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PeopleSoft HCM 9.2: Human Resources Meet Regulatory Requirements

June 2019

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Documentation Accessibility

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

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Contents

Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft Applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

PeopleSoft Hosted Online Help

You access the PeopleSoft Online Help on Oracle's PeopleSoft Hosted Online Help website, which enables you to access the full help website and context-sensitive help directly from an Oracle hosted server. The hosted online help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support, because that documentation is now incorporated into the hosted website content. The Hosted Online Help website is available in English only.

Note: Only the most current release of hosted online help is updated regularly. After a new release is posted, previous releases remain available but are no longer updated.

Locally Installed Help

If you are setting up an on-premises PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the Hosted Online Help website, you can install the PeopleSoft Online Help locally. If you install the help locally, you have more control over which documents users can access and you can include links to your organization's custom documentation on help pages.

In addition, if you locally install the PeopleSoft Online Help, you can use any search engine for full-text searching. Your installation documentation includes instructions about how to set up Elasticsearch for full-text searching. See *PeopleSoft 9.2 Application Installation* for your database platform, "Installing PeopleSoft Online Help." If you do not use Elasticsearch, see the documentation for your chosen search engine.

Note: See Oracle Support Document 2205540.2 (PeopleTools Elasticsearch Home Page) for more information on using Elasticsearch with PeopleSoft.

Note: Before users can access the search engine on a locally installed help website, you must enable the Search field. For instructions, go to your locally installed PeopleSoft Online Help site and select About This Help >Managing Locally Installed PeopleSoft Online Help >Enabling the Search Button and Field in the Contents sidebar.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals
- Using PeopleSoft Applications

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft Applications.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

Typographical Convention	***Description***
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For Alt+W, hold down the Alt key while you press the W key.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.

Typographical Convention	*Description*
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region and Industry Identifiers

Information that applies only to a specific region or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in the PeopleSoft Online Help:

- USF (U.S. Federal)
- E&G (Education and Government)

Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

Using and Managing the PeopleSoft Online Help

Click the Help link in the universal navigation header of any page in the PeopleSoft Online Help to see information on the following topics:

- What's new in the PeopleSoft Online Help.
- PeopleSoft Online Help accessibility.
- Accessing, navigating, and searching the PeopleSoft Online Help.
- Managing a locally installed PeopleSoft Online Help website.

PeopleSoft Application Fundamentals

The *PeopleSoft HR PeopleBook: Meet Regulatory Requirements* provides you with implementation and processing information for your PeopleSoft HR system.

Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called Application Fundamentals. Each PeopleSoft product line has its own version of this documentation.

Application Fundamentals consists of important topics that apply to many or all PeopleSoft applications across the PeopleSoft HCM product line. No matter which PeopleSoft HCM products you are implementing, you should be familiar with the contents of this central documentation. It is the starting point for fundamentals, such as setting up control tables and administering security.

Related Links for PeopleSoft HCM

PeopleSoft Information Portal

My Oracle Support

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

PeopleSoft Business Process Maps (Microsoft Visio format)

Contact Us

Send your suggestions to PSOFT-INFODEV_US@ORACLE.COM. Please include release numbers for the PeopleTools and applications that you are using.

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Chapter 1

Getting Started with Meet Regulatory Requirements

Meet Regulatory Requirements Overview

Meet Regulatory Requirements enables you to set up your system to monitor the regulatory requirements for a particular country.

Meet Regulatory Requirements Business Processes

Meet Regulatory Requirements provides these business processes:

- (AUS) Meet regulatory requirements for Australia.
- (CAN) Meet regulatory requirements for Canada.
- (FRA) Meet regulatory requirements for France.
- (GBR) Meet regulatory requirements for the United Kingdom.
- (NZL) Meet regulatory requirements for New Zealand.
- (USA) Meet regulatory requirements for the United States.
- (USF) Perform Central Personnel Data File edit processing.
- (GBR, USA, and USF) Meet disability regulatory requirements.

We discuss these business processes in the business process topics in this documentation.

Meet Regulatory Requirements Integrations

The Meet Regulatory Requirements business process integrates with these applications:

- All PeopleSoft HCM applications.
- Other PeopleSoft applications.
- Other third-party applications.

We discuss integration considerations in the implementation topics in this documentation.

See also Interactive Services Repository on My Oracle Support

Meet Regulatory Requirements Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding documentation.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines.

Refer to the *PeopleSoft HCM 9.2 - Reorganization of Component Interface Permissions* (Doc ID 2342162.1) MOS posting for a list of system-delivered CIs and their usage, the mapping of CIs and associated permission lists, and the mapping of CI permission lists and user roles.

See the product documentation for *PeopleTools: Setup Manager* and *PeopleTools: Component Interfaces*.

Chapter 2

(AUS) Meeting Regulatory Requirements for Australia

Understanding Regulatory Requirements for Australia

The Meet Regulatory Requirements business process provides the tools to meet the Australian reporting requirements in several areas. You can meet the workplace gender equality requirements by running reports to generate the data and then uploading them into the Workplace Gender Equality Agency (WEGA) online portal. Public Service and Merit Protection Commission (PSMPC) reports supply the current job details of all employees.

PeopleSoft HCM provides the following Australian regulatory reports:

- Workplace Gender Equality Agency Report
- PSMPC reports

Setting Up Control Tables for Australian Regulatory Reports

To set up the control tables for regulatory requirements, use the Occupational Category (WGEA_OCCUP_CG_AUS), Australian Standard Classification of Occupations (ASCO) Codes (ASCO_TBL_AUS) components.

These topics discuss how to define Occupational category and ASCO codes.

Pages Used to Set Up Control Tables for Regulatory Requirements

Page Name	***Definition Name***	***Usage***
Define Occupational Category Page	OCCUP_CG_AUS	Define the occupational categories for managers and non-managers.
Define ASCO Codes Page	ASCO_TBL_AUS	Define occupational codes as per ASCO standard requirements.

Define Occupational Category Page

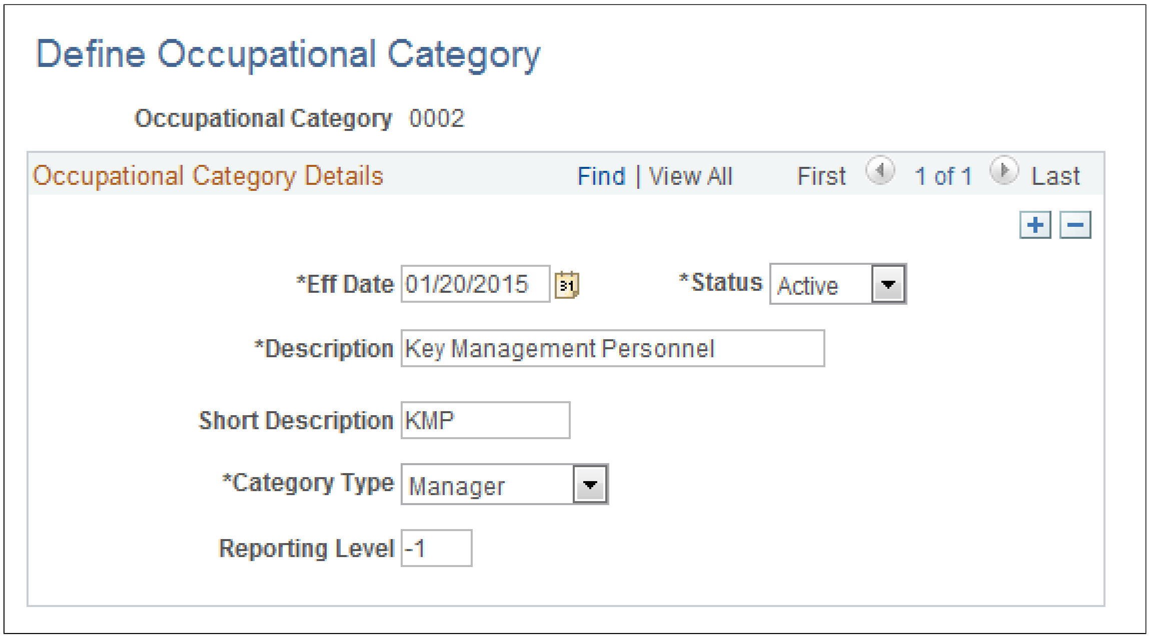
Use the Define Occupational Category page (OCCUP_CG_AUS) to define the occupational categories for managers and non-mangers.

Navigation

Set Up HCM > Product Related > Workforce Monitoring >Meet Regulatory Rqmts AUS >Occupational Categories AUS

Image: Define Occupational Category Page

This example illustrates the fields and controls on the Define Occupational Category page. You can find definitions for the fields and controls later on this page.



Eff Date	Enter the effective date of the occupational category.
Status	Displays the status of the occupational category. There are two options: Active and Inactive. **Note:** Before making an occupational category inactive, ensure that there are no active employees mapped to it.
Description/Short Description	Enter the description/short description for the occupational category.
Category Type	Select the category of the worker. Value can be either Manager or Non-Manager.
Reporting Level	Enter the reporting level of the worker to the CEO. If the worker reports directly to the CEO, then his reporting level will be -1, and for each level below, it will be -2, -3 and accordingly. Reporting level is mandatory for managers but not for non-managers.

Define ASCO Codes Page

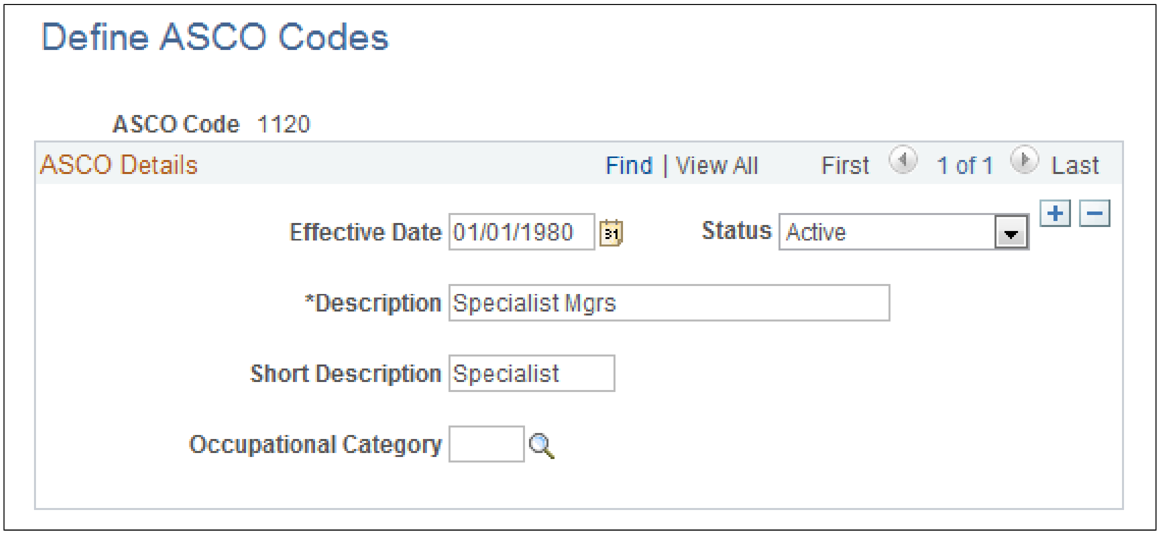
Use the Define ASCO Codes page (ASCO_TBL_AUS) to define occupational codes as per ASCO standard requirements.

Navigation

Workforce Monitoring > Regulatory Requirements >ASCO Codes >Define ASCO Codes

Image: Define ASCO Codes page

This example illustrates the fields and controls on the Define ASCO Codes page. You can find definitions for the fields and controls later on this page.



Eff Date	Enter the effective date of the ASCO Code.
Status	Displays the status of the ASCO Code. There are two options: Active and Inactive.
Description/Short Description	Enter the description/short description for the ASCO Code.
Occupational Category	Select the Occupational Category. The WGEA reporting is done on the basis of occupational categories. Selecting the Occupational Category in this page, links it to the ASCO codes which are already linked to the job codes in the PeopleSoft HCM system.

Maintaining the ASCO Table

PeopleSoft provides standard ASCO codes. You can modify existing codes or add new codes as ASCO standards change. You can also print a report of the ASCO codes that you use.

Pages Used to Maintain the ASCO Table

Page Name	***Definition Name***	***Usage***
Define ASCO Codes Page	ASCO_TBL_AUS	Define occupational codes per ASCO (Australian Standard Classification of Occupations) standard requirements.

Page Name	Definition Name	Usage
ASCO Report - Prcsruncntl Page	PRCSRUNCNTL	Run the ASCO report (PER712AUS) that provides a list of the ASCO reporting codes.

Related Links

"(AUS) Meet Regulatory Requirements Reports for Australia" (PeopleSoft HCM 9.2: Application Fundamentals)

Running the Workplace Gender Equality Report

The Workplace Gender Equality Act 2012 requires all non-public sector employers to report to the Workplace Gender Equality Agency (WGEA) annually. The employers must complete and submit online a workplace profile and the reporting questionnaire covering standardized reporting matters under a specific number of gender equality indicators. The workplace profile should show the composition of their workforce by gender, employment status, standardized occupational categories and remuneration data, and for managers, their reporting level to the CEO. Two options are available for reporting: Unit level data and Aggregate data. PeopleSoft HCM supports the Aggregate data format, in which you have to report workplace profile totals into two tables: one for managers and one for non–managers.

You can download a system-generated Excel template from the WGEA online portal to enter the workplace profile data. While downloading the Excel template, you have to indicate how many reporting levels are present until the CEO. The template thus generated will reflect those precise reporting levels. PeopleSoft HCM does not generate the template as such, but instead, will support you to draw all the necessary details. The data so drawn can be used to fill the Excel spreadsheet. Once populated, that spreadsheet can be uploaded to the online portal.

This topic discusses how to run the Workplace Gender Employment Equity report for Australia.

Pages Used to Run the Workplace Gender Equality Report

Page Name	Definition Name	Usage
Create Workplace Gender Equality Report Page	GPAU_RC_WGEA	Run the Create Workplace Gender Equality report.
Review Workplace Gender Equality Report Page	GPAU_WGEA_RPT	Review the WGEA report. From this report you can draw data to enter into the Excel spreadsheet which can be uploaded to the online portal.

