Oracle® HRMS for Romania

Supplement

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

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

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

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

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Preface

Intended Audience

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

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

- The principles and customary practices of your business area.

- Oracle HRMS.

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

- Oracle Self-Service Web Applications.

- The Oracle Applications graphical user interface.

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

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

Documentation Accessibility

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

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Structure

1 Enterprise and Workforce Management
2 Workforce Sourcing and Deployment
3 Self-Service Modules
4 Implementation Steps

Related Information Sources

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

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

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

Guides Related to All Products

Oracle E-Business Suite User's Guide

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

Oracle Application Framework Personalization Guide

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

Guides Related to This Product

Oracle Human Resources Management Systems Enterprise and Workforce Management Guide

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

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

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

Oracle Human Resources Management Systems Payroll Processing Management Guide

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

Oracle Human Resources Management Systems Compensation and Benefits Management Guide

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

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

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

Oracle Human Resources Management Systems Implementation Guide

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

Oracle Human Resources Management Systems FastFormula User Guide

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

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

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

Oracle Performance Management Implementation and User Guide

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

Oracle Succession Planning Implementation and User Guide

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

Oracle Human Resources Management Systems Deploy Strategic Reporting (HRMSi)

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

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

Learn about the workforce intelligence Discoverer workbooks.

Oracle Human Resources Management Systems Approvals Management Implementation Guide

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

Oracle Human Resources Management Systems Window Navigation and Reports Guide

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

Oracle iRecruitment Implementation and User Guide

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

Oracle Learning Management User Guide

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

Oracle Learning Management Implementation Guide

Implement Oracle Learning Management to accommodate your specific business practices.

Oracle Time and Labor Implementation and User Guide

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

Oracle Labor Distribution User Guide

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

Other Implementation Documentation

Oracle E-Business Suite Maintenance Guide

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

Oracle E-Business Suite Security Guide

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

Oracle E-Business Suite Setup Guide

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

Oracle E-Business Suite Flexfields Guide

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

Oracle eTechnical Reference Manuals

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

Integration Repository

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

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

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

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

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

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

information and you risk unpredictable results throughout Oracle E-Business Suite.

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

1

Enterprise and Workforce Management

Organization Structures

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, *Oracle HRMS Enterprise and Workforce Management Guide*

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*

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 1-6

For HR organization see: HR Organization, page 1-7

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

For constituency see: Constituency, page 1-8

For bargaining association see: Bargaining Association, page 1-9

For bargaining association see: Bargaining Association, page 1-9

For professional body information see: Professional Body Information, page 1-9

For GRE/legal entity see: Legal Entity, page 1-10

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

To enter Business Group additional information:

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

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

3. Select one of the following:

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

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

   - Work Day Information, see: Business Groups and HR Organizations: Work Day Defaults, *Oracle HRMS Enterprise and Workforce Management Guide*

   - Benefits Defaults, see: Business Groups: Defining a Default Monthly Payroll, *Oracle HRMS Enterprise and Workforce Management Guide*

   - PTO Balance Type, see Business Groups: Selecting a PTO Balance Type, *Oracle HRMS Enterprise and Workforce Management Guide*

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

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

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

4. Repeat these steps to enter further information.

To enter HR organization additional information:

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

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

3. Select one of the following:
   - Reporting Information, see: Entering Reporting Information for an HR Organization or a Company Cost Center., *Oracle HRMS Enterprise and Workforce Management Guide*

   - Costing Information, see: HR Organizations: Entering Costing Information, *Oracle HRMS Enterprise and Workforce Management Guide*

   - Parent Organization, see: HR Organizations: Entering Parent Organizations, *Oracle HRMS Enterprise and Workforce Management Guide*

   - Work Day Information, see: Business Groups and HR Organizations: Entering Work Day Defaults:, *Oracle HRMS Enterprise and Workforce Management Guide*

   - Payslip Information, see Entering Payslip Information, *Oracle HRMS Enterprise and Workforce Management Guide*

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

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

4. Repeat these steps to enter further information.

To enter representative body additional information:

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

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

3. Select one of the following:

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

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

4. Repeat these steps to enter further information.

To enter constituency additional information:

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

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

3. Select one of the following:

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

    •   Organization, see Entering Organization Information for Constituencies, *Oracle HRMS Enterprise and Workforce Management Guide*

    •   Organization Hierarchy, see Entering Organization Hierarchy information for Constituencies, *Oracle HRMS Enterprise and Workforce Management Guide*

    •   Grade, see Entering Grade information for Constituencies, *Oracle HRMS Enterprise and Workforce Management Guide*

    •   Bargaining Unit, see Entering Bargaining Unit information for Constituencies, *Oracle HRMS Enterprise and Workforce Management Guide*

    •   Job, see Entering Job information for Constituencies, *Oracle HRMS Enterprise and Workforce Management Guide*

    •   Collective Agreement Grade, see Entering Collective Agreement Grade information for Constituencies, *Oracle HRMS Enterprise and Workforce Management Guide*

4. Repeat these steps to enter further information.

To enter bargaining association information:

