upload the post office information you receive from the Norwegian authorities to display the postal code in the employee's address correctly.

To upload the postal code file :

1. Convert the post office file that you receive from the Norwegian authorities to a text file (with extension .txt).
2. Place the converted file in a directory readable by the database. The profile HR: Data Exchange defines the directory. This is a system administration task.
3. Choose the Single Request option.

4. Query the Norwegian Postal Code Upload request in the Submit Request window.
5. Enter the name of the post office file that contains all the post office details.
6. Submit the request.
7. Close the window.

Documents of Record

Documents of Record

The Documents of Record function enables you to store information on documents such as work permits, visa information, and medical certificates in one place. If required, you can also upload electronic versions of documents as attachments.

As a worker, you can create, maintain, and delete your own documents of record. If your document requires authorization, the verifier receives a notification.

If you select the country name, the document type associated with the country and global document types appear in the Document Type search. When creating a document of record, select the country name and document type based on your requirement. The valid from date value defaults to the Issued Date field. You can retain the date or change it.

Note: The person who registers the document type defines whether it requires authorization.

The default verifier is your supervisor. On verification, you also receive a notification.

Note: If the subject of the document is a contact or other person who does not exist as a user in Oracle HRMS, no notification is received.

As a manager or HR Professional, you can create, maintain, and delete documents for your direct reports and for other individuals whose records you can access.

Note: HR Professional users access the Documents of Record functionality using the forms-based interface. Self-service users (individuals and managers) access the functionality using the appropriate self-service menu.

Using the Documents of Record Function

The initial pages for the Documents of Record function differ according to the navigation path selected. If you use the Employee Self-Service responsibility, the first page lists your existing documents of record. Similarly, if you use the Manager Self-Service responsibility, the first page lists any existing documents of record for the worker selected in the hierarchy. From here, you can view, create, maintain, or delete documents of record.

If you are using a HR Professional responsibility and accessing the function from the forms-based interface, you can display a search page (by navigating to People > Search Documents of Record). Alternatively, to view, create, or maintain the documents of

record for a person, display the person's record in the People window and access the Documents of Record function through the task flow (Others button).

As an HR Professional, you can also access the Documents of Record pages by selecting Fastpath > Documents of Record, and then selecting a person for the transactions.

Document of Record Function with Approvals

If your enterprise has setup approvals for the Documents of Record function, then when you create or update a document of record, the Next button appears on the Create Document of Record or the Update Document of Record page. When you click the Next button, the Documents of Record Review page appears. It shows the details that you can review. You can view the supporting documents that were attached in the Create or Update page. Also, Add Adhoc Approvers region is available, and you can add further approvers and notification recipients.

When you click the Submit button on the Review page, the transaction is routed for approval. The Confirm page contains a confirmation message describing the status of the transaction.

When a transaction is pending approval, the Update feature is unavailable on the Documents of Record for Person and View Document of Record pages. The Documents of Record for Person page displays the document of record details in a table. Users can click the View icon to view further details on the View Document of Record page and also can click the attachment image to view all the supporting documents.

The Notification page that an approver receives to review the document of record does not display the Return for Correction button and the Update link.

Talent Management

Qualifications

Qualification Types

Oracle HRMS enables you to record the types of qualifications recognized by your enterprise, including:

- Educational and vocational qualifications
- Licenses
- Awards
- Honors

You can rank qualifications. For example, you could rank a doctorate as 1, a master's degree as 2, a bachelor's degree as 3, and so on. You can rank equivalent qualifications at the same level. For example, you could rank both a bachelor's degree and a vocational qualification as level 3. This feature is useful for identifying all workers qualified at level 3 or above, for example.

Qualifications Framework Qualifications

Qualifications Framework qualifications result from the achievement of unit standard competencies. For this type of qualification, you record national Qualifications Framework details, including the number of credits attached to the qualification, the awarding body, and the field of learning to which the qualification belongs.

Schools and Colleges

You can identify the schools and colleges that deliver the qualifications that your enterprise recognizes so that you can record where a worker gained a qualification. As schools and colleges are available to all business groups, you have to define them once only.

Defining Qualification Types

Use the Qualification Types window to define the qualifications that your enterprise recognizes.

Before you start this task, your system administrator must define generic qualification types (such as Degree, Diploma, and License) in the PER_CATEGORIES lookup.

To define qualification types:

1. Enter the name of the qualification.
2. In the Category field, select the qualification type.
3. If required, rank the qualification.
4. Click in the Further Information field. In the Further Qualification Types Info window, enter the NUS-2000 code for the qualification type. You use this information for internal reporting.

Entering Qualifications Framework Details

Note: This section applies only if you are defining a Qualifications Framework qualification.

5. Enter the Qualifications Framework identifier for the qualification.
6. Select the Qualifications Framework qualification type (for example, Diploma, Bachelor of Arts, or School Certificate).
7. Select the main and subsidiary fields of learning to which the qualification belongs.

The main field of learning identifies the industry or sector to which the qualification belongs (for example, Management Studies or Nursing).

The subsidiary field identifies the subject area within the field of learning to which the qualification belongs (for example, Marketing or Neonatal Care).
8. Select the level type and level.

Qualifications Framework levels indicate the extent to which knowledge and skills have been advanced by learning. For example, a qualification could be at Level 3 on a scale ranging from Level 1 through Level 5.

The level type identifies the category to which the Qualifications Framework level belongs (for example, NQF, NVQ, or HND).
9. Select the credit type and enter the total number of credits for this qualification.

The credit type identifies the unit of measure for unit standard credits. For example, the credit type could be notional hours of work or study required to achieve a Qualifications Framework qualification.
10. Select the qualification provider.
11. Select the Quality Assurance (QA) organization that registered the qualification provider.

Entering Qualification Competencies

Note: This section applies only if you are defining a Qualifications Framework qualification.

12. Click Competencies to open the Qualification Competencies window.
13. In the Unit Standard Competency Links region, select the name of a unit standard competency that contributes to this qualification.
The Unit Standard ID appears automatically.
14. Select the unit standard type. This value specifies the relevance of the unit standard competency to the qualification (for example, core or optional).
15. Enter the dates between which the link is valid. You must enter a start date, but you can leave the end date blank.
16. Repeat Steps 13 through 15 for additional unit standard competencies.
17. Save your work.

Entering Qualifications

You can enter your workers' completed and in-progress qualifications when they first join the enterprise. You may need to update a worker's qualifications record after completion of a training course, for example.

Note: If the worker for whom you are entering qualifications has qualifications records in other business groups, then you will be able to see, but not update, qualifications entered for the worker in those other business groups.

Workers and managers can use these SSHR functions to enter and update worker qualification records:

- Education and Qualifications
- Other Professional Qualifications

In the forms-based interface, use the Qualifications window, accessed from the People window, to enter and update qualifications.

To enter qualifications:

1. Select the qualification type, and enter its title.

For information about defining qualification types, see: *Defining Qualification Types, Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

2. Select the qualification status, for example, ongoing or completed.
3. Enter the grade at which the worker holds the qualification, if appropriate.
4. Select the establishment at which the worker gained the qualification. The list comprises establishments you recorded the worker as having attended.
See: Entering Schools and Colleges Attended, Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide
5. Enter the name of the body that awards the qualification. If you record this value in the qualification types record for a Qualifications Framework qualification, it appears here automatically.
6. Enter the dates between which the worker studied for the qualification. Leave the end date blank if the qualification is in progress.
7. Enter the worker's ranking in the study group, if relevant.
8. Save your work.
9. Click on the Further Information field to open the Further Qualification Information window.

To enter further qualification information

10. Enter the NUS-2000 code. You use this information for internal reporting purposes.
11. Indicate if the educational qualification is the most recently held.
12. Enter the employee's grade point average.
13. Enter the number of credits held by the employee. You use this information later to find the employee's level of education.

You use both the grade point average and the number of credits as additional internal information about the employee's education.

14. Save your work.

To enter license details:

1. Click the License tab.
2. Enter the license number, for example, a driver's license number.

3. Enter any restrictions on the license. For example, the license may not be valid in certain states.
4. Enter the license expiry date.

To enter tuition fees:

1. Click the Tuition tab.
2. Enter the fee amount, and select the currency.
3. Select the tuition method, for example, day release.
4. Specify how the worker's tuition fees will be reimbursed (for example, bank transfer when the qualification is awarded).

To enter training details:

1. Click the Training tab.
2. Enter the amount of training completed. For example, enter 30 days completed of a training program that lasts 60 days.
3. Enter the total amount of training required to deliver the qualification (for example, 60 days).
4. Enter the units in which the training is measured, for example, days.

To enter professional membership details:

1. Click the Professional Membership tab.
2. Select the professional body to which the person belongs. The list comprises organizations with the classification Professional Body.
3. Enter the worker's membership number and category.

The available membership categories depend on the table used to calculate subscription rates for the professional body. Oracle Payroll uses this table when calculating the amount to deduct from a worker's salary during the payroll run.
4. Select the method by which the subscription is to be paid. This is optional and for information only.

To view Qualifications Framework details:

Note: This section applies to Qualifications Framework qualifications only.

1. Click the Qualifications Framework Details tab.
2. Details of the selected qualification appear. For example, you can see its ID, the field of learning to which it belongs, and the number of credits earned. You cannot update this information.

To enter subject details:

1. Save your work.
2. Select the first subject the qualification comprises.
3. Select the subject status, for example, passed or ongoing.
4. Enter the dates between which the subject is studied. You must enter a start date, but you can leave the end date blank.
5. If the subject forms a major part of the qualification, select Major.
6. Optionally, enter the grade at which the worker studies the subject.
7. Enter further subjects, as appropriate.
8. Save your work.

Creating Schools and Colleges

Use the Schools and Colleges window to enter the establishments that deliver the qualifications recognized by your enterprise.

To create establishments:

1. Enter the name of the establishment.
2. Enter the name of the location.
3. Click in the Further Information field to open the Further Establishment Information window. You can select the school type, for example, Business College or Technical School.

4. Continue to enter establishments, then save your changes.



Compensation and Benefits Management

Elements

Predefined Elements

The following table shows the predefined elements for Norway.

Predefined Elements

Element Name	Description
Additional Voluntary Tax	This non-recurring element holds all the additional tax values that the employee wants the employer to deduct.
Additional Passenger Rate	This non-recurring element holds information and initiates the formula related to the calculation of allowance for additional passengers who travel with the employee.
Administrative Board Rates	This non-recurring element initiates the formula that calculates administrative board rates related to travel expenses.
Adjustment Additional Passenger Rate	Only for reporting purposes, use this non-recurring element to enter your calculated allowance for additional passengers who travel with the employee.
Adjustment Administrative Board Rates	Only for reporting purposes, use this non-recurring element to enter your calculated administrative board rates related to travel expenses.
Adjustment Allowance for Abroad Home Visits	Only for reporting purposes, use this non-recurring element to enter your calculated allowance for abroad home visits by the employee.
Adjustment Allowance for Domestic Home Visits	Only for reporting purposes, use this non-recurring element to enter your calculated allowance for domestic home visits by the employee.
Adjustment Car Allowance	Only for reporting purposes, use this non-recurring element to enter your calculated car allowance for the employee.
Adjustment Other transportation Not Subject to Tax	Only for reporting purposes, use this non-recurring element to enter your calculated allowance for the employee's vehicles other than cars.

Element Name	Description
Adjustment Per Diem and Night Rate for Overnight Travel	Only for reporting purposes, use this non-recurring element to enter your calculated per diem and night rate allowance for the employee's overnight travel.
Adjustment Per Diem for Day Travel	Only for reporting purposes, use this non-recurring element to enter your calculated per-diem allowance for the employee's day travel.
Adjustment Per Diem for Overnight Travel Cooking Impossible	Only for reporting purposes, use this non-recurring element to enter your calculated per-diem allowance for the employee's overnight travel when cooking is impossible.
Adjustment Per Diem for Overnight Travel Cooking Possible	Only for reporting purposes, use this non-recurring element to enter your calculated per-diem allowance for the employee's overnight travel when cooking is possible.
Adjustment Total Abroad Overnight Travel over 28 days Hotel	Only for reporting purposes, use this non-recurring element to enter your calculated per-diem and night rate allowance for the employee's overnight travel abroad for more than 28 days.
Adjustment Total Domestic Overnight Travel over 28 days Hotel	Only for reporting purposes, use this non-recurring element to enter your calculated per-diem and night rate allowance for the employee's domestic overnight travel for more than 28 days.
Agreement Based Pension Details	When an employer opts for the agreement-based pension scheme, use this element to calculate the employer's pension amount.
Agreement Based Pension Contribution Estimate	This element holds the results of the employer's pension amount, where the employer opts for an agreement-based pension. Use this element to estimate costs or to pay pension providers an estimated amount each period prior to receiving the invoice of pension due to be paid to the pension provider.
Agreement Based Pension Premium	Use this element to enter the pension amount that the pension provider invoices under the Agreement Based pension scheme.
Allowance for Abroad Home Visits	This non-recurring element holds information and initiates the formula related to the calculation of allowance for abroad home visits by the employee.

Element Name	Description
Allowance for Domestic home visits	This non-recurring element holds information and initiates the formula related to the calculation of allowance for domestic home visits by the employee.
Average Working Hours	Use this element to calculate the average working hours of an hourly-paid employee.
BIK Company Cars	This recurring element holds all inputs required to calculate the benefits in kind value for company cars.
BIK Employer Assets	This non-recurring element holds all inputs required to calculate the benefits in kind value for employee's use of employer's assets.
BIK Free Board and Lodging	This non-recurring element holds all inputs required to calculate the benefits in kind value for the employee availing free boarding and lodging.
BIK Free Board Deduction	This non-recurring element holds the value that the employee wants the employer to deduct towards free boarding and lodging.
BIK Free Housing	This non-recurring element holds all inputs required to calculate the benefits in kind value for the employee availing free housing.
BIK Loan Amount Paid By Employee	This recurring element holds the installment value paid by the employee towards the preferential loan given the employer.
BIK Loan Employee Interest Amount	This recurring element holds the installment interest value paid by the employee towards the preferential loan given by the employer.
BIK Preferential Loans	This recurring element holds all inputs required to calculate the benefits in kind value for the employee availing preferential loans. Note that to avoid payroll error, you need to enter or update the required interest rates in the user table NO_PREFERENTIAL_LOAN_RATES before using this element.
Car Allowance	This non-recurring element holds information and initiates the formula that calculates the car allowance payable to the employee.
Deduction for Holiday	This element holds the results of the formula when an employee takes a holiday and the payroll process adjusts the pay.

Element Name	Description
Employer Contribution Estimate on Pension Estimate	This element holds the results of the employer contribution estimate on the employer's pension estimate, where Estimate Employer's Pension Contribution from Legal Employer Information is set to Yes and the pay value is the Employer Contribution estimate.
Individual Pension Scheme Details	When an employer opts for the individual pension scheme, use this element to calculate the employer's pension amount.
Individual Pension Scheme Premium	Use this element to enter the actual amount that the pension provider invoices under the Individual pension scheme. The invoiced amount is considered a taxable benefit for the employee.
Holiday Advance	This element holds the results of the formula when an employee takes a vacation and you process the holiday pay in advance of the fixed period.
Holiday Advance Over 60	This element holds the results of the formula when an employee aged 60 or above takes a vacation and you process the holiday pay in advance of the fixed period.
Holiday Carried Forward Payment	This element holds the results of the formula when an employee takes a carried forward vacation and the payroll process deducts an unpaid amount for holiday pay.
Holiday Carry Over	This element holds the results of the carry over process on holiday pay accrual, where the accrual becomes entitlement. Users can override the number of days and amount to be carried over on this element by entering it manually.
Holiday Days Termination Payment	When you process a deduction for any number of holidays in the fixed period salary, and the employee does not avail these days on the date of the termination, use this element to pay the remaining days to the employee.
Holiday Days Over 60 Termination Payment	When you process a deduction for any number of holidays in the fixed period salary for an employee aged 60 or above, and the employee does not avail these days on the date of the termination, use this element to pay the remaining days to the employee.
Holiday Deduction	This element holds the results of the formula for processing the reduction in earnings when you process the holiday pay is paid in the fixed period.

Element Name	Description
Holiday Detail	Use this element to enter vacation absence and attach it to all relevant assignments within the start and end dates.
Holiday Pay	Use this element to pay the holiday pay in a fixed period.
Holiday Pay Over 60	Use this element to pay the holiday pay in a fixed period to employees aged 60 or above. Users can override the amount to be paid on this element by entering it manually.
Holiday Pay Accrual	This element holds the results of the holiday pay accrual.
Holiday Pay Accrual Over 60	This element holds the results of the holiday pay accrual for employees aged 60 or above.
Holiday Pay Accrual Information	This element initiates the accrual calculation and uses the accrual formula.
Holiday Pay Current Accrual Termination Payment	Use this element to pay the amount accrued in the current year, when you terminate an employee.
Holiday Pay Current Accrual Over 60 Termination Payment	Use this element to pay the amount accrued in the current year, when you terminate an employee who is aged 60 or above.
Holiday Pay Daily Rate	This element holds the results of the holiday pay daily rate calculation for hourly paid or salaried employees who are not paid holiday pay in a fixed period. Users can override the daily rate on this element by entering it manually.
Holiday Pay Daily Rate Over 60	This element holds the results of the holiday pay daily rate calculation for hourly paid or salaried employees who are not paid holiday pay in a fixed period and who are over 60 years. Users can override the daily rate on this element by entering it manually.
Holiday Pay Entitlement	This element holds the results of the carry over process on holiday pay accrual, where the accrual becomes entitlement. Users can override the amount to be carried over on this element by entering it manually.

Element Name	Description
Holiday Pay Entitlement Over 60	This element holds the results of the carry over process on holiday pay accrual where the accrual becomes entitlement, for employees who are aged 60 or above. Users can override the amount to be carried over on this element by entering it manually.
Holiday Pay Employer Contribution Accrual	This element holds the results of the employer contribution for the holiday pay accrual.
Holiday Pay Over 60 Termination Payment	Use this element to pay the current year's outstanding entitlement, when an employee is terminated.
Holiday Pay Taken	This element holds the results of the formula when an employee takes a vacation and you process the holiday pay in the fixed period.
Holiday Pay Taken Over 60	This element holds the results of the formula when an employee aged 60 or above takes a vacation and exhausts the main entitlement but you do not process the holiday pay in the fixed period.
Payment for Holiday Over 60	This element holds the results of the formula when an employee takes a vacation and you process the holiday pay in the fixed period. In addition, the Pay to be Adjusted option is set to Yes, after the fixed period has been reached.
Payment in Lieu of Holiday	Use this element to pay cash in lieu of holiday.
Pension Insurance Contribution Employees	This element holds the results of the employee's pension calculation, where the pay value is the employee's pension insurance contribution. The employees pension contribution is considered as a pre-tax deduction.
Pension Insurance Contribution Employers Estimate	This element holds the results of the employer's pension calculation. Use this element to estimate costs or to pay pension providers an estimated amount each period prior to receiving the invoice of pension due to be paid to the pension provider.
Pension Insurance Employees Details	This element triggers the employee's pension calculation (percentage).
Pension Insurance Employers Details	This element triggers the employer's pension calculation (percentage).

Element Name	Description
Pension Insurance Fixed Employees Details	This element triggers the employee's fixed amount calculation.
Pension Insurance Fixed Employers Details	This element triggers the fixed amount employer's pension calculation
Pension Insurance Premium Employers	Use this element to enter the actual amount that the pension provider invoices under the Pension Insurance scheme.
Supplemental Collective Life Annuity Employees Details	Use this element to trigger an employee's pension calculation under the Supplemental Collective Life Annuity pension scheme.
Supplemental Collective Life Annuity Employers Details	Use this element to trigger the employer's pension calculation under the Supplemental Collective Life Annuity pension scheme.
Supplemental Collective Life Annuity Employees	This element holds the results of an employee's pension calculation under the Supplemental Collective Life Annuity pension scheme.
Supplemental Collective Life Annuity Employers Estimate	This element holds the results of the employer's pension calculation under the Supplemental Collective Life Annuity pension scheme.
Supplemental Collective Life Annuity Premium Employers	Use this element to enter the actual amount that the pension provider invoices under the Supplemental Collective Life Annuity Premium pension scheme. The invoiced amount is considered a taxable benefit for the employee.
Per Diem and Night Rate for Overnight Travel	This non-recurring element holds information and initiates the formula that calculates the per diem and night rate allowance payable to the employee for overnight travel.
Per Diem for Day Travel	This non-recurring element holds information and initiates the formula that calculates the per-diem allowance payable to the employee for day travel.

Element Name	Description
Per Diem for Overnight Travel Cooking Impossible	This non-recurring element holds information and initiates the formula that calculates the per-diem allowance payable to the employee for overnight travel when cooking is impossible.
Per Diem for Overnight Travel Cooking Possible	This non-recurring element holds information and initiates the formula that calculates the per-diem allowance payable to the employee for overnight travel when cooking is possible.
Remaining Union Dues	This non-recurring element holds the union dues value that is deducted from the employee's net pay.
Seaman Deduction	This non-recurring element holds the value that gives the reduction in taxable pay of the seaman employee.
Tax	This recurring element is attached to each assignment to indicate whether it is the primary employment.
Tax Card	This recurring element is attached to each assignment for tax information processing.
Tax Deduction Base	This element holds the taxable base information used to calculate the employee's withholding tax.
Tax Period Override Element	This element holds information you require to prorate the withholding tax for an employee joining or leaving during a pay period.
Total Abroad Overnight Travel Over 28 Days Hotel	This non-recurring element holds information and initiates the formula that calculates the per-diem and night rate allowance payable to the employee for overnight travel abroad for more than 28 days.
Total Domestic Overnight Travel Over 28 Days Hotel	This non-recurring element holds information and initiates the formula that calculates the per-diem and night rate allowance payable to the employee for domestic overnight travel for more than 28 days.
Travel Expenses Subject to Withholding Tax	This non-recurring element holds the value you calculate for any taxable part of employee's travel expenses.
Union Dues	This recurring element holds information related to union dues deduction.

Element Name	Description
Wage Attachment Support Order	This recurring element holds information about wage attachment orders related to the employee.
Wage Attachment Tax Levy	This recurring element holds information about the wage attachment tax levied by the tax authority on the employee.
Weekly Working Hours	Use this element to calculate an hourly- paid employee's total number of working hours in a week.

Survey of the Classifications

The survey of the classification identifies:

- The function of elements within each primary classification, page 4-10
- The processing priority range, default priority, and cost type for each classification, page 4-12
- A list of the predefined secondary classifications within each primary classification, page 4-13

Primary Element Classifications

Primary element classifications are supplied as startup data, and you cannot delete or update them as they are designed to meet legislative requirements.

Classification	Meaning
Information	Information elements can be used to represent information items that are not used in payroll processing. They can also be set up to hold information for use in other elements, and to trigger the processing of other elements.
Absence	Absence elements can be used to hold information related to employee absences.

Advance Earnings	Advance Earnings elements can be used to pay earnings in advance of earnings period, such as holiday pay. You can adjust the payment at a later period.
Balance Initialization	Balance Initialization elements are used specifically for the loading of initial values into balances. You mainly use these elements when transferring data from another payroll system.
Earnings	Earnings elements can be used for calculating salary, overtime payments, bonuses, and any other salary-related compensation.
Earnings Adjustment	Earnings Adjustment elements can be used to adjust earnings, for example, to deduct a prorated amount of an employee's earnings during absences.
Employer Charges	Employer Charges elements can be used for calculating employer's contributions such as National Insurance.
Supplementary Earnings	Supplementary Earnings elements can be used for non-recurring compensation or compensation not tied to a specific time period such as severance pay.
Taxable Expenses	Taxable Expenses elements can be used for holding expense payments that exceed the legal limit and which are subject to tax.
Taxable Benefits	Benefits in Kind elements can be used to calculate the monetary value of non-monetary benefits like car, lunch, and other taxable benefits.
Benefits Not Taxed	Benefits Not Taxed elements can be used to calculate the monetary value of non-monetary benefits like phone and other non-taxable benefits.
Pre-Tax Deductions	Pre-Tax Deductions elements can be used to hold the values to be deducted before withholding tax deduction.

Statutory Deductions	Statutory Deductions elements can be used to calculate statutory deductions like tax and other similar deductions.
Reductions	Reductions elements can be used to calculate values that contribute towards reduction of the seaman employee's taxable base.
Direct Payments	Direct Payments element can be used to hold payments made directly to the employee.
Involuntary Deductions	Involuntary Deductions elements are for compulsory deductions, such as court orders.
Voluntary Deductions	Voluntary Deductions elements are for deductions that employees authorize the employer to make on their behalf.
Expenses Information	Expenses Information elements can be used to hold expenses not subject to withholding tax that are not processed through payroll, such as travel expenses.

Primary Classification Processing Properties and Cost Types

The following table shows the default processing priority and costing details for the primary classifications supplied.