Create Workplace Gender Equality Report Page

Use the Create Workplace Gender Equality Report page (GPAU_RC_WGEA) to run the Workplace Gender Equality report.

Once the Create Workplace Gender Equality Report process is run, a PDF file gets created which lists all employees processed to arrive at the aggregated data for the configured occupational categories.

Navigation

Workforce Monitoring >Meet Regulatory Rqmts AUS > Create WGEA Report

Image: Create Workplace Gender Equality Report page

This example illustrates the fields and controls on the Create Workplace Gender Equality page. You can find definitions for the fields and controls later on this page.

Business Unit	Select the desired business unit.
Reporting Year	Select the year, for which the report is run. The WGEA reporting is done for a 12-month period from 1 April to 31 March annually and the reports are due between 1 April and 31 May. For example, to create the WGEA report for April 2013 to March 2014, enter 2014 in the reporting year field, as the reporting period end date would fall in that year **Note:** The WGEA reporting year is from April to March and is different from the Australia Fiscal year, which is from July to June.
Category Type	Select the category type for the report. The values are Managers and Non-Managers.

Review Workplace Gender Equality Report Page

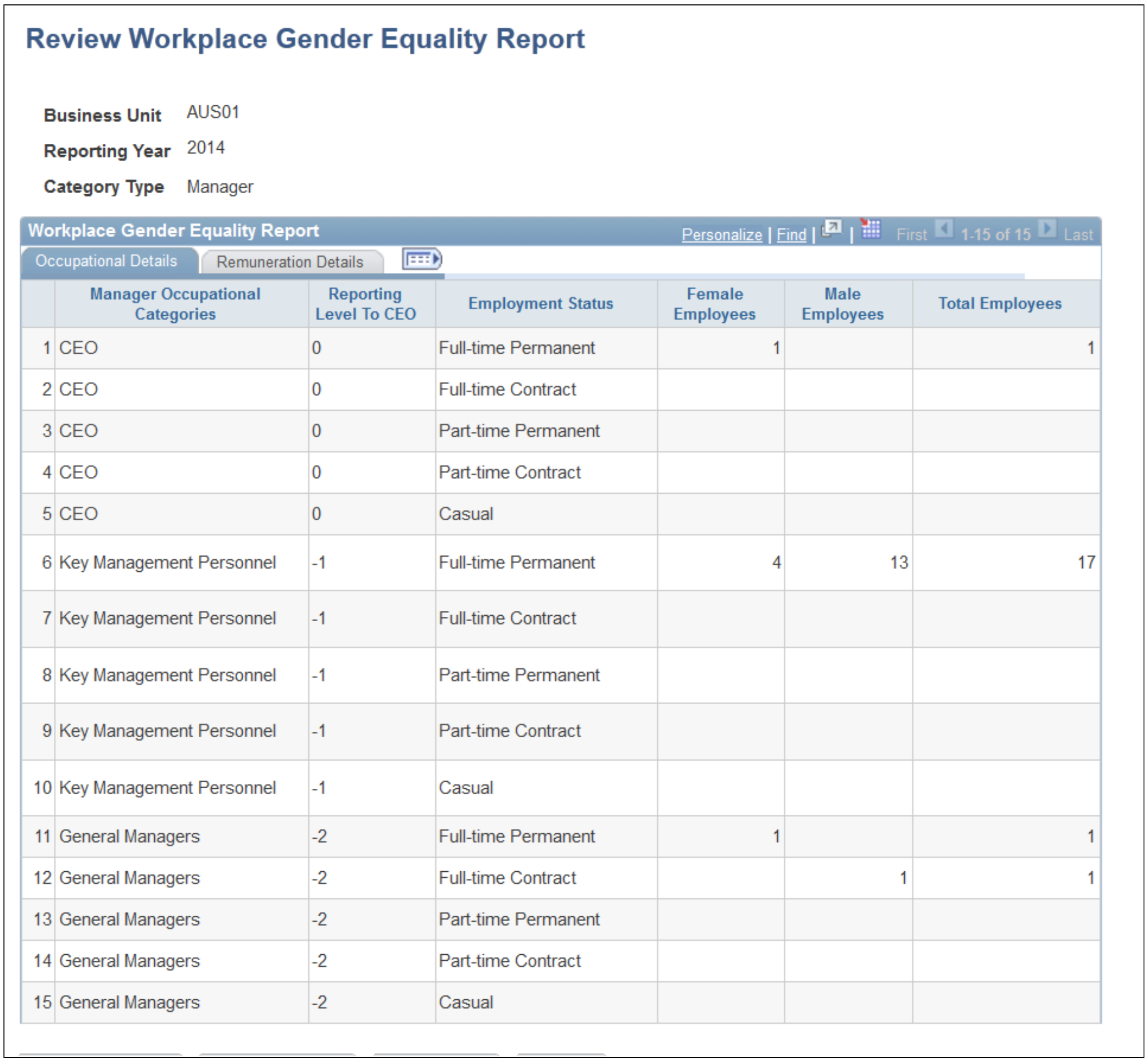
Use the Review Workplace Gender Equality Report page (GPAU_WGEA_RPT) to review the Workplace Gender Equality report. From this report you can draw data to enter into the Excel spreadsheet which can be uploaded to the online portal.

Navigation

Workforce Monitoring >Meet Regulatory Rqmts AUS > Review WGEA Report

Image: Review Workplace Gender Equality Report page: Manager, Occupational Details tab

This example illustrates the fields and controls on the Review Workplace Gender Equality Report page. You can find definitions for the fields and controls later on this page.

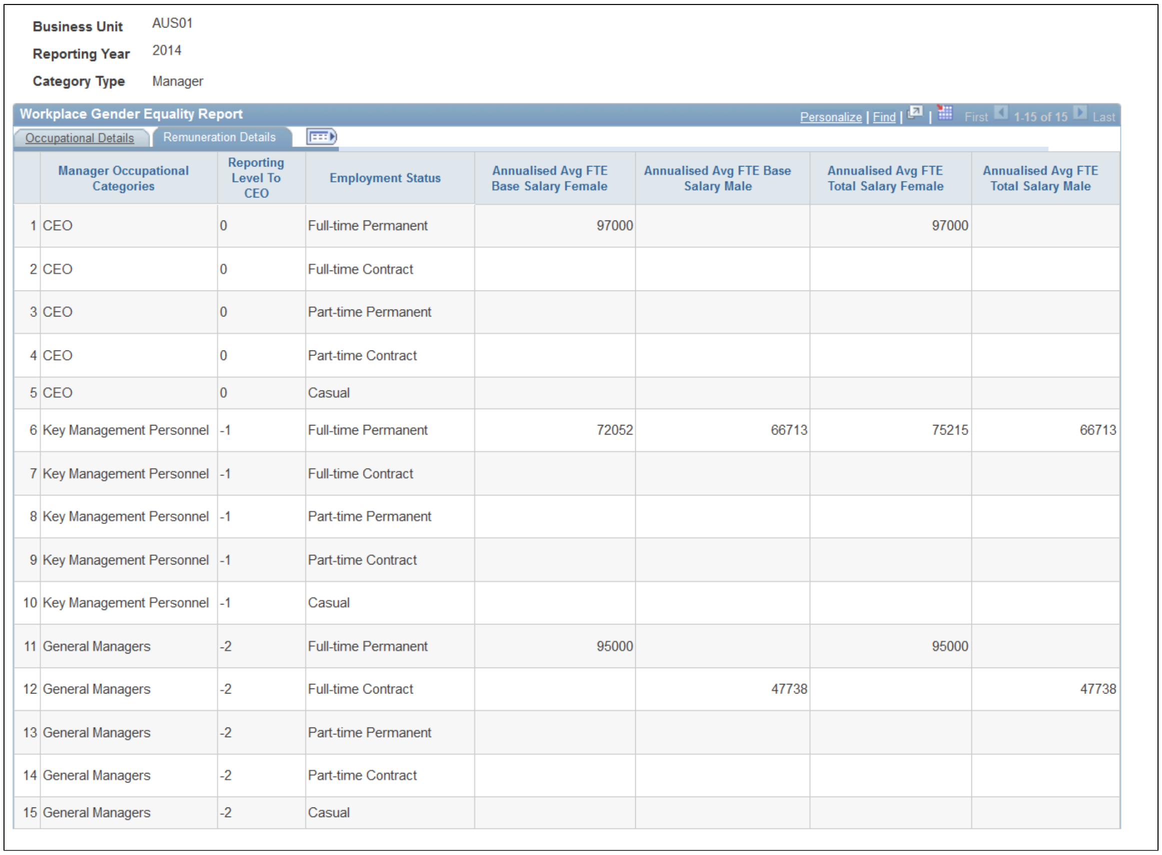


	Manager Occupational Categories	Reporting Level To CEO	Employment Status	Female Employees	Male Employees	Total Employees
1	CEO	0	Full-time Permanent	1		1
2	CEO	0	Full-time Contract			
3	CEO	0	Part-time Permanent			
4	CEO	0	Part-time Contract			
5	CEO	0	Casual			
6	Key Management Personnel	-1	Full-time Permanent	4	13	17
7	Key Management Personnel	-1	Full-time Contract			
8	Key Management Personnel	-1	Part-time Permanent			
9	Key Management Personnel	-1	Part-time Contract			
10	Key Management Personnel	-1	Casual			
11	General Managers	-2	Full-time Permanent	1		1
12	General Managers	-2	Full-time Contract		1	1
13	General Managers	-2	Part-time Permanent			
14	General Managers	-2	Part-time Contract			
15	General Managers	-2	Casual			

Manager Occupational Categories	Displays the Manager occupational categories.
Reporting Level to CEO	Displays the reporting level to the CEO.
Employment Status	Displays the employment status.
Female Employees	Displays the number of female employees.
Male Employees	Displays the number of male employees.
Total Employees	Displays the total number of employees.

Image: Review Workplace Gender Equality Report: Manager page, Remuneration Details tab

This example illustrates the fields and controls on the Review Workplace Gender Equality Report: Manager page, Remuneration Details tab. You can find definitions for the fields and controls later on this page.



Business Unit AUS01
Reporting Year 2014
Category Type Manager

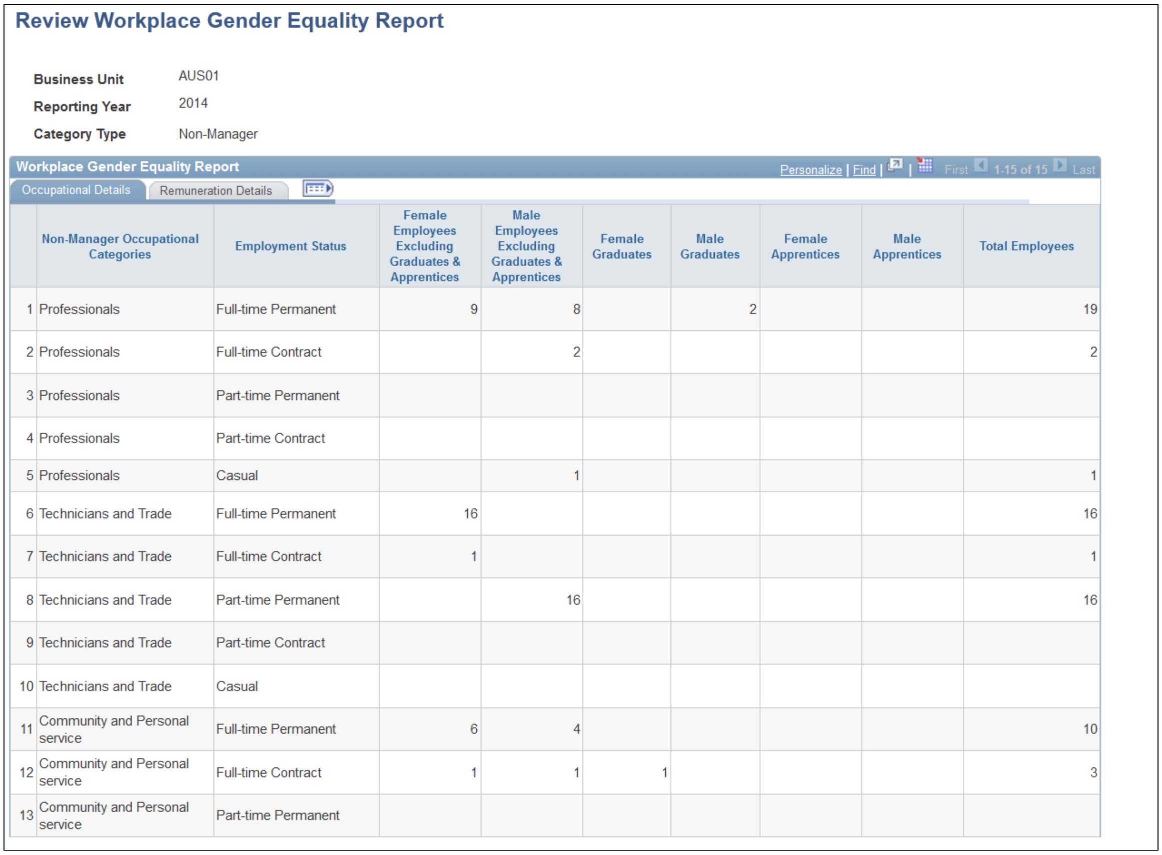
Workplace Gender Equality Report — Personalize | Find | First 1-15 of 15 Last
Occupational Details | Remuneration Details

	Manager Occupational Categories	Reporting Level To CEO	Employment Status	Annualised Avg FTE Base Salary Female	Annualised Avg FTE Base Salary Male	Annualised Avg FTE Total Salary Female	Annualised Avg FTE Total Salary Male
1	CEO	0	Full-time Permanent	97000		97000	
2	CEO	0	Full-time Contract				
3	CEO	0	Part-time Permanent				
4	CEO	0	Part-time Contract				
5	CEO	0	Casual				
6	Key Management Personnel	-1	Full-time Permanent	72052	66713	75215	66713
7	Key Management Personnel	-1	Full-time Contract				
8	Key Management Personnel	-1	Part-time Permanent				
9	Key Management Personnel	-1	Part-time Contract				
10	Key Management Personnel	-1	Casual				
11	General Managers	-2	Full-time Permanent	95000		95000	
12	General Managers	-2	Full-time Contract		47738		47738
13	General Managers	-2	Part-time Permanent				
14	General Managers	-2	Part-time Contract				
15	General Managers	-2	Casual				

Manager Occupational Categories	Displays the Manager occupational categories.
Reporting Level to CEO	Displays the reporting level to the CEO.
Employment Status	Displays the employment status.
Annualized Avg FTE Base Salary Female	Displays the annualized average FTE base salary for females.
Annualized Avg FTE Base Salary Male	Displays the annualized average FTE base salary for males.
Annualized Avg FTE Total Salary Female	Displays the annualized average FTE total salary for females.
Annualized Avg FTE Total Salary Male	Displays the annualized average FTE total salary for males.