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

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

3. Select Trade Union Information, see: Entering Trade Union Information for a Bargaining Association, *Oracle HRMS Enterprise and Workforce Management Guide*

4. Repeat these steps to enter further information.

To enter company cost center information:

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

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

3. Select one of the following:

   • GL Company Cost Center, see: Entering GL Company Cost Center Information for a Company Cost Center, *Oracle HRMS Enterprise and Workforce Management Guide*

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

4. Repeat these steps to enter further information.

To enter professional body information:

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

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

3. Select Professional Body Info, see: Entering Additional Information for a Professional Body, *Oracle HRMS Enterprise and Workforce Management Guide*

4. Repeat these steps to enter further information.

To enter additional legal entity 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:

    *   RO Legal Employer, see: Entering Employer Information for a Legal Entity, page 1-10

    *   Revisal Information, see: Entering Revisal Information for a Legal Entity, page 1-11

    *   112 Statement Information, see: Entering 112 Statement Information for a Legal Entity, page 1-12

    *   Statistics Report Information, see: Entering Statistics Report Information for a Legal Entity, page 1-12

4. Repeat these steps to enter further information.

Entering Employer Information for a Legal Entity

Oracle HRMS enables you to enter information required for statutory reports such as Revisal, 112 Statement, and the Statistic Report. Use the Legal Employer window to enter this information for a legal entity.

To enter employer information:

1. In the Organization window, query the Legal Entity. In the Organization Classifications region, select GRE/Legal Entity, choose Others, and select Employer Information.

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

3. Select the parent organization if the organization type is not headquarters.

4. Enter the name of the employer

5. Modality

6. Select the category of the employer.

7. Enter the employer's FIC code.

8. Enter the order number from the Trade Register Office. The 112 Statement uses this number.

9. Select the juridical form of the employer for Revisal and Statistics reporting.

10. Select the organizing form of the employer for reporting in Revisal and Statistics report.

11. Select applicable reporting employer.

12. Select the property form of the employer.

13. Enter the CAEN section, division, group, and class codes for the employer.

14. Select the location of the health insurance unit.

15. Click OK.

Entering Revisal Information for a Legal Entity

Oracle HRMS enables you to enter information required for the Revisal statutory report. Use the Revisal Information window to enter this information for a legal entity.

To enter revisal information:

1. In the Organization window, query the Legal Entity. In the Organization Classifications region, select GRE/Legal Entity, choose Others, and select Revisal Information.

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

3. Enter the following employer contact details:

   • Contact Name

   • Contact Phone Number

   • Contact Fax Number

   • Contact Email Address

4. Click OK.

Entering 112 Statement Information for a Legal Entity

Oracle HRMS enables you to enter information required for the 112 Statement statutory report. Use the 112 Statement Information window to enter this information for a legal entity.

To enter 112 statement information:

1. In the Organization window, query the Legal Entity. In the Organization Classifications region, select GRE/Legal Employer, choose Others, and select 112 Statement Information.

2. Click in the field of the Additional Organization Information window to open the 112 Statement Information window.

3. Enter the fiscal address of the employer.

4. Enter the following employer contact details:

    *   Contact Last Name

    *   Contact First Name

    *   Contact Position

    *   Contact Phone Number

    *   Contact Fax Number

    *   Contact Email Address

5. Click OK.

Entering Statistics Report Information for a Legal Entity

Oracle HRMS enables you to enter information required for the Statistics report. Use the Statistics Report Information window to enter this information for a legal entity.

To enter statistics report information:

1. In the Organization window, query the Legal Entity. In the Organization Classifications region, select GRE/Legal Entity, choose Others, and select Statistics Report Information.

2. Click in the field of the Additional Organization Information window to open the Statistics Report Information window.

3. Enter the employer contact name and phone number.

4. Click OK.

Locations

Locations

In Oracle HRMS, you set up each physical site where your employees work as a separate *location*. If you use the Configuration Workbench to configure your basic enterprise structure, then you only need to create locations for the additional organizations you require.

See: Key Concepts for Representing Enterprises, page 1-2

You can set up:

- **Global locations:** These are available in all Business Groups.

- **Business Group locations**: These can only be used in one Business Group.

- **Business Place locations (Korea only)**: These can only be used in one Business Place.

Similarly, you enter the addresses of external organizations that you want to maintain in your system, such as employment agencies, tax authorities, and insurance or benefits carriers. When setting up internal or external organizations, you select from a list of these locations.

This approach has these advantages:

- You enter information about each location only once, thereby saving data entry time.

- Central maintenance of locations ensures consistency of address standards.

- Your work sites exist as separate structures identifiable for reporting purposes, and for use in the rules that determine employee eligibility for various types of compensation and benefits.

Mexico Only

Oracle HRMS uses the location associated with an assignment to determine its social security affiliation. It is recommended that you associate all locations with one or more appropriate GRE using the Mexico HRMS Statutory Reporting Hierarchy. Oracle HRMS determines the GRE of an assignment based on the hierarchy you have associated the location with.