Primary Classification	Priority Range	Default Priority	Cost Type
Balance Initialization	0 - 0	0	Credit
Information	0 - 1000	500	Debit
Earnings	1001 - 2000	1500	Debit
Supplementary Earnings	2001 - 3000	2500	Debit
Earnings Adjustment	3001 - 3500	3250	Debit

Absence	3001 - 4000	3500	Debit
Taxable Benefits	4001 - 5000	4500	Debit
Direct Payments	5001 - 6000	5500	Debit
Taxable Expenses	6001 - 7000	6500	Credit
Pre-tax Deductions	7001 - 8000	7500	Credit
Reductions	8001 - 9000	8500	Credit
Statutory Deductions	9001 - 10000	9500	Credit
Involuntary Deductions	10001 - 11000	10500	Credit
Employer Charges	11001 - 12000	11500	Debit
Voluntary Deductions	12001 - 13000	12500	Credit
Benefits Not Taxed	13001 - 14000	13500	Debit
Expenses Information	14001 - 15000	14500	Debit
Advance Earnings	15001 - 16000	15500	Credit

Predefined Secondary Element Classifications

This table shows the predefined secondary classifications supplied. 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
Information	(None)	N/A

Primary Classification	Secondary Classifications	Default
Earnings	Taxable Pay Untaxed Taxable Pay Subject to Union Dues Subject to Employer Contributions Additional Taxable Pay <p>Note: You always consider elements with secondary classification as Additional Taxable Pay for percentage-based tax calculation irrespective of the type of card.</p> Taxable Pension Seaman Absence Pay Base Absences Earnings Adjust Base Holiday Earnings Adjust Base Holiday Pay Base Subject to Pension Insurance	N/A

Primary Classification	Secondary Classifications	Default
Earnings Adjustment	Holiday Earnings Adjust Base Holiday Earnings Adjust Base Seaman Subject to Employer Contributions Subject to Union Due Taxable Pay Additional Taxable Pay Taxable Pension Absence Pay Base Absences Earnings Adjust Base Holiday Earnings Adjust Base Holiday Pay Base Subject to Pension Insurance	NA

Primary Classification	Secondary Classifications	Default
Supplementary Earnings	Taxable Pay Subject to Employer Contributions Additional Taxable Pay Note: You always consider elements with secondary classification as Additional Taxable Pay for percentage-based tax calculation irrespective of the type of card. Subject to Union Dues Absence Pay Base Absences Earnings Adjust Base Holiday Earnings Adjust Base Holiday Pay Base Subject to Pension Insurance	N/A
Absence	Taxable Pay Additional Taxable Pay Subject to Employer Contributions Subject to Union Dues Holiday Pay Base Taxable Pension Subject to Pension Insurance	N/A
Advance Earnings	None	
Balance Initialization	None	

Primary Classification	Secondary Classifications	Default
Taxable Benefits	Not Subject to Withholding Tax Subject to Employer Contributions Subject to Withholding Tax Subject to Union Dues Additional Taxable Pay	N/A
Direct Payments	None	N/A
Taxable Expenses	None	N/A
Pre-tax Deductions	Subject to Employer Contributions Subject to Union Dues	N/A
Reductions	Subject to Employer Contributions	N/A
Statutory Deductions	(None)	N/A
Involuntary Deductions	(None)	N/A
Employer Charges	(None)	N/A
Voluntary Deductions	(None)	N/A
Benefits Not Taxed	(None)	N/A

Defining an Element

Use the Element window to create an element to represent compensation and benefit types or earnings and deductions.

This procedure describes how to define elements using a Payroll responsibility (that is, a responsibility with the HR User Type profile option set to *Payroll User* or *HR with Payroll User*). If you are an HR-only user, you will not see certain fields relating to element processing information. You can just ignore the steps that apply to these fields.

Note: Depending on your localization and the types of element you want to create, you may not need to start from scratch in the Element window. Check which earnings and deductions are available in the template library in the Configuration Workbench. If these template elements do not meet your requirements, you may be able to generate earnings and deductions using Earnings and Deductions windows or the Element Design Wizard. You can use the Element window to further configure template elements and generated elements.

- For the United States and Canada, see: Earnings and Other Payments Overview, *Oracle HRMS Compensation and Benefits Management Guide* and Deductions Overview, *Oracle HRMS Compensation and Benefits Management Guide*
- For Mexico, see: Element Design Wizard, *Oracle HRMS Compensation and Benefits Management Guide*
- For UAE, see: Element Design Wizard, *Oracle HRMS Compensation and Benefits Management Guide*
- For Norway:
 - For each element, you must enter the End of Year codes using the list of values provided in the Further Information field.
 - You must set up an extra information type (EIT) element for a-melding reporting.

Dates, Names and Classifications

To enter dates, names, and a classification for the element:

1. Set your effective date early enough to handle any historical element entries you want to make. Note that an element cannot be linked or entered until its start date.
2. Enter a unique:
 - Name
 - Reporting name

Start the names with a letter of the alphabet (not a number or symbol). The reporting name is a short identifier for reports and pay advices.

3. Enter a description for the element.
4. Select a Primary Classification.

This controls an element's processing priority and the balances it feeds. If you are defining a salary element for Salary Administration, you must select the classification Earnings.

Processing Information

To enter processing information for the element:

1. Select the processing type. Select *Recurring* if an entry of this element applies in every period until the entry is ended, or *Nonrecurring* if an entry applies in one pay period only. The dates of the pay period are determined by the payroll to which the employee is assigned.

Note: If you are defining a salary element for salary administration, you must select the type *Recurring*. If you are defining a net-to-gross element you must select the type *Nonrecurring*.

2. Select a termination rule to determine how entries of the element are processed after termination of the employee:

Note: UK only: Always select *Actual Termination* for UK proration.

- *Actual Termination* if you want recurring entries to close down on the date the employee leaves. For a nonrecurring element, select *Actual Termination* if you want the entries to close down at the end of the pay period in which the employee leaves, or on the date the assignment ends (the final process date) if this is earlier.
- *Final Close* if you want the entries to stay open beyond the employee's leaving date so that you can continue to pay the employee.

If you are a Payroll user, you can also select:

- *Last Standard Process* for all recurring and nonrecurring elements if you want their entries to close down on the Last Standard Process date or on the date the assignment ends (the final process date) if this is earlier. The Last Standard Process date defaults to the last day of the pay period in which the employee is terminated, but you can set it to a later period when you terminate an employee.
3. Select the *Multiple Entries Allowed* check box if you want to give an employee more than one entry of the element at the same time. If you are creating a net-to-gross element, you must select *Multiple Entries Allowed*.

4. Select the Additional Entries Allowed check box if you want to make occasional one-time entries of a recurring element (instead of, or in addition to, a normal recurring entry).

US and Canada only: The Additional Entry Allowed rule is not applicable for US and Canadian installations.

5. Select the Closed for Entry check box if you want to prevent any new entries being made for the element, either temporarily or permanently. This does not affect any existing entries of the element.

Important: Use this feature with caution. When you perform certain important tasks in Oracle HRMS, the application may automatically create or delete element entries. These tasks include hiring and terminating people, and updating assignments. Therefore, if you check Closed for Entry on an element, this might prevent users terminating employees and updating assignments. If there are standard links for the element, it will also prevent users hiring people who are eligible for the element.

HR-only users: Go to Currency.

Oracle Payroll Users:

6. Select the Process in Run check box if you want the element to process in payroll runs.
7. Select the Once Each Period check box to ensure that only the first payroll run of each period processes entries of this element.

Note: If this check box is not available for your localization, you can select a ONCE_EACH_PERIOD skip rule for the element instead.

8. Select the Indirect Results check box if you want the element only to accept entries from indirect formula results. Leave the check box unchecked if you want to accept entries both from indirect formula results and from manual entries in the Element Entries window.
9. Select the Adjustment Only check box if you want to use the element only for creating balance adjustments.
10. Select the Third Party Payments check box if you want to use the element only for creating third party payments.
11. Overwrite the default priority number in the Priority field if you want to determine the order in which the element processes within its classification range. Lower

numbers process before higher ones.

If the order of processing within the element classification is not important, you can accept the default priority number, which is the midpoint of the range.

12. Select a formula in the Skip Rule field if you have written a skip rule formula to determine the circumstances in which the element should be processed.

UK only: If you are using different run types, select the ONCE_EACH_PERIOD skip rule for all earnings, to ensure they are not processed by each child run type.

Currency

The default currency for element entry values is the currency defined for the Business Group. You can select a different currency for the element if required.

Advanced Processing Information

Oracle Payroll users only: Use the Advanced tab to enter further processing information if you are defining:

- An earnings type, such as a bonus, that is to be taxed separately from the normal payroll run. The element can also be paid separately.
- An earnings type that requires a net-to-gross calculation. For example, this applies to bonus payments that are a fixed net amount. Oracle Payroll calculates the gross amount needed to meet the net pay.
- **UK:** A pre-tax deduction that you want to reduce if there is insufficient pay to cover the deduction along with taxes and court orders. This requires iterative processing.

Note: The Advanced tab may not be available for some localizations.

To define an element as a separate payment:

1. On the Advanced tab, select the Separate Payment check box.

The Process Separate box is checked automatically.

UK users: Do not select this check box. This functionality is not currently available for UK Payroll.

To define an element to process separately:

1. On the Advanced tab, select the Process Separate check box.

To define an element for net-to-gross calculation:

1. On the Advanced tab, select the Gross Up check box.

The Iterative Flag and Process Separate boxes are checked automatically.

2. Select DEFAULT_GROSSUP in the Iterative Formula field. This formula controls the iterative calculation of the pay value, adjusting an input value as necessary to get a result that is defined to be close enough to the required net payment.

Note: After saving your element, choose the Iterative Rules button to specify how to use the formula results. Also choose the Exclude Balances button to select which balances are grossed up for the element (meaning that these deductions are paid by the employer).

3. Optionally, enter a value in the Iterative Priority field to determine the sequence in which elements are adjusted during iterative calculations. Elements with lower iterative priority values are adjusted first.
4. Select the Separate Payment box if you want the payment to be made separately from the regular payment. **UK Payroll, Irish Payroll:** Do not select this check box.
5. Save your work.

To set up iterative processing for a pre-tax deduction (UK):

1. Check the Iterative Flag box.
2. Select PQP_GB_ITERATIVE_ARREARAGE in the Iterative Formula field.
3. Enter an Iterative Priority number in the range 1 to 1500. The element with the lowest iterative priority number is reduced first. If this deduction is reduced to zero and net pay is still insufficient to cover taxes and court orders, the element with the next lowest priority number is reduced, and so on.

Important: Iterative priority numbers must be in the reverse sequence of the processing priority numbers. This means that the element that is processed first is reduced last.

4. Choose Iterative Rules, and select the L_stopper rule.

Advance Pay Processing Information

Oracle Payroll Users only except Ireland. If Advance Pay by Element is enabled in your legislation, use the Advance Pay tab to:

- Indicate that an element may be processed as an Advance Pay element
- Establish the processing conditions for your Advance Pay element.

To define an element as an Advance Pay element:

1. On the Advance Pay tab, check the Mark as an Advance Pay Indicator check box.

This marks the element as an Advance Pay indicator. This means that when you run the Advance Pay by Element process, it will identify this that this element can be potentially processed as an Advance Pay element according to the processing conditions that you define.

To set the processing conditions for an Advance Pay element:

On the Advance Pay tab:

1. Check the Include as an Advance Element check box if you want to process this element as an Advance Pay element.
2. If you want to specify a separate Advance Pay element, select this element from the list of available elements in Use Advance Element. If you leave Use Advance Element blank and do not specify an element, then you do not select a separate advance pay element. You can still process advance payments, but all the entries are held within your current earnings element rather than reported separately in an advance pay element.
3. Check the Deduct Advance Amount check box if you want to show the deduction for the advance in the current payroll period. Every advance payment has a deduction associated with it to bring the overall payroll amounts back into balance. You can use this check box to control the point at which the deduction should be applied.
4. If you want to specify a separate Deduction element, select this element from the list of available elements in Use Deduction Element. If you leave Use Deduction Element blank and do not specify an element, then you do not create a separate deduction element. You can still process deductions for advance payments, but all the entries are held within your current earnings elements rather than reported separately in a deduction element.

Note that when you create either an Advance Pay element, or a Deductions element, you must ensure that it exists for the same period of time as the underlying earnings element, and that the input values match those on the underlying element.

5. Check the Process Advance Entry in Run check box if you want to include this element in a payroll run, If you do not check this box, then the element does not process in a payroll run and is reported as information in your Statement of Earnings report.

Continuous Calculation

For prerequisite steps to set up continuous calculation, see: Setting Up Continuous

To set up an element for continuous calculation:

1. Choose the Recalculation tab and select a RetroPay element. This is an event group that defines the events that trigger proration for this element.

Proration

In some localizations, Oracle Payroll can calculate proportionate earnings amounts whenever payroll-relevant data changes during a payroll period. The Payroll Earnings and Deductions section describes the full setup steps for the relevant localizations. To enable proration for an element, choose the Proration tab.

To set up an element for proration:

1. Choose the Proration tab and select a proration group. This is an event group that defines the events that trigger proration for this element.
2. Optionally, select a proration formula. Alternatively you can edit the element's payroll formula to handle proration.

Further Information

1. Enter the Further Information field if:
 - Your Oracle localization team has set up additional fields for element definition
 - You are in the UK, and you use Oracle SSP/SMP

French Payroll

- Select a group, which is the name by which this element, and the others in the group, appears as one line on the pay advice.
- On the pay advice, most earnings and deductions are shown as a base, a rate, and an amount. Select the base unit if you want this displayed on the pay advice.

South African Payroll

- Enter a clearance number for Statutory Information and Deduction elements, if applicable. This number appears on the tax certificate.

Kuwait Payroll

- Select a deduction type for the Deductions elements. This information is used by the PIFSS report.

New Zealand Payroll:

- If you want to display custom elements with the classification of Employer Charges in the Online Payslip, SOE form, and Statement of Earnings under

Employer Superannuation Contribution section, select Yes in the Super Section Display field.

2. Choose Input Values to define input values for the element

See: Defining an Element's Input Values, page 4-27

Oracle Payroll Users:

3. Choose Balance Feeds to select balances you want this element to feed

See: Creating Balance Feeds for Individual Elements, *Oracle HRMS Compensation and Benefits Management Guide*

4. Click Balance Feed Control to add or remove secondary element classifications for this element.

Mexico only: Click this button to attach sub-classifications to your element.

See: Creating Classes of Balance Feeds, *Oracle HRMS Compensation and Benefits Management Guide*

5. Choose Frequency Rules to enter frequency rules to determine when the element should be processed.

See: Defining Frequency Rules, *Oracle HRMS Compensation and Benefits Management Guide*

6. For a net-to-gross element, choose Exclude Balances to select the deductions to be paid by the employer.

7. For a net-to-gross element, or any other element that is processed iteratively, choose Iterative Rules to specify how to use the Iterative Formula results.

Extra Information

Choose the Extra Information button to enter extra attribution for the element. You can link as much attribution as you need to an element.

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

If Payslip Modeling feature has been enabled for your localization, you can specify whether to enable the element for payslip modeling. If you select No, the elements will not be available for the users during payslip modeling process.

Payslip Modeler

If Payslip Modeler has been enabled, then you can specify whether to enable the element for payslip modeling. If you select No, the element will not be available for the users during payslip modeling process.

To enable an element to be available for payslip modeling, query the element and select Yes in the Enable Simulation field in the Element Extra Information window. You can select input values of this element which are to be made available for simulation. Only user enterable input values are available for Payslip modeling. Ensure to select all mandatory input values to be made available for simulation, if the element is available for simulation.

If the Multiple Entries checkbox is enabled for an element, then you cannot use this element for payslip modeling. Instead, create a copy of the base element, enter input values, attach the appropriate formulas and balances as the base element and then use this element for payslip modeling. Ensure that this new element is not used for payroll run.

Note: Please note that there is a restriction for predefined elements being used for payslip modeling. For predefined elements, if you setup the details in one business group, then these details will be accessible to other business groups. For example, for predefined element Regular Salary element, if you want to enable Input Value A for one Business Group and Input Value B for another Business group, then this is not possible. This limitation occurs for predefined elements applicable to all localizations. Therefore, if there are multiple business groups, then you must define a single structure for the predefined elements. If there are custom elements, then the custom elements are accessible only for that business group.

Additional Resources: For more information about using the payslip modeler, see the *Oracle Self-Service Human Resources Deploy Self-Service Capability Guide, Payslip Modeling (UK)*.

Usages

To exclude the element from a run type:

1. Choose the Usages button if you want to exclude this element from a run type, or combination of run types.
2. Select the run type or combination of run types from which you want to exclude this element.

Note: For Norway: You must select the Employer Contributions run type to exclude the elements.

3. Select the effective dates for your exclusions.
4. Save your work.

Defining an Element's Input Values

Use the Input Values window to define the input values for the element. You can define up to 15 input values for an element.

Depending on the type of element you have defined, Oracle HRMS may have applied one or more default input values.

North America users: All elements must have the default Jurisdiction input value.

Norway users: All elements that feed the Holiday Pay Base classification must have the Tax Municipality input value. This input value must have the HR_NO_TAX_MUNICIPALITY valueset attached to it.

Payroll users: If you are creating balance feeds for individual elements, ensure you define an input value of the same unit of measure as the balance. Money units must be the same currency.

You can add new input values to a saved element only if you have not entered the element for any employees. To add an input value, you must set your effective date to the element's start date.

To define input values:

1. Set your effective date early enough to handle any historical element entries you want to make.
2. Enter or query the element in the Element or Element Link window and choose the Input Values button.
3. Enter the name of the first input value. Remember that if you want to define a *pay value* to hold run results, you must name it Pay Value.
4. Select the unit type of your input value (money, hours, character, date, number, or time). A Pay Value must have the unit type Money if the element is in a Payments type classification.
5. You can enter numbers in the Sequence field to change the order in which the input values appear in the Entry Values window.
6. Check the Required check box if all entries of the element must have a value for this input.

Note: When you have saved an input value, you cannot change it to be Required. If you have saved it as Not Required by mistake (or you have generated an element that has an input value you want to make required), delete the input value and re-enter it with the

correct values. If you are re-entering a generated input value, be careful to enter exactly the same name. You cannot delete the input value if you have made any entries of the element for employees.

7. Check the User Enterable check box if users can enter a value for this input. Uncheck it if you want to ensure that the default value is entered for all employees.
8. Check the Database Item check box if you want the value to be available to formulas or QuickPaint inquiries.

Database Items are simple identifiers that the system uses to find specific items of information in the human resources database. Any spaces in the input value name are converted to underscores in the Database Item name.

Entering Element-Level Defaults

If you enter defaults at the element link level, these override the defaults at element level. If you update an element-level default, remember to check the values on the element links too.

To enter a default for an input value:

1. Enter the value in the Default field.
2. If you want existing entries to be updated whenever the default is changed, check the Hot Default check box. The input value must be required if you want to use this option.

A hot default appears in the Entry Values window in quotation marks.

Important: If a user overrides a hot default in the Entry Values window, subsequent changes to the default will *not* affect the entry. For this reason, you may prefer to use BEE to change defaults for large groups of employees, rather than the hot default feature.

Defining Entry Validation

To enter validation for an input value:

1. Do *one* of the following:
 - Enter maximum and minimum values for the input.
 - Select a Lookup Type to act as a lookup supplying a list of valid values.
 - Select a formula to validate entries for this input value. Formulas can return

messages to users about the success or failure of the validation.

2. Select Warning or Error to determine whether the system warns users that an entry is invalid or prevents them from saving an invalid entry. You cannot select a value if you chose a Lookup because a user cannot enter an invalid value for an input value validated by lookup.

Defining Element Links

Use the Element Link window to define groups of assignments that are eligible for an element.

Note: When you define a link for a benefit or for an entitlement item in a collective agreement, do not select any eligibility criteria. Instead use participation eligibility profiles to restrict eligibility for the benefit or entitlement item.

Note: When querying data the Element Link window returns values for Payroll, Location and Position and Organizations, irrespective of the security profile restrictions set, enabling you to view the links already created. You cannot create links for data outside your security profile.

To define an element link:

1. Set your effective date to the date you want the eligibility criteria to come into effect.
2. In the Element Name field, select the Element for which you are defining a link.
3. Check the Standard check box if you want all employees who are made eligible by the link to receive the element automatically.

You can only create a standard link if the element is recurring and multiple entries are *not* allowed by the element definition.

4. In the Eligibility Criteria region, select the assignment components that constitute this eligibility rule. If you want to link to all employees, do not enter any eligibility criteria.

You can link to all payrolls or to a specific payroll. Do one of the following:

- Leave the Payroll field blank and check the Link to all Payrolls check box if you want employees assigned to *any* payroll to be eligible. This rule excludes employees who are not assigned to a payroll.

- Select the name of a specific payroll if you want only employees on that payroll to be eligible for the element. Do not check the Link to all Payrolls check box.
- Leave both fields blank if assignment to a payroll is irrelevant to eligibility for the element.

Costing

To enter costing information for the link:

1. Select the Costable Type. The default is *Not Costed*, meaning that the system maintains no costing information for the element.
 - To allow entry of costing information at all levels, including the assignment and element entry levels, select *Costed*. This is the appropriate selection for most elements representing earnings types.
 - If you do not need to cost the element at organization and assignment levels, select *Fixed Costed*. This is appropriate for some deductions, which are irrelevant to labor distribution analyses.
 - If you want to distribute overhead costs (such as employer contributions to a pension plan) over other elements, select *Distributed*. Then select a Distribution Set.

Note: Some element classifications for your legislation may be predefined as Not Costed and you cannot override this.

2. Check the Transfer to GL check box if the payroll run results from this link should be transferred to the general ledger.
3. Use the Costing field to select a GL account code and, if present, account codes of labor distribution or other systems in which to collect the run results of this element. Then use the Balancing field to select the GL account that balances this one.

For deductions elements:

- Select the code for the GL account to credit in the Costing field, and the code for the account to debit in the Balancing field.

For elements in all other classifications:

- Select the code for the GL account code to debit in the Costing field, and the code for the account to credit in the Balancing field.

Note: Depending on your set up of the Cost Allocation flexfield, the Balancing field may not be enabled.

Batch Creation of Element Links

You can use a batch process to create multiple links more efficiently than creating each link individually.

To create element links in a batch operation

1. Check the Create in Batch Mode check box to specify that you want to defer creation of this element link until later when you run the Generate Element Links process. Alternatively, leave the box unchecked if you want to create this element link immediately.
2. View the Link Status to confirm the status of your link:
 - Unprocessed - you have selected this element link for creation as part of a batch, but the Generate Element Links process has not started yet.
 - Processing - the Generate Element Links process is now attempting to create this link.
 - Complete - the Generate Element Links process has completed, and you have successfully created this element link.
 - Incomplete - the Generate Element Links process has completed, but this element link was not included in the processing and you have not yet created the element link. Correct the link definition before rerunning the Generate Element Links process.
 - Error - the Generate Element Links process failed to complete, and you have not yet created the element link. Correct the link definition before rerunning the Generate Element Links process.
3. Run the Generate Element Links process to complete the creation of those links that you selected for batch processing.

See Generating Element Links, page 4-32

Qualifying Conditions

To enter qualifying conditions for the link:

1. Go to the Qualifying Conditions region. Here you can add or change age or length of service requirements for this particular eligibility rule.

The system checks these conditions when you make an entry of the element. If the

employee does not meet the qualifying conditions, you receive a warning.

Input Values

To adjust input values for the link:

1. Save your link definition and choose the Input Values button to display the Link Input Values window.

Use this window to:

- Enter a new default or change one entered at the element level
- Check the Costed box to maintain costing information for an input value.
- Change the maximum, minimum or both for an input value. Logically, the new values should be within the range you defined for the element as a whole. However the system does not enforce this.

Generating Element Links

Use the Generate Element Links process to create element links quickly. You must first select the links for batch creation when defining them on the Element Links window. Then, run the Generate Element Links process from the Submit Requests window to link to the element entries created.

To generate element links:

1. Select one of the following Generate Types to determine whether you want to process:
 - All element links that are not completed and are not processing currently.
 - A single element link. If you make this selection, go on to select the particular element link that you want to create. Note that you are selecting one element link from the range of links that are awaiting processing. You cannot change the characteristics of the link at this point, but you can return to the Element Links window to make changes.
2. Click OK
3. Click Submit

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 retro pay 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 5-51

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.

Additional Element Setup for Payroll

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 an event group to it. An event group is a collection of proration points that share similar characteristics. You can create an event group to group together all proration points that affect an employee's salary, for example. This event group could contain proration points such as salary increases, assignment changes, and pay rate changes.

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: *Sample Payroll Formulas Enabled for Proration (UK)*, *Oracle HRMS FastFormula User Guide*, *Sample Proration Formula*, *Oracle HRMS FastFormula User Guide*, and *Writing Proration Formulas*, *Oracle HRMS FastFormula User Guide*

When you define the event group, you select the events that will activate proration calculation, such as:

- 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

Note: The proration unit can be periods, days, or hours. Proration can be applied to a monetary, time-based, or numeric amount.

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, Oracle HRMS Compensation and Benefits Management Guide*

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, page 4-27*

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, page 4-29

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*

Setting Up Third-Party Payments

Oracle HRMS supports the capture of third-party payment details to enable the employer to make grouped payments. Grouped payments are deductions, made for a set of employees, that are grouped together and paid to a specific third party. Grouped payment enables you to process all similar deductions as a batch instead of processing deductions separately for each employee.

1. Create an organizational payment method using the payment type NO Third Party Payment. See: Defining a Payment Method, page 5-11
2. Create your third-party organizations with the Payee organization classification.
See: Setting Up Norwegian Organizations, page 1-15
3. Enter the third-party payment details for each payee organization. See: Entering

Setting Up Support Orders

Oracle HRMS supports the capture of the relevant support order deduction that the employer must pay to the correct third party. For example: The employer deducts an amount from the employee's salary based on the child support order issued by an authority and transfers the amount to the correct third-party organization.

1. Create your third-party payee organization to which you transfer the support order deductions.

See: Organization Classifications, page 1-4

See: Setting Up Norwegian Organizations, page 1-15

2. Link the Wage Attachment Support Order element to your payroll.

See: Defining Element Links, page 4-29

3. Enter the Wage Attachment Support Order element for the employee's primary assignment.

See: Making Manual Element Entries, page 4-32

Setting Up Travel Expenses

Oracle HRMS captures travel expense-related information to meet your tax reporting requirements. You can process these expenses directly from payroll or upload the information from third-party systems.

Note: If you process the travel expenses through a third-party system, you can upload the information into the predefined travel expense elements with help from the payroll implementation team.

1. Create your legal employers and local units.

See: Setting Up Norwegian Organizations, page 1-15

2. Review the predefined travel expenses elements. You can use these as supplied or define your own elements with the primary classification as Direct Payments.

See: Predefined Elements, page 4-2

You must select the Termination type as Final Close for all elements that you create.

See: Defining an Element, page 4-17

3. Link the elements to your payroll.

See: Defining Element Links, page 4-29

4. Enter the elements for each employee's assignment.

See: Making Manual Element Entries, page 4-32

Setting Up Benefits in Kind

Oracle HRMS supports the calculation of the monetary value of the following benefits in kind:

- Free Boarding and Lodging
- Preferential Loan
- Private Use of Company Cars

1. Create your legal employers and local units.

See: Setting Up Norwegian Organizations, page 1-15

2. Define your Benefit in Kind elements, selecting the primary classification Benefits in Kind. You must exclude all benefits in kind elements from the Pay Separately and Process Alone run types and you should define these elements with Termination as Final Close.