Image: Review Workplace Gender Equality Report: Non-Manager page, Remuneration Details tab

This example illustrates the fields and controls on the Review Workplace Gender Equality Report: Non-Manager page, Remuneration Details tab. You can find definitions for the fields and controls later on this page.



Review Workplace Gender Equality Report

Business Unit AUS01

Reporting Year 2014

Category Type Non-Manager

Workplace Gender Equality Report — Personalize | Find | First 1-15 of 15 Last

Occupational Details | Remuneration Details

	Non-Manager Occupational Categories	Employment Status	Female Employees Excluding Graduates & Apprentices	Male Employees Excluding Graduates & Apprentices	Female Graduates	Male Graduates	Female Apprentices	Male Apprentices	Total Employees
1	Professionals	Full-time Permanent	9	8		2			19
2	Professionals	Full-time Contract		2					2
3	Professionals	Part-time Permanent							
4	Professionals	Part-time Contract							
5	Professionals	Casual		1					1
6	Technicians and Trade	Full-time Permanent	16						16
7	Technicians and Trade	Full-time Contract	1						1
8	Technicians and Trade	Part-time Permanent		16					16
9	Technicians and Trade	Part-time Contract							
10	Technicians and Trade	Casual							
11	Community and Personal service	Full-time Permanent	6	4					10
12	Community and Personal service	Full-time Contract	1	1	1				3
13	Community and Personal service	Part-time Permanent							

Non-Manager Occupational Categories Displays the non-manager occupational categories.

Employment Status Displays the employment status.

Female Employees Excluding Graduates & Apprentices Displays the number of female employees excluding graduates and apprentices.

Male Employees Excluding Graduates & Apprentices Displays the number of male employees excluding graduates and apprentices.

Female Graduates Displays the number of female graduates.

Male Graduates Displays the number of male graduates.

Female Apprentices Displays the number of female apprentices.

Displays the number of female apprentices. Displays the number of male apprentices.

Total Employees Displays the total number of employees.

Troubleshooting

Log messages list out erroneous data encountered while processing WGEA report. The employment details and occupations are listed out in the log file. Logs are written for the following cases:

- Persons who are POIs in the primary job
- Persons without primary job
- Persons having unknown gender
- Persons with zero FTE
- Persons linked to inactive occupational categories

Image: Log messages for Workplace Gender Equality Report

This example displays errors logged while running the Workplace Gender Equality Report.

```
Log messages for Workplace Gender Equality Report
---------------------------------------------------

 Following Person of Interests exists in the system

     Employee Id  0077,  Employment Record  0,  Occupational Category  0002, Occupation Key Management Personnel

 Primary job does not exists for the following employees

     Employee Id  0076,  Employment Record  0,  Occupational Category  0002, Occupation Key Management Personnel

 Please check following employee's Gender and report appropriately

     Employee Id  GABCKPY002,  Employment Record  0,  Occupational Category  0002, Occupation Key Management Personnel
     Employee Id  GAPSMSS006,  Employment Record  0,  Occupational Category  0002, Occupation Key Management Personnel
     Employee Id  GAPSMSS011,  Employment Record  0,  Occupational Category  0002, Occupation Key Management Personnel
     Employee Id  GAPSMSS014,  Employment Record  0,  Occupational Category  0002, Occupation Key Management Personnel

 Employee's with zero FTE

     Employee Id  GA00011,  Employment Record  0,  Occupational Category  0002, Occupation Key Management Personnel

 Inactive Occupational category exists. Please input the appropriate data for the following employee'

     Employee Id  GA00002,  Employment Record  0,  Occupational Category  1004, Occupation Sales
```

Creating Reports for the PSMPC

These topics provide an overview of and discuss Australian PSMPC reporting.

Pages Used to Create Reports for the PSMPC

Page Name	***Definition Name***	***Usage***
APS Employee Additional Data Page	APS_PERSDTA_AUS	Enter additional employee data required for APS (Australian Public Service) reporting.
Define APS Movement Page	APS_MOVECODE_AUS	Define or modify codes for changes in employment status. These codes are used by APS for administering human resources functions when employees change positions or job status.

Page Name	Definition Name	Usage
Define APS Non-English Code Page	APS_LNG_CD_AUS	Define or modify codes for languages used in APS (Australian Public Service non-English code) reporting.
Create APS PSMPC Page	APS_RUNCTL_AUS	Process the Snapshot and Change reports for PSMPC (Public Service and Merit Protection Commission) reporting.

Understanding Australian PSMPC Reporting

The Australian PSMPC requires that all government agencies provide employment details for employees employed under the Public Service Act 1999. Agencies are required to supply this information to the PSMPC in two files that include a range of personal and employment data about the agency's workforce.

The first file, called the *Snapshot* report, describes the state of the agency at a particular point in time. The second file, the *Change* report, describes how the agency has changed over a specific period of time.

The reports supply the employees' current job details. If an employee performs another job for a period of more than 90 consecutive days, then the employee's substantive job is not reported.

APS Employee Additional Data Page

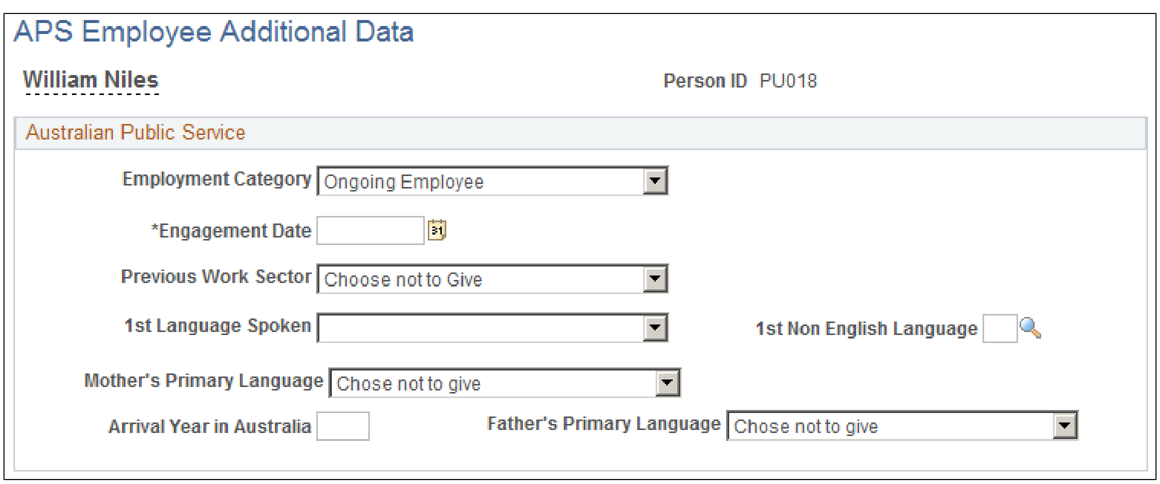
Use the APS Employee Additional Data (Australian Public Service employee additional data) page (APS_PERSDTA_AUS) to enter additional employee data required for APS reporting.

Navigation

Workforce Monitoring > Meet Regulatory Rqmts AUS > APS Employee Additional Data > APS Employee Additional Data

Image: APS Employee Additional Data page

This example illustrates the fields and controls on the APS Employee Additional Data page. You can find definitions for the fields and controls later on this page.



Employment Category

Select the appropriate category to define the employee's position. Options are *Non Ongoing - Irregular Duties, Non*

	Ongoing - Specific Task, Non Ongoing - Specific Term, and *Ongoing Employee.*
Engagement Date	Select the date to record the engagement date of the current period of employment in APS.
Previous Work Sector	Select the employee's previous work sector.
1st Language Spoken	Select the language classification.
1st Non English Language	If you select *Language other than English* as the first spoken language, select the employee's first language in this field.
Mother's Primary Language and**Father's Primary Language**	Select the employee's parents' primary language.
Arrival Year in Australia	Enter the year the employee first arrived in Australia.

Create APS PSMPC Page

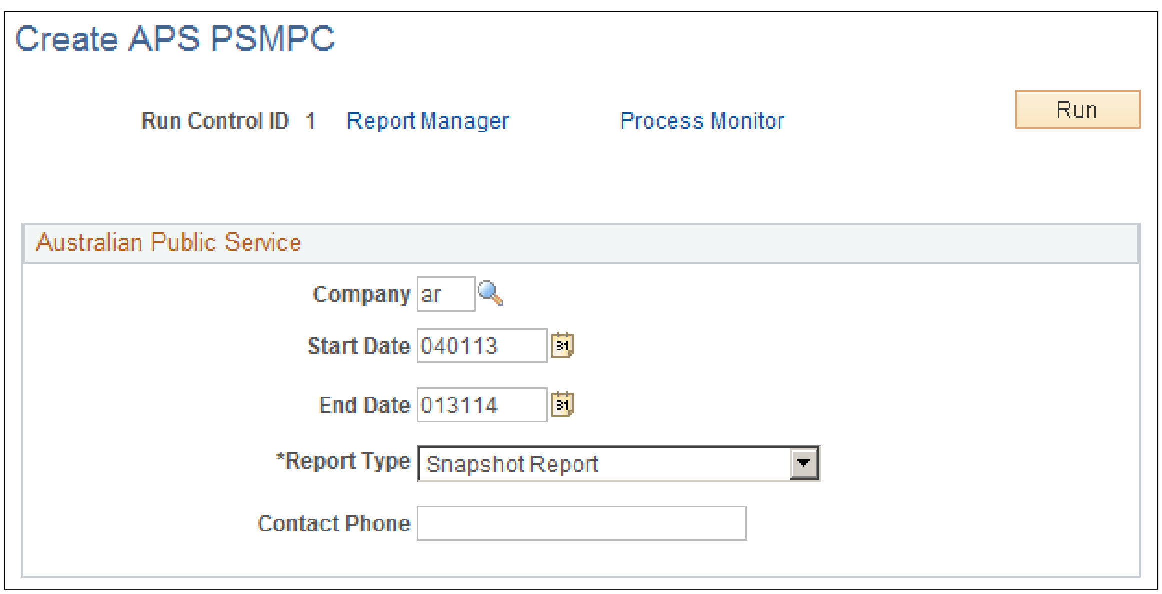
Use the Create APS PSMPC (create Australian Public Service Public Service and Merit Protection Commission) page (APS_RUNCTL_AUS) to process the Snapshot and Change reports for PSMPC reporting.

Navigation

Workforce Monitoring > Meet Regulatory Rqmts AUS > Create APS PSMPC > Create APS PSMPC

Image: Create APS PSMPC page

This example illustrates the fields and controls on the Create APS PSMPC page. You can find definitions for the fields and controls later on this page.



Company	Enter the company that you want to report on.

Start Date and**End Date**	This date range is the period when employee details are processed. For the Change report, this date range is the period when change entities specified by APS, like maternity leave or postal code, has changed on the period specified on the run control. For the Snapshot report, employees who are active at the end date will be reported.
Report Type	Select the report type. Options are *Change Extract* and *Snapshot Report.*
Contact Phone	Enter a number for the APS employment database project team to call in order to clarify information in the APS employee report.

See the product documentation for *PeopleTools: Process Scheduler*

Related Links

"(AUS) Meet Regulatory Requirements Reports for Australia" (PeopleSoft HCM 9.2: Application Fundamentals)

Chapter 3

(CAN) Meeting Regulatory Requirements for Canada

Understanding Regulatory Requirements for Canada

The Meet Regulatory Requirements business process provides the tools to meet Canadian federal reporting requirements in several areas. You can establish pay equity criteria and generate a report summarizing job classes and related evaluation criteria. To classify jobs for census or other reporting purposes, you need to review and update Canadian standard occupational classification codes.

To meet employment equity and official language reporting requirements, run reports to generate data extract files for loading into two federal government reporting systems: the Workplace Equity Information Management System (WEIMS) and the Treasury Board Secretariat's system for reporting on the Official Languages Act (OLA).

PeopleSoft provides the following Canadian regulatory reports:

- Employment Equity.
- National Occupational Codes.
- Official Languages Requirements.
- Pay Equity Table.

Setting Up Control Tables for Canadian Regulatory Reports

To set up the Canadian regulatory reports tables, use the Define Canadian Pay Equity Table (CAN_PAY_EQUITY_TBL), and Define Canadian NOC Codes (CAN_NOC_TABLE) components.

These topics discuss control table for Canadian regulatory reports.

Pages Used to Set Up Control Tables for Canadian Regulatory Reports

Page Name	***Definition Name***	***Usage***
Define Canadian Pay Equity Page	CAN_PAY_EQUITY_TBL	Quantify job evaluation criteria to meet requirements set by the Pay Equity Act. Associate pay equity job class codes with job codes in the Job Code table.

Page Name	***Definition Name***	***Usage***
Define Canadian NOC Codes Page	CAN_NOC_TABLE	Review NOC (National Occupational Classification) codes for Canadian companies and associate NOC codes with job codes in the Job Code table. PeopleSoft delivers an extensive list of NOC codes, which you can change.
Pay Equity - Run Control Page	PRCSRUNCNTL	Run the Pay Equity Table report (PER715CN), which lists evaluation information.
National Occupation Codes - Run Control Page	PRCSRUNCNTL	Run the National Occupation Codes report (PER716CN), which lists the NOC codes used in categorizing job codes.

Define Canadian Pay Equity Page

Use the Define Canadian Pay Equity page (CAN_PAY_EQUITY_TBL) to quantify job evaluation criteria to meet requirements set by the Pay Equity Act.