See: Government Reporting Entities (GREs), *Oracle HRMS Enterprise and Workforce Management Guide (Mexico)*

See: Mexico HRMS Statutory Reporting Generic Hierarchy Type, *Oracle HRMS*

Enterprise and Workforce Management Guide (Mexico)

See: Entering an Assignment (Assignment Window), *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

Setting Up Locations

You can enter addresses in the Location window.

Locations are shared across Business Groups in HRMS and with two other Oracle applications: Inventory and Purchasing. HRMS does not use some of the fields in the Location window. These fields are disabled for HRMS users. For example, the Legal Address check box is read-only and supports future functionality in Oracle Financials.

For information about Oracle Purchasing locations, see: Defining Locations, *Oracle Purchasing User's Guide*.

To enter a work location and its address:

1. Enter the name of the location, and a description if required.

2. Uncheck the Global check box if you want the location to only be available within the default Business Group of your current responsibility. Accept the default if you want the location to be a global location and therefore available to all Business Groups.

   If you are setting up a global location, the location name must be unique across all Business Groups.

   If you are setting up a location for one Business Group, the location name must be unique within that Business Group and all global locations, but does not have to be unique across all Business Groups.

   > **Note:** You cannot amend the Global check box once you have set up your location.

3. Select a national address style from the list. If a local address style exists for your country, it is displayed as the default. Otherwise, the international style is displayed.

   Australian users: There is a choice of Australia (International) address style and Australia address style. If you want to upgrade from an existing Australia (International) address style to the Australia address style, run the Upgrade Australia Address Style process. This is an optional step. This process enables you to validate and correct any invalid address information for reporting purposes.

   If you are entering an international address, use the Australia (International) address style. If this is unavailable, use the generic style with a valid ISA 3166 code country code.

US and Canadian users: The local style is only displayed if you have Vertex geocode data installed.

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

4. Enter address information in this window.

   US Payroll users: If you change a location address, then you must update the location in the State Tax Rules window for each assignment at that location. If the Address Validation Using Vertex Web Services feature is enabled, then Vertex Web Services validates addresses in the Location window. See: Address Validation Using Vertex Web Services, *Oracle HRMS Implementation Guide (US)*

   US users: In the EEO Exception Report, location addresses are truncated to 115 characters if the combined length of the location code and address lines 1,2, and 3 is greater than 115 characters.

   Canadian Payroll users: You enter Census Metropolitan Area codes here in the Location Address flexfield.

   > **Note:** You must enter the postal code in the following format NNNNAA, for example, 1234AB.

   Irish users: You enter the employer's address here and attach it to the legal employer.

5. If the mailing address of the location differs from the payroll taxation address, you need to enter an overriding address into the Payroll Tax fields.

6. Select a time zone if you want to associate a time zone with the location.

   > **Note:** When you select a time zone, ensure that it corresponds to the location's address.

7. Choose OK, and then choose the Extra Information button to enter any additional information required by your enterprise.

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

8. Save your location.

To make locations inactive:

Making a location inactive prevents users from selecting it.

To remove an address from the Location list:

1. Enter an inactive date when the location is no longer in use in your enterprise, and save your changes.

To delete a location:

You can delete locations that have not been used.

> **Note:** If a location is still in use, but you do not want it to be selected today or in the future, enter an inactive date.