See: Defining an Element, page 4-17

3. Select the benefit type through the Further Element Information descriptive flexfield, if you are entering information for other employee benefits. You use this information for income reporting purposes.

4. Link the elements to your payroll.

See: Defining Element Links, page 4-29

5. Enter the elements for each employee's assignment.

See: Making Manual Element Entries, page 4-32

Setting Up Union Dues

Oracle HRMS captures the trade union information to facilitate the payment of union dues to the correct trade union to which an employee belongs and for statutory reporting.

1. Create the trade unions as third-party payee organizations to which you transfer the union dues.

See: Setting Up Norwegian Organizations, page 1-15

2. Link the Union Dues element to your payroll.

Note: If the majority of your employees belong to trade unions, then you can create a standard link. In this case, you will have to manually remove the Union Dues element from the assignments of those employees who are not trade union members.

See: Defining Element Links, page 4-29

3. Enter the Union Dues element for each employee's primary assignment.

See: Making Manual Element Entries, page 4-32

Setting Up Tax Levies

Oracle HRMS captures the tax levy information to facilitate the payment of any additional tax to the tax authority. For example: Tax authorities can issue orders to cover claims for tax arrears, value added tax, or other charges to municipal or public authorities.

1. Create the tax authority as a third party payee organization to which you transfer the tax levies.

See: Setting Up Norwegian Organizations, page 1-15

2. Link the Wage Attachment Tax Levy element to your payroll.

See: Defining Element Links, page 4-29

3. Enter the Wage Attachment Tax Levy element for each employee's primary assignment.

See: Making Manual Element Entries, page 4-32

Leave and Absence Management

Absence Categories and Types

Oracle HRMS provides a convenient way to maintain information about the various absence types your enterprise recognizes. To facilitate reporting and analysis of employee absences, you can distinguish between *absence types* and *absence categories*. An absence category is a group of related absence types.

Some absence categories may be predefined for your legislation. The table below contains examples of absence categories and types, for illustration purposes only. You can extend the list of predefined categories and define your own absence types, as required.

Example Absence Categories and Types:

Absence Category	Absence Type
Medical Leave	Illness or Injury
	Work-related Injury
	Work-related Illness
	Medical Appointment
Family Leave	Paid Maternity/Paternity
	Unpaid Maternity/Paternity
	Dependent Care
Personal Leave	Compassionate Leave
	Personal Business
Professional Leave	Certification Classes
	Meeting Attendance

Also, to assist with absence reporting and analysis, you can provide *reasons* to select from when recording employees' time taken for an absence type. For example, if you

need information to analyze the particular family-related responsibilities that cause employees to miss work, you can define reasons for absence types as follows:

Example Absence Category, Types and Reasons:

Absence Category	Absence Type	Absence Reasons
Family Leave	Paid Maternity/Paternity	Birth of a child
		Adoption of a child
	Dependent Care	Child Care
		Elder Care
		Disabled Care

Setup of Absence Types

Setting up each absence type is essentially a two-step process. One step involves defining the type, that is, entering its name, and optionally selecting a category and reasons for it. The other step involves defining an element to associate with the type. This element serves two important purposes:

- It provides a way to *maintain a running total* of time taken for the absence type. The Absence Detail window shows the running total of absences with an end date before the effective date, and with an absence duration on record. Each absence can add to, or subtract from, the running total, depending on how you define the absence type.
- It provides a way to *restrict employee eligibility* for the absence type. The links you build for the element establish which employees are eligible to use the type.

For example, if the absence type compassionate leave is available only to full time employees, you link its element to the assignment category Full Time.

To hold a single running total of time taken for two or more absence types, you associate all the types with the same absence element. For example, your absence category Personal Leave may include two absence types you need for certain reporting purposes, Compassionate Leave and Personal Business. However, you require just one running total to be kept of employees' time taken for both types of personal leave. In this case you simply associate both absence types with the same absence element.

Note: If you want to use absence types without recording accrued totals or eligibility rules, you can define the type with no associated element.

Absence Elements

You can associate each absence type with a recurring or nonrecurring absence element. Each element has an input value with either hours or days as its unit of measure.

Using a Nonrecurring Element

Nonrecurring element entries are valid for one payroll period. When you enter an absence of a type associated with a nonrecurring element, the application creates an element entry for the period in which the absence start date falls. For example, if you enter an absence that starts on 4 May for someone on a monthly payroll, the entry is dated 01 May to 31 May.

The entry is only created when you enter the absence end date, and you must enter the absence duration at the same time. The duration can be defaulted if you set up an absence duration formula. The full value of the absence duration is recorded in the absence element entry, even if the end date falls outside of the payroll period.

Using a Recurring Element

Important: This option is only available if you use Oracle Payroll and the Proration functionality is enabled in your localization.

UK Users: If you use the Statutory Absence Payments feature you must continue to use nonrecurring elements to record long term sick leave.

Use this approach if you want to begin processing absences before end dates are recorded. You do not enter absence duration on the recurring element entry. Instead, you use a payroll formula to calculate the absence duration to be processed in each payroll period. Use the absence duration formula to calculate the duration displayed on the Absence Detail window. This value is deducted from the current PTO accrual when you enter an end date for an absence type that is associated with a PTO accrual plan.

Recurring element entries start on the absence start date and end on the absence end date (if there is an end date). If the absence ends in the middle of a payroll period, the payroll run detects and processes the absence using the proration functionality.

Absence Balance Information

When you define an absence type, you specify whether the application should maintain an increasing balance, a decreasing balance, or no balance of time off. The balance is a running total of the hours or days an employee has taken for the absence type, as recorded in the Duration field.

Increasing Balances of Time Taken

As you would expect, an increasing balance for an absence type starts with no time entered, and increases as you enter employees' hours or days absent. For example, if the absence type Compassionate Leave has an increasing balance, the balance starts from zero for each employee and increases by the number of hours entered for each absence of this type.

Increasing balances are appropriate for most absence types. For absence types for which your enterprise sets a maximum time allowed, the system issues a message when an entry of time absent exceeds this maximum, or Oracle Alert can notify you when an employee reaches the maximum time or takes excess time.

See: *Oracle Alert User's Guide*

When defining an absence type for a PTO accrual plan, you give it an increasing balance that shows the employee's accrued time taken. When you record an absence using the Absence Detail window, you can see the amount of accrued time a plan participant has available for use as vacation or sick leave.

Decreasing Balances of Time Remaining

If your enterprise sets a maximum time allowed for an absence type, you have the option of setting up a *decreasing balance* for this type, instead of an increasing balance. (If the absence type is used for a PTO accrual plan, it is simpler to use an increasing balance and an accrual formula that records an up-front accrual amount.)

For example, suppose your enterprise allows certain employees 32 hours leave per year for professional development. The Professional Leave absence type can have a decreasing balance, and an initial entry of 32 hours.

If you record an employee absence of 4 hours for this absence type, the decreasing balance shows 28 hours still available to be taken.

Decreasing absence balances require more maintenance than increasing balances. They need a prorated initial balance entry for all eligible new hires throughout the year, and require resetting each year for all eligible employees.

Notice that an absence type cannot have both a decreasing and an increasing balance; it has one or the other.

Initializing an Absence Balance

You can initialize or adjust an absence balance using the Element Entries window, or the Element Entry API. You can also initialize a decreasing balance by entering a negative value using BEE. For example, if you enter -16 hours using BEE, a decreasing balance starts at 16 hours. However, be aware that using BEE creates an absence record that will show on employees' absence history.

Referencing Absent Time in Payroll Runs

You can define an absence element as an Information element or an Earnings element.

Using an Information Absence Element

If you define an Information absence element, you can use a recurring Earnings element to manage the calculation and payment of vacation and sick pay. When you define the absence element, you check the Database Item box for the input value that holds the absence balance. Entries to this input value then become database items that formulas for payroll calculations can access.

US Users: You will typically set up your absence elements in the Information classification for employees who do not submit timecards (Timecard Required = No on the Statutory Information tab of the Assignment window). If you are using the seeded Regular Salary or Regular Wages elements, the payroll run creates indirect results for the seeded Vacation Pay or Sick Pay elements when it finds absence entries in the Vacation or Sickness categories. These elements appear on the Statement of Earnings, but the Information elements do not. You do not need to set up any additional absence Earnings elements for these employees.

Other localizations: Typically, you define an Earnings element to have a skip rule that triggers processing when it finds an entry for the absence element. The element's payroll formula uses the database item for the entry value so that it automatically gets the sum of all the entries in the pay period. Then, using the salary database item to get the salary or hourly rate, it calculates the total absence pay for the period. You can also use the formula to reduce regular earnings for the period so employees do not get paid twice.

The advantage of this approach is that it simplifies the processing of absence payments into one calculation.

Using an Earnings Absence Element

Select the Earnings classification for absence elements if you want to process absences individually in each payroll period. You can use these elements with Oracle Time and Labor. This approach creates a one-line entry on the statement of earnings for each absence type. Typically, you would create nonrecurring Sick and Vacation Pay earnings elements. You can also create different absence elements for each rate or multiple of pay if the element must appear on the statement of earnings as a different line item.

US Users: For employees who *do* submit timecards (making entries in BEE to the Time Entry Wages element), you can create your absence elements as Earnings. This also applies if you do not use the seeded Regular Salary and Regular Wages elements, and you want your absence payment to show on the Statement of Earnings. Use the Earnings window to initiate the element. Select the Category *Regular* and check the Reduce Regular box.

Retrospective Entries and Adjustments

Oracle Payroll users: If you enter or update an absence retrospectively, or you delete an absence that started in the past, these changes are listed in the Retro Notification report the next time you run this report. This enables you to use RetroPay to correct any payroll processing.

Absence Recording

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

Dates and Times

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

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

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

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

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

Absence Duration

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

For the first method, the application calculates the duration of the absence based on the

worker's schedule and applicable calendar events for their primary assignment. To use these features, set the HR: Schedule Based Absence Calculation profile option to Yes.

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

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

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

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

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

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

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

Authorization and Replacement

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

Absence Cases

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

Batch Entry of Accrued Time Taken

For fast batch entry, you can use BEE, instead of the Absence Detail window, to enter

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

Self-Service Entry of Absences

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

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

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

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

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

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

Viewing and Reporting on Absence Information

For monitoring and analyzing recorded employee absences, use the:

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

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

Entering Absences

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

Because the calendar holding absence records for an employee is the same as that of the employee's payroll, the primary assignments of employees for whom you enter absence information must include an assignment to a payroll. For absence types based on

nonrecurring elements, the effective start date of this assignment must be no later than the start of the current payroll period.

To enter absences for an employee:

1. Select the absence type.

The following information appears:

- The category of the type.

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

- The occurrence of the new absence record you are entering. For example, if the employee has already incurred two absences of this type, the occurrence of the new record is 3.
- The running total of hours or days absent for all the absence types associated with the element. For absence types with increasing balances, this is the number of days or hours absent with an end date on or before your effective date. For any types with decreasing balances, this is the number of hours or days remaining to be taken.
- The number of days absence recorded for the absence type in the current calendar year.
- The name of the element that maintains each employee's time taken or time remaining for this absence type.

Note: For Denmark, Finland, Norway, and Sweden users only:

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

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

See: Making Manual Element Entries, page 4-32

2. If the Further Information field is visible for your localization, click in the field and select a context value relevant to your localization.

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

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

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

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

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

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

- General Disease
- Maternity
- Risk Incident

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

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

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

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

- **Russia HRMS:** If your absence category is Maternity Leave, enter the number of children and the new born child's date of birth. If the absence category is Child Rearing Leave, enter the new born child's date of birth. If you select the absence type as Temporary Disability with Sickness Allowance Payment, then select the disability details.
- **Finland HRMS:** If your absence category is Annual Holiday, Layoff, Labour Dispute, or Unauthorized, enter the details of a similar absence taken by the employee. For the absence category Sickness, select the doctor's certificate and contract details. For the Accident category, select the work incident and doctor's certificate details. If your absence category is Family Leave, enter the child and maternity leave details.
- **UK HRMS:** For an OSP or OMP scheme and an absence that is, or contains, a part of a day, select a unit of measure - days or hours - for measuring part days. For a days-based scheme, select Day and select full or half day . For an hours based scheme, select Hours and select the number of hours absent. Select the appropriate value for the start date, end date, or both. If the entire absence is less than a full day, select the value in the Start Date field.

3. Do one of the following:

- Enter *projected* dates for the absence. You can copy these later to the Actual Date fields by choosing Confirm Projected Dates.
- Enter *actual* dates and duration as days or hours, according to the units of the balance. If you enter an end date, you must also enter the duration.

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

See: Absence Duration, page 4-48

4. You can also select:

- Reasons for the absence
- The employee authorizing the absence

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

5. Save your work.

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

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

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

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

Viewing Accruals for Plans Associated with the Absence Type

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

To view accruals:

1. Enter or query an absence in the Absence Detail window, and choose Accruals.
2. If nothing is displayed, run a query in the Associated Accrual Plans window to display the name and category of any accrual plans associated with the absence type.

For each plan, three net accrual amounts are displayed:

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

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

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

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

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

Example

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

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

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

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

Entering Adoption Absence

You use the Absence window to record absence due to adoption. You can enter additional information related to an employee's adoption absence.

1. Enter the date of adoption.
2. Enter the date of birth of the adopted child.

3. Enter the number of children adopted by the employee.
4. Select the compensation rate applicable for the employee.
5. Select whether the employee receives advance reclaimable pay from the social security fund.
6. Select whether you need to use the social security daily rate.
7. Select whether reclaimable pay to the employee is Maximum 6G.
8. Select the required daily rate of calculation.
9. Select whether this absence is the employee's first recorded absence.
10. Select the linked absence.

Entering Child Minder Sickness Absence

You use the Absence window to record absence due to child minder sickness. You can enter additional information related to an employee's child minder sickness absence.

1. Select the type of certificate submitted by the employee.
2. Enter the start and end dates of the absence.
3. Select whether you need to reimburse the employee from the social security fund.
4. Select whether the employee receives advance reclaimable pay from the social security fund.
5. Select whether reclaimable pay to the employee is Maximum 6G.
6. Select a type of daily rate calculation.

Entering Maternity Absence

You use the Absence window to record absence due to maternity. You can enter additional information related to an employee's maternity absence.

1. Enter the expected date of birth notified by the employee.
2. Enter the actual date of birth of the child.
3. Enter the number of babies born to the employee.
4. Select the compensation rate that the employee is entitled to.

5. Select whether the employee has a spouse.
6. Enter the number of paternity days availed by the employee's spouse.
7. Select whether the employee receives advance reclaimable pay from the social security fund.
8. Select whether you need to use the social security daily rate.
9. Select whether reclaimable pay to the employee is Maximum 6G.
10. Select a type of daily rate calculation.
11. Enter the number of paid holidays that the employee is entitled to.
12. Select whether the absence is the employee's first absence.
13. Select the linked absence.

Entering Part-time Adoption Absence

You use the Absence window to record the absence due to part time adoption. You can enter additional information relating to an employee's absence due to part-time adoption.

1. Enter the date of birth of the adopted child.
2. Enter the number of children adopted by the employee.
3. Enter the percentage of part-time adoption. For example, enter 60 if the employee works for 60% of the normal working time.
4. Select the compensation rate that the employee is entitled to.
5. Select whether the employee receives advance reclaimable pay from the social security fund.
6. Select whether you need to use the social security daily rate.
7. Select whether reclaimable pay to the employee is Maximum 6G.
8. Select a type of daily rate calculation.
9. Select whether the absence is the employee's first recorded absence.
10. Select the linked absence.

Entering Part-time Maternity Absence

You use the Absence window to record the absence due to part time maternity. You can enter additional information relating to an employee's absence due to part-time maternity.

1. Enter the date of birth notified by the employee.
2. Enter the actual date of birth
3. Enter the percentage of part-time maternity. For example, enter 60 if the employee works for 60% of the normal working time.
4. Select the compensation rate that the employee is entitled to.
5. Enter the number of days that the employee's spouse was on paternity leave.
6. Enter the number of children born to the employee.
7. Select whether the employee receives advance reclaimable pay from the social security fund.
8. Select whether you need to use the social security daily rate.
9. Select whether reclaimable pay to the employee is Maximum 6G.
10. Select a type of daily rate calculation.
11. Enter the number of holiday pay days accrued by the employee.
12. Select whether the absence is the employee's first recorded absence.
13. Select the linked absence.

Entering Part-time Paternity Absence

You use the Absence window to record the absence due to part time maternity. You can enter additional information relating to an employee's absence due to part-time paternity.

1. Enter the date of birth notified by the employee.
2. Select the maternity compensation rate entitled to the employee.
3. Enter the percentage of part-time paternity. For example, enter 60 if the employee works for 60% of the normal working time.

4. Enter the number of days that the employee's spouse was on maternity leave.
5. Enter the number of children born to the employee's spouse.
6. Select whether the employee receives advance reclaimable pay from the social security fund.
7. Select whether you need to use the social security daily rate.
8. Select whether reclaimable pay to the employee is Maximum 6G.
9. Select a type of daily rate calculation.
10. Enter the number of holiday pay days accrued by the employee.
11. Select whether the absence is the employee's first recorded absence.
12. Select the linked absence.

Entering Sickness Absence

You use the Absence window to record the absence due to sickness. You can enter additional information relating to an employee's absence due to sickness.

1. Select the type of certificate produced by the employee.
2. Enter the start and end dates of the sickness as shown in the certificate.
3. Enter the appointed date for a follow-up plan.
4. Enter the date on which the follow-up plan was created.
5. Select whether the employee receives advance reclaimable pay from social security.
6. Select whether you need to use the social security daily rate.
7. Select whether the employer pays maximum 6G.
8. Select whether reclaimable pay to the employee is maximum 6G.
9. Enter the date on which the follow-up plan was sent to the employee.
10. Select a type of daily rate calculation.
11. Select whether the absence is the first recorded absence of the employee.
12. Select the linked absence.

13. Enter the appointed date for the liaison meeting.
14. Enter the actual date of the liaison meeting.

Entering Part-time Sickness Absence

You use the Absence window to record the absence due to part time sickness. You can enter additional information relating to an employee's absence due to part-time sickness.

1. Select the type of certificate produced by the employee.
2. Enter the start and end dates of the sickness as shown in the certificate.
3. Enter the percentage of part-time sickness.
4. Enter the appointed date for a follow-up plan.
5. Enter the date on which the follow-up plan was created.
6. Select whether the employee receives advance reclaimable pay from the social security fund.
7. Select whether you need to use the social security daily rate.
8. Select whether the employer pays Maximum 6G.
9. Select whether reclaimable pay to the employee is Maximum 6G.
10. Enter the date on which the follow-up plan was sent to the employee.
11. Select a type of daily rate calculation.
12. Select whether the absence is the first recorded absence of the employee.
13. Select the linked absence.
14. Enter the appointed date for the liaison meeting.
15. Enter the actual date of the liaison meeting.

Entering Paternity Absence

You can use the Absence window to record the paternity absence for employees. You can enter additional information relating to an employee's paternity absence.

1. Enter the date of birth.

2. Select the maternity compensation rate that the employee is entitled to.
3. Enter the number of days that the employee's spouse was on maternity leave.
4. Select whether the employee receives advance reclaimable pay from the social security fund.
5. Select whether you need to use the social security daily rate.
6. Select whether reclaimable pay to the employee is Maximum 6G.
7. Select an option for the daily rate calculation.
8. Enter the number of paid holidays that the employee is entitled to.
9. Select whether the absence is the employee's first absence.
10. Select the linked absence.

Setting Up Absences

Oracle HRMS enables you to record the absence information for employees to receive the various absence benefits for sickness, maternity, paternity, and adoption. This process ensures that you process the absence information and the related deductions accurately.

1. Record the absence information for an employee using the Absence window.
See *Entering Absences*, page 4-50
2. Enter the additional information for each of these absences using the Further Information field:
 - Adoption, page 4-55
 - Child Minder Sickness, page 4-56
 - Maternity, page 4-56
 - Part-time Adoption, page 4-57
 - Part-time Maternity, page 4-58
 - Part-time Paternity, page 4-58
 - Sickness, page 4-59Sickness
 - Part-time Sickness, page 4-60

- Paternity, page 4-60

Setting Up Absence Management

Use the following steps to set up absence management.

1. If you want to associate recurring elements with absence types, you must set up proration and retro notifications. This ensures that absences that end in the middle of a payroll period are detected and processed by the payroll run, and that retrospective changes to absences are recorded in the Retro Notifications report.

Note: Proration is available to Oracle Payroll users in selected localizations only.

To set up proration and retro notifications, you must:

- Find all the dynamically generated triggers for the table PAY_ELEMENT_ENTRIES_F in the Dynamic Trigger Definition window. (You must deselect the Insert triggering action so that all the triggers are returned by the Find.) Make sure the Generated and Enabled check boxes are checked for all the continuous calculation triggers.
- Query the Incident Register functional area in the Functional Area Maintenance window, and enter the business groups for which you want to enable proration on the Business Group tab. Optionally, you can further secure the proration functionality by selecting payrolls on the Payroll tab.
- Use the Table Event Group window to group the two events that you need to detect to prorate absences - datetracked updates to absence start date and absence end date. Select Proration for the event group type, and Payroll Period for the proration period. In the Datetracked Events region, select DateTrack Update as the update type, PAY_ELEMENT_ENTRIES_F as the table, and EFFECTIVE_START_DATE and EFFECTIVE_END_DATE as the columns.
- Use the Table Event Group window to group the datetracked events on the PAY_ELEMENT_ENTRIES_F table you want to track in the Retro Notifications report. The event group type is Retro.

See: Setting Up Proration and Retro Notifications, page 4-37

2. Define an absence element, with at least one input value, for each absence type. Link this element to define who is eligible.

See: Defining and Linking an Absence Element, *Oracle HRMS Compensation and Benefits Management Guide*

Note: Omit this step if you are setting up an absence type for which you do not need to maintain a running total of time taken or remaining, and you do not need eligibility rules.

US and Canada Payroll only: If you want to process the absence element in the payroll run, generate it using the Earnings window.

Mexico only: If you want to process the absence element in the payroll run, generate it using the Element Design Wizard.

3. Define categories of absence types as values for the Lookup Type ABSENCE_CATEGORY, and your absence reasons as values for the Lookup Type ABSENCE_REASON. In some legislations there are predefined categories and reasons.

You can select the same reason for different absence types.

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

4. Define each absence type, and associate it with an absence element.

See: Defining an Absence Type, *Oracle HRMS Compensation and Benefits Management Guide*

Note: To keep a single record of employees' time taken for two or more different absence types, you can associate the same element with several types.

5. For an absence type with a decreasing balance, use BEE or the Absence Detail window to initialize the absence balances for employees eligible for the type.

If you want to make batch entries, see Making Batch Element Entries Using BEE, *Oracle HRMS Configuring, Reporting, and System Administration Guide*.

6. If you defined a recurring element, create a payroll formula that handles proration to process the element and calculate the appropriate absence duration in each pay period (taking into account the number of days or hours in a month, working and shift patterns, public holidays, and so on).

Sample Proration Formulas, *Oracle HRMS FastFormula User Guide*

7. If you want to set up the application to calculate the duration of an absence automatically, you have two options:

- Set the HR: Schedule Based Absence Calculation profile option to Yes, if you want the application to use the worker's schedule and calendar events from their primary assignment to calculate absence durations. To use this option, you

must first define schedules and calendar events that are relevant to your enterprise and assign them to various levels in your work structures.

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

- To calculate absence duration from the absence start and end dates without using the schedules and calendar events information of an employee, create a basic formula. If you want the absence duration calculation to update automatically each time you change the absence dates, you must set the profile option HR: Absence Duration Auto Overwrite to Yes.

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

Setting up Holiday Pay

Oracle HRMS enables you to record various holiday absences for employees and administer holiday pay and public holiday pay. You can process the holiday pay that the employees accrue based on the different kinds of earnings and remuneration they earn in the holiday accrual year. Oracle HRMS provides you predefined lookups, elements, and fast formulas for processing an employee's holiday pay. Before you can process the holiday pay, you define the holiday allowance percentage for the employee.

1. Enter the holiday pay details of the employee on the Person or Assignment window.
2. Include the relevant secondary classifications that relate to the holiday accruals and deductions on the absence elements.
3. Link the Holiday Pay Accrual Information and Holiday Pay in Fixed Period elements to the required payroll.

See: *Defining Element Links, page 4-29*

4. Run the payroll.

See: *Starting a Payroll Run, page 5-37*

Pensions

Pension Contributions Overview

Pension contributions receive favorable tax treatment and special rules are applicable to such deductions.

Oracle HRMS supports the calculation of the following types of pension contributions:

- **Collective Pension Insurances – Mandatory Occupational**
- **Individual Pension Scheme paid by the Employer**

Oracle HRMS provides the following different pension types for different groups of people:

- **Output Based Collective Pension Insurance:** The yearly deposit for this pension type covers the future pension the members are entitled to, including disability pension, child pension, spouse pension, if this is included in the collective pension insurance.
- **Deposit Based Collective Pension Insurance:** The yearly deposit for this pension type is either a fixed amount or a fixed percentage within certain limits.
- **Supplemental collective life annuity pension:** This pension type provides supplemental coverage for certain employees, for example, employees with a salary exceeding 12G and who thus, do not have coverage for the exceeding amount in the two preceding types.
- **Agreement Based Pension (AFP):** This pension type covers employees in the private sector and the public sector who opt for early retirement (from the age of 62). The government funds parts of this pension in the private sector.
- **Individual Pension Scheme Paid by the Employer:** The employer can pay the employees premium (or part of it) to individual pension schemes. Such cases are taxable for the employee, and the employer must contribute to NIS based on the premium.
- **Other (user-defined) types:** Users can define their own pension types.

Setting Up Pension Contributions

This topic provides information on how to set up pension contributions.

1. Create a Pension Provider organization and add pension provider details.

See: Entering Pension Providers Details, page 1-26

2. Create a formula for every pension scheme and link it to the appropriate element.

See: Creating an Organization, page 1-16

See: Predefined Elements, page 4-2

Payroll Management

Payroll Definition

Consolidation Sets

Consolidation sets are the means by which you label payroll runs for further processing. This enables you to process the results from more than one payroll in a single action. You need only produce one tape per payment method for several payrolls, one set of reports and one set of costing for the whole set.