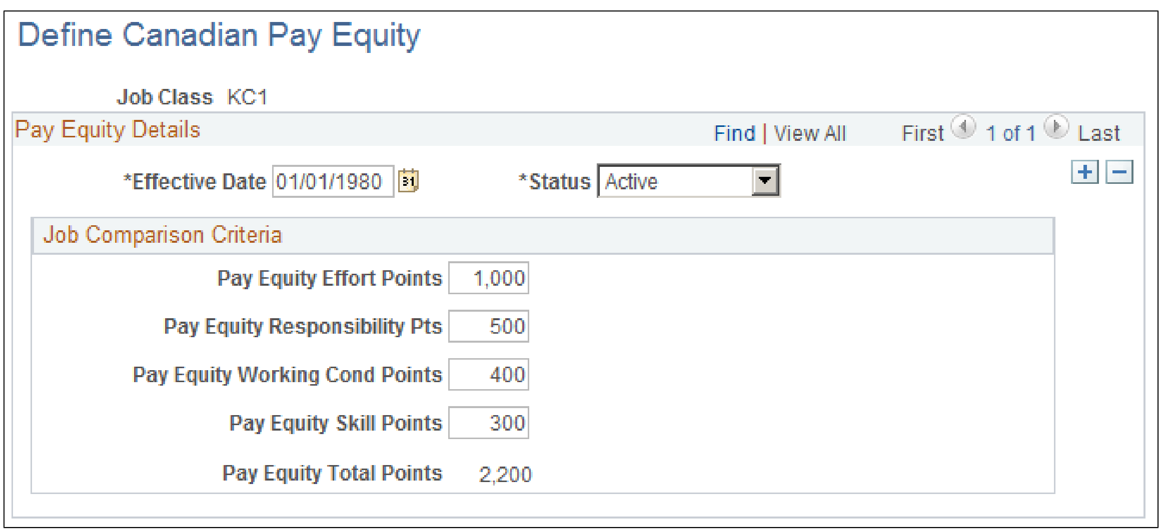
Associate pay equity job class codes with job codes in the Job Code table.

Navigation

Workforce Monitoring > Meet Regulatory Rqmts CAN > Define Canadian Pay Equity > Define Canadian Pay Equity

Image: Define Canadian Pay Equity page

This example illustrates the fields and controls on the Define Canadian Pay Equity page. You can find definitions for the fields and controls later on this page.



Design the point system used in Job Comparison Criteria group box. Determine and enter points by comparing each of the factors to every other job class in the company. For example, you might assign more pay equity skill points to an engineer job class than a mailroom clerk job class because the engineering job requires more education and experience.

Pay Equity Effort Points	Enter points for the physical and mental effort required to perform a job.
Pay Equity Responsibility Pts (pay equity responsibility points)	Enter points for decision-making and responsibility for people, equipment, and budgets.
Pay Equity Working Cond Points (pay equity working conditions points)	Enter points for the working environment, including dirt, noise, stress, and health risks.
Pay Equity Skill Points	Enter points for the education, experience, and special abilities that are required to perform a job in this job class.
Pay Equity Total Points	Displays the total points as you enter points.

Define Canadian NOC Codes Page

Use the Define Canadian NOC Codes (define Canadian National Occupational Classification codes) page (CAN_NOC_TABLE) to review NOC codes for Canadian companies and associate NOC codes with job codes in the Job Code table.

PeopleSoft delivers an extensive list of NOC codes, which you can change.

Navigation

Workforce Monitoring > Meet Regulatory Rqmts CAN > Define Canadian NOC Codes > Define Canadian NOC Codes

Image: Define Canadian NOC Codes page

This example illustrates the fields and controls on the Define Canadian NOC Codes page. You can find definitions for the fields and controls later on this page.

Employment Equity Occup Grp (Employment Equity Occupational group)	Select the group to which this job classification code belongs. Occupational group codes are included in the translate table.
Can OEE Skill Level (Canadian Ontario Employment Equity skill level)	Select from the list of values.

Running the Employment Equity Report

These topics provides overviews of employment equity reporting, Employment Equity report files, employee inclusion in the Employment Equity report, and salary calculation, and discuss how to run the Employment Equity report.

Page Used to Run the Employment Equity Report

Page Name	***Definition Name***	***Usage***
Employment Equity Page	RUNCTL_PER101CN	Run the Employment Equity report (PER101CN). This SQR creates an interface file that you can export to Canadian Employment Equity software.

Understanding Employment Equity Reporting

If you're a federally regulated employer in Canada and required to report to the federal government on employment equity, HR provides the Canadian Employment Equity 2.0 interface—the Employment Equity report (PER101CN)—which creates three data interface files for the federal government's Workplace Equity Information Management System (WEIMS). You don't have to enter the data in the database and then reenter the same data in WEIMS each year.

The report retrieves extensive data for all Canadian employees in the organization who were active employees at any point during the calendar year. The report includes up to four promotion dates per employee within a given year, in ascending order.

The Employment Equity report is based on the interpretation of Employment Equity Reporting Guideline 11, as published by HR Development Canada (HRDC). Because the interpretation of the guidelines can vary, there may be differences between your requirements and the rules that PeopleSoft has built into the generic solution. If the data imported into the WEIMS does not meet Guideline 11, either modify the information once it has been imported into the WEIMS or modify the Employment Equity report.

You are responsible for reporting accurate information to HRDC. The HRDC is the source of interpretation and final authority on all matters related to employment equity reporting, including the definition of salary and its rules for annualization and non-annualization. PeopleSoft doesn't assume this role.

Understanding Employment Equity Report Files

The Employment Equity report creates three files: employee.txt, promo.txt, and term.txt. The employee file includes information on temporary and permanent employees. The following tables lists the field names in each report file, the fields in PeopleSoft HCM from which the report retrieves the data, and the tables where the fields are located.

Employee File

The following table lists the fields and tables used to create the employee.txt file:

WEIMS Report Field Name	***PeopleSoft Field***	***PeopleSoft Table***	***Notes***
Employee # (employee number)	Employee ID	PERSONAL_DATA	None
CMA Code (Census Metropolitan Area code)	Census Metropolitan Area	LOCATION_TABLE	Based on the location code in the employee job record, the report uses the CMA associated with that location code in the LOCATION_TBL table.
Province Code	Numeric Code	STATE_NAMES_TBL	Based on the location code in the employee job record, the report uses the numeric code associated with that location code in the LOCATION_TBL table.
NOC Code (National Occupational Classification code)	Canadian NOC Code (Canadian National Occupational Classification code)	JOBCODE_TBL	Based on the job code in the employee job record, the report uses the NOC code associated with the job code in the JOBCODE_TBL table.
NAICS (North American Industrial Classification System) four-digit code	NAICS Code	DEPT_TBL_CAN	Based on the department ID in the employee job record, the report uses the NAICS code associated with that department ID in the DEPT_ TBL table.
Employee Type Code	Temporary Full-/Part-Time Other	Derived value based on rules in Structured Query Report (SQR); data from a combination of PERSONAL _DATA and EMPLOYMENT records.	See Understanding Inclusion of Employees in the Employment Equity Report.
Employee Type Comment	Employment Status Full-Time Student	Derived value based on rules in SQR; data from a combination of PERSONAL _DATA and EMPLOYMENT records.	See Understanding Inclusion of Employees in the Employment Equity Report.
Gender	Sex	PERSONAL_DATA	None
Last Name	Name	PERSONAL_DATA	None
Given Name	Name	PERSONAL_DATA	None

WEIMS Report Field Name	***PeopleSoft Field***	***PeopleSoft Table***	***Notes***
Salary	Annual Rate	JOB	See Understanding Salary Calculation.
Aboriginal	Aboriginal	PERSONAL_DATA	None
Visible Minority	Visible Minority	PERSONAL_DATA	None.
Disabled	Disabled	PERSONAL_DATA	None
Hire Date	Hire Date	EMPLOYMENT	None
Termination Date	Termination Date	EMPLOYMENT	None

Promotion File

The following table lists the fields and tables used to create the promo.txt file:

WEIMS Report Field Name	***PeopleSoft Field***	***PeopleSoft Table***	***Notes***
Employee #	Employee ID.	PERSONAL_DATA	None
Promotion # (promotion number)	Derived values from SQR program; sequential count.	Based on a number of job records that meets appropriate criteria as defined by WEIMS reporting rules.	None
Promotion Date	Derived value from EFF_DT.	JOB	None

Temporary Terms File (for Temporary Employees)

The following table lists the fields and tables used to create the term.txt file:

WEIMS Report Field Name	***PeopleSoft Field***	***PeopleSoft Table***	***Notes***
Employee #	Employee ID	PERSONAL_DATA	None
Term # (term number)	Derived field; sequential count.	CONTRACT_DATA	None
Start Date	CONTRACT_BEGIN_DT	CONTRACT_DATA	None
End Date	CONTRACT_END_DT	CONTRACT_DATA	None
Completed Date	Termination Date	EMPLOYMENT	Temporary employees only.

Understanding Inclusion of Employees in the Employment Equity Report

The Employment Equity report includes any employee in a Canadian regulatory region during the reporting year. This includes employees who were hired, rehired, transferred, or terminated, and anyone who was active, on leave, or suspended during the year.

The job record used in the data files includes the maximum effective date and effective sequence that is less than or equal to the year end. This may be a record from before the current year if an employee has had no job activity during the reporting year.

The minimum employee record number is used if more than one job is present. Data from personal data, diversity, disability, and employment records appears as of the report's run date. Data from the tables JOBCODE_TBL, DEPT_TBL, and LOCATION_TBL appears as of the end of the year.

Employees with Multiple Jobs

For employees with multiple jobs, the report provides information on only one job.

The report selects the job to include based on:

- Active job.
- Full-time job.
- Job with the highest salary.

The employee salary is reported as the sum of all job salaries.

Determination of Employee Type

Two fields in the employee.txt file are related to employee type: Employee Type and Employee Type Description (for an employee type categorized as *Other (04)*.

The system determines the appropriate category for each WEIMS employee type:

Full-Time (01)	REG_TEMP = 'R' (regular) FULL_PART_TIME = 'F' (full-time) EMPL_STATUS not in (L,P,S) FT_STUDENT <> 'Y'
Part-Time (02)	REG_TEMP = R FULL_PART_TIME <> 'F' EMPL_STATUS not in (L,P,S) FT_STUDENT <> 'Y'
Temporary (03)	REG_TEMP = 'T' EMPL_STATUS not in (L,P,S) FT_STUDENT <> 'Y'
Other (04)	EMPL_STATUS in (L,P,S) or FT_STUDENT = 'Y' or (EMPL_STATUS not in (L,P,S) and has not worked in this reporting year (using LAST_DATE_WORKED)) Supersedes *Full-Time, Part-Time, Temporary,* and *Casual.*
Casual (05)	Employees who would otherwise be temporary but whose combined start and end dates (from contract data) add up to fewer than 12 weeks during the reporting year.

If the employee type code is *Other (04),* the description field is populated as follows:

Full-Time Student	FT_STUDENT = 'Y'
On Leave of Absence	EMPL_STATUS = L,P
Terminated and hasn't worked during the year	EMPL_STATUS = T,U
Retired and hasn't worked during the year	EMPL_STATUS = R,Q
Deceased and hasn't worked during the year	EMPL_STATUS = D
Last Date Worked not in reporting year and not null	LAST_DATE_WORKED <>Null and <Reporting Year

Understanding Salary Calculation

The following stipulations regarding salary definition and calculation apply to Employment Equity Reporting Guideline 11:

- Salary should be annualized in some situations.
- If two activities with respect to earnings or job take place in a year, one that requires annualization and one that does not, then the most recent activity takes priority.

  For example, if a new hire (annualized) is laid off that same year (non-annualized), the employee's salary should be non-annualized for this report.
- The salary figure includes salary, wages, commissions, tips, bonuses, and piece rates, but not overtime wages.
  - When salary isn't annualized, the default salary figure provided is pulled from the CIT YTD tax in CAN_TAX_BALANCE field.

    This information does not include overtime. If overtime is allowed, modify the data manually in the report files or modify the PER101CN report.
  - Annualized salary does not include overtime.

    Annualized salary information uses the ANNUAL_RT field. If you are not using PeopleSoft Payroll, the ANNUAL_RT is used in all circumstances.

Important! The final authority in interpretation of annualization or non-annualization rests with HRDC. You have the final responsibility for compliance with the WEIMS reporting rules.

Salary Annualization

The following table shows when salary is annualized and how the Employment Equity report handles each situation. Note cases in which you must modify the report manually for accurate results.

Employment Equity Report Annualization	***Interface Functionality***
New hires and promotions during the reporting period.	The Employment Equity report annualizes using ANNUAL_RT.
Unpaid leaves of absence granted at the request of employees who returned to work on or before December 31.	The Employment Equity report annualizes using ANNUAL_RT; however, paid leaves are non-annualized. If unpaid leave is still active at December 31, it is non-annualized.
New hires with a salary including commission; add salary and commission and annualize total.	The Employment Equity report annualizes using ANNUAL_RT. Modify the provided figure manually in WEIMS.
New hires with steady base salary; annualize only base salary and then add commission.	The Employment Equity report annualizes using ANNUAL_RT. Modify the provided figure manually in WEIMS.
Transferred employees as a result of a corporate transaction; employees considered new hires.	Human Resources does not specify how to complete corporate transactions. If you have terminated employees from one company and hired them in another one as the means of corporate transfer, they appear as new hires and PER101CN annualizes using ANNUAL_RT. Otherwise, modify the figure manually within WEIMS.

The following table shows when salary is not annualized and how the Employment Equity report handles each situation. Note cases in which you must modify the report manually for accurate results.

No Employment Equity Report Annualization	***Interface Functionality***
Temporary employees.	The SQR categorizes them as employee type *Temporary (03).*
Seasonal workers who have worked a complete season.	All seasonal workers are considered to have worked a complete season. Human Resources does not use partial seasons.
Seasonal workers who work part of a season.	All seasonal employees are considered to have worked a complete season and do not have their salary annualized by the Employment Equity report. Modify data in WEIMS manually if employees worked an incomplete season.
Employees who are temporarily laid off.	The SQR categorizes them as employee type *Other (04).*
Employees recalled in accordance with the mid year collective agreement.	The Employment Equity report does not annualize.