1. Query the location you want to delete.

2. Delete the location.

3. Save the changes.

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.
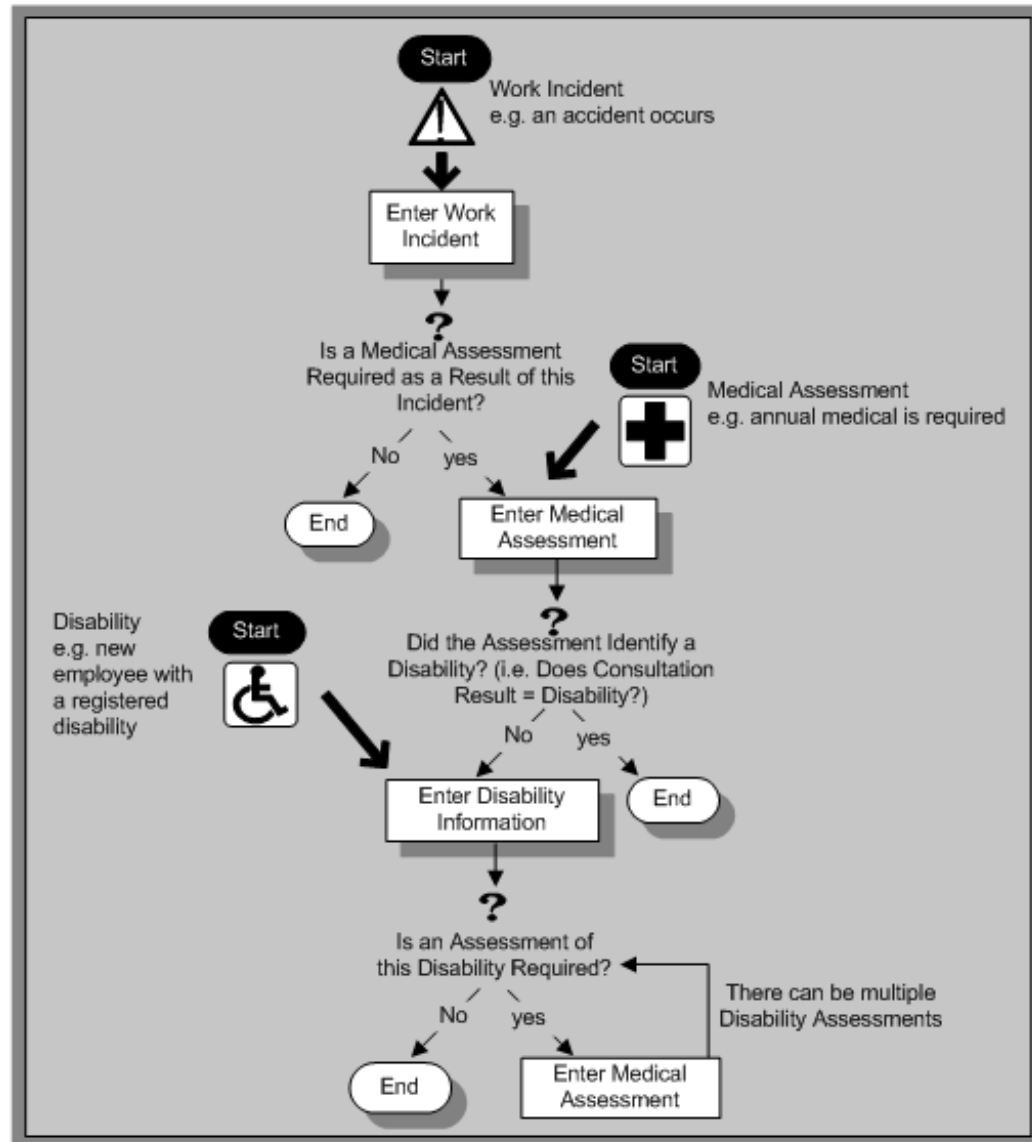
Entering Work Incident Information

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.

  For Russian users only: Activity is not required in Russia, so this field is not available to Russian users. Select the primary and secondary reasons for the incident. For example, you can select violation of industrial discipline as the primary reason and extreme temperatures as the secondary reason.

- 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.

    Note: For Russian users: The Incident Reporting tab is not applicable.

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.

    Note: For Russian users: The Medical Details tab is not applicable.

Other Information:

1. Choose the Other tab.

2. Enter other information about this incident:

- If compensation was awarded for this incident, enter the amount. Then select the currency for the compensation amount. The Business Group's currency is shown as the default.

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

- Enter the date on which the compensation was given.

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

- Enter the time the worker began work on the day of the incident.

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

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

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

3. Enter further information about this work incident in the Further Information field if it has been set up by your Oracle localization team.

   For Russian users only, see: Entering Work Incident Information, page 1-21

   For Mexican users only: Select the type of risk from the available list-of-values.

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.

Entering Medical Assessments

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

To enter a medical assessment:

1. Enter the date on which the medical assessment was held.

2. Select the type of assessment, for example, Annual Medical Assessment.

   • If you opened the Medical Assessment window via the Disability window, the assessment type is Disability and cannot be changed.

   • If you opened the Medical Assessment window via the Work Incidents window, the assessment type is Occupational Assessment and cannot be changed.

3. Select the result of the assessment.

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

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

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

   See: Entering Organizations, page 1-4 and Entering Organization Classifications, *Oracle HRMS Enterprise and Workforce Management Guide*.

5. Enter the date on which the next assessment is planned.

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

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

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

   To enter a work incident for this person, see Entering Work Incidents, page 1-21.

7. Enter a description of the assessment.

8. Enter further details in the Further Information field if it has been set up by your Oracle localization team.

9. Save your work.

What Next?

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

See: Entering Disability Information, page 1-26

> **Note:** Once a medical assessment is referenced in a disability record, you cannot change its result from Disability.

Entering Disability Information

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

You use the Disability window to enter this information.

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

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

To enter disability information:

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

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

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

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

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

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

4. Select the status of this disability information.

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

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

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

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

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

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

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

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

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

8. Select the medical assessment that recorded this disability.

   The list of assessments is limited to assessments that:

   • have a result of Disability

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

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

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

   To link an incident to an assessment, see: Entering Medical Assessments, page 1-25

   This field is not datetracked.

Entering Disability Registration Information:

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

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

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

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

   See: Creating an Organization, page 1-4

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

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

Entering Additional Disability Information:

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

2. Enter a description of the disability.

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

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

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

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

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

   For Korea users only: Specify the following:

   • Disability grade

   • Effective date of the disability

   • If a certificate of disability is available or not.

   • Disabled type

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

   For Mexican users only: Specify the following:

   • Disability ID of any related disabilities

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

   • Number of disability days subsidized by the social security agencies

   • Type of disability

     Valid values are:

     • General Disease

     • Maternity

- Risk Incident

- Result of the disability

  The Consequence field provides the following options:

  - None

  - Temporary Disability

  - Provisional Initial Assessment

  - Definitive Initial Assessment

  - Death

  - Relapse

  - Assessment after start date

  - Provisional re-assessment

  - Relapse without medical discharge

  - Definitive re-assessment

- Disability control

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

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

For Japanese users only: Specify the following:

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

- Degree/Grade - select the degree if the employee is intellectually disabled and the grade if physically disabled.