You can follow this procedure when scheduling additional runs. These are the runs you make in addition to your regular payroll runs; for example, to pay leavers. You can decide whether to consolidate an additional run with the regular run or switch it to a special set.

Consolidation sets are also used to label assignment sets when you use these for payroll processing. The same choices apply to assignment sets as to payrolls. You can accept the default consolidation set or select a new one when you set the run parameters in the Submit Requests window. You can also change the consolidation set after the run in the Update Payroll Run window.

Changes to a Consolidation Set

Consolidation sets facilitate the selective post-run processing of different payrolls. For example, after processing three payrolls in one consolidation set, you may want to select just one for immediate post-run processing. To do this, transfer the one you want to process to a new consolidation set.

You may also want to retry a payroll while continuing with prepayments for other payrolls whose status is Complete. This too would require a change of consolidation set for the first payroll.

See Assignment Sets, page 5-3

Period Types and Calendars

Since a payroll has only one pay frequency, you must define at least one payroll for each pay frequency you use. The following table shows the valid period types for pay frequency.

Period types and pay frequency table:

Payroll Period Types	Periods per Year
Semi-Year	2
Quarter	4
Bi-Month	6
Calendar Month	12
Lunar Month	13
Semi-Month (not available for UK users)	24
Bi-Week	26
Ten-Day	36
Week	52

Note: For Norway and Swedish users: Only Bi-Month, Calendar Month, Bi-Week, and Week payroll period types are available.

For Spanish users: Only Calendar Month payroll period is available.

Assignment Sets

There are three uses of assignment sets in Oracle HRMS:

- You can run a QuickPaint report for a set of assignments, rather than individual assignments.
- You can process subsets of the employees assigned to a payroll. Normally you initiate payroll runs and other post-run processes for one or more payrolls at a time. However, if you need to process smaller groups within a single payroll, you define an assignment set.
- You can use a BEE concurrent process to create an identical batch line for each assignment in an assignment set.

There are three ways to define the set:

- You can enter selection criteria, which the system generates into a formula. When

you use the assignment set, Oracle FastFormula runs the formula to find the assignments that match the criteria. It checks all the assignments in the business group or, if you select a payroll when you define the set, all the assignments to that payroll. When you define the set you can also include or exclude individual assignments to modify the set created by the formula.

Important: To define an assignment set for a benefits eligibility profile, you must enter information about the person to be included or excluded in both the Amendment and Criteria windows.

See: *Defining an Assignment Set Using Formula Criteria, Oracle HRMS FastFormula User Guide*

- You can select individually all the assignments you want to include in the set.
- You can start from a full set of all the employees in the Business Group or all the employees assigned to a selected payroll. Then you can exclude individual assignments from the set.

See: *Defining an Assignment Set by Including or Excluding Assignments, Oracle HRMS Enterprise and Workforce Management Guide*

Defining a Payroll

Use the Payroll window to define a payroll, including its calendar and valid payment methods.

To define a new payroll:

1. Set your effective date to a date early enough to handle any historical information you want to enter. Your effective date must be on or before the first period start date of the payroll calendar.
2. Enter the payroll's name and select its period type from the list.
3. Enter the end date of the payroll's first period, and the number of years for which the system should initially generate the payroll's calendar. You can increase this number later to generate additional years.

Note: Be aware that some processes require the calendar to extend into the future. For example, the PTO Carry Over process requires payroll periods extending to the end of the new accrual term.

When you enter the First Period End Date, make sure that the corresponding start date of the first period is after the start date of the payroll.

Additional Information: The Reset Years field is available if you have set the profile option PAY: Display Reset Years in Payroll to Yes. The field signifies the years after which the period start of the next corresponding year would be reset. This field cannot be greater than the number of years.

4. In the Date Offset region, you can change the zero default to a negative or positive number of days before or after the period end date. For example, for a semi-monthly payroll, the Cut Off date can be 3 days before the period end date (-3), while the Scheduled Run and Check dates can be 5 and 7 days after this date, respectively. You can also set the Payslip offset to determine when employees can view payslip information.

Note: For India users only : You can calculate and deduct taxes from employees on the date salary is paid to the employee instead of date earned, thereby supporting payroll earned with a date paid in future (from March to February instead of April to March) by using a positive offset.

Note: Australia, China, Hong Kong, India, Japan, Korea, Singapore, and New Zealand users: You can set the payslip offset to determine when employees can view their payslip information.

- The Check Date, sometimes called Pay Date, is the date of constructive receipt of pay, on which paychecks become negotiable.
- The Scheduled Run Date is the date scheduled for the Regular run of this payroll each period.
- The Cut Off date, included for your reference, is the final date for entering or changing payroll information before a run.
- A payslip offset, reckoned from the completion date for your payroll processes is always a positive number to enable you to prevent employees from viewing payslips before the official payment date. For example, if the payroll processes complete on 15th May, and employees do not receive payment until 20th May, you can enter an offset of 5 to align the payslip date to the payment date.

These offsets are the defaults for the calendar. You can manually make date changes in the calendar (such as when an offset date falls on a weekend or holiday, by choosing Period Dates).

5. Select a default payment method for employees who have no valid personal payment method. You cannot select a method using magnetic tape because this

requires information about employees' bank accounts.

6. Select a default consolidation set for this payroll. One consolidation set is created automatically when you define your Business Group. Oracle Payroll users can create other consolidation sets for payroll processing.
7. In the Costing region, you can enter information about the ledger and suspense account holding costing information for this payroll.

The information you enter here depends on the setup of your Cost Allocation key flexfield.

See: Setup of the Cost Allocation Key Flexfield, *Oracle HRMS Enterprise and Workforce Management Guide*

8. Check the Negative Payment Allowed check box if you want the PrePayments process to include negative payments. If you leave the box unchecked, the PrePayments process ignores negative payments.
9. Check the Multiple Assignment check box if you want an employee to receive a single payment, for multiple assignments carried out within your organization. However, if a PrePayments process, which runs prior to your effective processing date, already exists you cannot go back and change the Multiple Assignment check box. This box is only visible if the functionality is enabled for your localization.

Note: If you check the Multiple Assignment check box, make sure it remains checked throughout your payroll processing. Oracle Payroll reports in error if some of your payroll processes support multiple assignment processing and others do not.

10. If you are an Oracle Payroll user, enter the Statutory Information field to open the Statutory Information window.

Your Oracle localization team may have created fields in this window.

Note: The Statutory Information field is not visible if your HR:User Type profile option is set to HR User.

11. If the Payslip Modeler is enabled for your localization, then you can set locking period for payslip modeling. This restricts users from making updates to payroll information while modeling their payslip during a mock payroll run during the specified period.

Note: Payslip Modeler is not available by default. Check with your system administrator if Payslip Modeling is available for your

localization.

12. You can specify the Availability Rule whether to disable the functionality days after the period start and days prior to the End date or enable the functionality between the days from start and before the period end date. Specify the number of days prior to and after a specified date when can you make changes for modeling/simulating the payslip.

Note: You cannot make any changes beyond the days specified here for payslip modeling.

13. **For India users only:** Click in the Further Payroll Information field and specify Yes in the March Salary paid in April field, if you want to enable processing of payroll of two periods in a single month.
14. **For Korea users only:** Click in the Further Payroll Information field and specify the exemption amounts. By default, the application uses the TRUNC function for tax calculations. Specify Yes if you want the application to use ROUND function instead of TRUNC function for tax calculations.

Specify if you want to adjust the amounts for standard tax breaks.

Specify if you want to enable reprioritization of pension related amounts as the last priority within the calculation category.

For Japan users only:

Click in the Further Payroll Information field and specify the following information

- income tax dependent reference type
 - social insurance premium collection type
 - user defined year end adjustment formula
 - Hi Wp Monthly Remuneration Synchronous
 - Geppen Santei Process Date (MMDD)
 - Print Personal Number
15. Save your work.
 16. Save your work.
 17. Choose the Period Dates button to view the calendar generated for your payroll. In the Period Dates window:

- You can view the default offset dates for every period, and you can manually override any of these dates in any record.
- You can change the payroll's default *Open* status in any period to *Closed* to prevent further element entries. You can also reopen the period if necessary.

Important: Use this feature with caution. When you perform certain important tasks in Oracle HRMS, the system may automatically create or delete element entries. These tasks include hiring and terminating people, and updating assignments. You cannot change any element entries that span a closed payroll period, and so you may be prevented from performing these tasks.

18. Choose the Valid Payment Methods button to add valid payment methods for this payroll.

In the Valid Payment Methods window, the default payment method for the payroll appears automatically. You can add other methods. First set your effective date to the date you want the method to become valid.

Note: An employee assigned to this payroll can have any number of personal payment methods chosen from those you enter here for the payroll.

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

Related Topics

For more information about using the payslip modeler, see the *Oracle Self-Service Human Resources Deploy Self-Service Capability Guide, Payslip Modeling (UK)*.

Payments and Distributions

Cash Management and Oracle Payroll

Oracle Cash Management manages and controls the enterprise cash cycle. The Cash Management auto reconciliation matches Oracle Payroll against bank statement lines if the transaction meets the following criteria:

- The Oracle Payroll payment number matches the statement line payment number.
- The Oracle Payroll payment amount matches the statement line payment amount.

Cash Management accesses a view of payments generated by Oracle Payroll and compares it against the information on the bank statement. This process generates error messages on mismatched transactions.

Each time a new payment method is created, the bank details transfer to Oracle Accounts Payable. When defining a payment method, you must enter the GL Cash Account field to work with Cash Management.

Important: Because payment method details are passed to Accounts Payable from Payroll, it is important to ensure that you are entering this information correctly. If you inadvertently enter incorrect details, you could end up with reconciliation issues later.

Cash Management is available only for the Payroll payment methods of checks/cheques and electronic fund transfers (such as NACHA in the U.S, Direct Deposit in India).

Important: If you want to use Cash Management fully, you must install Oracle Accounts Payable and Oracle Accounts Receivable due to the interdependency of the products. All accounting functions take place in Accounts Payable and Accounts Receivable, and Cash Management provides the engine for reconciliation and forecast.

Online Payslip

The Payslip module enables self-service users to view their electronic payslip for a pay period. Users can select what pay period to view from a list of values showing the Pay Dates, or by clicking on the *Next* or *Back* button.

Note: All columns and fields in the Online Payslip function are display only.

The Payslip is generated from the user's assignments. If there are multiple paid assignments for a user, the user can select the required assignment. Once the user has logged into the application and clicks on the View Payslip option, the user sees an electronic version of their payslip based on their selected assignment and the last pay period that has been processed.

If Multiple Assignment Payments functionality has been enabled for your localization, you have the option of combining the checks for multiple assignments into one pay check. In this case, the online payslip will show the combined totals for all assignments.

Viewing Online Payslips as a Payroll Professional

Using the Payroll Professional responsibility you can select the Payslip Details link and search for a person. When you select a person from the list, their payslip will be displayed. You can also save a person in My List for future access, so you do not need to search for that person again.

In addition to displaying payslips for current employees, you can also display online payslips for ex-employees. To search for ex-employees, you use the Person Type field in the Advanced Search page and select the person type Ex-Employee.

For more information on the function parameter used to enable the Ex-Employee Search, see: Menu Function Parameter Descriptions, *Oracle Self-Service Human Resources 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 V5.1	Payslip V5.1
Payroll Professional	Employee Search (with Ex-Employee Search enabled)

See: Defining Menus for SSHR, *Oracle Self-Service Human Resources 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.

HR: Mask Characters - South Africa only

You can use this profile option to set the number of characters or digits to display in numbers such as bank account or credit card numbers.

Configuration Options

To set up a payslip for your employees to view online.

See: Setting Up Payslip Information and Generating Payslips, page 5-20

To view an employee's statement of earnings.

See: Viewing Statement of Earnings, *Oracle HRMS Payroll Processing Management Guide*

Defining a Payment Method

Use the Organizational Payment Method window to define payment methods for your enterprise.

From this window, you:

- Supply the name and starting date of your payment method.
- Enter the details of the source bank account from which your enterprise makes the payment.
- Specify the General Ledger (GL) accounts that hold reconciliation and error details for the payment method.
- Handle costing for the payment method. For example, you can specify whether to transfer the costs to GL and whether costing applies to cleared payments only, uncleared payments only, or a combination of cleared and uncleared payments.
- Confirm that your source bank account in Oracle Payroll is the same bank account that Oracle Cash Management uses to clear your payments. This confirmation assures you that you are operating with a single consistent bank account rather than with duplicate accounts that introduce accounting errors.

To define a payment method:

Supply a name and start date for your payment method

1. Set your effective date so that it reflects the date when you want to begin using this payment method.
2. Enter a name for the payment method, and select the payment method type.
For a third-party payment method, always select the type Check/Cheque. The default currency for your business group appears automatically.
3. If an alternative currency exists for your payment method, select it.
4. If your payment method controls payments to a third party such as a benefits carrier or garnishment receiver, check the Third Party Payment box.

Enter the source bank details for your payment method

5. Navigate to the Source Bank tab. The Country for your source bank account appears automatically.
6. Enter the Bank Details field to open the Bank Details window. Enter information about the account from which your enterprise intends to make payments.

If you are using Cash Management, include the following information:

- Account Name
- Account Type
- Account Number

- **Bank Name:** If this already exists, enter the name exactly as it appears in Accounts Payable.
- **Bank Branch:** If this already exists, enter the name exactly as it appears in Accounts Payable.

Italy Users: You can enter the Bank Name, Bank Location, Account Number, and Account Name. The IBAN Account displays by default.

Ensure that you enter any additional bank details that are specific to your enterprise. For example, bank details for U.S. payment methods always require a transit code. The transit code, or transit routing number is the nine-digit number that identifies the financial institution. If the transit code is incorrect, the funds will not be posted to the account.

South Africa Users: Enter the account holder's name and indicate whether the account holder relationship is joint, own, or third party.

Belgium, Denmark, Finland, France, Germany, Hungary, Ireland, the Netherlands, Norway, Poland, Russia, Spain, and Sweden users: Enter the Bank Identifier Code (BIC) and International Bank Account Number (IBAN) in the Bank Identifier Code and the IBAN Number fields, respectively. Note that you must enter at least one of the account numbers, that is, either the International Bank Account Number (IBAN) or the Account Number. If you enter the Account Number, then the Bank Code and Branch Code fields are mandatory.

Warning: Always review the account setup for Oracle Accounts Payable before you define the account in Oracle Payroll. The details for your Payroll account must exactly match the account details in Accounts Payable. Otherwise, Accounts Payable creates an extra account with marginally different details. This duplicate account introduces errors when you reconcile payments between Payroll and Accounts Payable.

Specify what type of payments to cost for this payment method

7. Navigate to the Costing tab. Each check box indicates a particular type of payment. Check the boxes for each type of payment that you want to cost. When you subsequently run the Costing of Payment process, it costs each type of payment as you have indicated. The entries that you make for an individual check box can imply automatic checking of related boxes. Your choices are:
 - **Cost Payment:** Check this box to specify that you want to cost only uncleared payments for this payment method.
 - **Cost Cleared Payment:** Check this box to specify that you want to cost only cleared payments for this payment method. If you check this box, the Cost

Payment box is also checked by default.

- **Cost Cleared Voided Payment only:** Check this box to specify that you want to cost any voided payments that have also been cleared by Oracle Cash Management. If you check this box, the Cost Payment and Cost Cleared Payment boxes are also checked by default.
- **Exclude External/Manual Payment:** Check this box to exclude any external/manual payments from costing. This exclusion is useful if you are using this payment method as a dummy payment method to cancel a previous payment, or if you are making a payment by cash. If you check this box, the Cost Payment box is also checked by default.
- **Transfer to GL:** Check this box to specify that costed payments should transfer to General Ledger. If you check this box, the Cost Payment box is also checked by default.

Specify the GL accounts for this payment method

8. Navigate to the General Ledger tab.
9. Select Ledger to indicate the ledger to use if you intend to reconcile payments using Oracle Cash Management.
10. Select the GL Control Account.
11. Select GL Cash Account to indicate which cash account to use for the reconciliation of payments.

The entry for Description appears automatically by default, depending on what you enter in the GL Cash Account details.

12. Select the Cash Clearing Account.
13. Select the Error Account.

When you first specify the GL accounts for a bank account, these then become the default GL accounts for any other payment methods that use the same bank account. The defaults apply for all new payment methods using the bank account. They also apply retrospectively for any existing payment methods that were already using the same account. However, you can override these defaults by entering your preferred GL accounts on the General Ledger tab.

At this point, check that your Payroll setup and Cash Management setup are fully integrated.

Confirm that you can reconcile payments in Cash Management

14. Navigate to the Cash Management tab. You cannot change the information on this

tab, but you can confirm that your GL accounts are correct.

15. To confirm that Oracle Cash Management is operating with the same source bank account that you are using in Oracle Payroll, view the check box. If the box is checked, then Oracle Cash Management holds the bank account for this payment method, and you can reconcile payments knowing that you are using an identical account in Payroll, and in Cash Management.

However, if the box is not checked, this indicates that Oracle Cash Management does not hold the details for your Payroll account. This may indicate that duplicate accounts exist and you should exercise caution when you reconcile your payments.

Map the Payee organization to make third party payments

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

Enter further information for the payment method

21. Enter further information to determine how to process this payment method. Click in the Further Information field to see the range of further information for your enterprise.

For Japan users only: Enter the company code and company name. Select the delimiter type for the Direct Deposit file.
22. **For Norway users only:** Enter values for the following fields to define the payment method level. (The same payment type supports the ISO20022 and older Telepay process).

Field	Description
Initiating Party Name	Enter the name of the known party.
Sender ID	Enter the initiating party ID. This unique organization identification is assigned by an institution using an identification scheme. Typically, this is the customer-ID in the debtor bank based on the <i>Bronnøysundregistrene</i> and their Central Coordinating Register of Legal Entities, or other identification arranged with the bank.
Scheme Name	<p>Enter the code for the identification scheme as published in an external list. The options are BANK and CUST:</p> <ul style="list-style-type: none"> • BANK: Debtor/creditor relates to a sub-level agreement under the main agreement (a bilateral agreement between a customer and a bank) regarding a special service or subsidiaries or divisions. When the scheme name is BANK, the Sender ID should have a Customer Service ID assigned by the bank. • CUST: Debtor/creditor relates to the main-agreement with the financial institution. When the scheme name is CUST, the sender ID should be the organization number of the initiating party.
Batch Booking	<p>Indicate whether [the requestor] has requested a single entry per individual transaction or a batch entry for the sum of the amounts of all transactions within the group of a message. The options are:</p> <ul style="list-style-type: none"> • No: Single Booking requested. • Yes: Batch Booking requested. This default value is Yes. <p>Note: The Yes and No values are reflected in XML as true and false.</p>

Field	Description
Service Level Code	<p>The service level code specifies a pre-agreed upon service or level of service between the parties as published in an external service level code list. Select one of the following options:</p> <ul style="list-style-type: none"> • NURG (Non-urgent Payment): Select as the default. • SDVA (Same Day Value): Intercompany only (not for salaries). • SEPA (Single Euro Payments Area) • URGP (Urgent Payment): Only suppliers (SUPP) but not for salaries.
Payment File Format	<p>This field indicates which supported payment file format and process are in use. The supported processes are Telepay and ISO 20022.</p> <ul style="list-style-type: none"> • Telepay: Indicates that the older file format and process, the Norwegian Payment Process, are in use. This is the default value if the field is blank. If this value is set, and you run the newer ISO20022 process, then an error occurs. • ISO20022: Indicates that the ISO 20022 file format and process are in use. If this value is set and you run the older Telepay process, the following error message appears: <i>Bank file format processed is not according to specified set up on Payment method.</i> <p>Note: If you see this message, you must roll back the error process before running the new process.</p>
Payment Identification ID	<p>The payment identification ID is a reference assigned by a sending party to identify the payment information block within a message.</p>

Field	Description
Payment Method	Select one of the following values to specify the payment type to use for transferring the funds: <ul style="list-style-type: none"> • CHK: Cheque • TRF: Credit Transfer. This default value is TRF.
Debtor Name	Enter the name of the debtor party.
Debtor ID	The debtor ID is a unique identifier assigned to a debtor organization by an institution using an identification scheme.

Setting Up 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 1-23*

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 1-24

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.

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 than 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.

Setting Up Payslip Information and Generating Payslips

You need to identify any additional information you want to appear on your payslips using payslip balances and elements. Once you have identified the information to archive and display, run your regular payment and archive processes and generate

your payslip for printing or viewing online.

To set up your payslip:

1. Select the payslip balances and elements to be included in your payslips.

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

For UK, Netherlands, and South Africa: Enter the information balances and elements through the following:

See: Identifying Balances for the Payslip, *Oracle HRMS Enterprise and Workforce Management Guide* and Identifying Elements for the Payslip, *Oracle HRMS Enterprise and Workforce Management Guide*

For Ireland: Enter the balances and elements information in the SOE Balances and SOE Elements windows.

See: Selecting SOE Balances, *Oracle HRMS for Ireland Supplement* and Selecting SOE Elements, *Oracle HRMS for Ireland Supplement*

2. For online payslips, enter self-service preference information to indicate how you want to view them. You can specify these settings at the organization, location, and person levels.

See: Entering Self-Service Preference Information, *Oracle HRMS Enterprise and Workforce Management Guide*, Location Extra Information Types, *Oracle HRMS Enterprise and Workforce Management Guide*, and Person Extra Information Types, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

3. Configure your online payslip to view through Oracle Self-Service.

See: Online Payslip, page 5-9

US, Canada, Mexico, and UAE only: Oracle Payroll uses an RTF template to produce the online payslip through XML Publisher. You can use the default template or create your own.

See: Oracle XML Publisher Administration and Developer's Guide and Oracle XML Publisher Report Designer's Guide.

For Ireland: To include the regular payment date of the payroll period in your online payslip, set the Visible property of the Regular Payment Date field to Yes.

4. **US, Canada, Mexico, and UAE only:** Oracle Payroll provides the ability to customize the content of your employee payslips to suit your business needs. Prior to making any changes, however, you should review the default content to best determine what changes you require. See: Payslip Region Information, *Oracle HRMS Payroll Processing Management Guide (Mexico)*

To change balances or include additional balances on the payslip:

1. From the Total Compensation menu, select Basic and then Balance.
2. Query for the element whose balance you want to add, and click Attribute.
3. Click on a new row under Attribute, and choose the attribute you want to display from the list of values. This represents where the current balance will appear on the payslip.
4. Choose a dimension from the list of values.
5. To delete an entry, select the row and click Delete.
6. Save your changes.

Note: These changes do not take effect on the payslip until you rerun the Payroll Archiver Process for the affected payroll period.

Generating the Payslip

You must have completed the payroll runs, prepayments, and payment processes prior to generating the payslip.

5. Run the archive process to gather the latest payroll information.
See: Extracting Information to Appear on the Payslip, page 5-23
6. You can view the payslip online through Self-Service.
7. Print your payslips in the usual way. Users in the Netherlands and China, run the payslip report to produce a formatted report ready for printing and sending out to your employees.
See: Printing the Payslip, page 5-24
8. **US and Canada only:** Oracle Payroll provides the flexibility to choose the way annual salary is calculated and reported on the Online Payslip (both HTML and PDF). This flexibility is available through the HR: Base Annual Salary Display on Standard Work Conditions profile option.
See: Defining the Profile Option for Pay Annualization, *Oracle HRMS Payroll Processing Management Guide (US)*

Running the Norwegian Bulk Payslip Report

You can generate the Norwegian Bulk Payslip Report for a single employee or by an assignment status. For example, you can generate separate reports for terminated employees and active employees if needed. The default is to generate the report for all

the employees with the payroll selected.

Prerequisites

- Run the pre-payments, payment, and archive processes before running the Norwegian Bulk Payslip Report.

To run the Norwegian Bulk Payslip Report:

1. Navigate to the Submit Request window.
2. In the Name field, enter Norwegian Bulk Payslip Report.
3. Enter the values for the following parameters:
 - Payroll: Select the payroll to be run for the report.
 - Consolidation Set
 - Assignment Status: Select the assignment status. The options are Active, All, or Terminated.
4. Click **OK**, and then submit the request.

Extracting Information to Appear on the Payslip

You run the payslip archive process to extract and gather relevant information to appear on your employees' payslips. The archiver accesses the payslip information for the dates you select and copies the information across to storage archive tables, where it is picked up and converted into a format for printing and distributing to employees or for viewing online through the self service application.

Run this process after each payroll period to enable Self-Service. You must complete the payroll runs, prepayments, and payment processes before you can run the payslip archive process.

Netherlands, US, and Mexico only: If you are producing paper reports, use this process to view your current payslip.

Run the payslip archiver from the **Submit Request** window.

To run the payslip archiver:

1. Select your country's payslip archive process in the **Name** field.

China and Netherlands: Select the Payslip Archiver.

India: Select the Payroll Reports Archive (India).

Ireland: Select the IE Legislative Reports Generator. See: Running the Legislative Reports Generator, *Oracle HRMS for Ireland Supplement*

Mexico: Select the Payroll Archiver. See: Managing the Payroll Archiver, *Oracle HRMS Payroll Processing Management Guide (Mexico)*

South Africa: See: Pay Advice Generation - Self Service (South Africa), *Oracle HRMS for South Africa Supplement*

UK: See: Payslip Generation Self-Service, *Oracle HRMS Payroll Processing Management Guide (UK)*

US and Canada Payroll: If required, you can set the PAY:Show Payslip with Zero Net Pay profile option to archive the payroll data and generate payslips for those employees receiving a net pay amount of zero.

For US, see: Managing the Payroll Archive, *Oracle HRMS Payroll Processing Management Guide (US)*

For Canada, see: Running the Canadian Payroll Archiver, *Oracle HRMS Payroll Processing Management Guide (Canada)*

2. In the **Parameters** window, select a payroll name and consolidation set. This selects the employees for whom you want to run the report. When you select a payroll, the default consolidation set is displayed.
3. Enter the start and end dates for the period of time you want the information extracted. You typically run this process for the same dates you ran your payroll.
4. **India:** Select whether you want to mail individual payslip or view consolidated payslips in the Generate Payslip field.
5. Choose Submit.