No Employment Equity Report Annualization	***Interface Functionality***
Striking employees.	The Employment Equity report does not annualize.
Permanent employees working part of the year as full-time employees.	The Employment Equity report does not annualize.
Acting assignments.	Human Resources does not take these situations into account. Modify the provided figure manually in WEIMS.
New hires with fluctuating base salary and commission.	Human Resources does not take these situations into account. Modify the provided figure manually in WEIMS.
Employees with commission-only salary.	Human Resources does not take these situations into account. Modify the provided figure manually in WEIMS.
Employees who change employment status mid year (temp to part-time, part-time to full-time, and so on).	Modify the provided figure manually in WEIMS.

Employment Equity Page

Use the Employment Equity page (RUNCTL_PER101CN) to run the Employment Equity report (PER101CN).

This SQR creates an interface file that you can export to Canadian Employment Equity software.

Navigation

Workforce Monitoring > Meet Regulatory Rqmts CAN > Reports > Employment Equity > Employment Equity

Importing the Report into WEIMS

When you import the interface file into WEIMS, you have two options: update the existing file or overwrite it. The default is to overwrite the file because normally you submit information for the whole organization at the same time.

If divisions in the organization prepare their information separately and you need to combine division files, you may need to use the update option. Keep in mind that the update option creates duplicate records. The WEIMS software does not warn you about duplicate records or issue error messages. For this reason, the Canadian government strongly recommends that you back up your final files. Because you can inadvertently delete or overwrite existing employee data in WEIMS, backing up your files ensures that you retain accurate records of the information submitted each year.

The Employment Equity report does not extract information about employers. Before you run the final report using the WEIMS software, enter values in the WEIMS Employer Information fields.

Troubleshooting

The Employment Equity report detects errors that can prevent the WEIMS from successfully importing data.

If you find that records are missing from the import files when you run the Employment Equity report, information that is required for the WEIMS report may not be included in the online pages. The PER101CN.LIS file identifies these situations and produces an error message.

Running Official Languages Reports

Canadian federal institutions are required to report on the official languages used in their departments in accordance with the Official Languages Act (OLA). Human Resources provides the Canadian Official Language Data File report and the Canadian Official Languages reports.

These topics provide overviews of the Canadian Official Language Data File report and the Canadian Official Language reports.

Page Used to Run Canadian Official Languages Report

Page Name	***Definition Name***	***Usage***
Official Language Requirements Page	RUNCNTL_PER102CN	Run the Canadian Official Languages Data File SQR (PER102CN), which creates an import file to report official languages information.

Understanding the Canadian Official Language Data File Report

The Canadian Official Language Data File report (PER102CN) creates an import file used by the Official Languages Information System (OLIS II) software, which is required under the OLA to report official language information. The report captures information about permanent employees and temporary employees who work for periods of six months or more.

The following table lists the field names in the report, the fields in PeopleSoft HCM from which the report retrieves the data, and the tables where the fields are located:

OLA Report Field Name	***PeopleSoft Field***	***PeopleSoft Table***	***Notes***
Institution Code	Institution Code	COMPANY_TBL	None
Record ID	Employee ID	PERSONAL_DATA	None
First Official Language	Preferred Language	PERSONAL_DATA	None
Occupational Category	Occupational Category	JOBCODE_TBL	Based on the job code in the employee job record, the report uses the occupational category associated with the job code in the JOBCODE_ TBL table.
Language of Service to Public	Pub Svc Lng Can (public service language Canada)	PERS_OFFLNG_CAN	None

OLA Report Field Name	***PeopleSoft Field***	***PeopleSoft Table***	***Notes***
Language of Internal Service to NCR	Intrl Ncr Lng Can (internal National Capital Region language Canada	PERS_OFFLNG_CAN	None
Language of Internal Service to Ontario North and East	Intrl On Lng Can (internal Ontario language Canada)	PERS_OFFLNG_CAN	None
Language of Internal Service to Montreal	Intrl Mnt Lng Can (internal Montreal language Canada)	PERS_OFFLNG_CAN	None
Language of Internal Service to Bilingual Quebec-Other	Intrl Qc Lng Can (internal Quebec language Canada)	PERS_OFFLNG_CAN	None
Language of Internal Service to New Brunswick	Intrl NB Lng Can (internal New Brunswick language Canada)	PERS_OFFLNG_CAN	None
Bilingualism Code	Bilingualism Code	PERSONAL_DATA	None
Comm Req Supervision to NCR	Supr Comm Ncr Can (communication requirements - supervision to National Capital Region Canada)	PERS_OFFLNG_CAN	Identifies whether or not the employee is required to provide bilingual supervision to employees located in the NCR.
Comm Req Supervision to Ontario North & East	Supr Comm On Can (communication requirements - supervision to Ontario North & East Canada)	PERS_OFFLNG_CAN	The same as above, except applies to supervision of employees in the bilingual region of Ontario North & East.
Comm Req Supervision to Montreal	Supr Comm Mnt Can (communication requirements - supervision to Montreal Canada)	PERS_OFFLNG_CAN	The same as above, except applies to supervision of employees in the bilingual region of Montreal.
Comm Req Supervision to Bilingual Quebec-Other	Supr Comm Qc Can (communication requirements - supervision to Quebec and other Canada)	PERS_OFFLNG_CAN	The same as above, except applies to supervision of employees in the bilingual region of Quebec - other.
Comm Req Supervision to New Brunswick	Supr Comm Nb Can (communication requirements - supervision to New Brunswick Canada)	PERS_OFFLNG_CAN	The same as above, except applies to supervision of employees in the bilingual region of New Brunswick.
TBS Office Code	Office Cd Can (office code Canada)	LOCATION_TBL	This designates a point of service. The values should correspond to the office codes established by the TBS (Treasury Board Secretariat).

Understanding the Canadian Official Language Reports

The Canadian Official Language reports (PER108CN) provide summary information that is required by the OLA. The reports assume an as of date of December 31 of the current year, unless another date is specified.

There are five summary reports that are produced in a print format:

- Participation by Province.
- Participation by Occupational Category.
- Service to Public by Bilingual Office/Point of Service.
- Internal Service to Bilingual Regions.
- Supervision in Bilingual Regions.

Participation by Province

The Participation by Province summary report includes individuals whose most recent job record has a REG_REGION value equal to CAN and an EMPL_STATUS value equal to A, L, P, or S.

The following table lists the report field names, the fields in PeopleSoft HCM from which the reports retrieve the data, and the tables where the fields are located:

OLA Summary Report Field Name	***PeopleSoft Field***	***PeopleSoft Table***	***Notes***
Province	JOB..LOCATION_CODE	JOBCODE_TBL	Displays the location code based on the employee JOB location code as indicated in the employee job code record.
Total # of Employees (total number of employees)	JOB.LOCATION_CD	JOBCODE_TBL	Displays the total number of employees for each province based on their JOB. LOCATION_CD. When an employee's JOB.LOCATION _CD is equal to the National Capital Region (NCR), that employee is included in the NCR count, not in the provincial count.
Total # of Employees First Official Languages English	LANGUAGE_CD	PERSONAL_DATA	The count of selected employees in the selected group who have a language code that isn't equal to *CFR* or *FR.* If the employee's language isn't French, then the report uses English.

OLA Summary Report Field Name	***PeopleSoft Field***	***PeopleSoft Table***	***Notes***
Total # of Employees First Official Languages French	LANGUAGE_CD	PERSONAL_DATA	The count of selected employees in a selected group who have a language code that is equal to CFR or FR.

Participation by Occupational Category

The Participation by Occupational Category summary report includes individuals whose most recent job record has a REG_REGION value equal to *CAN* and an EMPL_STATUS value equal to *A, L, P,* or *S.*

The following table lists the report field names, the fields in PeopleSoft HCM from which the reports retrieve the data, and the tables where the fields are located:

OLA Summary Report Field Name	***PeopleSoft Field***	***PeopleSoft Table***	***Notes***
Occupational Category	CAN_NOC_CD	JOBCODE_TBL	The Occupational Category field displays one of five occupational categories that corresponds to the CAN _NOC_CD code in the JOBCODE_TBL table. The categories are: • *91-Managers* • *92-Professionals* • *93-Specialists & Technicians* • *94-Administrative Support* • *95-Operational*
Total # of Employees (total number of employees)	CAN_NOC_CD	JOBCODE_TBL	The count of selected employees with that occupational category.
Total # of Employees First Official Languages English	LANGUAGE_CD	PERSONAL_DATA	The count of selected employees in the selected group who have a language code that isn't equal to *CFR* or *FR*. If the employee's language isn't French, then the report uses English.

OLA Summary Report Field Name	***PeopleSoft Field***	***PeopleSoft Table***	***Notes***
Total # of Employees First Official Languages French	LANGUAGE_CD	PERSONAL_DATA	The count of selected employees in a selected group who have a language code that is equal to CFR or FR.

Service to Public by Bilingual Office/Point of Service

The Service to Public by Bilingual Office/Point of Service summary report includes individuals whose most recent job record has an EMPL_STATUS value equal to *A, L, P,* or *S* and whose OFF_LNG_RQMT_CAN record has a PUB_SVC_LNG_CAN value of either *French, English,* or *Bilingual.*

Employees with a *Bilingual* value in the PUB_SVC_LNG_CAN field are counted in both the French and English columns, resulting in values that may total more than the value in theResources Serving the Public field. This is according to the OLIS II guidelines.

The following table lists the report field names, the fields in PeopleSoft HCM from which the reports retrieve the data, and the tables where the fields are located:

OLA Summary Report Field Name	***PeopleSoft Field***	***PeopleSoft Table***	***Notes***
Province	LOCATION_DESCR	LOCATION_TBL	None
Location	STATE_TBL.DESCR	STATE_TBL	None
Office Code	LOCATION_TBL.TBS_ OFFICE_CD_CAN	LOCATION_TBL	None
Resources Servicing the Public	PUB_SVC_LNG_CAN	OFF_LNG_RQMT_CAN	The count of selected employees at that location.
Resources Serving in English	PUB_SVC_LNG_CAN	OFF_LNG_RQMT_CAN	The count of selected employees at that location with a PUB_SVC_LNG_CAN value of either *English* or *Bilingual.*
Resources Serving in French	PUB_SVC_LNG_CAN	OFF_LNG_RQMT_CAN	The count of selected employees at that location with a PUB_SVC_LNG_CAN value of either *French* or *Bilingual.*

Internal Services to Bilingual Regions

The Internal Services to Bilingual Regions summary report includes individuals whose most recent job record has a REG_REGION value equal to *CAN* and an EMPL_STATUS value equal to *A, L, P,* or *S.*

Individuals must also have a value of either *English, French,* or *Bilingual* in any of the following fields on the OFF_LNG_RQMT_CAN page:

- INTRL_ON_LNG_CAN
- INTRL_NCR_LNG_CAN
- INTRL_MNT_LNG_CAN
- INTRL_QC_LNG_CAN
- INTRL_NB_LNG_CAN

Employees with a *Bilingual* value in any of these internal services fields are counted in both the French and English columns, resulting in values that may total more than the value in theInternal Services to Bilingual Regions field. This is according to the OLIS II guidelines.

The following table lists the report field names, the fields in PeopleSoft HCM from which the reports retrieve the data, and the tables where the fields are located.

OLA Summary Report Field Name	***PeopleSoft Field***	***PeopleSoft Table***	***Notes***
Internal Services to Employees In: • National Capital Region • Ontario North & East • Montreal • Bilingual Quebec-Other • New Brunswick • Total	INTRL_NCR_LNG_CAN INTRL_ON_LNG_CAN INTRL_MNT_LNG_CAN INTRL_QC_LNG_CAN INTRL_NB_LNG_CAN	OFF_LNG_RQMT_CAN	None
Resources Providing Internal Services	INTRL_NCR_LNG_CAN INTRL_ON_LNG_CAN INTRL_MNT_LNG_CAN INTRL_QC_LNG_CAN INTRL_NB_LNG_CAN	OFF_LNG_RQMT_CAN	Displays the count of employees who have a value of *English, French,* or *Bilingual* in theInternal Languages field for each region.

OLA Summary Report Field Name	***PeopleSoft Field***	***PeopleSoft Table***	***Notes***
Resources Serving in English	INTRL_NCR_LNG_CAN INTRL_ON_LNG_CAN INTRL_MNT_LNG_CAN INTRL_QC_LNG_CAN INTRL_NB_LNG_CAN	OFF_LNG_RQMT_CAN	Displays the count of employees who have a value of *English* or *Bilingual* in theInternal Languages field for each region.
Resources Serving in French	INTRL_NCR_LNG_CAN INTRL_ON_LNG_CAN INTRL_MNT_LNG_CAN INTRL_QC_LNG_CAN INTRL_NB_LNG_CAN	OFF_LNG_RQMT_CAN	Displays the count of employees who have a value of *French* or *Bilingual* in theInternal Languages field for each region.

Supervision in Bilingual Regions

The Supervision in Bilingual Regions summary report includes individuals whose most recent job record has a REG_REGION value equal to *CAN* and an EMPL_STATUS value equal to *A, L, P,* or *S.*

Individuals must also have a value of either *English, French,* or *Bilingual* in any of the following fields on the OFF_LNG_RQMT_CAN page:

- SUPR_COMM_ON_CAN
- SUPR_COMM_NCR_CAN
- SUPR_COMM_MNT_CAN
- SUPR_COMM_QC_CAN
- SUPR_COMM_NB_CAN

The following table lists the report field names, the fields in PeopleSoft HCM from which the reports retrieve the data, and the tables where the fields are located:

OLA Summary Report Field Name	***PeopleSoft Field***	***PeopleSoft Table***	***Notes***
Bilingual Supervision: • To Supervise Employees in NCR. • To Supervise Employees in Ontario North & East. • To Supervise Employees in Montreal. • To Supervise Employees in Bilingual Quebec-Other. • To Supervise Employees in New Brunswick. • Total.	SUPR_COMM_NCR_CAN SUPR_COMM_ON_CAN SUPR_COMM_MNT_CAN SUPR_COMM_QC_CAN SUPR_COMM_NB_CAN	OFF_LNG_RQMT_CAN	None
The Number of Supervisors Required to Be Bilingual	SUPR_COMM_NCR_CAN SUPR_COMM_ON_CAN SUPR_COMM_MNT_CAN SUPR_COMM_QC_CAN SUPR_COMM_NB_CAN	OFF_LNG_RQMT_CAN	Displays the count of employees who have a value of *Bilingual* in theSupervisors Required field for each region.
Of These, the Number Qualified to Carry Out Their Duties in Both Official Languages	SUPR_COMM_NCR_CAN SUPR_COMM_ON_CAN SUPR_COMM_MNT_CAN SUPR_COMM_QC_CAN SUPR_COMM_NB_CAN	PERSONAL_DATA	None

Related Links

"Basic PeopleSoft HCM Reports: A to Z" (PeopleSoft HCM 9.2: Application Fundamentals)

Chapter 4

(FRA) Meeting Regulatory Requirements for France

Understanding French Regulatory Requirements

Human Resources provides resources for managing and reporting on various types of data that are required by French government regulations.