- Confirmation Method - select the confirmation method by which the disability was confirmed by the employer.

- Severely Disabled - select Yes if the employee has severe physical disability or severe intellectual disability and must be counted as 2 disabled persons for

reporting purposes.

- Part-time Worker - select Yes if the employee is a part-timer for reporting purposes.

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

- Wa Insurance Disability Grade - select the grade for work insurance purposes.

- Insurance Injury and Sickness - select the values for the work insurance purposes.

5. Save your work.

What Next?

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

See: Entering a Medical Assessment, page 1-25 for more information.

Maintaining Disability Information

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

2

Workforce Sourcing and Deployment

People Management

Assignment Extra Information Types (EITs)

You can define as many Extra Information Types (EITs) as you require to hold information about assignments. This topic lists predefined EITs that you can use.

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

- Romania Assignment Information - use this EIT to record the date of signing the contract and the applicable classification of occupations in Romania (COR). Ensure that you have set up the COR values. See: Additional Implementation Steps for Romania, *Oracle Human Resources Management Systems Implementation 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 HRMS Enterprise and Workforce Management Guide*

Entering Employee Information:

Enter the following information if the person is an employee.

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

   - The Latest Start Date field displays your effective date.

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

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

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

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

Entering Identification Information:

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

1. If your enterprise uses a manual number generation scheme, enter an employee,

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

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

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

Sending Emails for Personal Information Updates

Your system administrator can configure the application to send emails when you update personal information in the People window. Emails are sent to the email recorded in the Email field in the Office Details tab. See Subscribing to Business Events to Send Emails, *Oracle HRMS Configuring, Reporting, and System Administration Guide* for more information.

Entering Additional Personal Information (People Window)

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

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

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

1. Choose the Office Details tabbed region.

2. Enter the office number.

3. Enter the internal location of this office.

4. Enter the office identifier for internal mail.

5. Enter the person's 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 background check information:

1. Choose the Background tabbed region.

2. Check whether the person background check has been performed.

3. Select the date the background check was performed.

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

1. Choose the Rehire tabbed region.

2. If the former manager has recommended the applicant for rehire, select the Recommended check box.

3. Select the reason for this recommendation.

To enter further information:

1. Choose the Further Information tabbed region.

2. If the person was previously known by a different name, then enter the previous last and first names.

3. Enter the previous numerical person code.

4. Select Yes or No to indicate whether the employee is a pensioner or not.

5. Indicate whether the employee is an old age pensioner or a blind pensioner. You can extend the list of values in this field. See: Defining Lookup Values, Oracle Human Resources Management Systems Configuring, Reporting, and System Administration Guide

6. Select the applicable health insurance unit.

To enter medical information for a person:

1. Choose the Medical tabbed region.

2. Select the person's blood type.

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

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

To enter other information for a person:

To enter schedule information for a person, you can:

• Set up extensive availability information such as, shifts, schedules, and calendar events using integrated features from HRMS and Common Application Components (CAC).

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

• Set up holiday calendars, shifts, and work plans in OTL.

  See: Time Management Structures, *Oracle Time and Labor Implementation and User Guide*

Alternatively, you can enter basic schedule information in various areas of Oracle HRMS, such as here in the People window.

> **Important:** The HR application does not use the schedule information that you can enter here to determine a worker's availability. This is for information purposes only.

The decision for which method to set up is based on knowledge of which applications use which information.

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

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

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

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

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

6. Enter the 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.

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

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

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

10. Check the Voluntary Service check box, if your employee or applicant is

volunteering, for example as a missionary.

Entering and Maintaining Documents of Record

You can create documents of record, such as work permits, visas, travel documents, and medical certificates, and store them in Oracle HRMS.

You can view, update, and delete stored documents as required.

As an HR Professional, you can search for existing documents using the Search Documents of Record function. Alternatively, you can create and maintain documents for your direct reports or for individuals whose records you can access using the Documents of Record window. The Documents of Record window is available from the People window, from the FastPath menu, and from the Search Documents of Record page.

> **Note:** The Documents of Record functionality is also available from SSHR.
>
> See: Documents of Record, *Oracle SSHR Deploy Self-Service Capability Guide*

To search for documents of record:

1. Select Search Documents of Record from the Navigator.

2. Enter your search criteria.

   > **Note:** You must enter either a document type, category, or subcategory.

3. Click Go to perform the search.

   From the search results, you can view, update, and delete documents of record.

To create or maintain documents of record for an individual:

1. Either display the person record in the People window and select Documents of Record from the list of navigation options, or select Documents of Record from the FastPath menu and search for a person.

   See: Finding a Person Using the Find Person Window, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

   The Documents of Record window appears showing any existing documents for the individual. You can create new documents of record and view, maintain, and delete existing documents.