After running the Payroll Archiver, you can use the Payroll Actions Not Processed report to see what employees (and corresponding payroll processes) were not archived but did fall within the report's parameters.

Printing the Payslip

You can generate your payslips to be printed and distributed to your employees using a report that picks up the payroll information you extracted previously through the payslip archive process, and converts it into a formatted file ready for printing. The payslip consists of a header and a body section, with the information you enter in the Parameters window appearing on the header page and the payslip figures in the main body.

You run the payslip report from the Submit Request window.

To run the payslip report:

1. Select your country's payslip report in the Name field.
2. In the Parameters window, enter the start and end dates for the period of time you want the report to cover. You run the report for the same period as the payslip information extracted by the payslip archiver.
3. In the Parameters window, select a payroll, consolidation set and assignment set. This selects the employees for whom you want to run the report. Selecting a payroll overrides the consolidation set and processes the report only for the selected payroll. You can opt to select just a consolidation set, but cannot do the same with the assignment set.
4. The Sort Order fields that appear on the header section of the payslip enable you to divide the payslips into areas of your choice. For example, the current defaults divide the payslips into Person Info 1(Employer), Organization and Full Name areas. You can change the default values that appear by selecting another item from the list of values, selecting information about Additional Employee Details, Address Details, Payroll Information and Employee Details.
5. Choose the Submit button.
6. Choose the View Output button to view or print the payslip report file.

Running the Norwegian Payment File Program

Use the Norwegian Payment File concurrent program to initiate a payment order. This program provides information to financial institutions about making payments including instructions about transferring a specified amount in a specified currency to a particular receiving account. Its use depends on an agreement between the bank and customer.

Important: The Norwegian Payment File concurrent program complies with the Customer Credit Transfer Initiation message standard (pain 001.001.03). The payment type *NO Payment Process* supports both the older Norwegian Payment Process (Telepay) and the ISO20022 process.

This program uses a magtape (magnetic transfer) process to generate two output files:

- .mf file (XML format)
- .out file (Report format)

To run the Norwegian Payment File program:

1. Navigate to the Submit Request window.
2. In the Name field, select Norwegian Payment File.
3. Enter values for the following parameters:

Parameter	Description
Payroll	Select the payroll. All employees with a positive net pay and with the selected payroll will be picked up in the process.
Consolidation Set	The value for the Consolidation Set parameter appears after you select the payroll.
Start Date	Enter the Start Date of the process from which employees with payroll/pre-payments run to be picked up.
Effective Date	Enter the effective date.
Payment Method	Select the payment method. Employees with the payroll selected above and with the specified payment method (the personal payment method that is set at the employee level) attached will be included in the process. Note: The Payment Method must be of payment type <i>NO Payment Process</i> .
Payment Date	Enter the date on which the payments are to be processed.
Category	Select a payment category: <ul style="list-style-type: none">• Salary: Salary Payment. Transaction is the payment of salaries. Set as the default value.• Pension: Pension payment.
Assignment Set	To generate the report for a set of employees under a legal employer, create an assignment set with the set of employees and run only for that set.

4. Click **OK**, and submit the report.

Payroll Statutory Deductions and Reporting

Tax, Statutory Deductions, Involuntary Deductions, and Employer Contributions Information

Oracle HRMS supports the following statutory deductions:

- Income Tax
- Support Orders
- Tax Levies
- Union Dues
- Seaman deduction for employees working at sea.
- Employer Contributions

Income Tax

An employee tax card indicates the amount of tax that the employer withholds from the employee's wages. You can use these tax cards:

- Tax Table Card
- Tax Percentage Card
- Tax Free Card
- Tax Free Card with Threshold

You can upload tax cards to Oracle HRMS when your tax authority sends updated tax cards for an employee.

See: Uploading the Tax Card, page 5-30

Oracle Payroll supports the following types of earnings for income tax calculation:

- Regular earnings such as salary
- Supplemental earnings such as overtime pay and bonus
- Benefits in Kind subject to withholding tax such as company car
- Expense reimbursements subject to withholding tax such as car allowance

- Travel Expenses
- Pensions paid by the employer

See: Setting Up Income Tax, page 5-28

See: Setting Up Benefits in Kind, page 4-41

See: Setting Up Travel Expenses, page 4-40

You can pay all your employees simultaneously. Oracle HRMS generates a payment file to send to the employer's bank for electronic transfer of funds from the employer's bank account to the employees' accounts.

See: Setting Up Electronic File Transfer, page 5-40

Support Orders

Employers are responsible for making regular deductions from the salary of employees who incur support orders as wage attachments. Oracle Payroll enables you to manage these deductions and also make payments to the relevant third-party organization, such as the courts.

See: Setting Up Support Orders, page 4-40

Employer Contributions

You can calculate employer contributions to the national fund. Such contributions are based on salary and wages of employees.

See: Setting Up Employer Contributions, page 5-33

Setting Up Income Tax Deduction

Oracle HRMS supports the capture of the provincial tax office name and address as well as bank account details to enable the employer to transfer the tax deductions correctly.

Oracle HRMS also enables you to request and upload employee tax information from the tax authority. The application extracts the tax information for each employee assignment.

1. Create your tax authority as a third-party Payee organization to whom you pay taxes.

See: Organization Classifications, page 1-4

See: Setting Up Norwegian Organizations, page 1-15

2. In the Element Entries window, select the elements you have created to complete the information for the employee.

See: Making Manual Element Entries, page 4-32

3. Link the Tax element to your payroll.

Note: You have the option to link the Tax Days Override element to the payroll if you need to prorate the tax days for employees having earning-periods that diverge from the payroll period. This case could be for the employees who join or leave some time during the payroll period, or employees going on or returning from absence-related leave.

See: Defining Element Links, page 4-29

4. Attach the Tax element to all employee assignments. Attach the Tax Card element to the employee's primary assignment only.

Note: If you link the Tax Days Override element to the payroll in the previous step, then you attach the same element to the employees for whom you want to prorate the tax days. This is applicable for employees with table-based tax cards only. After attaching the element to the employee, you select this element in the Element Entries window. Next, you select the Earnings Period value and enter the Earnings Period Multiplier value for the employee through the Entry Values tab. The Norwegian withholding-tax rules specify these values depending on the earnings period of the employee. For example: For earning periods between 18-24 days, you can use the week table for 1/3 of the Tax Deduction Basis to calculate the tax and then multiply the calculated tax by three. Therefore, you select Week Table in the Earnings Period field. Also, you enter 3 in the Earnings Multiplier field.

5. Upload the tax card details into your application.

Note: Depending on updates from the tax authority, you may have to change or correct the tax information for a particular employee. To do this, you can update the tax information manually using the Tax Cards User Interface. Ensure you do this using datetrack in the *update* mode, else you could reset all tax balances and lose all previous tax information for the employee. The Tax Cards User Interface enables you to enter data for a tax card in both the Tax and Tax Card elements through the same page, which opens in a browser and performs various validations on the data you enter.

Note: Once you upload the tax card information correctly, the

application extracts the employee tax information and stores it in the available elements.

See: Uploading the Tax Card, page 5-30

Uploading the Tax Card

You run the tax card requisition process to create the flat file that the tax authority requires. You can then upload the completed electronic tax cards that your tax authority provides in the flat file format.

If an existing employee receives a new tax card during the tax year, you must update the existing tax card in Oracle HRMS.

Primary Employer Designation

On the RF-1211 tax card inbound file upload that tax authorities send to employers, the TABLE CARD FLAG provides information if more than one employer has requested tax table card information for the same person (meaning that the person has earnings from more than one employer). If a person is employed by more than one employer, only the primary employer is allowed to claim a table tax deduction for the related NI-number.

Employers have a legislative obligation to notify the tax authorities of whether or not they are the primary employer for an employee. Each employer needs to consult with their employees to determine who is the primary employer and therefore, eligible to claim the table tax deduction. By default, an employer is designated as primary for each of their employees. To change this designation for an employee:

1. Navigate to the Element Entries window and then to the Entry Values window.
2. Select the tax element associated with the employee.
3. In the Primary Employment field, select No.
4. Save

Note: A non-primary employer cannot use a table tax deduction and must capture this information and use only the percentage information provided for all tax calculations.

1. To run the Norwegian eTaxCard Requisition:

1. In the Submit Request window, select Norwegian eTaxCard Requisition as the Name.
2. Enter the following parameters:

- Legal Employer
 - Requesting Entity
 - Initial Report
3. Click OK and Submit.
2. **To run the Norwegian eTaxCard Upload:**
 1. In the Submit Request window, select Norwegian eTaxCard Upload.
 2. Enter the following parameters:
 - File Name
 - Effective Start Date
 - Batch Name
 - Batch Reference
 3. Click OK and Submit.
3. **To run the Tax Card Requisition process:**
 1. Choose the Single Request option.
 2. Query the Norwegian Tax Card Requisition request in the Submit Request window.
 3. Enter the information for the following parameters:
 - Report Type
 - Start Date
 - Effective Date
 4. Submit the request.
 5. Close the window.
4. **To run the Tax Card Upload process:**
 1. Convert the flat file that you receive from the Norwegian authorities to a text file (with extension .txt).

2. Run the meta-mapper process, if you have not already done so, and place the converted file in a directory readable by the database. This is a system administration task.
See: Running the Meta-Mapper, page 6-2
3. Choose the Single Request option.
4. Query the Norwegian Tax Card Upload request in the Submit Request window.
5. Enter the information for the following parameters:
 - File Name
 - Effective Start Date
 - Batch Name
 - Batch Reference
6. Submit the request.
7. Close the window.
8. Choose the Single Request option again.
9. Query the Data Pump Engine request in the Submit Request window.
10. Enter the information for the following parameters:
 - Batch Name
 - Validate
 - Action Parameter Group
11. Submit the request.
12. Close the window.

Uploading the Tax Table

Oracle HRMS enables you to upload the tax table for a new tax year.

The tax authority provides the electronic tax table in a fixed file format to the employer through a Web site. You upload the tax table information into the application.

To upload the tax table:

1. Choose the Single Request option.
2. Query the Norwegian Tax Table Upload request in the Submit Request window.
3. Enter the information for the following parameters:
 - Data File Name

Note: You enter the name of the tax table file that you receive from the tax authority.

 - Effective Start Date
4. Submit the request.
5. Close the window.

Purging the Tax Table

You can purge old tax table records. You can also use the purge functionality to remove a tax table that you uploaded, for example a new table, for a wrong time period.

To purge the tax table:

1. Choose the Single Request option.
2. Query the Norwegian Tax Table Purge request in the Submit Request window.
3. Select the information for the following parameters:
 - Effective Start Date
 - Effective End Date
4. Submit the request.
5. Close the window.

Setting Up Employer Contributions

Oracle HRMS enables you to calculate the employer contributions to the national fund, based in part on employee's tax card information and the employer's industry type. If you need to process some assignments using the QuickPay functionality, then also you

can calculate the employer contributions.

1. Define the employer's industry type and applicable exemption limit at the organization level.

See: Organizations Classifications, page 1-4

See: Setting Up Norwegian Organizations, page 1-15

2. Define the element you want to use for calculating employer contributions. See: Defining an Element, page 4-17

Note: When defining the element for employer contribution, enable the secondary classification as Subject to Employer Contributions. Because the application processes this element during the Norwegian Payroll Run process, you must ensure you exclude this element from the Norwegian Employer Contribution Run process to avoid duplicate processing.

3. Link the Employer Contribution Information element to your payroll. See: Defining Element Links, page 4-29

Link the Employer Contribution Over 16 G element to your payroll only for the period when you require this element to be a part of the Norwegian Employer Contribution Run process.

Note: When an employee is terminated, the Final Close date must be on or after the year end. This is to ensure that the assignment (which may be terminated before the end of the year) is still available for the calculation of Over 16G employer contributions. For the same reason, you must make an element entry of the Employer Contribution Over 16G Terminated Employee element in the assignment for the final processing at the year end.

4. Run the reimbursement inbound file process before running the payroll.
5. Run the Norwegian Payroll Run process. See: Starting a Payroll Run, page 5-37
6. Run the Norwegian Employer Contribution Run process. See: Calculating the Employer Contribution Amount, page 5-38

Payroll Processing and Analysis

Process Part of a Payroll

Oracle Payroll enables you to run a payroll and conduct post-processing on a payroll that has completed successfully. You can also enter subsequent changes and corrections for a payroll that has not completed successfully.

Oracle Payroll makes use of the following concepts when implementing payroll procedures:

Assignment Sets

Occasions when you need to use assignment sets for the payroll run include:

- You need to process the night shift earlier than the rest of the payroll as they must receive their pay advices the night before the rest.
- You need to process a correction run, as entries were not received in time for the normal run and the overtime must be paid this period.
- You want to process an additional run for a long service award, which the enterprise is presenting as a cheque/check to each qualifying employee.

To fulfil these requirements, you can select from a range of assignments:

- Include all assignments
- Include or exclude individually identified assignments
- Use a formula to include or exclude certain groups of assignments

Consolidation Sets

A consolidation set is a grouping of payrolls that simplify post-run processing and reporting. It enables you to produce a single set of reports, costing results, and other results for all payrolls in a consolidation set. When you run a payroll, make sure that you have named the consolidation set to which the payroll belongs.

Element and Distribution Sets

With a normal payroll run, you would want to include all elements, but for a long service award bonus you would want to include only the bonus element and the statutory elements. You first calculate gross pay for ascertaining the gross amount to transfer into the payroll account. Then you complete the gross to net calculation.

You can select element sets as follows:

- Include all elements
- Include or exclude individually identified elements
- Include or exclude classifications of elements.

Canada only: When creating a Run set, you need to explicitly add the Canadian Tax recurring element to your element set.

US only: When creating a Run set, you need to explicitly add the VERTEX recurring element to your element set.

The predefined elements for Oracle Payroll are processed for every payroll run in which they have been included. The deductions are recalculated using the period totals, the amount already paid in previous runs is deducted, leaving the remainder as the deduction for the new payroll run.

QuickPay

QuickPay enables you to carry out payroll processing for individual employees. You can use QuickPay to pay employees who are leaving and who require payment immediately. If an employee asks what their net pay will be this month, you can run QuickPay to find the answer, then roll it back to remove all results from the database.

QuickPay: Two Options for PrePayments:

Once the QuickPay run has a status of Complete, you have a choice of two options for post-run processing:

- Include the QuickPay in the batch prepayments processing for the assignment's payroll.

Choose this option if, for example, you have a new employee who joins after the payroll run for the current period has taken place. Instead of rolling back the whole payroll and resubmitting it with the new employee added, you run QuickPay instead so that you can include the new employee in the consolidation set for batch prepayments.

- Start the PrePayments process from the QuickPay window, if necessary overriding the default payment method.

Choose this option if, for example, an employee is leaving and is waiting to be paid by cash or cheque/check.

Troubleshooting QuickPay: Concurrent Manager

When you start the QuickPay process, the screen freezes, and you cannot delete or update the QuickPay definition until the process completes.

You may receive one of the following error messages:

- **The process has not started**

This means either that the concurrent manager has not been started, or that there are other requests of a higher priority. Ask your system administrator to start your request or change its priority.

- **The process has started but has not finished**

Ask your system administrator to investigate the reason for this.

Starting a Payroll Run

You start a payroll run in the Submit Requests window.

To run a payroll:

1. In the Name field, select the name of your payroll run process.
2. In the Parameters window, which opens automatically, select the payroll.
3. Select the default consolidation set name for the payroll, then select the current payroll period display.
4. Select a new consolidation set for the run if required.
Use the consolidation set to control post-run processing of the results.
5. Select the payroll period for the run.
6. Select an element set and assignment set if required.
US only: Make sure that you have included the VERTEX seeded recurring element in your element set if you are using an element set.
7. Select a run type.
8. If your legislation supports Regular and Supplemental runs, then select R for a Regular run or S for a Supplemental run.
India only: Select "Bonus" run type for paying bonus.
9. You can optionally enter a message to appear on the statements of earnings for this run if your SOE is designed to support such a message.
10. Choose Submit.

Calculating the Employer Contribution Amount

You run the process Norwegian Employer Contribution Run to calculate the employer contribution amount. You must run the Norwegian Employer Contribution Run after each run of the Norwegian Payroll Run for the same payroll and the same period. The Norwegian Employer Contribution Run always recalculates the full bimonthly period and only posts the difference from any previous runs (in the same bimonthly period). You run this process from the Submit Requests window.

Prerequisites

- Ensure that you have run the reimbursement file process and included it in the payroll run.

To run the Employer Contribution process:

1. Select Norwegian Employer Contribution Run in the Name field.
2. Select the payroll.
3. Select the consolidation and element sets for this payroll.
4. Select Yes if you are calculating the employer's contribution for salaries that fall under the Over 16G category.
5. Choose OK.
6. Click Submit.

Running the PrePayments Process

Run this process when you want to do one of the following:

- Distribute employee pay over more than one payment method using either a percentage or monetary split. You define the amount or percentage to be paid by each method for each employee in the Personal Payment Method window. You can also indicate that payment methods should take account of run types and run types at personal level.
- Override the default payment methods. For example, you may need to run a supplemental payroll for which the distribution between payment methods will be different from that specified for the regular run. When you override the defaults, the payments for the supplemental run only are distributed according to the override payment method that you specify.

- If Multiple Assignments is enabled for your Payroll, the PrePayments process creates one regular cheque for all assignments and one cheque for each separate payment. Assignments must be included on the same payroll in the same payroll period or they will not be included.

Note: The Net Pay from each assignment is deposited into the payment method account for the primary assignment unless the primary assignment is not processed. If it is not processed and the secondary assignment does not have a personal payment method, the employee receives a cheque.

Additional Information: You cannot delete personal payment methods if a PrePayment process is run.

Canada only: The PrePayments process creates different results depending on the setting of the Payroll Archiver Level option, which is set at the business group level. If you set it to "Tax Group," PrePayments consolidates the payment for all GREs of an assignment (which must belong to the same tax group), and Cheque Writer/Deposit Advice generates only one cheque or deposit (this can happen only at the beginning of the year, after running the last payroll for the previous year and before running the first payroll of the current year). If you set it to "GRE," PrePayments creates separate payments for each GRE, and Cheque Writer/Deposit Advice generates a cheque or deposit advice for each GRE.

See: Entering Payroll Archiver Level Information, *Oracle HRMS Enterprise and Workforce Management Guide*

You run this process from the Submit Requests window.

To run the PrePayments process:

1. In the Name field, select PrePayments.
2. In the Parameters window, select the name of the payroll or consolidation set to run the process for.

When you select a payroll, the default consolidation set is displayed.

3. Enter the start and end dates of the time span for the prepayments processing to cover.

Note: If you specify the end date and not a start date, the process automatically uses the start date of the period for the end date you specified.

4. If required, enter an override payment method. The method you select overrides all other payment methods for this processing.
5. Choose OK.
6. Choose Submit

Setting Up Electronic File Transfer (EFT)

You submit employee and payment details to the bank in the form of a bank transfer file.

1. Record the available formula details for the payment method.

Note: You can use the payment type NO Payment Process for direct bank credits and NO Money Order for payment through money orders.

See: Defining a Payment Method, page 5-11

2. Run the payroll process.

See: Starting a Payroll Run, page 5-37

3. Run the pre-payment process.

See: Running the Pre-payment Process, page 5-38

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

See: Running the EFT Process, page 5-40

5. View the output of the EFT file.

Running the EFT Process

Oracle HRMS provides the concurrent program Norwegian Payment Process to run the Electronic File Transfer process.

You run the Norwegian Payment Process from the Submit Request window.

To run the Payment Process:

1. Select the Norwegian Payment Output File in the Name field.
2. In the Parameters window, enter the payment date.
3. Enter the name of the magnetic file.

4. Enter the name of the report file that you want to create for the EFT process.
5. Enter the payroll name.

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

6. Enter the assignment set.
7. Enter the legal employer.
8. Enter the AH Sequence number if you want to override the default number that comes from your previous payroll run.
9. Enter the Sequence Control number if you want to override the default number that comes from your previous payroll run.
10. Enter the name of the division for which you are generating the file.
11. Enter the enterprise number for the legal employer.
12. Enter the password for bank's use.
13. Enter the new password for bank's use if the bank requests a new password or you want to change the existing password.
14. Click Submit.

Running the Acknowledgement Process

Oracle HRMS provides the concurrent program Norwegian Payment Acknowledgement Reply. This concurrent program reads the acknowledgement reply file sent from the bank and creates a log file showing the status of all the payments made through the EFT process, indicating whether they have been accepted or rejected.

You run the Norwegian Payment Acknowledgement Reply process from the Submit Request window.

To run the Payment File Acknowledgement Reply process:

1. Select the Norwegian Payment Acknowledgement Reply process in the Name field.
2. Enter the name of the magnetic file that the bank sends to the employer.
3. Enter the effective date.

4. Click Submit.
5. View the log file through the Requests window to know the status of all the payments you make using the EFT process.

Note: You need to run the payroll again for any employees whose payment attempt produces an error in the log file. You also run the EFT process again for these employees and send the corrected payment details to the bank.

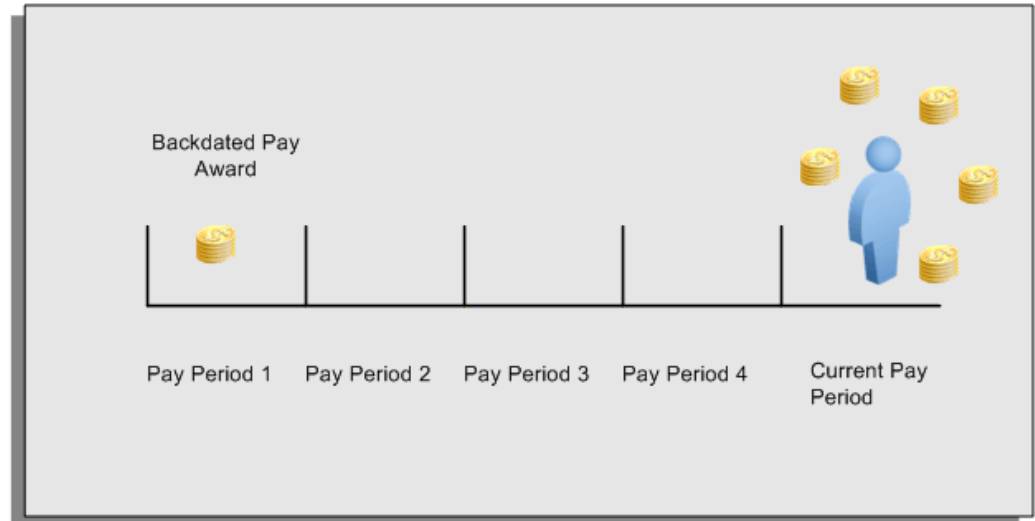
RetroPay Processing

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

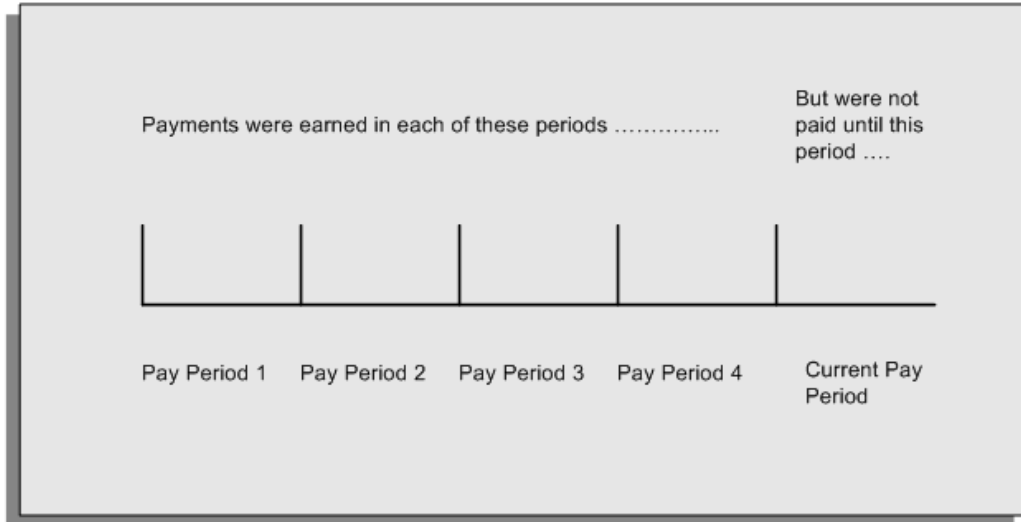


For example, at the start of the current pay period, this employee has a pay award backdated to pay period 1. The employee has not yet received any payments for this award. In the current pay period the employee is entitled to payments that represent the backdated amounts for:

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

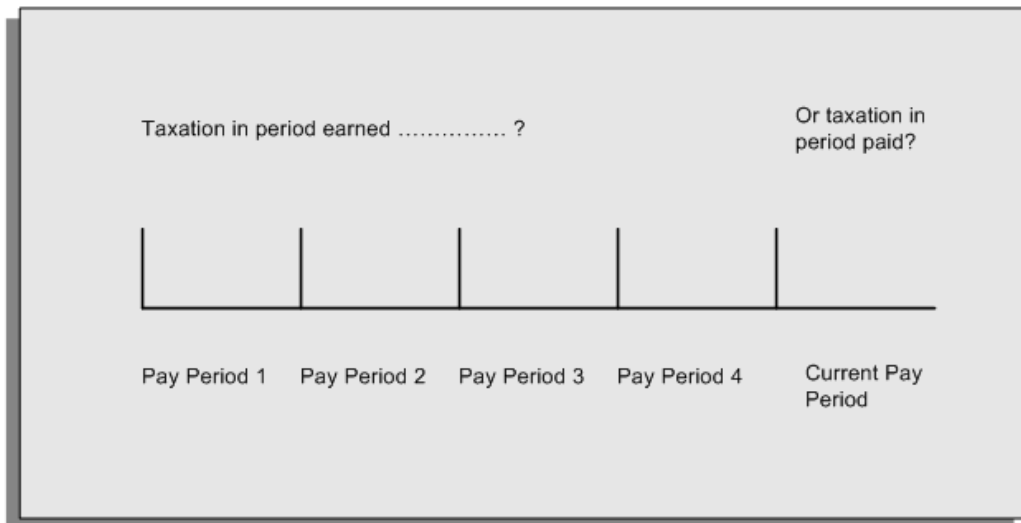
You run your RetroPay process to ensure that the employee receives correct payment when you next run the payroll.