PeopleSoft provides the following French regulatory reports:

- Disability (DIS001).
- Election (ELE001).
- Employee Survey (SOC001).
- Monthly Workforce (REG001FR).
- Personal Register (REG002FR).
- Training 2483 (TRN029).
- Workforce by Nationality (REG003FR).
- Single Hiring Statement (HRSHSFRA).
- BIAF report (*Bordereau Individuel d'Accès à la Formation* report) (REG004FR).

Related Links

"(FRA) Meet Regulatory Requirements Reports for France" (PeopleSoft HCM 9.2: Application Fundamentals)

Prerequisites

Set up control tables using the following pages before running French regulatory reports:

Control Table Page	***Description***
APE Table *(activite principale exercee* table)	Classify the company's primary industry, such as software, banking, or insurance. The APE codes are mandated by French law.
External Variables	Enter information related to salaries and social security ceilings that are established by the French government each year, and enter the disability rates for the Disability report.

Control Table Page	***Description***
INSEE Table FRA (National Institute For Statistical And Economical Studies table France)	Input the INSEE codes for the company's job codes. Then map the company's job codes to one of the INSEE codes.
URSSAF Code (*Union de Recouvrement de la Sécurité Sociale et des Allocations Familiales* code)	Store the codes of the local URSSAF offices. This government agency collects employee and employer contributions made for illness and work accidents.
Trn 2483 Parameters (training 2483 parameters)	Enter data required for the 2483 report. Much of the information required for the 2483 report is stored in the HR system and payroll system.

In addition to setting up the control tables, you must set up Training 2483 report groups and indicators.

Understanding Pension and Contingency Fund Data

In France, employees and employers contribute to different types of pension funds:

- *Association des Régimes de Retraites Complémentaires* (ARRCO) is a complementary pension fund to which all employees can contribute.
- *Association Générale des Institutions de Retraite des Cadres* (AGIRC) is a complementary pension fund for executives.
- Contingency funds supplement standard social security payments.

The funds to which an employee contributes are determined by the employee's contract. The Category Status field in the French section of the Contract Data - Contract Type/Clause page defines employees' manager or non-manager status for pension fund processing.

Companies and establishments set up contracts with organizations, known as institutions, that manage a particular type of fund. For some contracts, it is mandatory that employee contribute to that fund but others are optional.

In HR you set up the pension and contingency data as follows:

1. Set up the codes for the funds to which employees contribute.
2. Define the institutions that manage the pension and contingency funds.

   For each institution define the institution number, the institution type (ARRCO, AGIRC, or Contingency), the fund managed by that institution, the DUCS and DADS codes for the institution, the institution address, and the SIRET number.
3. Define the pension/contingency contracts.

   For each pension/contingency contract you define the membership number (contract number), the institution associated with the contract, and assign the contract to companies or establishments in the organization.

The pages for setting up the fund codes, institutions, and pension/contingency contracts are in Set Up HCM >Product Related >Workforce Monitoring >Meeting Regulatory Requirements FRA and described in this documentation.

Pension and contingency funds are assigned to companies and establishments from the Pension/ Contingency Contracts page, but you can also assign pension and contingency funds to individual employees from the Contract Data - Contract Type/Clauses page. The Contact Data component is described in the PeopleSoft HR: Administer Workforce documentation. See "Tracking Workforce Contracts" (PeopleSoft HCM 9.2: Human Resources Administer Workforce).

For AGIRC and ARRCO contracts, a contract defined on the Contract Type/Clauses page overrides any contracts defined at the company or establishment level. However, for contingency funds, contracts assigned at the employee level are added to funds defined at the company or establishment level. If you have PeopleSoft Global Payroll for France installed, it takes into account all contingency contracts that are applicable to the employee.

The Pension/Cont. Contracts Review page enables you to view a list of the pension and contingency funds for which an employee is eligible. Access this page as follows: Workforce Monitoring > Meet Regulatory Rqmts FRA > Pension/Cont. Contracts Review. This page is described in this documentation. See Reviewing Pension and Contingency Fund Information.

If you have PeopleSoft Global Payroll for France installed, refer to the PeopleSoft Global Payroll for France documentation for information about processing contributions through payroll. See "Understanding ARRCO, AGIRC, and Contingency Fund Contributions" (PeopleSoft HCM 9.2: Global Payroll for France).

Setting Up French Regulatory Requirements

To set up the French regulatory requirements, use the Contract Type Group (CNTRCT_TYPE_GRP), Action Group (ACTION_GRP_FRA), Country Group (COUNTRY_GRP), Define Employee Survey Indicators (SOC_INDIC_TBL_FRA), Election Group (ELECTION_GR_TBL), Election Roll (ELECTION_RL_TBL), Mandatory Base Scheme (BSE_SCH_FRA_TBL), Contract Event (CTC_KND_FRA_TBL), Category Status (CTG_STS_FRA_TBL), Covered Population (CVD_POP_FRA_TBL), Job Category (JOB_CTG_FRA_TBL), Previous Employment Situation (WRK_EXP_FRA_TBL), Medical Organization (MED_ORG_FRA_TBL), Population Category (POP_CTG_FRA_TBL), Professional Status (PRF_STS_FRA_TBL), Funds Codes (FUND_FRA_TBL), Pension/Ctgcy Institutions (FUND_INST_FRA), and the Pension/Contingency Contracts (CNTRCT_FUND_FRA), 2483 Parameters (TRN_2483_PARM), and 2483 Indicators (GROUP_2483_TBL_GBL) components.

These topics provide an overview of pages with system-populated fields and discuss French regulatory requirements.

Pages Used to Set Up French Regulatory Requirements

Page Name	***Definition Name***	***Usage***
Contract Type Group Page	CNTRCT_TYPE_GRP	Group contract types together. Before using this page, set up the Contract Type table.

Page Name	***Definition Name***	***Usage***
Action Groups Page	ACTION_GRP_PNL_FRA	Define action groups used by processes.
Country Group Page	COUNTRY_GRP	Modify country groupings. Before using this page, set up the Country table.
Employee Survey Group Page	GROUP_SHEETTBL_FRA	Update the seven main groups defined by the French government.
Employee Survey Indicator Page	INDIC_SHEETTBL_FRA	Update the indicators and link the indicators with the relevant application engine section.
Election Group Page	ELECTION_GR_TBL	Define the various groups that are active in the company.
Election Roll Page	ELECTION_RL_TBL	Define the election rolls or candidacies.
Base Scheme Page	BSE_SCH_FRA_TBL	Define the base scheme necessary for DADS, a French payroll report.
Contract Event Page	CTC_KND_FRA_TBL	Define the contract events that are needed for DADS.
Category Status Page	CTG_STS_FRA_TBL	Define the category status needed for French payroll and DADS.
Covered Population Page	CVD_POP_FRA_TBL	Define the covered population needed for DADS.
Job Category Page	JOB_CTG_FRA_TBL	Define the job categories used in the company. This information is required for the Single Hiring Statement report.
Previous Employment Situation Page	WRK_EXP_FRA_TBL	Review and update the previous employment codes used for the Single Hiring Statement report.
Medical Organizations Page	MED_ORG_FRA_TBL	Define the medical organizations used in the company. This information is required for the Single Hiring Statement report.
Population Category Page	POP_CTG_FRA_TBL	Define the population categories used by your company. Needed for DUCS, a French payroll report.
Professional Status Page	PRF_STS_FRA_TBL	Define the professional status used in the company; this information is required for DADS.
Funds Codes Page	FUND_FRA_TBL	Set up fund codes for pension/ contingency funds. You associate fund codes with the pension/contingency institutions on the Institution Type page.

Page Name	***Definition Name***	***Usage***
Institution Type Page	FUND_INST_FRA	Define pension/contingency institutions. Specify the institution type, and the fund code, DADS and DUCS codes associated with the institution.
Institution Address Page	FUND_INST2_FRA	Enter the pension/contingency institution's address information and enter the SIRET number for the institution. This information doesn't roll into PeopleSoft Pension Administration, which is a U.S. application.
Pension/Contingency Contracts Page	CNTRCT_FUND_FRA	Set up contract information for pension/ contingency contracts. Define your fund codes and institutions before you set up contract information.
Trn 2483 Parameters Setup Page(training 2483 parameters setup)	TRN_2483_PARM	Set up 2483 training parameters.
Trn 2483 Company Costs Page (training 2483 company costs)	TRN_2483_CPNY_COST	Set up 2483 training costs.
2483 Group Page	GROUP_2483_TBL_FRA	Set up 2483 indicator groups.
2483 Indicator Page	INDIC_2483_TBL_FRA	Set up 2483 indicators.
Define OPS Page	OPS_SETUP_FRA	Define the OPS type. You can also view the OPS types and corresponding Delegates that are already defined in the system.
Define OPS by Establishment Page	OPS_ESTAB_SETUP	Use this page to enter the details of OPS types that doesn't require contract. If there is contract associated, the details about the OPS is captured in Pension/ Contingency Contracts page.

Understanding Pages with System-Populated Fields

The following pages are populated with system data:

- Mandatory Base Scheme.
- Contract Event.
- Category Status.
- Covered Population.
- Job Category.
- Medical Organization.

- Population Category.
- Professional Status.

On these pages, you can modify, delete, and add new codes. As legislative changes occur, you can easily update this data to comply with French legislation that applies to your organization. In some cases, not all the system data is populated, because only a few parts of this information may be relevant to your organization.

Contract Type Group Page

Use the Contract Type Group page (CNTRCT_TYPE_GRP) to group contract types together.

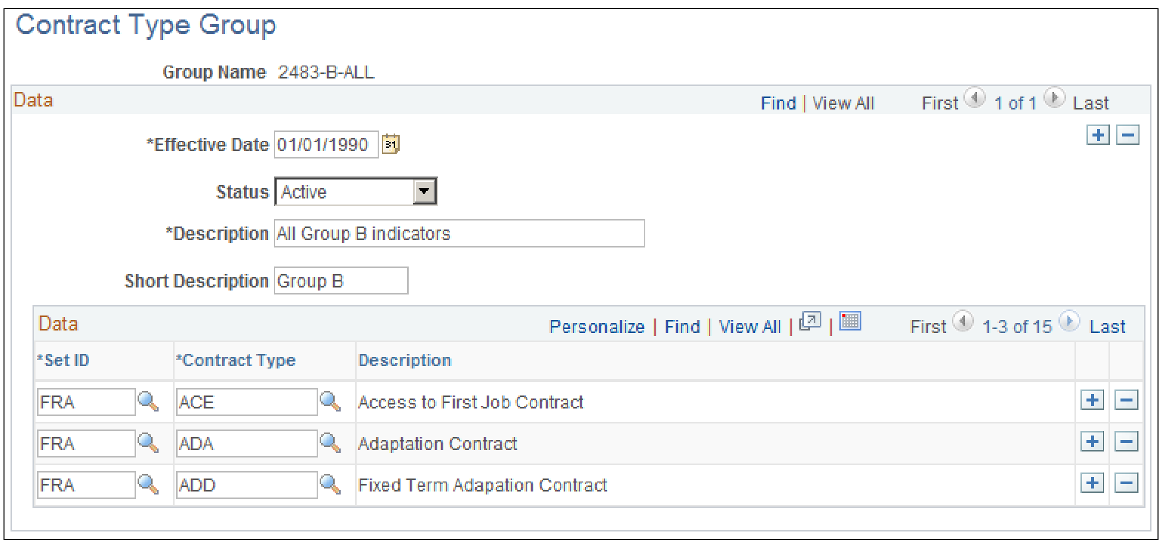
Before using this page, set up the Contract Type table.

Navigation

Set Up HCM > Product Related > Workforce Monitoring > Regulatory Requirements FRA > Contract Type Group > Contract Type Group

Image: Contract Type Group page

This example illustrates the fields and controls on the Contract Type Group page. You can find definitions for the fields and controls later on this page.



Set ID and **Contract Type**

Enter or look up a set ID and a contract type to associate with this group name.

These groups are used for legal reporting, including the Training 2483 report, Monthly Workforce report, and Personal Register report.

Employee Survey Group Page

Use the Employee Survey Group page (GROUP_SHEETTBL_FRA) to update the seven main groups defined by the French government.

Navigation

Set Up HCM > Product Related > Workforce Monitoring > Regulatory Requirements FRA > Define Emply Survey Indicators > Employee Survey Group

Image: Employee Survey Group page

This example illustrates the fields and controls on the Employee Survey Group page. You can find definitions for the fields and controls later on this page.

Note: All groups and nearly all indicators that you must prepare for the Employee Survey report already exist in the Employee Survey Group table and the Employee Survey Indicator table as system data; however, the Employee Survey process does not determine all indicators. The system determines about half of the indicators. Use the Employee Survey Group page and the Employee Survey Indicator page to modify these groups and indicators, if necessary.

Number of Columns

Enter the number of columns on the Employee Survey report. When you change the number of columns, a corresponding number of Descr. (description) fields appear on the page.

The columns (number and value) are used as defaults when you add a new indicator. The report displays only the columns defined on the Employee Survey Indicator page.