For Romanian users: Ensure that you set up the identity documents. See: Additional Implementation Steps for Romania, *Oracle Human Resources Management Systems Implementation Guide*

2. To perform an action on an existing document, select the corresponding icon (Update or Delete).

> **Note:** To view the document in read-only format, click the link in the Type column.

The Update Document of Record page or the Deletion warning page appears.

3. Alternatively, to create a new document, click Create Document of Record.

The Create Document of Record page appears.

See: Documents of Record, *Oracle HRMS Deploy Self-Service Capability Guide*

4. Complete the Create Document of Record page or update the document information, and click Apply.

5. Close the window.

Entering Contracts

You enter and maintain contracts in the Contracts window.

To enter a new contract:

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

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

   For Romanian users: Enter the contract number in this field.

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

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

4. Select the contract type.

5. Select the status of the contract, such as pending, opened, printed and so on. You must set up document statuses using the user extensible Lookup Type DOCUMENT_STATUS. Enter the date the document status of the contract changed.

> **Note:** The document status is not DateTracked.

6. You can enter any remaining information relating to the contract such as start reason, duration, or contractual job title.

7. Enter further information about this contract if your Oracle localization team has set up the Further Contract Information window.

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

8. Save your changes.

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

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

Maintaining Contracts

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

- If you change the status of an active contract to make it inactive, and choose the Update button, the contract record will be ended. A new contract record with an inactive status will be created and the fields in the Active Contracts Dates region will become blank.

- If you change the status of an active contract to make it inactive and choose the Correction button, the current contract record will be amended to appear as if the most recent active period has never occurred.

Deleting Contracts

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

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

To delete a contract:

1. Query the contract in the Contract window.

2. Select Delete Record from the Edit menu and proceed as instructed in the displayed windows.

Entering Further Contract Details

Oracle HRMS enables you to enter further contract information required for reporting purposes.

To enter further contract information:

1. Query the contract in the Contract window.

2. Click in the More Information field to open the Further Contract Information window.

3. Select the legal reason applicable to the contract status.

4. Enter any extra information regarding the contract status.

5. Enter the employer to whom the contract is applicable based on the contract status.

6. Enter the applicable employer's VAT number or the numerical person code.

7. Enter the country where the contract is applicable based on the contract status.

Entering Previous Employment Details

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

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

• Previous Employer

• Previous Job

• Assignment - Previous Job Mappings

To enter previous employment details:

1. Enter the previous employer name.

2. Enter an address.

3. Select a country.

4. Select the type of business.

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

6.   Enter a description for the employer.

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

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

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

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

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

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

11. Save your work.

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

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

To enter previous job details:

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

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

3.   Enter a job title.

4.   Select an employee category.

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

6. Enter a description for the previous job.

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

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

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

   See: Entering Further Previous Job Information.

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

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

10. Save your work.

To map previous jobs to an assignment:

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

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

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

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

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

6. Save your work.

Entering Additional Assignment Details (Assignment Window)

Once you have set up basic assignment details, you can enter additional information,

such as supervisor details, special ceiling progression points, and salary information, in the tabbed regions of the Assignment window. The tabbed regions that appear in the Assignment window vary according to person type and localization.

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

To enter salary information for an employee:

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

1. Choose the Salary Information tabbed region.

2. Select a salary basis for the employee.

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

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

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

To enter supplier information for a contingent worker:

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

If you are not using Oracle Services Procurement:

1. Choose the Supplier tabbed region.

2. Select the names of the supplier and the supplier site for the contingent worker.

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

If you are using Oracle Services Procurement

4. Choose the Supplier tabbed region.

5. Select a purchase order number for this assignment.

6. 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.

7. 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.

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

To enter supervisor information for an employee or contingent worker:

1. Choose the Supervisor tabbed region.

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

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

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

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

To enter probation period and notice information for an employee:

The probation period defaults from the employee's position.

1. Choose the Probation and Notice Period tabbed region.

2. Amend the default probation period for your employee's assignment, if required.

3. Enter the notice period for the assignment, if required.

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

To enter schedule information for a person, you can:

• Set up extensive availability information such as, shifts, schedules, and calendar events using integrated features from HRMS and Common Application Components (CAC).

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

• Set up holiday calendars, shifts, and work plans in OTL.

   See: Time Management Structures, *Oracle Time and Labor Implementation and User Guide*

Alternatively, you can enter basic schedule information in various areas of Oracle HRMS, such as here in the Assignment window.

> **Important:** The application does not use the schedule information that you can enter here to determine a worker's availability. This is for information purposes only.

The decision for which method to set up is based on knowledge of which applications use which information.

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

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. If you are in the US, benefits are often based on whether a person is paid hourly or receives a salary.

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

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.

> **Note:** If you are a German public sector user, selecting a contract defaults some values, for example pay grade, from the contract into

the assignment. If you want to amend these values you must change them on the contract as you cannot update them in this window.

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.