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

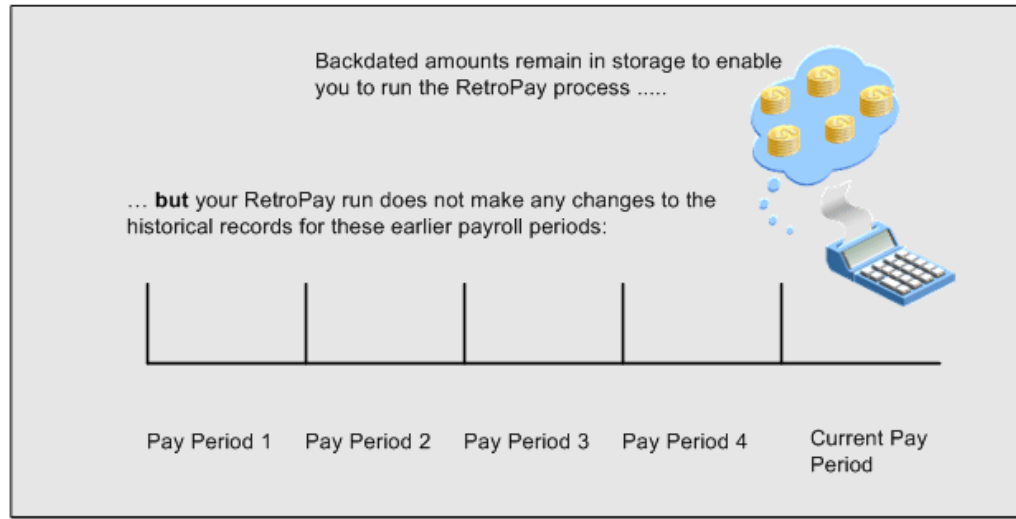


For example, the taxation implications are different for:

- 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.

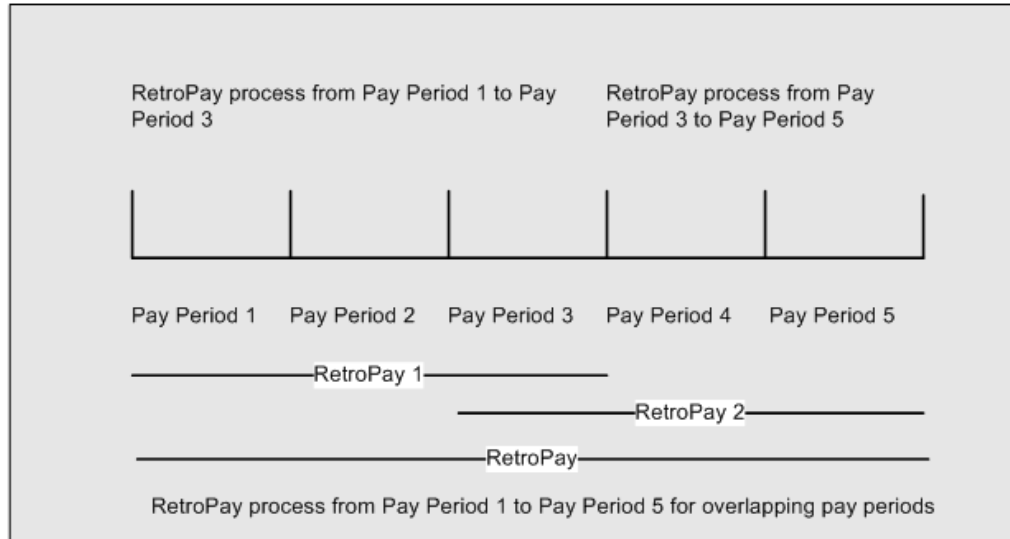
For example, you perform a RetroPay (RetroPay 1) for an assignment in period 3, with Payroll Runs being recalculated from a start date of period 1. In period 5, you perform another RetroPay (RetroPay 2) for the assignment with a start date of Period 3. The second RetroPay detects an overlap of RetroPays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

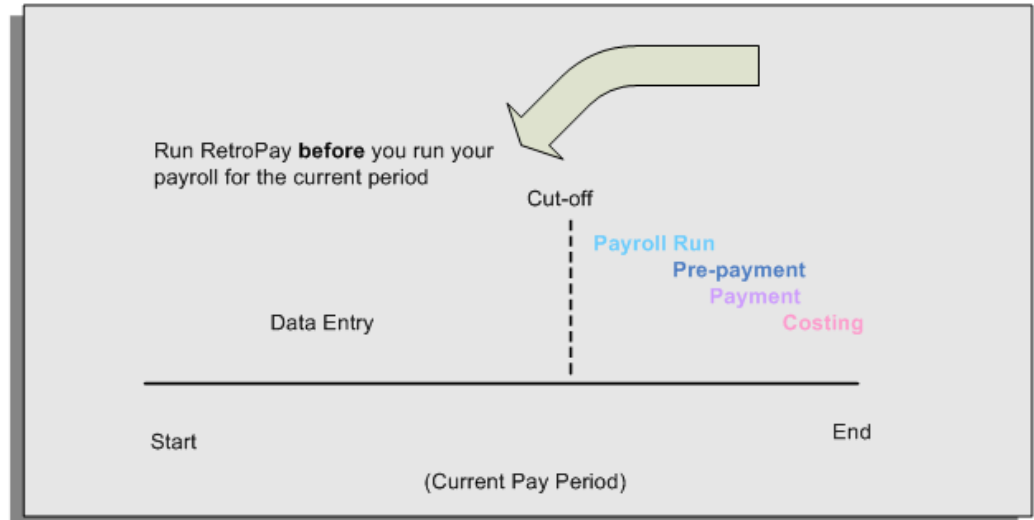
Additional Information: RetroPay Overlap is not available by default for all localizations. To use this feature, localizations must need to enabled it.

For more information on RetroPay Overlap , refer to RetroPay Overlap - A Technical White Paper Note ID 842307.1 on My Oracle Support



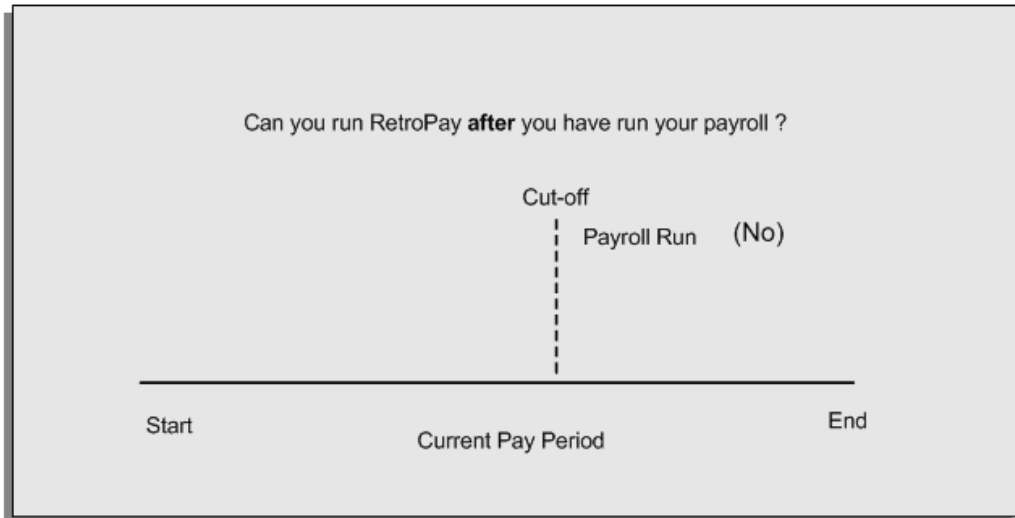
When to Run the RetroPay Process

The RetroPay Process and the Payroll Cycle



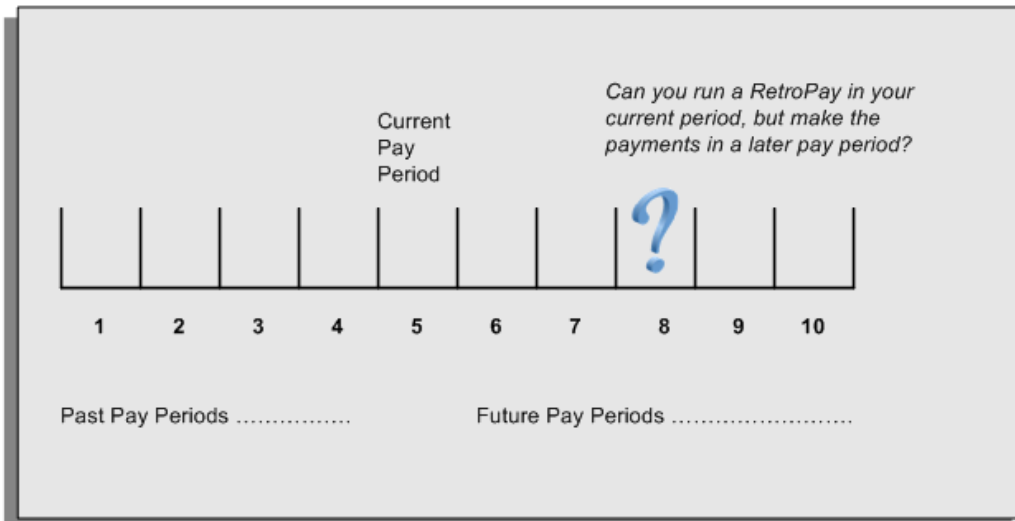
It is important to run your RetroPay process at the correct point in the payroll cycle. Always run RetroPay immediately before you run a payroll, and, for greatest accuracy, as close to the cut-off date as possible. The cut-off date is the point at which all data entry for the payroll is complete.

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.

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_V ALUES_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 retro pay.

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

Setting Up RetroPay Component Usages:

Retro pay 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 Retro Components region of the Retro 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 retro pay for another element.

4. Select the Reprocess Type. If you select Static, then Retro pay 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 retro pay 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 retro pay 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 retro pay element carries forward the retro changes. You must define your retro pay elements and components before defining the element time spans.

Set up the Element Span Usages in the Retro pay 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 Retro pay Elements region, select the appropriate time spans from the From and To fields, to define the time period the retro pay element is covering.
4. Select the retro pay elements you created from the Retro pay Element field.
5. Save your work.

Setting Up Overlapping RetroPay Using Balance Adjustments

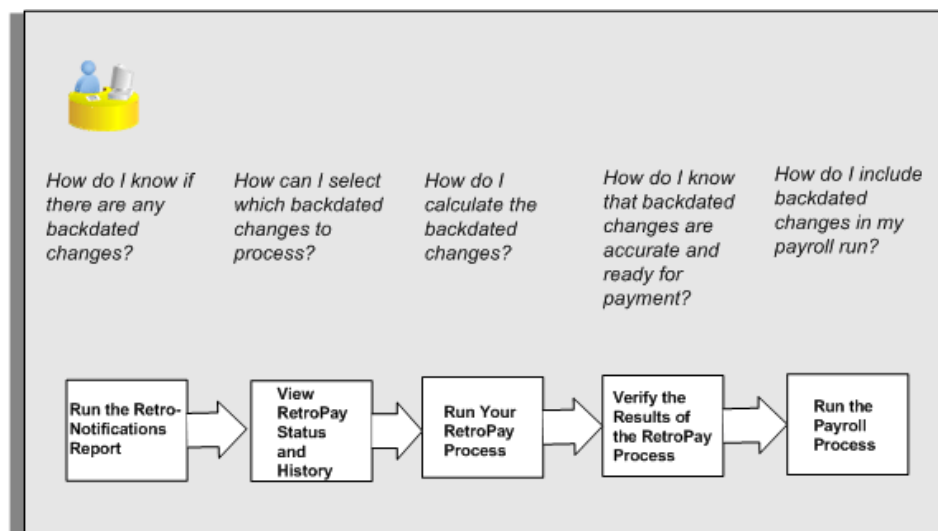
If you have overlapping periods for making retro payments, ensure that the Retro Overlap feature is enabled. This process recalculates from the latest reprocess date and uses Balance Adjustments. Follow these steps to set up the Retro Overlap feature :

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 retro pay 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.

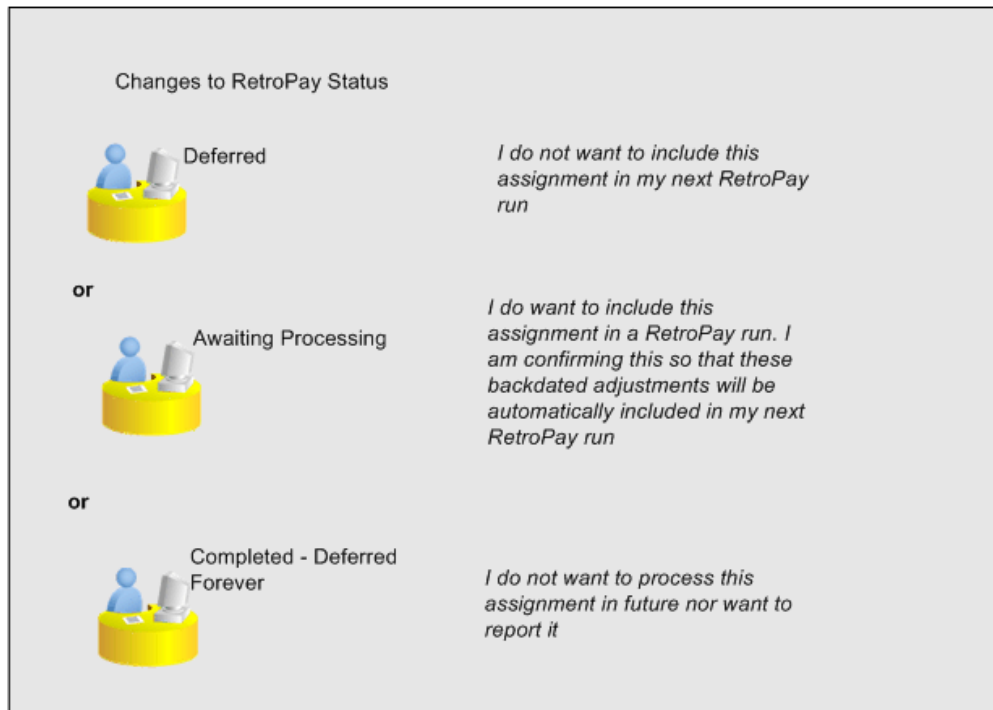
You can save your summary of backdated changes into an event group.

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.

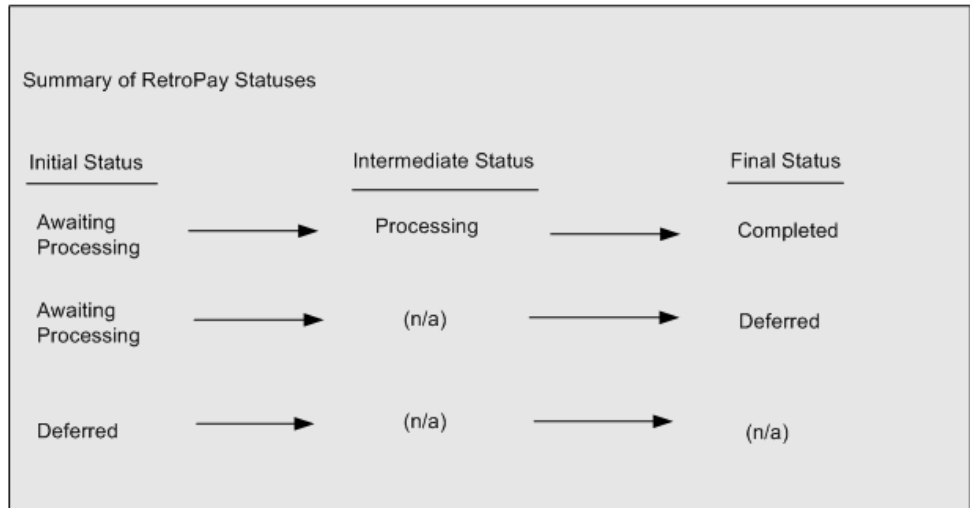


The Retro-Notifications report identifies the assignments with backdated adjustments. If you defer, then the assignment is not included when you next run RetroPay.

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:

Outstanding and Completed Categories for RetroPay Statuses	
Initial Status	Final Status
<i>These items are reported as All Outstanding</i>	<i>These items are reported as All Completed</i>
Deferred	Completed
Awaiting Processing	Completed Deferred Forever

See: Viewing RetroPay Status and History, page 5-56

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 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.

Payroll Reporting

Payroll, Deduction, and Payment Reporting Overview

You can run the following payroll, deduction, and payment reports:

- Absences Report
- A-Melding reports
- Norwegian Annual Statement Report

Additional Information: The following reports are obsolete and have been replaced by a-melding reporting effective from January 2015:

- Employee Deduction Report (Tax Levy Deduction, Union Due Deduction, and Support Order and Other Deduction)
- Employers Employees Register Continuous Report
- Employers Employees Register Status Control Report
- End of Year Audit Report
- End of Year Employer Contribution Summary
- Payroll Accounting Reconciliation Report
- Recording Sheet for Employer's Contribution and Withholding Tax
- Salary Statistics Report

You generate the payroll reports after running the required payroll processes. Running reports is basically a two-step process that requires:

1. Archiving the relevant data for the report.
2. Running the report request.

After archiving the report data once, you can run the same report again without re-archiving. The application searches for the most recent archived data. For an up-to-date report, always perform both steps.

Related Topics

Absences Report, *Oracle HRMS Compensation and Benefits Management Guide*

Running the Archiving for Pay Related Processes, page 5-65

Running the Report for Pay Related Processes, page 5-65

Running the Archiving for Pay Related Processes

For an overview of the archiving process, see: Payroll, Deduction, and Payment Reporting Overview, page 5-64

To run an archiving process:

1. Choose the Request Set option.
2. Query the appropriate archive request in the Submit Request Set window.
3. Enter the parameters required for the archive program.

Note: Most processes allow you to save the results of this archive for future use by selecting Yes in the Archive Option field.

4. Submit the request.
5. Close the window.

Running the Report for Pay Related Processes

For an overview of the reporting process, see: Payroll, Deduction, and Payment Reporting Overview, page 5-64

To run the report:

1. Choose the Request Set option.
2. Query the relevant report request (audit or EFT) in the Submit Request Set window.
3. Enter the request parameters.
4. Submit the request.
5. Close the window.

Running the Norwegian A-Melding Reports

The Norwegian a-melding reporting scheme is a coordinated digital reporting of income, employment and tax deduction details. This reporting scheme is used by those who have a reporting obligation (primarily employers) to the Norwegian Labour and Welfare Administration (NAV), Statistics Norway, and the Norwegian Tax Administration.

Note: The a-melding reporting includes the employer's contributions and payroll withholding tax.

The a-notice scheme has a mandatory main form and an XML attachment that features most of the information. The file attachment must conform to the approved file format.

Oracle HRMS for Norway provides the following a-melding concurrent programs and reports:

- Norwegian A-Melding Archive
- Norwegian A-Melding Data Validation
- Norwegian A-Melding XML Report

For more information on setting up and using the Norwegian A-Melding Report, see My Oracle Support Knowledge <Document 1911096.1>, *Norwegian A-Melding Report effective from 2015*.

Norwegian A-Melding Archive:

This Norwegian A-Melding Archive report archives all information to be reported. To run this program:

1. Navigate to the Submit Request window.
2. In the Name field, enter Norwegian A-Melding Archive.
3. Enter values for the following parameters:
 - Report End Date. Select the calendar month to be reported.
 - Legal Employer
 - XML_VERSION: Select the valid XML version for your reporting period.
 - Assignment Set
 - Submission Type: Select Original or Replacement. If the submission type is

Replacement, the report includes a list of prior requests.

- Replacement ID
 - Override Replacement ID
 - Report Content
 - Response Language
4. Click **OK**, and submit the report.

Norwegian A-Melding Data Validation:

The Norwegian A-Melding Data Validation program validates the reported data before transferring it to Altinn. To run this program:

1. Navigate to the Submit Request window.
2. In the Name field, enter Norwegian A-Melding Data Validation.
3. Enter the values for the following parameters:
 - Request ID: Select the Norwegian A-Melding Archive request ID run earlier.
 - Local Unit
4. Click **OK**, and submit the report.

Norwegian A-Melding XML Report:

The Norwegian A-Melding XML Report generates the XML output that can be submitted to Altinn as an attachment. To run this program:

1. Navigate to the Submit Request window.
2. In the Name field, enter Norwegian A-Melding XML Report.
3. Enter the values for the following parameters:
 - Template Name
 - Request ID: Select the Norwegian A-Melding Archive request ID that you ran earlier.
4. Click **OK**, and submit the report.

Running the Norwegian Annual Statement Report

Run the Norwegian Annual Statement Report to generate an employee's annual summary of pay and tax deducted, including holiday pay basis.

To run this report:

1. Navigate to the Submit Request window.
2. In the Name field, enter Norwegian Annual Statement Report.
3. Enter values for the following parameters:
 - Template Name
 - Generator Request ID: From the list of request IDs, select a valid request ID for which the report will be generated.
 - Employee Number: When you enter an employee number, the report will be generated only for a single employee in the legal entity. If the field is blank, then the report will be generated for all the employees in the legal entity.
 - Sort Option
4. Click **OK**, and then submit the report.

Running the Norwegian Annual Statement of Reported Income Archive

Run the Norwegian Annual Statement of Reported Income Archive to archive all information to be reported.

To run this report:

1. Navigate to the Submit Request window.
2. In the Name field, enter Norwegian Annual Statement of Reported Income Archive.
3. Enter values for the following parameters:
 - Reporting Date
 - Legal Employer
 - Assignment Set ID
4. Click **OK**, and submit the report.

Running the Norwegian Annual Statement of Reported Income XML File

Run the Norwegian Annual Statement of Reported Income XML File to generate a report in the rich-text format (RTF).

To run this report:

1. Navigate to the Submit Request window.
2. In the Name field, enter Norwegian Annual Statement of Reported Income Archive.
3. Enter values for the following parameters:
 - Template Name
 - Generator Request ID: From the list of request IDs, select a valid request ID for which the report will be generated.
 - Employee Number: When you enter an employee number, the report will be generated only for a single employee in the legal entity. If the field is blank, then the report will be generated for all the employees in the legal entity.
 - Sort Option
4. Click **OK**, and submit the report.

Advance Pay

Advance Pay Process

The Advance Pay process enables you to pay employees in advance for holidays or other events. The process performs payroll runs for the periods to be advanced, using all date effective information in place, and stores the final net figure as the amount to be advanced.

You can always represent Advance Pay as a single consolidated amount. However, if your legislation has the Advance Pay by Element process enabled, then you can also calculate and display the total amount of Advance Pay for constituent elements in the overall total.

Note: If you do have the choice of using both the Advance Pay process and the Advance Pay by Element process you should note that these processes cannot be overlapped, That is you cannot:

- Run Advance Pay for a period to which Advance Pay by Element has already been applied.
- Run Advance Pay by Element for a period to which Advance Pay has already been applied.

The *advance pay period* is the period of the holiday or event for which the advance payment is being made. More accurately, it is the total number of *payroll periods* covering the event. Regular payroll processing continues for the employee during the advance pay period. The amount advanced is progressively recovered in each regular payroll run, and the following actions are also carried out as appropriate:

- If further payments become due to the employee during the advance pay period, these can be paid using the employee's normal payment method. Alternatively, the net payment can be deferred and paid to the employee in the period following the advance pay period.
- If the employee's entitlement during the advance pay period becomes less than the sum advanced, thereby creating an overpayment, the amount owing is recovered automatically in the pay period following the advance pay period.

You can make advance payments for any pay period types, but the most likely ones are weekly or biweekly. You set the maximum number of periods that can be advanced when you define the payroll.

Setting Up Advance Pay for Individual Assignments

To set up advance pay for single assignments:

1. Select the assignment to receive the payment and navigate to the Advance Pay window.

The arrears check box appears checked if the assignment is linked to an arrears payroll.

2. In the From field, select the start date of the holiday or other event for which you are making the advance payment. Oracle Payroll replaces the date you enter by the first date of the pay period in which it falls.

At the same time the Payment Date field displays the date for making the advance payment to the employee. This date defaults to the last day of the pay period immediately preceding the start of the advance pay period. You can manually alter this date to the last day of the preceding pay period if you require.

3. Do *one* of the following:

- In the Periods field, enter the number of pay periods covering the advance pay period.
- In the To field, select the end date of the advance. The system automatically replaces the date you enter by the last date of the pay period in which it falls.

4. Check the Defer check box if you want any net payment amounts to be deferred to the pay period following the recovery of the advance. If you do not check Defer, such payments will be made in the pay period they are earned according to the normal payment method for the assignment.

5. Save the entries you have made.

The Advance region now displays the period for which the Advance Payment element is entered for the assignment. For arrears payrolls this is one period later than the event period. For other payrolls this period is the same as the event period.

Setting Up Advance Pay for Batch Assignments

To set up advance pay for batch assignments:

1. In the Name field select Advance Pay Batch Setup. Then enter the parameters field to open the Parameters window.
2. Select the payroll for which you want to run the process, then the advance start

period, then the advance end period. These are the first and last pay periods of the advance pay period.

The advance end period list displays the maximum number of pay periods that can be advanced for the payroll you select.

3. Select Yes or No to flag whether you want to defer any net payments that accrue during the advance pay period.
4. Select the assignment set for which you want to run the process.
5. Select the payment date for the advance. This date defaults to the last day of the pay period immediately preceding the start of the advance pay period. You can move this date back by one pay period if required.
6. Select Yes for BEE transfer if you want the batches that the process creates to be transferred to the database automatically. Select No if you want to transfer the batches manually.
7. Enter a unique header name for your batch process. This name is used as a base header name for each BEE batch created. For each batch, the system appends an underscore and an incrementing number, for example, _1, _2.

This is a mandatory field whether you select Yes or No in the BEE Transfer field.

8. Save your entries.

Running the Advance Pay Listing Report

This report gives information about the advance pay periods for employees due to receive advance pay. The report can be used to detect whether there are assignments with Advance Pay entries during a particular payroll period.