Employee Survey Indicator Page

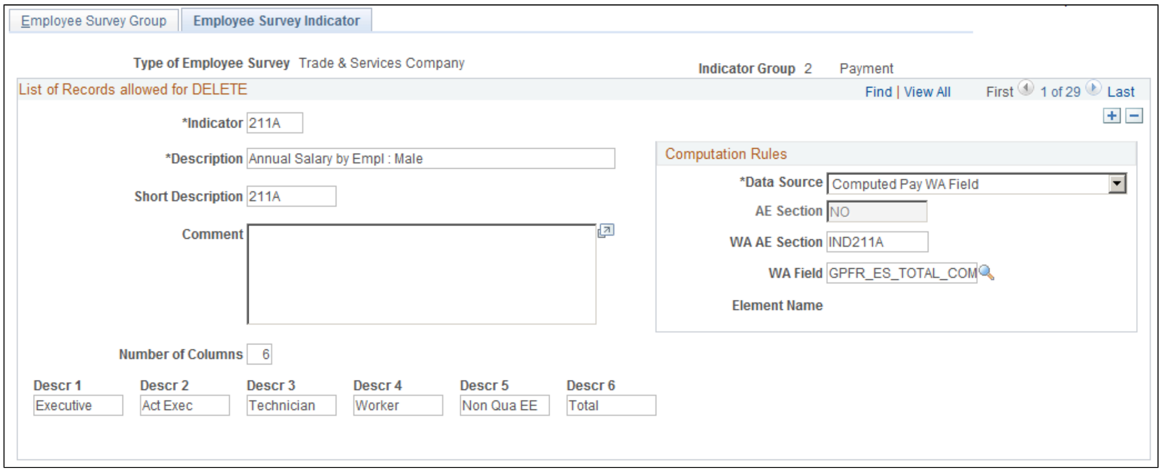
Use the Employee Survey Indicator page (INDIC_SHEETTBL_FRA) to update the indicators and link the indicators with the relevant application engine section.

Navigation

Set Up HCM > Product Related > Workforce Monitoring > Regulatory Requirements FRA > Define Emply Survey Indicators > Employee Survey Indicator

Image: Employee Survey Indicator page

This example illustrates the fields and controls on the Employee Survey Indicator page. You can find definitions for the fields and controls later on this page.



Indicator The code is defined in the employee survey legal requirement.

Number of Columns Displays the total number of columns and the corresponding column descriptions that are entered on the Employee Survey Group page. The number of Descr. (description) fields that appear at the bottom of the page is linked to the value that you enter in the Number of Columns field.

The descriptions that you enter are the headings for the categories, or columns, on the report. In this example, the *Payment* group displays the following columns in the report: *Executive, Act Exec, Technician, Worker, Non Qua EE* and *Total.*

Computation Rules

More than 60 PeopleSoft Application Engine processes are built into HR for the majority of the indicators.

Data Source Select the source used to compute data for the indicator. Options are *Absence WA Field, Computed, Computed Absence WA Field, Computed Pay WA Field, Not Computed,* and *Pay WA Field.*

Use *Computed* to compute the value for the indicator using only HR data (through an AE section). The other values (except for *Not Computed*) show that the indicator comes from Global Payroll results and are either calculated by Global Payroll and stored in a writeable array, or stored in a writeable array and then computed by an Application Engine section. Use *Not Computed* to indicate that the indicator is not computed.

PeopleSoft delivers this setup. However, you can modify it to calculate an indicator in a different way.

AE Section (application engine section)

Enter the section of the employee survey that PeopleSoft Application Engine should calculate for the given indicator.

Note: When the value is set to *NO,* it means that there is no PeopleSoft Application Engine process for the indicator. Changing this value without modifying the Application Engine results in an error and stops the overall process.

WA AE Section (writeable array application engine section)

Specify the Application Engine section used to compute payroll for the indicator.

WA Field (writeable array field)

Select the writeable array field to be used to compute payroll for the indicator.

Element

Displays the Global Payroll element associated with the writeable array shown in (WA) Field.

See the product documentation for *PeopleTools: Application Engine*.

Institution Type Page

Use the Institution Type page (FUND_INST_FRA) to define pension/contingency institutions.

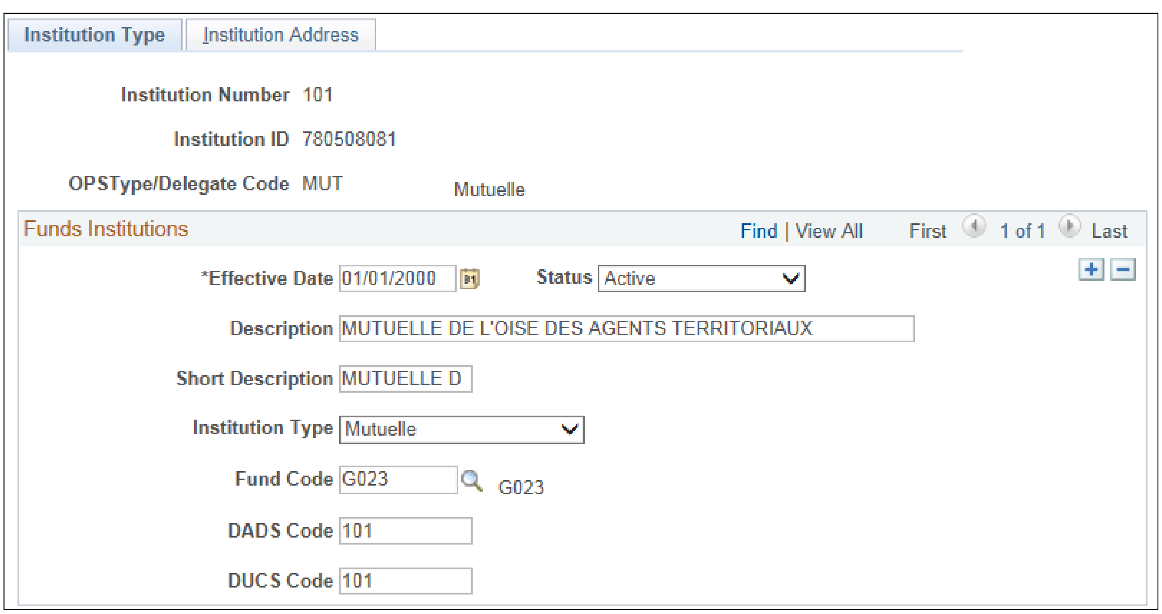
Specify the institution type, and the fund code, DADS and DUCS codes associated with the institution.

Navigation

Set Up HCM > Product Related > Workforce Monitoring > Regulatory Requirements FRA > Pension/Ctgcy Institutions > Institution Type

Image: Institution Type page

This example illustrates the fields and controls on the Institution Type page. You can find definitions for the fields and controls later on this page.



Institution Type	Select the institution type. Valid values are: *AGIRC:* Pension funds for managers (cadres). *ARRCO:* Pension funds for managers and non-managers (non-cadres). *Contingency:* Contingency funds.
Fund Code	Select the fund code to which the institution is affiliated.
DADS Code	Enter the DADS code to use for DADS reporting. This may be different from the institution code. Contact the institution to find out which the DADS code you should use.
DUCS Code	Enter the DUCS code for DUCS reporting. This may be different from the institution code. Contact the institution to find out which the DUCS code you should use.

See "Understanding DADS Reporting" (PeopleSoft HCM 9.2: Global Payroll for France), "Understanding DADS Data Structures" (PeopleSoft HCM 9.2: Global Payroll for France), and "Understanding Global Payroll Rules for DADS" (PeopleSoft HCM 9.2: Global Payroll for France).

Pension/Contingency Contracts Page

Use the Pension/Contingency Contracts page (CNTRCT_FUND_FRA) to set up contract information for pension/contingency contracts.

Define your fund codes and institutions before you set up contract information.

Navigation

Set Up HCM > Product Related > Workforce Monitoring > Regulatory Requirements FRA > Pension/Contingency Contracts > Pension/Contingency Contracts

Image: Pension/Contingency Contracts page (1 of 2)

This example illustrates the fields and controls on the Pension/Contingency Contracts page (1 of 2). You can find definitions for the fields and controls later on this page.

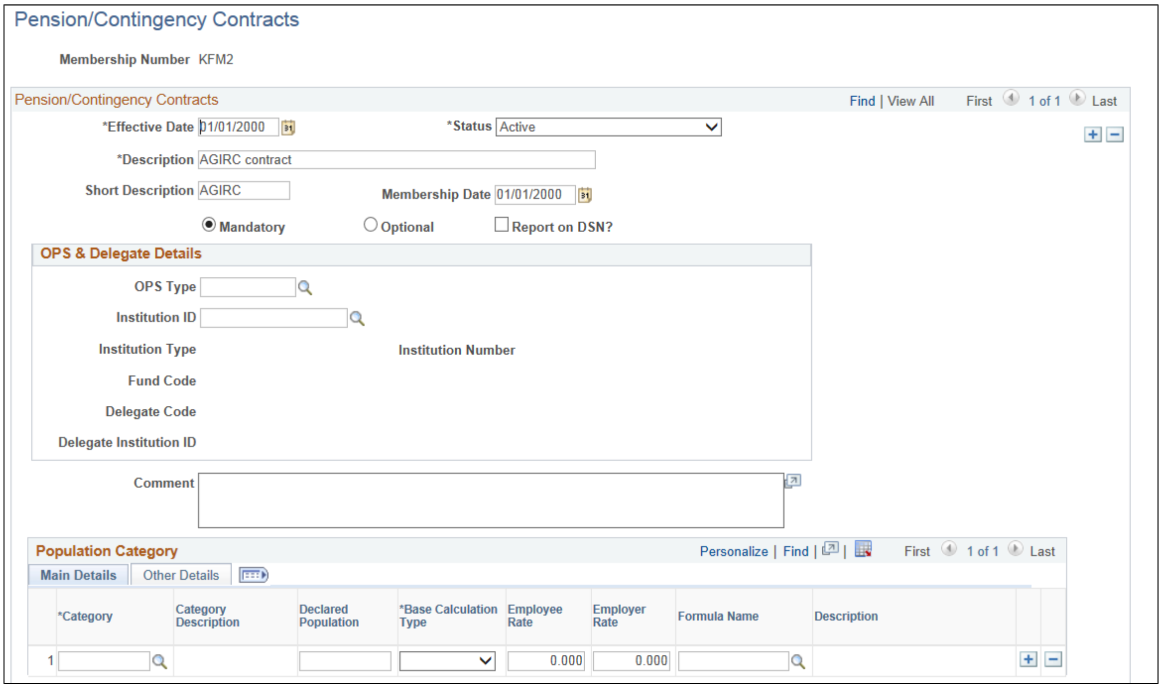
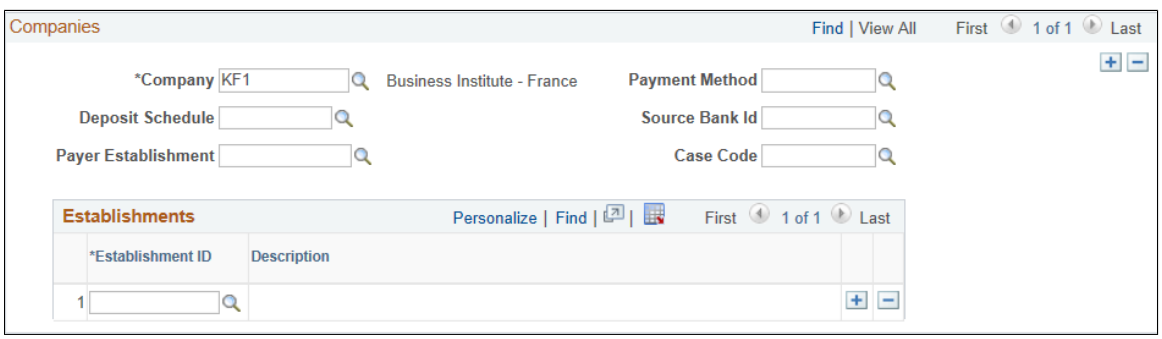


Image: Pension/Contingency Contracts page (2 of 2)

This example illustrates the fields and controls on the Pension/Contingency Contracts page (2 of 2). You can find definitions for the fields and controls later on this page.



Institution Nbr (institution number)	Select the institution associated with the membership number. See Institution Type Page.
Institution Type	Displays the institution type that is defined on the Institution Type page.
Fund Code	Displays the institution's fund code that is defined on the Institution Type page.
Membership Date	Enter the date that the contract was initially signed.

Mandatory, and **Optional**

Select Mandatory if the contract applies to all employees in the companies and establishments selected. SelectOptional if the contract applies to selected employees only.

If the institution type is *ARRCO* or *AGIRC,* the system selectsMandatory and the fields are display-only.

If a contract is optional, this affects the calculation of social and fiscal reinstatement in Global Payroll for France.

See "Understanding ARRCO, AGIRC, and Contingency Fund Contributions" (PeopleSoft HCM 9.2: Global Payroll for France).

Report on DSN?

Select the check box if you want to report the corresponding *Membership ID* as part of DSN.

OPS & Delegate Details

Use this area to enter the details about the OPS and its delegates that have contracts with the establishment.

OPS Type

Select the OPS type. The list displays only the OPS Types that are defined under Define OPS page with the field *Uses Pension / Ctgy Contract?* checked as yes.

Institution ID

Select the Institution ID based on the selected OPS type. Institution IDs are defined using the Pension/Ctgcy Institutions page.

Delegate Institution

Select the delegate Institution ID. This field is enabled only if you select Prevoyance as the OPS Type.

Population Category

This scroll area is available for entry if the institution type is *Contingency* and you have PeopleSoft Global Payroll for France installed. Use it to identify the population that is eligible for the contingency contract and define how contributions are calculated.

Category

Select the population category code that is eligible for the contract. Population category codes are defined on the Population Category page.

An employee's job code determines if the employee is eligible for a contract. Job codes are assigned an INSEE code, which in turn is linked to a population category code.

Declared Population

Use this field to override the default population category code defined in the Category field if the institution requires a specific code in the DUCS declaration.

Base Calculation Type

Select the base calculation type.

If contributions are calculated by multiplying a base by a rate, select the funding base type which is used by Global Payroll for France to calculate contributions. Enter the rate values in the Employee Rate andEmployer Rate fields.

If contributions are not calculated by multiplying a base by a rate, select *Other* and select the formula in theFormula Name field.

Employee Rate

Enter the employee rate. This value is multiplied by the base you specified in the Base Calculation Type field to calculate the employee contributions. This field is not available if you select *Other* in the Base Calculation Type field.

Employer Rate

Enter the employer rate. This value is multiplied by the base you specified in the Base Calculation Type field to calculate the employer contributions. This field is not available if you select *Other* in the Base Calculation Type field.

Formula Name

Select the formula that calculates employee and employer contributions. This field is only available if you select *Other* in the Base Calculation Type field. If this field is left blank and the Base Calculation Type is *Other,* the system issues a warning message.

See "Defining Formula Elements" (PeopleSoft HCM 9.2: Global Payroll).