3

Self-Service Modules

Personal Information Module

Personal Information

Oracle HRMS for Romania provides self-service access to the Personal Information modules that includes personal basic details, contact details of dependents and beneficiaries, address details, and emergency contact details. Employees with Manager Self-Service responsibility and employees with Employee Self-Service responsibility can access the following in this module:

Personal Information

Employees and managers can add, update, and view basic personal details such as first/last names, date of birth, marital status, and country/town/region of birth. Apart from these details, employees can only view the NPC/FRN number. However, they can update the previous NPC/FRN in the Basic Details: Correction Page.Additionally, they can update and view additional personal information such as residence, citizenship, previous first name, pensioner status, pensioner type, and health insurance unit in the Further Person Information descriptive flexfield. Managers can add, update, and view these details while hiring applicants and rehiring employees.

Contact Details

Employees and managers can create, update, and view dependents and beneficiary basic and additional details. Additionally, employees can add, update, and view the emergency contact details.

Address Details

Employees and managers can record Romania international address details and Romania specific address details in the Person Overview, Address, Review, and Emergency Contact pages.

For information regarding personalizing this module, see Personal Information Modules and Applicant Hire and Rehire topics in *Oracle Self-Service Human Resources Deploy Self-Service Capability Guide*. Additionally, see: Entering a New Person (People Window), page 2-2 and Entering Additional Personal Information (People Window), page 2-8, *Oracle HRMS for Romania Supplement*

4

Implementation Steps

Additional Implementation Steps for Romania

If you are implementing Oracle HRMS for Romania, then you must also complete the following additional implementation steps.

Please see the implementation section in *Implementing Oracle HRMS* for all other implementation steps that are not specific to Romania.

Additional Implementation Steps

Step 1: Set up Identity Documents *Required Step*

To create document of records for your workforce, you must set up the following identity documents:

For Romanians

- Identity Card

- Passport

- Identity Bulletin

- Other type of identity document

- Residence Card

- Residence Permit

- Another type of Romanian identity document

- Another type of identity document (stateless, tolerated)

For non-European Union foreign citizens who need a work authorization to be

employed in Romania, set up the following authorization types:

- For permanent workers

- For detached workers

- For season workers or interns

- For sportsmen

- For cross-border workers

- Nominal authorization

- For high-qualified workers

Additionally, set up the Fiscal Residence Certificate issued by the fiscal authority in the respective country (where the non-resident has the fiscal residence), in order to benefit from the Double Taxation Avoidance Conventions agreed between Romania and other states.

See: Entering and Maintaining Documents of Record, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

Step 1.1: Add sub-categories to the predefined document categories

Navigate to Other Definitions > User Types and Statuses and add the following subcategories for category RO ID Information.

Category Subcategory	Description	Subcategory Code
RO ID Information	Identity card	RO_ID_CARD
RO ID Information	Passport	RO_PASSPORT
RO ID Information	Identity bulletin	RO_ID_BULTN
RO ID Information	Others identity document	RO_OTHERS
RO ID Information	Residence card	RO_RESIDENCE_CARD
RO ID Information	Residence permit	RO_RESIDENCE_PERMIT
RO ID Information	Another type of Romanian identity document	RO_ANOTHER_TYPE

Category Subcategory	Description	Subcategory Code
RO ID Information	Another type of identity document (stateless, tolerated)	RO_ID_SL_TR

Add the following subcategories for category RO Work Authorization

> **Note:** The following work permit types are no longer supported from tax year 2020:
>
> - Detached Workers (RO_DETACHED_WORKERS)
>
> - Sportsmen (RO_SPORTSMEN)
>
> - Nominal Authorization (RO_NOMINAL)

Category Subcategory	Description	Subcategory Code
RO Work Authorization	For Permanent workers	RO_PERMANENT_WORKERS
RO Work Authorization	For detached workers	RO_DETACHED_WORKERS
RO Work Authorization	For season workers	RO_SEASON_WORKERS
RO Work Authorization	For interns	RO_INTERNS
RO Work Authorization	For sportsmen	RO_SPORTSMEN
RO Work Authorization	For cross-border workers	RO_CROSSBRDR_WORKERS
RO Work Authorization	Nominal authorization	RO_NOMINAL
RO Work Authorization	For high-qualified workers	RO_QUALIFIED_WORKERS
RO Work Authorization	Exception	RO_EXCEPTION
RO Work Authorization	Au Pair workers	RO_AU_PAIR_WOKRERS

Add the following subcategory for category RO Fiscal Certificate

Category Subcategory	Description	Subcategory Code
RO Fiscal Certificate	For foreign citizens	RO_FOREIGN_CITIZEN

Step 1.2: Define Document Type

You must define a unique document type for every unique category/sub category. Define document type for each category/sub category as follows:

Document Types	Category Code	Category Description	Subcategory Code	Subcategory Description
RO Identity Card	RO_ID_INFO	RO ID Information	RO_ID_CARD	Identity Card
RO Passport	RO_ID_INFO	RO ID Information	RO_PASSPORT	Passport
RO Identity Bulletin	RO_ID_INFO	RO ID Information	RO_ID_BULTN	Identity Bulletin
RO Others Identity document	RO_ID_INFO	RO ID Information	RO_OTHERS	Others Identity document
RO Residence card	RO_ID_INFO	RO ID Information	RO_RESIDENCE _CARD	Residence card
RO Residence permit	RO_ID_INFO	RO ID Information	RO_RESIDENCE _PERMIT	Residence permit
RO Permanent workers	RO_WORK_AU TH	RO Work Authorization	RO_PERMANE NT_WORKERS	For Permanent workers
RO Detached workers	RO_WORK_AU TH	RO Work Authorization	RO_DETACHED _WORKERS	For detached workers
RO Season workers	RO_WORK_AU TH	RO Work Authorization	RO_SEASON_W ORKERS	For season workers
RO Interns	RO_WORK_AU TH	RO Work Authorization	RO_INTERNS	For interns

Document Types	Category Code	Category Description	Subcategory Code	Subcategory Description
RO Sportsmen	RO_WORK_AUTH	RO Work Authorization	RO_SPORTSMEN	For sportsmen
RO Cross-border workers	RO_WORK_AUTH	RO Work Authorization	RO_CROSSBRDR_WORKERS	For cross-border workers
RO Nominal authorization	RO_WORK_AUTH	RO Work Authorization	RO_NOMINAL	Nominal authorization
RO High-qualified workers	RO_WORK_AUTH	RO Work Authorization	RO_QUALIFIED_WORKERS	For high-qualified workers
RO Foreign citizens	RO_FISCAL_CERT	RO Fiscal Certificate	RO_FOREIGN_CITIZEN	For foreign citizens
RO Identity Card	RO_WORK_AUTH	RO Work Authorization	RO_EXCEPTION	Exception
RO Identity Card	RO_WORK_AUTH	RO Work Authorization	RO_AU_PAIR_WOKRERS	Au Pair workers

Step 1.3 Run Register Document Types (EITs) Program

Run the concurrent Program Register Document Types (EITs) to define the document type corresponding to each category/subcategory.

Enter the parameters as follows:

- Document Type: Populate Document Type as defined above.

- Multiple Rows: Yes

- Country Code: Romania

- Description: (as appropriate)

- Category Code : Select the appropriate Category code from LOV

- Subcategory code: Select the appropriate Subcategory code from LOV

- Authorization Required: (set to No)

- Waiting period: Null

This concurrent program populates the document type in hr_document_types table as follows:

DOCUMENT_TYPE_ID	CATEGORY_CODE	SUB_CATEGORY_CODE	LEGISLATION_CODE	SYSTEM_DOCUMENT_TYPE
184	RO_ID_INFO	RO_ID_CARD	RO	RO Identity Card
201	RO_ID_INFO	RO_PASSPORT	RO	RO Passport
202	RO_ID_INFO	RO_ID_BULTN	RO	RO Identity Bulletin
203	RO_ID_INFO	RO_OTHERS	RO	RO Others Identity document
204	RO_ID_INFO	RO_RESIDENCE_CARD	RO	RO Residence card
205	RO_ID_INFO	RO_RESIDENCE_PERMIT	RO	RO Residence permit
221	RO_WORK_AUTH	RO_PERMANENT_WORKERS	RO	RO Permanent workers
222	RO_WORK_AUTH	RO_DETACHED_WORKERS	RO	RO Detached workers
223	RO_WORK_AUTH	RO_SEASON_WORKERS	RO	RO Season workers
224	RO_WORK_AUTH	RO_INTERNS	RO	RO Interns
225	RO_WORK_AUTH	RO_SPORTSMEN	RO	RO Sportsmen
226	RO_WORK_AUTH	RO_CROSSBRDR_WORKERS	RO	RO Cross-border workers

DOCUMENT_TYPE_ID	CATEGORY_CODE	SUB_CATEGORY_CODE	LEGISLATION_CODE	SYSTEM_DOCUMENT_TYPE
227	RO_WORK_AUTH	RO_NOMINAL	RO	RO Nominal authorization
228	RO_WORK_AUTH	RO_QUALIFIED_WORKERS	RO	RO High-qualified workers
229	RO_WORK_AUTH	RO_EXCEPTION	RO	RO Exception
230	RO_WORK_AUTH	RO_AU_PAIR_WORKERS	RO	RO Au Pair workers

Step 1.4: Add Document Type

To add the document type:

1. Navigate to Security > Information Types Security

2. Query the responsibilities to add the DOCUMENT TYPE

3. Select the DOCUMENT TYPE defined in step 1.2. The application populates the category and subcategory automatically based upon what was defined when the document type was created.

4. Save.

Step 2: Include the COR in either JOB, Position, or Grade flexfield *Required Step*

In the individual labor contract, to select the title of the job from an official list named COR (The Classification of Occupations in Romania) and to meet REVISAL (to report labor contracts) requirements and for statistical reports, you must include the COR in either JOB, Position, or Grade flexfield. Use the applicable user table to specify in which key flexfield you have the COR along with the segment number holding the value.

Step 3: Set up Address and Job Title Related Data *Required Step*

Set up address and job title related data by uploading the SIRUTA and COR files. See: My Oracle Support Note 1559031.1.

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