The report lists the following information:

- Name and assignment number of employees with an entry for the Advance Period element in the date range covered by the report
- For each assignment, the dates held on the Advance Period element entry
- Yes/No to show whether the Advance Pay process has already been run for the assignment
- Summary listing, by payroll, of the number of employees with entries, and the number that have been processed

You run this report in the Submit Requests window.

To run the Advance Pay Listing:

1. In the Name field select Advance Pay. Then enter the parameters field to open the Parameters window.
2. In the Summary Version field select No for the full version of the listing, or Yes for the summary version only.
3. Enter a date range for the period in which you want to see information.
4. You can restrict the information to a particular payroll by entering the payroll name. If you leave the Payroll field blank, the report shows information for the whole Business Group.
5. If you want to produce this report in Portable Document Format (PDF), select a template.
6. Choose the Submit button.

Running Advance Pay

Use the Advance Pay process window to run the Advance Pay process.

To run the Advance Pay process:

1. In the Name field select Advance Pay. Then enter the parameters field to open the Parameters window.
2. Select the payroll for whose assignments you are running the process.
3. Enter the effective date of the process. This should be the date on which you intend to pay the advance.
4. Select an element set if you want to exclude items from the calculation. For example, you may want to exclude some pay elements, such as expenses, from the Advance Pay run.
5. Choose the Submit button.

Running the Advance Pay Process

Use the Advance Pay process to pay employees in advance for holidays or other events.

You may need to do each of the following to run the Advance Pay process.

1. Set Up Advance Pay for Individual Assignments, page 5-71 (if applicable).

2. Set Up Advance Pay for Batch Assignments, page 5-71 (if applicable).
3. Run the Advance Pay Listing Report, page 5-72
4. Run the Advance Pay Process, page 5-73
5. View the results of the Advance Pay process, page 5-74

Running Advance Pay by Element

You run the Advance Pay by Element process from the Submit Requests window. This process may not be available for all legislations.

To run the Advance Pay by Element process:

1. In the Name field, select Advance Pay by Element. The Parameters window displays automatically and you can provide details as follows:
 - Select the Payroll for which you want to run Advance Pay by Element.
 - Enter the Effective Date of the payroll.
 - Enter the Advance End Date - this is the date at which you want the Advance Pay processing to terminate.
 - Select the Assignment Set to which the Advance Pay by Element calculation applies.
 - Select an Element Set Name if you want to specify that Advance Pay processing should only apply to some elements on this assignment. Otherwise, leave this entry blank if you want to process all the elements for this assignment.
2. Choose the Submit button

Viewing the Results of the Advance Pay Process

You can view the results of the Advance Pay in the Advance Pay window.

To view the results of the Advance Pay process:

- View the amount of the advance. Note that the amount outstanding remains at zero until the first payroll run of the advance pay period completes.
- If you want to see advance payments for future events, move your cursor down.
- If you want to see historical information, change the effective date.

- If you want to see Deferred Payments, check the Defer check box This information is also datetracked and you can see current and future information as above.

HR Information Systems

Oracle HRMS Data Pump

Running the Meta-Mapper

Based on your implementation you might decide that you do not need to use all of the predefined APIs to load external data. Run the Meta-Mapper for all APIs or for each single API that you select. The Meta-Mapper generates a specific PL/SQL package and view for each API.

Note: For APIs with overloaded interfaces, the Meta-Mapper will only generate code for the latest interface. The latest interface is the interface that has the greatest number of mandatory parameters.

Use the following SQL*PLUS command to generate packages and views for a number of APIs. (Not, however, **all** APIs, as the GENERATEALL name appears to suggest):

```
sql> execute hr_pump_meta_mapper.generateall;
```

See also: APIs Supported by the GENERATEALL Command., *Oracle HRMS Implementation Guide*

Use the following SQL*PLUS command to generate packages and views for one API:

```
sql> execute hr_pump_meta_mapper.generate( <package_name> , <
procedure_name> );
```

For example:

```
sql> execute hr_pump_meta_mapper.generate( 'hr_employee_api',
'create_employee' );
```

The naming convention for the view is hrdpv_<api_module_name> and the naming convention for the PL/SQL package is hrdpp_<api module name>. This applies unless the name would exceed 30 bytes, in which case the name is truncated to 30 bytes. In the example, the name of the view is hrdpv_create_employee, and the name of the package is hrdpp_create_employee.

You can use the view to insert legacy data into the HRMS schema or the batch tables, or to update data already in the batch lines table. The PL/SQL package contains an insert_batch_lines procedure to make it easy to insert data from your external systems into the batch lines table; and a call procedure that executes the API on the rows in the batch lines table.

View Generated by the Meta-Mapper

For each API the Meta-Mapper generates a view on the HR_PUMP_BATCH_LINES table that reflects the parameters of the API. This makes it easier to examine and update row values. The name of the view reflects the API name. For example, HRDPV_CREATE_EMPLOYEE. For a full listing of this view see: Table and View

Descriptions, *Oracle HRMS Implementation Guide*.

In addition to the parameters for the API, the Meta-Mapper always creates the following columns in the view:

Column	Description
BATCH_ID	Foreign key to HR_PUMP_BATCH_HEADERS
BATCH_LINE_ID	Foreign key to HR_PUMP_BATCH_LINES.
	Primary key generated using the hr_pump_batch_lines_s sequence.
API_MODULE_ID	Foreign key to HR_API_MODULES. This tells Data Pump which api to call for each row.
LINE_STATUS	Load status of this API: `U' - Unprocessed. This must be the initial value for all lines 'C' - Complete. The API call was successful and the changes have been committed. 'E' - Error. 'V' - Validated The API call was successful but the changes have not been committed.
USER_SEQUENCE	Used to control processing order. For example, to make sure that address for an employee is loaded after the employee record has been created.
LINK_VALUE	Use a unique link_value to link multiple rows in a single batch. Set this value when using parallel processing to make sure that related rows in a batch are processed together.
BUSINESS_GROUP_NAME	Alternative business group name to use for a particular API call. If not null, this overrides the value specified in the batch header

Meta-Mapper also creates other columns for specific APIs. For example, some of the columns on the create employee view are:

- P_EFFECTIVE_DATE
- P_MANAGER_FLAG
- P_ASSIGNMENT_USER_KEY

Other columns are created to reflect the PL/SQL OUT values returned from the API so that you can examine these values. For example:

- P_NO_MANAGERS_WARNING

You do not need to know which columns of the batch lines table hold specific parameters for the API.

Required Columns

If you use the view to insert data to the batch lines table then remember that in addition to the data required for the insert batch line procedure you also need :

- `batch_line_id`
Primary key generated using the `hr_pump_batch_lines_s` sequence.
- `line_status`
Must be set to 'U' (unprocessed).
- `api_module_id`
Foreign key to `hr_api_modules`.

The following query gets the `api_module_id` for create employee:

```
SELECT API_MODULE_ID
FROM HR_API_MODULES
WHERE UPPER(MODULE_NAME) = 'CREATE_EMPLOYEE'
AND    UPPER(MODULE_PACKAGE) = 'HR_EMPLOYEE_API' ;
```

PL/SQL Package Generated by the Meta-Mapper

The Meta-Mapper also generates a separate package for each API to make it easier for you to load data to the batch lines table or to review the content of the table for specific APIs.

For example, the `create_employee` package `hrdpp_create_employee` contains two procedures:

- `insert_batch_lines`
- `call`

Insert Batch Lines Procedure

Use this procedure to simplify loading data into the batch lines table.

See also: Default and Null Values for API Parameters., *Oracle HRMS Implementation Guide*

A call to this procedure creates one row in the batch lines table, complete with all the parameters. For create employee, some of the parameters are:

<code>p_batch_id</code>	number	in	
<code>p_data_pump_batch_line_id</code>	number	in	default

p_data_pump_business_grp_name	varchar2	in	default
p_user_sequence	number	in	default
p_link_value	number	in	default
p_hire_date	date	in	
p_last_name	varchar2	in	
p_sex	varchar2	in	
p_per_comments	varchar2	in	default
p_date_employee_data_verified	date	in	default
p_date_of_birth	date	in	default
p_email_address	varchar2	in	default
p_employee_number	varchar2	in	
p_expense_check_send_to_addres	varchar2	in	default
p_first_name	varchar2	in	default
p_known_as	varchar2	in	default
p_marital_status	varchar2	in	default
p_middle_names	varchar2	in	default
p_nationality	varchar2	in	default
p_national_identifier	varchar2	in	default
p_previous_last_name	varchar2	in	default
p_registered_disabled_flag	varchar2	in	default
p_title	varchar2	in	default
p_attribute1	varchar2	in	default
p_attribute2	varchar2	in	default
p_attribute3	varchar2	in	default
p_attribute4	varchar2	in	default
p_attribute5	varchar2	in	default
p_attribute6	varchar2	in	default
p_attribute7	varchar2	in	default
p_attribute8	varchar2	in	default
...			
...			
p_resume_exists	varchar2	in	default
p_resume_last_updated	date	in	default
p_second_passport_exists	varchar2	in	default
p_student_status	varchar2	in	default
p_work_schedule	varchar2	in	default
p_suffix	varchar2	in	default
p_person_user_key	varchar2	in	
p_assignment_user_key	varchar2	in	
p_user_person_type	varchar2	in	default
p_vendor_name	varchar2	in	default

`p_correspondence_language` `varchar2` `in` `default`

This example does not show all the parameters as there are many more.

The optional `p_data_pump_business_grp_name` parameter specifies a business group name to override the name specified in the batch header.

The optional `p_data_pump_batch_line_id` parameter specifies the `batch_line_id` for the inserted row (if necessary an existing row with this `batch_line_id` will be deleted).

Note: This procedure requires two user key values `p_person_user_key` and `p_assignment_user_key`. You must supply values for these keys. If you use Data Pump to create records in Oracle HRMS then Data Pump automatically inserts your key values and the HRMS key values generated by the APIs into the user keys table. For subsequent actions Data Pump can use these keys to match records from your external system with the Oracle HRMS records. A more detailed explanation and example is included in a later section of this document.

Call Procedure

This is the actual 'wrapper' procedure executed by the Data Pump process to call the API and pass in the appropriate parameter values. The procedure takes two arguments: `p_business_group_id` and `p_batch_line_id`.

Note: Direct calls to this procedure are NOT supported. You must use the Data Pump concurrent process to execute the procedures.

Meta-Mapper Help Procedure

The Meta-Mapper package also includes a help procedure `hr_pump_meta_mapperhelp` that returns information on the generated PL/SQL package and view names, and the batch lines table parameter values for a given API.

The help procedure has two parameters:

- `p_module_package`
The name of API PL/SQL package
- `p_module_name`
The name of API PL/SQL procedure

You must set server output on before calling this procedure.

For example, use the following SQL*PLUS to get help for `hr_employee_api`.
`create_employee:`

P_USER_PERSON_TYPE	VARCHAR2	IN	DEFAULT
P_VENDOR_NAME	VARCHAR2	IN	DEFAULT
P_CORRESPONDENCE_LANGUAGE	VARCHAR2	IN	DEFAULT
...			

The following is an explanation of the help output:

- In the above example, the insert_batch_lines procedure is: hrdpp_create_employee.insert_batch_lines.
- The Parameter Name column shows the name of the parameter as it appears in the insert_batch_lines procedure and generated view.
- A parameter can have type USER_KEY which means that it is a user key (see the section User Key Values, *Oracle HRMS Implementation Guide* for more details). For example, P_SUPERVISOR_USER_KEY USER_KEY IN DEFAULT. User key parameters are implicitly of type VARCHAR2.
- DATE parameter values are passed to the insert_batch_lines procedure as VARCHAR2 strings in the appropriate date format.

Data Pump makes use of two different date formats:

- Unsigned Date Format: This can be either YYYY/MM/DD, or for dates in Oracle HRMS, the internal date format is YYYY/MM/DD HH24:MM:SS
- Signed Date Format: This can be either SYYYY/MM/DD, or for dates in Oracle HRMS, the internal date format is SYYYY/MM/DD HH24:MM:SS. The signed date format has been introduced for HR_API_G_SYSDATE which must be capable of holding a negative date.
- BOOLEAN parameter values are passed to the insert_batch_lines procedure as VARCHAR2 strings with the values TRUE or FALSE'.
- The In/Out column has the value IN for parameters that are PL/SQL IN or IN/OUT when passed to the API, or are user key parameters. If the parameter is an API PL/SQL OUT parameter, then the In/Out column value is OUT.
- Only IN parameters are arguments to the insert_batch_lines procedure. OUT parameters appear in the generated view.
- The Default column has the value DEFAULT if the parameter's value is not required in the batch lines table. For mandatory parameters this column is empty.
- Mandatory parameter values must be passed to the insert_batch_lines procedure.
- If the parameter is a lookup parameter, the Lookup Type column contains the name of the parameter's lookup type.

Implementing Oracle HRMS

Additional Implementation Steps for Norway

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

See the implementation section in *Implementing Oracle HRMS* for all other implementation steps that are not specific to Norway.

Additional Implementation Steps

Step 1: Upload the Postal Code File

You must upload the postal code file provided by the postal authority.

See: *Uploading the Postal Code File*, page 2-49

Step 2: Set Up Norwegian Organizations

You must set up the following additional organizations to meet statutory Norwegian requirements.

See: *Setting up Norwegian Organizations*, page 1-15

Step 3: Run Meta-Mapper

Run the meta-mapper process to support the uploading of tax cards. You run this process only once during implementation.

See: *Running the Meta-Mapper*, page 6-2

Step 4: Set Up A-melding *Required Step*

Set up elements, organizations, and persons for a-melding reporting. For more information, refer to My Oracle Support Knowledge <Document 1911096.1>, *Norwegian A-Melding Report effective from 2015*.

Step 5: Set Up Income Tax Information

You need to set up your tax information to calculate tax correctly.

See: Setting Up Income Tax Deduction, page 5-28

Step 6: Upload Tax Card

You must upload the flat file, containing the employees' tax information, which you receive from the tax administration to calculate the tax deductions correctly.

See: Uploading the Tax Card, page 5-30

Step 7: Set Up Proration

You need to set up the proration information to process these payments correctly.

See: Setting Up Proration or Retro-Notification, page 4-37

Step 8: Set Up Retro-Notification and RetroPay

You need to set up the retro-notification and retro-pay information to process these payments correctly.

See: Setting Up Retro-Notification and RetroPay, *Oracle HRMS Payroll Processing Management Guide*

Step 9: Set Up Third-Party Payment Information

You need to set up the third-party payment information to capture the third-party payment details.

See: Setting Up Third-Party Payments, page 4-39

Step 10: Set Up Support Order Information

You need to set up support order information to calculate support order wage attachments.

See: Setting Up Support Orders, page 4-40

Step 11: Set Up Union Dues Information

You need to set up union dues information for the electronic payment of union dues to any trade union to which an employee belongs.

See: Setting Up Union Dues, page 4-41

Step 12: Set Up Tax Levy Information

You need to set up tax levy information for the electronic payment of tax levies to the tax authority.

See: Setting Up Tax Levies, page 4-42

Step 13: Set Up Employer Contributions

You need to set up the employer contributions calculation.

See: Setting Up Employer Contributions, page 5-33

Step 14: Set Up Travel Expense Information

You need to set up travel expense information to capture the relevant details.

See: Setting Up Travel Expenses, page 4-40

Step 15: Set Up Benefits in Kind Information

You need to set up benefits in kind information to capture and calculate the applicable benefit information.

See: Setting Up Benefits in Kind, page 4-41

Step 16: Set Up Statement of Earnings

You need to set up the online statement of earnings before you can see the values correctly.

When entering SOE information at the Business Group level, select the predefined element sets NO_SOE_EARNINGS_ELEMENTS and NO_SOE_DEDUCTIONS_ELEMENT and the predefined balance attribute NO_SOE_BALANCE_ATTRIBUTES.

See: Setting Up a Global Statement of Earnings (SOE), page 5-18

Technical Essays

Payroll Process

Balances in Oracle Payroll

This essay deals with the definition and use of balances and balance dimensions in Oracle Payroll. It also explains how to deal with the issue of loading initial balances. This essay does not provide any detail on how to add balance dimensions to the system.

Terms

This essay assumes that you are already familiar with the database design diagrams and tables contained in the Oracle HRMS *Technical Reference Manual*.

If you are not already familiar with the setup and use of balances, or the concepts of employee assignment, assignment actions, database items, or payroll processing in Oracle FastFormula you should refer to your Oracle HRMS user guides for more information.

For additional information on how the Payroll Run processes balances, see also: Payroll Run Process - Create and Maintain Balances, *Oracle HRMS Implementation Guide*.

Overview of Balances

In Oracle Payroll a balance is defined as the accumulation of the results of a payroll calculation. The balance has a name, feeds and dimensions.

For example, the balance GROSS PAY is the accumulation of the results of processing all 'Earnings'. However, the idea of a dimension is unique to Oracle Payroll. Dimensions enable you to view the value of a balance using a combination of different criteria. So, you might want to view the value of Gross Pay for one employee for the current pay period, or for the year to date. The actual balance and dimension you would use in a formula or a report would be the GROSS_PAY_ASG_PTD or the GROSS_PAY_ASG_YTD.

In general, balances in Oracle Payroll can be thought of as the 'calculation rules' for obtaining the balance value. Most values are not held explicitly in the database. This approach has many advantages: New balances can be defined and used at any time with any feeds and dimensions; balance values do not need to be stored explicitly in the database, taking up valuable storage space and causing problems with data archiving and purging.

Balance Types

These are the balance names, for example Gross Pay and Net Pay. Balance types always have a numeric Unit Of Measure, and in some instances a currency code.

Balance Feeds

Balance feeds define the input values that contribute to a balance. For example the pay values of all earnings types contribute to the Gross Pay balance. Feeds can add to (+) or subtract from (-) a balance

Balance Dimensions

The balance dimension is identified by the database item suffix for the balance. For example, '_YTD' indicates the balance value is for the year to date. Balance dimensions are predefined in Oracle Payroll.

Defined Balances

The defined balance is the name used to identify the combination of Balance Type and Balance Dimension. For example, GROSS_PAY_ASG_YTD. When you use the Balance window to define a new balance, Oracle Payroll automatically generates database items for every balance dimension you select. You can then access the value directly within any formula. In any detailed calculation or report on balances you always refer to the 'defined balance' to return a value.

Latest Balances

To optimize the performance of payroll processing, some balance values are held explicitly in the database and these are referred to as **Latest Balance Values**. The payroll process accesses and updates latest balance values as it runs. In some cases it clears and then resets values, for example when you do a rollback. All of this is invisible to the

user and is managed by the payroll process.

Note: If you need to return the value of a balance in a report you should use the balance function `pay_balance_pkg.get_value`. See: Including Balance Values in Reports, page 7-24.

Expiry

An important concept for latest balances is that of 'expiry'. For example, consider the GROSS_PAY_YTD balance. When you cross the tax year boundary you would expect the value to return to zero. This 'expiry' of a balance is maintained internally by Oracle Payroll and there is code to work out if we have crossed such a boundary.

Important: Even if a defined balance has expired in theory for a payroll run, it is not actually zeroed on the database unless it is subsequently updated by the same payroll run. Thus, following a Payroll Run, you may well see balances that you would have expected to have expired, but have their old values.

Balance Contexts

There is occasionally a requirement to report balances where the combination of ASSIGNMENT_ACTION_ID and BALANCE_TYPE_ID does not uniquely identify the individual balance values that should be reported. For example in the US legislation you need to maintain balance dimensions for particular states, while in the UK legislation you need to maintain balance dimensions for distinct tax offices.

Both of these requirements are met by the definition of special balance contexts. These are legislative specific 'C' code and appear to you as part of the balance dimensions.

User definition of additional balance contexts is not yet supported because of the major impact these may have on the overall performance of the payroll process. Bad code in the definition of these contexts can run exceptionally slowly, especially when you accumulate a large number of run results.

Context Balances - a UK Example

To report on context balances, we must define the relevant balances with the ELEMENT_PTD and ELEMENT_ITD dimensions. The further context that is required to identify the values is taken from the PAY_RUN_RESULTS.SOURCE_ID. This is obtained from the balance feed joining to the PAY_RUN_RESULT_VALUES table, then to PAY_RUN_RESULTS.

Using this value, we can select via the PAY_ASSIGNMENT_LATEST_BALANCES -> PAY_BALANCE_CONTEXT_VALUES method. Or, if there is no latest balance, by the route code call, which in the UK can be done with a function call:

```
hr_gbbal.calc_element_ptd_bal(ASSIGNMENT_ACTION_ID,  
                             BALANCE_TYPE_ID,  
                             SOURCE_ID);  
  
(or calc_element_itd_bal with the same parameters).
```

Balance Dimensions

This essay describes what a balance dimension is and what it does, and how the various parts interact with formulas and the Payroll Run.

A balance dimension defines how the value of a specific balance should be calculated. The balance dimension is also an entity with its own attributes that are associated with balance calculations.

Database Item Suffix

The database item suffix identifies the specific dimension for any named balance. The 'defined balance' name is the combination of the balance and the suffix. For example, the suffix '_ASG_YTD' in 'GROSS_SALARY_ASG_YTD' identifies that the value for the gross salary balance is calculated for one assignment, for the year to date.

Routes

The balance dimension route is a foreign key to the FF_ROUTES table. A route is a fragment of SQL code that defines the value to be returned when you access a balance. As with other database items, the text is held in the DEFINITION_TEXT column of the FF_DATABASE_ITEMS table.

The select clause of the statement is always:

```
select nvl(sum(fnd_number.canonical_to_number(TARGET.result_value) *
FEED.scale), 0)
```

Thus, a balance could be defined as the sum of those run result values that feed the balance type ('Gross Salary' in our example), across a certain span of time (in our example, this is since the start of the current tax year).

The SQL statement itself must follow a number of rules, and an example appears below:

```
        pay_balance_feeds_f      FEED
        ,pay_run_result_values    TARGET
        ,pay_run_results          RR
        ,pay_payroll_actions      PACT
        ,pay_assignment_actions  ASSACT
        ,pay_payroll_actions      BACT
        ,pay_assignment_actions  BAL_ASSACT
where   BAL_ASSACT.assignment_action_id = \&B1
and     BAL_ASSACT.payroll_action_id   = BACT.payroll_action_id
and     FEED.balance_type_id          = \&U1
and     FEED.input_value_id           = TARGET.input_value_id
and     TARGET.run_result_id          = RR.run_result_id
and     RR.assignment_action_id       = ASSACT.assign_action_id
and     ASSACT.payroll_action_id      = PACT.payroll_action_id
and     PACT.effective_date between
        FEED.effective_start_date and FEED.effective_end_date
and     RR.status in ('P','PA')
and     PACT.effective_date >=
        (select to_date('06-04-' || to_char( to_number(
            to_char( BACT.effective_date,'YYYY')
            + decode(sign( BACT.effective_date - to_date('06-04-'
                || to_char(BACT.effective_date,'YYYY'),'DD-MM-YYYY')), -1,
-1,0)), 'DD-MM-YYYY')
        from dual)
and     ASSACT.action_sequence <= BAL_ASSACT.action_sequence
and     ASSACT.assignment_id = BAL_ASSACT.assignment_id');
```

This example is the route for a UK based assignment level year to date balance that uses

the 6th of April as the start of the tax year.

Comments

The route is made up of the following parts:

1. Return all possible actions for the assignment
2. Identify the possible feeds to the balance
3. - feed checking
4. Restrict the period for which you sum the balance
- expiry checking

Note: The expiry and feed checking parts have a special significance that will become obvious later.

Specific table aliases should be used as they have a particular meaning.

- The BAL_ASSACT table is the `source` assignment action, that is, the current action for this assignment.
- The ASSACT table is the `target` assignment action, that is, the action for those results that feed the balance.
- The PACT table is the `target` payroll action, that is, used to define the date of the ASSACT assignment actions.
- We join to the BACT table, getting all the Payroll Actions in which the assignment appears.
- We join to the FEED table for the balance type and get all the TARGET input values that could possibly feed this balance.
- The run results that feed must be processed ('P' or 'PA').
- The complicated looking sub-query returns the start of the current tax year, which is from when we are summing the balance. That is, the results that feed the balance will be between the start of the current tax year and the current action sequence.

Dimension Type

Dimension type determines how a balance is treated by the Payroll Run, and for predefined dimensions this is optimized for performance of the payroll run.

The dimension type can take one of the following values:

- N - Not fed and not stored. This dimension type does not create a latest balance at any time. A balance with this dimension will always have its SQL re-executed

whenever that balance is executed.

- **F** - Fed but not stored. This dimension type creates a balance 'in memory' during the Payroll Run. This balance is fed by the run code but it does not store a latest balance on the database.
- **R** - Run Level balance. This dimension type is used specifically for those balances that total for the current run and must be used with the appropriate route. No latest balance value is stored on the database.
- **A** - Fed and stored at assignment level. This dimension type creates an assignment level latest balance and stores it in the PAY_ASSIGNMENT_LATEST_BALANCES table.
- **P** - Fed and stored at person level. This dimension type creates a person level latest balance and stores it in the PAY_PERSON_LATEST_BALANCES table.

Feed Checking Type

The feed checking type controls the feed checking strategy used during the payroll run. This type is used to keep the in memory balance up to date by deciding whether a run result should feed the balance. It can have the following values:

- **Null** This is the default value, and means that all the run result values included by the existing balance feeds will feed the balance.
- **P** Payroll Run executes the package procedure defined in the expiry_checking_code column on the dimension. An expiry flag parameter indicates whether feeding should occur or not.
- **E** Equality feed checking is done. That is, feeding occurs if there is a match between the in memory balance context values and the contexts held in the UDCA (User Defined Context Area).

The following additional types are for US and Canadian legislative balances only:

- **J** Jurisdiction checking is done.
- **S** Subject Feed Checking is done.
- **T** A combination of 'E' and 'S' feed checking types.
- **M** A combination of feed checking types 'S', 'J' and 'E'.

Expiry Checking Type

Latest balances should expire (that is, return to zero) at a time determined by their dimension. For example, a YTD (Year to Date) balance expires at the end of the year.

All loaded balances are checked for expiry by the Payroll Run, according to their expiry checking type:

- N - Never expires: balances are never set to zero.
- P - Payroll Action Level: for these types, a list of the expiry check results for each owning action/balance dimension are kept.

Once expiry checking code has been called for such a combination, it does not need to be checked again for other balances that have the same combination, thus avoiding multiple calls to the database.

The expiry checking is balance context independent - the list of balance contexts is not passed to the expiry checking code.

- A - Assignment Action Level: no assumptions can be made, expiry checking code is always called. The expiry checking is balance context dependent - the list of the balance contexts is passed to the expiry checking code.
- D - Date Expiry: the date expiry checking mechanism looks at the balance dimension/balance contexts combination of the balance being expiry checked, and scans the in-memory list to see if a balance with the same combination has already been expiry checked.

If so, the expiry date is taken from that stored on the in-memory balance.

The expiry checking is balance context dependent-the list of the balance contexts is passed to the expiry checking code.

Initial Balance Loading for Oracle Payroll

This essay describes the functionality available with Oracle Payroll to assist in the loading of initial balance values from an existing payroll system.

Introduction

Whether you are implementing Oracle Payroll for the first time, or upgrading from an earlier release you will need to set initial values for your legislative balances. It is essential for the accurate calculation of legislated deductions in Oracle Payroll that the initial values for these balances are correct.

This section shows you how to set up and load these initial balance values before you begin to process payrolls. After you have begun processing payrolls you may need to repeat this process for additional user balances you define in the future.

Warning: The steps you follow to load initial balances are completely different from the steps an end user follows to adjust a balance. You must not use the balance loading method to make balance adjustments.

Balances and Balance Adjustments in Oracle Payroll

In Oracle Payroll a balance is the accumulation of the results of a payroll calculation. The balance has a name, feeds and dimensions. The results that feed a specific balance are known as the 'balance feeds' and these can add or subtract from the total. The

balance loading process calculates and inserts the correct run results to set the initial values with effect from the upload date.

Balances are calculated directly from the run results that are designated as feeding the balance. This approach ensures run results and balance values are always in step and it removes the need to store and maintain extra information in the database. In effect, the definition of a balance is really the definition of the 'calculation' that is performed to return the balance value.

The run results that feed a defined balance are usually the results of processing elements during a payroll run. However, there may be times when balance values have to be adjusted manually. You do this by making an entry of an element as a 'balance adjustment'. When you make a balance adjustment online, the effect is to create a single processed run result for the element. This run result automatically feeds, or adjusts, all the balances that are normally fed by the element. In this way, you are able to cascade the adjustment to all affected balances.

Important: When performing an online balance adjustment you must be careful to choose the right element and input value. However, if you make a mistake you can always go back and delete and re-enter the adjustment. You delete balance adjustments from the Payroll or Assignment Actions windows.

Steps

There are three basic steps involved in loading initial balance values:

1. Define an element and input value to feed each specific balance
2. Set up the initial balance values in the tables
PAY_BALANCE_BATCH_HEADERS
PAY_BALANCE_BATCH_LINES
3. Run the *Initial Balance Upload* process
 - Use the SRS window.
 - Use Validate, Transfer, Undo and Purge modes as needed.

Balance Loading Process

When you run the initial balance loading process you set values for each balance relative to a specific date - the **Upload Date**. The process creates run results, to ensure your legislative balances are correct from the upload date. Maintenance of balance information after this date is managed by the system, or by using the balance adjustments.

The upload date represents the effective date of the initial balance load. For example, you run the first payroll on 01-March, with wages of 5,000 and taxes of 1,000. The salary

PTD, MTD, QTD and YTD are all 5,000. The taxes PTD, MTD, QTD, and YTD are all 1,000. If you require YTD balances for Jan and Feb, run the balance initialization for a date other than 01-March. If you want values of PTD = 0, MTD = 0, YTD 200 on 01-March, you need to run the Initial Balance Upload with a date of 28- February or 01-February, and with a dimension of YTD, and a value of 200. At 01-March the values are PTD = 0, MTD = 0, YTD 200.

Consider the following example of three dimensions for gross pay balance values for one employee.

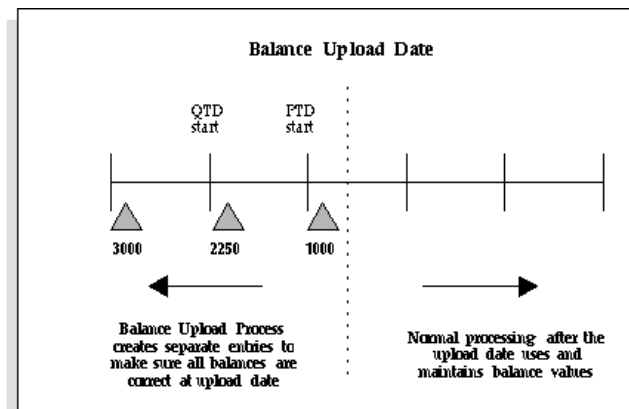
- Gross Pay Ptd 1000.00
- Gross Pay Qtd 3250.00
- Gross Pay Ytd 6250.00

The balance loading process must calculate the actual values required for each entry and the effective date for these entries. The result of the calculation is the creation of 3 balance entries.

- `_PTD` balance entry value is 1000.00
- `_QTD` balance entry value is 2250.00
- `_YTD` balance entry value is 3000.00

Balance Loading

Balance Loading



The result is that the cumulative values of the individual entries match the initial requirement for each balance.

- Gross Pay Ptd = 1000.00
- Gross Pay Qtd = 1000.00 + 2250.00 = 3250.00
- Gross Pay Ytd = 1000.00 + 2250.00 + 3000.00 = 6250.00

Latest Balances

To improve payroll run performance Oracle Payroll sets and maintains 'Latest Balance Values'. If these values are not set, the balance value is created by summing the run results for the balance. If a large number of assignments have no value then there could be a significant impact on the first payroll run. Therefore, loading the latest balances prior to the first payroll run has significant implications for performance.

Note: Some balances cannot have latest balances, such as those that are used in-memory but not stored.

When you are deciding which balances and dimensions you should include in the initial loading process, consider the balances that are used in the payroll run. For example, if the payroll run uses the balance bal_YTD, but the upload process loads bal_PTD only, then the latest balance value for bal_PTD exists but not for bal_YTD. The first payroll run would have to evaluate bal_YTD.

In the normal payroll run the latest balance value is associated with the last assignment action that uses the defined balance. The balance upload process attempts to simulate this action by creating a number of balance adjustment entries prior to the upload date.

Important: If the defined balance includes contexts then the latest balance can only be created on a balance adjustment payroll action that has context values that do not contradict the latest balance that is to be created.

In Oracle Payroll, each balance adjustment entry is considered to be a separate assignment action. These adjustments are performed in date order - earliest first. The last balance adjustment, with the highest assignment action number, is used to create the latest balance.

Setting Up an Element to Feed Initial Balances

Because of the complex web of feeds that can exist for any specific balance there is a simple mechanism to let you set the initial value for any specific balance. The basic principle is that you require a special element input value to feed each specific balance; and you set each balance separately.

Elements to Initialize Legislative Balances

Oracle Payroll comes with the predefined elements and input values you need to set initial values for all your legislative balances.

Important: US and Canadian users should run a special PL/SQL script (paybalup.pkb) to create the elements and inputs needed to feed the predefined legislative balances. This script has been registered as an SRS process - *Initial Balance Structure Creation*. You will need to create

batch lines for each of these elements.

Users in other legislations need only link the predefined elements that feed the legislative balances that must be initialized.

Elements to Initialize User-defined Balances

For all other balances you need to set up the elements that will provide the entry values for each of your initial balances. There are some rules for setting up elements for initial balance feeds.

Element

- Must have a start date 01-JAN-0001

This rule simplifies the validation by making sure that the element and input value to feed the balance are always available.

- Must have a classification of 'Initial Balance Feed'

This classification is excluded from the list of classifications available when you define a balance. You can only set up manual balance feeds for this type of element.

- Must be 'Adjustment Only'
- Must be a nonrecurring type
- Must be processable in a payroll run

Input Values

- Must have a start date 01-JAN-0001
- Each input value must feed only one balance

If you need to set initial values for a large number of balances you can define multiple input values for a single element with each input value feeding a different balance.

Element Link

- Must have a start date 01-JAN-0001
- Criteria must be only Link To All Payrolls - 'Yes'

Supported Balances

All the balances supported by the initialization process are set at the assignment level. Balances at the person level are set indirectly by accumulating the values from all the assignments.

Setting Up the Initial Balance Values

There can be many different sources for the initial balance value to be loaded. For example, you may be migrating from a previous version of Oracle Payroll, or from

another payroll system, or you may hold this information in another system.

Two batch interface tables are supplied with Oracle HRMS to standardize the process of loading the initial balance values. You can load information directly into these tables and you can also review, update and insert values manually. This gives you total flexibility for setting values. It also enables you to define and manage the loading of separate batches as logical groups.

PAY_BALANCE_BATCH_HEADERS

Name	Null?	Type
BUSINESS_GROUP_ID		NUMBER(15)
PAYROLL_ID		NUMBER(9)
BATCH_ID	NOT NULL	NUMBER(9)
BATCH_NAME	NOT NULL	VARCHAR2(30)
BATCH_STATUS	NOT NULL	VARCHAR2(30)
UPLOAD_DATE	NOT NULL	DATE
BATCH_REFERENCE		VARCHAR2(30)
BATCH_SOURCE		VARCHAR2(30)
BUSINESS_GROUP_NAME		VARCHAR2(60)
PAYROLL_NAME		VARCHAR2(80)

Each batch identifies the payroll that is being uploaded and the date of the upload. Other identifiers can be set to identify uniquely each batch as shown, for example, in the following table.

Batch Name	Batch Ref	Batch Source	Payroll	Upload Date
Weekly Payroll	0001	SQL*Loader	Pay1	01-Jan-1995
Weekly Payroll	0002	SQL*Loader	Pay1	01-Jan-1995
Monthly Payroll	0003	SQL*Loader	Pay2	01-Jan-1995

Batch Name	Batch Ref	Batch Source	Payroll	Upload Date
Semi Monthly Payroll	0001	Screen	Pay3	01-Aug-1995

Tip: Truncate the table PAY_BALANCE_BATCH_HEADERS after you complete the first Year End process to avoid any constraint violations on the table.

PAY_BALANCE_BATCH_LINES

Name	Null?	Type
ASSIGNMENT_ID		NUMBER(10)
BALANCE_DIMENSION_ID		NUMBER(9)
BALANCE_TYPE_ID		NUMBER(9)
PAYROLL_ACTION_ID		NUMBER(9)
BATCH_ID	NOT NULL	NUMBER(9)
BATCH_LINE_ID	NOT NULL	NUMBER(9)
BATCH_LINE_STATUS	NOT NULL	VARCHAR2(30)
VALUE	NOT NULL	NUMBER
ASSIGNMENT_NUMBER		VARCHAR2(30)
BALANCE_NAME		VARCHAR2(80)
DIMENSION_NAME		VARCHAR2(80)
GRE_NAME		VARCHAR2(60)
JURISDICTION_CODE		VARCHAR2(30)
ORIGINAL_ENTRY_ID		NUMBER(15)

Each batch has a set of batch lines that include details of the assignment, the balance and the value for each dimension. You can also include other contexts for a specific balance.

Assignment	Balance	Dimension	Value
101	Gross Pay	PTD	1000.00
101	Gross Pay	QTD	3250.00
101	Gross Pay	YTD	6250.00
101-2	Gross Pay	PTD	750.00

Note: The tables provide support for either a system ID (such as assignment_id) or a user ID (such as assignment_number) for each piece of information. This allows maximum flexibility when you are populating the batch tables.

The rule is that if both are specified then the system ID overrides the user ID. Here is a list of the system IDs and user IDs that can be specified when setting up the tables:

System ID	User ID
BUSINESS_GROUP_ID	BUSINESS_GROUP_NAME
PAYROLL_ID	PAYROLL_NAME
ASSIGNMENT_ID	ASSIGNMENT_NUMBER
BALANCE_DIMENSION_ID	DIMENSION_NAME
BALANCE_TYPE_ID	BALANCE_NAME
ORIGINAL_ENTRY_ID	
GRE_NAME (US and Canada only)	
JURISDICTION_CODE (US and Canada only)	

If an error occurs during the processing of the batch, the error message is written to the PAY_MESSAGE_LINES table with a source_type of H (header) or L (line).

Running the Initial Balance Upload Process

You run the *Initial Balance Upload* process from the SRS window to upload values from the batch tables. You can run this process in one of four modes:

- Validate
- Transfer
- Undo Transfer
- Purge

Prerequisites

On the upload date, every assignment in the batch must belong to the payroll identified in the batch header.

The payroll must have a sufficient number of time periods prior to the upload date to allow the setting of the initial balances.

Other specific criteria, such as the GRE or Legal Company, are not validated by the initial balance loading process. It is your responsibility to validate this information.

Note: The validation process contains a predefined hook to enable you to apply your own additional validation procedure to your own balances. The procedure should be named *validate_batch_line*.

The process will check for valid data but will not set it.

Modes

Validate Mode

There is no validation of the batch tables prior to running this process. The process validates data in PAY_BALANCE_BATCH_LINES, but does not transfer these to the Oracle HRMS database. It marks valid lines with V (Validated), and lines in error with E (Error), and sends error messages to the PAY_MESSAGE_LINES table.

The validation process is split into two phases:

- The first phase checks the integrity of the data in the batch tables.
- The second phase checks that it is possible to create all the required balance adjustment entries.

The validate process also populates the system ID entries in the table. This ensures that all subsequent processing has access to the system IDs.

All batch lines are validated independently and are marked with their individual status at the end of the process.

Transfer Mode

Transfer mode repeats the first phase of the validation check to ensure the integrity of the data in the batch tables and the existence of all system IDs.

The process calculates the balance adjustment entries required for each assignment. This list is checked and aggregated where values are shared and actual entries are then created for the assignment. This is repeated for each assignment in the batch. Successful transfer is marked with a status of T - Transferred.

Note: If any line for an assignment is in error, none of the lines for the assignment are transferred into the HRMS database. Failures are logged in the messages table against the batch line being processed and the batch line is marked as I - Invalid.

If the value of the adjustment is zero then no entry is created. For example:

Balance_PTD = 500

Balance_QTD = 500

There is no need for an adjustment to the QTD dimension since the value is already set by the PTD.

It is likely that there will be large volumes of data to load, so the work is periodically committed to preserve successful work and to reduce the number of rollback segments required.

Note: The commit size is specified by the `CHUNK_SIZE` parameter in `PAY_ACTION_PARAMETERS`. The default for `CHUNK_SIZE` is 20 successful assignments.

This is the same parameter used by other payroll processes to determine commit frequency.

If a batch has been processed with partial success, you can resubmit the batch and only those assignments with batch lines that have not been Transferred are processed again. You can also restart the batch process if it failed during processing, for example if it ran out of tablespace.

Undo Transfer

This mode removes all the balance adjustment entries created by the transfer process and return the status of the batch lines to U.

Note: The data in the batch tables is kept. You can correct any batch lines with incorrect values and repeat the transfer.

Purge

Purges all data in a batch regardless of current status. When a batch is purged all the messages, batch lines and the batch header are removed. This enables you to reclaim

space once a batch is successfully transferred.

Use Purge mode only when you are sure that the balances for all assignments in a batch have been successfully entered into the HRMS database.

Warning: Once you have purged a batch, all the entries for that batch are deleted. This action cannot be undone.

Deleting the Balance Initialization process

If you have employees migrated from legacy system and have performed balance initialization, you cannot delete the person record from the database as you cannot delete the Balance Initialization from the assignment.

When you run the Initial Balance Upload concurrent program with the mode as Transfer, then the assignment actions are created for all assignments listed in pay_balance_batch_lines table for that particular batch. You cannot delete the Balance Initialization assignment process result.

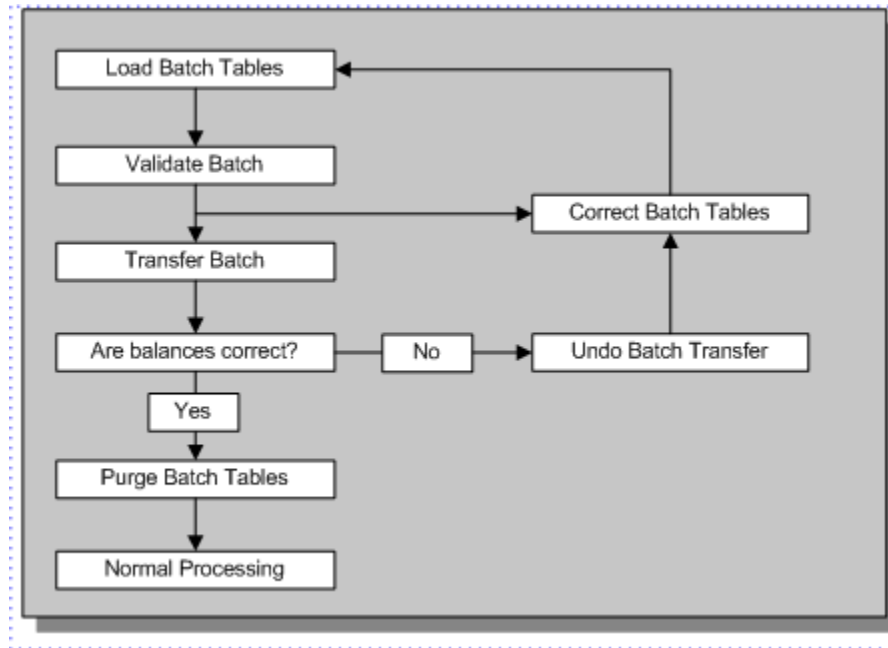
To delete Initial Balance Upload process, run the Initial Balance Upload concurrent program with the mode as Undo Transfer. The Balance Initialization assignment actions for all the assignments in the particular batch get deleted and it rolls back the assignment action created for all the assignments in the batch.

To perform Balance Initialization again, you must update/delete the employee data in the table pay_balance_batch_lines and then run the concurrent program in Transfer mode. This ensures assignment actions are created for only those assignments available in the pay_balance_batch_lines table.

Process Flow

The normal sequence for using these modes to load initial balances is shown in the following diagram:

Process Flow



Error Statuses

Any errors encountered are recorded in the messages table against the object being validated: either the batch itself or an individual batch line. The status set against the batch or batch lines is dependent on the mode the process is running in as well as the status of other batch lines.

Batch Line Status

The status of each batch line can be one of the following :

- V - Valid; the batch line is OK
- E - Invalid; the batch line has an error
- T - Transferred; the batch line has been successfully transferred

Batch Status

The status of the batch is dependent on the statuses of the batch lines within the batch:

- T - Transferred; all lines in the batch have been transferred
- P - Partially Transferred; some lines in the batch have been transferred
- V - Valid; all the lines in the batch are valid and none have been transferred
- E - Invalid; some of the lines in the batch are invalid and none have been transferred

Validation Problems

There are two common problems you should check.

The adjustment request for a balance dimension may be incorrect. For example, suppose an assignment has the following upload requests:

- <Balance>_QTD = 1500.00
- <Balance>_YTD = 1000.00

The YTD value is lower than the QTD value. This may be valid, if the balance decreases over time. However, balances normally increase so it is advisable to check a balance that has been decreased.

Secondly, an invalid adjustment error may occur, where the process could not find the correct date to do the adjustment. The cause of this error depend on the balance dimension that is being processed.

However, it is always good practice to make sure that all the business group details are correct, and there are enough payroll periods for the balance to be set. To check which date is being used for each assignment balance, use the following SQL:

```
select BL.dimension_name,
pay_balance_upload.dim_expiry_date
(BH.business_group_id
,BH.upload_date
,BL.dimension_name
,BL.assignment_id
,BL.gre_name
,BL.jurisdiction_code
,BL.original_entry_id) expiry_date
from pay_balance_batch_headers BH
,pay_balance_batch_lines BL
where BH.batch_name = '&Batch_Name'
and BL.batch_id = BH.batch_id
and BL.assignment_number = '&Assignment_Number'
and BL.balance_name = '&Balance_Name'
;
```

If the expiry date is set to '31-DEC-4712' then the adjustment date could not be found.

Balance Initialization Steps

Here's a simple check list on how to set up the data:

1. Create payrolls in Oracle Payroll with periods going back to the start of the year. Enter all employees into Oracle HRMS and give them assignments to these payrolls.

Important: The next step applies to US and Canadian users only. Users in other legislations need only define links for the predefined balance loading elements.

2. From the Submit Requests window, run the *Initial Balance Structure Creation* process, selecting a batch name as the parameter. For each batch, this process creates:

- An input value to hold the amount of each balance and of any context, and enough elements with the special classification Balance Initialization to hold all the input values created
 - The necessary links and balance feeds for these elements
3. Create any other elements you need to initialize balances for your own earnings and deductions.
 - Follow the requirements listed above. See: Setting Up an Element to Feed Initial Balances, page 7-12.
 - Use multiple input values to reduce the number of elements
 - Define one balance feed for each input value

Note: Each balance must have one initial balance feed only.

Multiple input values for one element must feed balances that have the same 'upload date'.

4. Group employees into batches for managing initialization of their balances. Enter an identifying header for each batch (these headers go into the PAY_BALANCE_BATCH_HEADERS table). Each header contains the following information:
 - Business Group name and payroll name
 - Batch name and ID number
 - Upload date: the date on which the balances in the current system will be correct and ready for transfer

For example:

Batch Name	Business Group	Payroll Name	Upload Date
Upload 1	BG name	Full Time 1	13-AUG-1995

5. Create a batch line for each balance to be transferred (these lines go into the PAY_BALANCE_BATCH_LINES table). A batch line includes the following information:
 - Employee assignment number
 - Balance name and dimension, such as quarter to date or year to date
 - Balance value

- Balance context where appropriate. For US and Canadian users the context may include a GRE and a jurisdiction (federal, state, local, or provincial).

Note: The process uses your balance feed definitions to determine which element input value to use.

- For example:

Asg. Number	Balance	Dimension	Value
60001	Salary	PTD	700
60001	Salary	QTD	1400
60001	Salary	YTD	2400
60001	Tax Paid	PTD	2200
60001	Tax Paid	QTD	2400
60001	Tax Paid	YTD	2400

Important: The Tax Paid YTD value is not required because it has the same value as the QTD. However, this balance is included to create a value for the latest balance, and improve the performance of the first payroll run.

6. From the Submit Requests window, run the Initial Balance Upload process. Select the mode in which to run this process as a parameter. Available modes are:
 - **Validate**
 Validate batch lines but do not transfer
 Send error messages to PAY_MESSAGE_LINES
 - **Transfer**
 Validate and transfer batch lines
 If any line for an assignment is in error, none of the lines for the assignment are transferred
 - **Undo**
 Removes balance initialization entries from the database and marks the lines as U in the batch lines table.
 - **Purge**
 Purges all lines in the batch lines table, regardless of how they are marked.

Note: Use Purge mode only when you are sure that the balances for all assignments in a batch have been successfully entered into the HRMS database.

Including Balance Values in Reports

This section describes the PL/SQL interface for the balance function that enables you to access balance values for inquiry and reporting tools.

UK users - see: Including Balance Values in Reports (UK Only), *Oracle HRMS Implementation Guide (UK)*

Tip: If you need to report the same balance value many times in different reports you might consider creating a reporting table. You would simply include the balance function in your PL/SQL script to populate this table.

Advantages

Using this PL/SQL function to retrieve balance values has several advantages:

- You can easily call the function from a form or SRW2 report.
- You can access latest balance values, where they exist. This will optimize performance automatically.

The Balance Function

The interface to the balance function is flexible and easy to use. Hard coded knowledge of contexts within the function are kept to a minimum and the balance function is controlled as follows:

- Before the function is called, calls are made to another PL/SQL function to set up the contexts to be used. These are held in package level PL/SQL tables. This enables the balance function to operate without hard coded knowledge of the contexts, and reduces client-server calls for several balances.
- The 'C' balance user exit works in two modes: date and assignment action. The balance function does not pass a mode parameter; instead the mode is resolved by using the PL/SQL overloading feature. This simplifies the interface.

The PL/SQL code resides in one package.

```
pay_balance_pkg
```

Procedure : Initialize the contexts:

```
procedure set_context (p_context_name in varchar2, p_context_value in  
varchar2);
```

For example:

```
pay_balance_pkg.set_context ('TAX_UNIT_ID', p_tax_unit_id);
```

This is called to set up ALL contexts required for a balance, with the exclusion of assignment action id. Context values are maintained throughout the entire session. Subsequent calls with the same context name update the value.

Note: The context name can be specified in any case. The routine converts all context names to upper case.

Function : Get balance value (Assignment action mode):

```
function get_value (p_defined_balance_id    in number,  
p_assignment_action_id in number,  
p_always_get_db_item   in boolean default false)  
return number;
```

Function : Get balance value (Date mode):

```
function get_value (p_defined_balance_id    in number,  
p_assignment_id      in number,  
p_virtual_date       in date,  
p_always_get_db_item in boolean default false)  
return number;
```

The balance value is returned by this function. The parameters required for the function have been kept to a minimum. Legislation code and business group id are derived by the PL/SQL function when the balance SQL has to be built up from ff_routes.

Note: If the balance uses business_group_id as a context then this must be set up using the set_context routine.

The parameter 'p_always_get_db_item' can be ignored. It is used for testing purposes. If this value is set to 'true' then the function will not even look for a latest balance value, and will always derive the balance from the database item.

Example

This example shows how to access parameterized balances supporting jurisdiction- and GRE-based taxation (US and Canada specific).

In the UK, with the exception of court orders, no use is made of parameterized balances.

Note: For balances that are not parameterized, no calls to pay_balance_pkg.set_context are necessary.

1. Set up the contexts

```
pay_balance_pkg.set_context ('TAX_UNIT_ID', 1);  
pay_balance_pkg.set_context ('JURISDICTION_CODE', '01-  
123-4567');
```

2. Retrieve the balance value

```
bal_value := pay_balance_pkg.get_value  
(p_def_balance_id, p_asg_action_id);
```

3. Retrieve the balance for a different jurisdiction code but using the same value for tax unit id

```
pay_balance_pkg.set_context ('JURISDICTION_CODE', '99-  
999-1234');  
bal_value := pay_balance_pkg.get_value  
(p_def_balance_id, p_asg_action_id);
```

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