Companies

Company

Select the company that subscribes to the contract. This field is available if the contract is mandatory. If it is an optional contract you assign the contract to employees using the Update Contracts component (CONTRACT_DATA)

Payment Method

Select the payment method used by the company for settlement .

Deposit Schedule

Select the Deposit Schedule applicable for the selected company. This value is unique for a company.

Note: The naming convention used for Deposit Schedule is mentioned in the Deposit Schedule section.

Source bank ID

Select the source bank ID for the selected company. Source Bank Ids are defined in the Source Bank Accounts page.

Payer Establishment

Select the establishment corresponding to the selected company that makes the payment.

Case Code

Select the case code corresponding to the selected OPS .

Establishments

Select the establishments that subscribe to the contract. This field is available if the contract is mandatory.

Note: If the contract is mandatory and you leave the Company and Establishment ID fields blank, the system issues an error message.

Define OPS Page

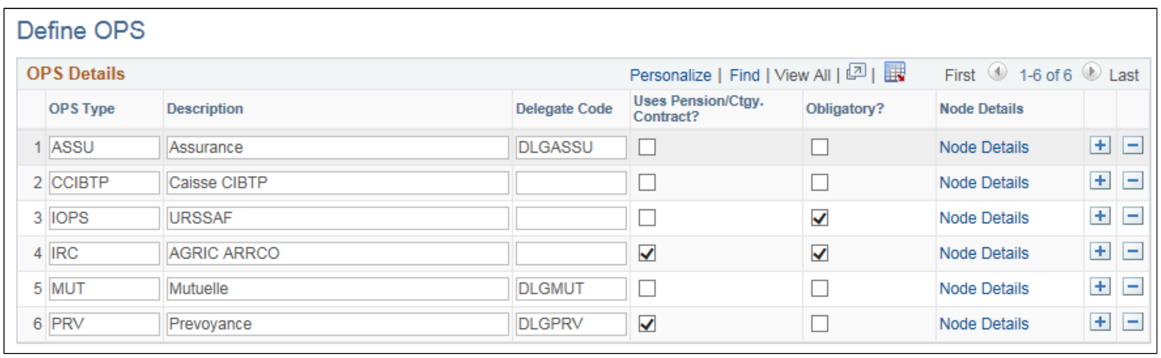
Use Define OPS page(OPS_SETUP_FRA) to define new OPS types. You can also view the existing list of OPS and corresponding delegates.

Navigation

Set Up HCM > Product Related > Workforce Monitoring > Regulatory Requirements FRA > Define OPS

Image: Define OPS Page

This example illustrates the fields and controls on the Define OPS page. You can find definitions for the fields and controls later on this page.


Define OPS

OPS Details — Personalize | Find | View All | First 1-6 of 6 Last

	OPS Type	Description	Delegate Code	Uses Pension/Ctgy. Contract?	Obligatory?	Node Details
1	ASSU	Assurance	DLGASSU	☐	☐	Node Details
2	CCIBTP	Caisse CIBTP		☐	☐	Node Details
3	IOPS	URSSAF		☐	☑	Node Details
4	IRC	AGRIC ARRCO		☑	☑	Node Details
5	MUT	Mutuelle	DLGMUT	☐	☐	Node Details
6	PRV	Prevoyance	DLGPRV	☑	☐	Node Details

OPS Type

Enter the OPS type. Available values are IRC (Agirc Arrco), IOPS (URSSAF), MUT (Mutuelle), ASSU (Assurance), PRV (Prevoyance) and CIBTP (Caisse).

Delegate Code

Enter the delegate code used for the corresponding OPS Type.

Delegate Code refers to the delegate institution affiliated to an OPS and is authorized to transact on behalf of the company/ establishment. Delegate Institution acts as a mediator between a company/establishment and the OPS.

Use Pension/Ctgcy Contract?

Select Yes or No to indicate whether the OPS has a contract (Membership ID) with establishments defined under Pension/ Contingency Contract component.

If the value is No, you need to capture Institution ID / Delegation ID in the OPS by Establishment page.

Obligatory

Select Yes or No to indicate whether the reporting of selected OPS is mandatory as per French law. If the value is Yes, you need to report all correlated nodes in DSN.

Node Details

Click the Node Details link to access the OPS Node Details page to select the nodes to be reported in DSN.

By default, all the nodes will be selected. You can deselect it only if the OPS is not mandatory by French law.

Define OPS by Establishment Page

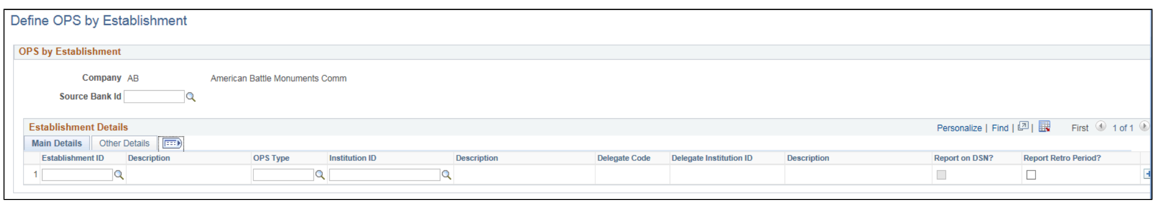
Use Define OPS By Establishment page(OPS_ESTAB_SETUP) to define OPS parameters for each establishment within a company. In this page, you can enter only the details of OPS types that are not bound by a contract.

Navigation

Set Up HCM > Product Related > Workforce Monitoring > Regulatory Requirements FRA > Define OPS by Establishment

Image: Define OPS by Establishment Page

This example illustrates the fields and controls on the Define OPS by Establishment page. You can find definitions for the fields and controls later on this page.



OPS by Establishment: Main Details Tab

Establishment ID

Select the establishments that are mapped to the selected company.

OPS Type

Select the OPS Type.

Institution ID

Select the Pension/Ctgcy Institution based on the selected OPS Type.

Delegate Code

Select the Delegate Code.

Only the delegate codes mapped for the selected OPS type will be listed.

Delegate Institution ID

Select the Pension/Ctgcy Institutions based on the selected Delegate Code.

Report on DSN?

Select the check box to report the corresponding OPS as part of DSN.

Report Retro Period

Select the check box to enable reporting of Retro periods under the S21.G00.22 node.

OPS by Establishment_Other Details Tab

Case Code

Select the Case Code for each OPS.

Payer Establishment

Select the establishment that makes the payment.

If no value is entered against Payer Establishment, system assumes that the payment is not done through DSN and the node S21.G00.20 and S21.G00.55 will not be reported in DSN.

Payment Method

Select the payment method. List of values includes Bank Transfer, Cash, Check etc

Deposit Schedule

Select the required deposit schedule.

The minimum of Debit Date based on current month will be reported under the node/attribute S21.G00.20.011.

Note: The naming convention used for Deposit Schedule is mentioned in the Deposit Schedule section

Source Bank ID

Enter the source bank ID.

This field will be enabled only if the Payer Establishment is defined and if the Payer Establishment is the same as the Establishment ID selected.

Reviewing Pension and Contingency Fund Information

This topic discusses how to review employee pension and contingency fund contracts.

Page Used to Review Employee Pension and Contingency Fund Contracts

Page Name	*Definition Name*	*Usage*
Pension/Cont. Contracts Review Page	CNTRCT_EEFRA_INQRY	Review the pension and contingency fund contracts for which an employee is eligible.

Pension/Cont. Contracts Review Page

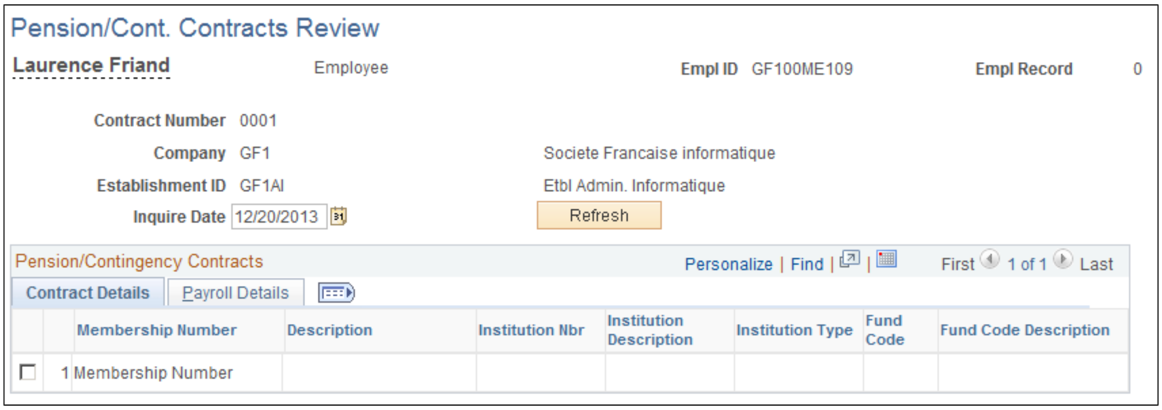
Use the Pension/Cont. Contracts Review page (CNTRCT_EEFRA_INQRY) to review the pension and contingency fund contracts for which an employee is eligible.

Navigation

Workforce Monitoring > Meet Regulatory Rqmts FRA > Pension/Cont. Contracts Review > Pension/ Cont. Contracts Review

Image: Pension/Cont. Contracts Review page

This example illustrates the fields and controls on the Pension/Cont. Contracts Review page. You can find definitions for the fields and controls later on this page.



Inquire Date, and**Refresh** — The system displays the employee's pension/contingency contract information as of the current date. If you want to view the information for a different effective date, enter the date and click the Refresh button.

Membership Number — Displays the number of the pension/contingency fund contract to which the employee is eligible. Click the link in this column to view the contract definition. The system displays the Pension/Contingency Contracts page.

See "INSEE Table Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce).

Institution Nbr (institution number) — Displays the institution ID of the institution associated with the pension/contingency fund contract.

Institution Type — Displays the institution type. This is one of: *AGIRC, ARRCO,* or *Contingency.*

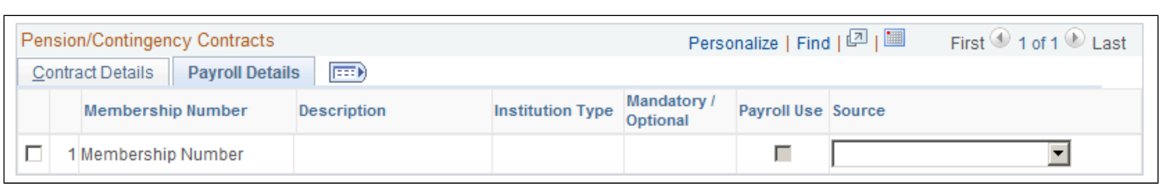
Fund Code — Displays the fund code associated with the institution.

Payroll Details Tab

Access the Payroll Details tab.

Image: Pension/Cont. Contracts Review page (Payroll Details tab)

This example illustrates the fields and controls on the Pension/Cont. Contracts Review page (Payroll Details tab). You can find definitions for the fields and controls later on this page.



Mandatory/Optional

Indicates if the pension or contingency fund is mandatory for employees in the company or establishment to which the fund is linked.

Payroll Use

The check box is display-only and only applies to customers who have PeopleSoft Global Payroll for France installed. The system selects the check box to indicate which contract is processed by payroll. Depending on your contract setup, employees may be eligible for multiple contracts of the same type. Contracts can be assigned at three levels:

- To companies.
- To establishments.
- To individual employees (using the Contract Type/Clauses page).

For AGIRC and ARRCO contracts only one contract is processed in payroll. The system selects the contract assigned at the lowest level for payroll processing. For example, if an employee is eligible for an AGIRC contract assigned to the company and a different AGIRC contract assigned to the employee's establishment, the contract assigned to the establishment is the one processed by payroll. If you assign a contract at the employee level, this takes precedence over the contracts for the employee's company or establishment.

For contingency contracts, all contracts associated with the employee are processed in payroll. The system determines whether employees are eligible for contingency contracts assigned to their company or establishment by checking the population categories defined for the contract against the employee's population category code. Employees' population code is determined by the INSEE code linked to their job code.

Source

Indicates the level at which the contract is assigned to the employee:

- *Estab.* (establishment): The contract was assigned to the establishment for which the employee works.
- *Company:* The contract was assigned to the company for which the employee works.

Note: If the contract was assigned at the employee level using the Contract Type/Clauses page, the Source field is blank.

Running the Disability Report

These topics provide an overview of French disability reporting and list common elements.

Page Used to Run the French Disability Report

Page Name	***Definition Name***	***Usage***
Disability Report Page	RUNCTL_DIS001_FRA	Run the Disability report. This report calculates the theoretical number of disabled employees who should work for the company and lists the disabled employees, excluding temporary workers, trainees, and apprentices. Before running this report, enter the correct codes in the INSEE table and the correct disability rate code in the External Variables table.

Understanding French Disability Reporting

French legislation of 1987 requires firms with more than 20 employees to hire qualified disabled people. Before hiring the disabled person, the employer is required to notify the proposed employee's social security commission, COTOREP *(Commission Technique d'Orientation et de Reclassement Professionnel),* in an effort to combat fraud.

When you run the Disability report, it calculates the theoretical number of disabled employees that your company should hire by multiplying the disability rate by the number of people in the calculation population. The system determines the calculation population by subtracting those people who have special job codes that are defined by the INSEE (National Institute for Statistical and Economical Studies) or who are external consultants or trainees from the total population of your organization. The report also lists all the disabled employees employed by your company. Based on this report, the French government determines if your company complies with the law.

To prepare this report, ensure that you enter the correct codes in the INSEE table and have the correct Disability Rate code in the External Variables table.

Common Elements Used When Running the French Disability Report

Company Total Population
Displays the total company population. Each HR French job code is linked to a four-digit INSEE *socio-professional* category description *(classification par categorie socio-professionnelle [PCS])* code. The first table of the report lists all the PCS codes corresponding to a job code within your company, their description, and the number of men or women in each category.

Jobs Requiring Special Abilities
Displays exempt job codes and the number of men or women in the company's population who must be excluded from the calculation population. Exempt job codes define jobs that require capabilities incompatible with any kind of disability.

Reference Population
Displays the total population minus consultants and trainees but including the excluded jobs.

Calculation Population
Displays the total population minus the consultants, trainees, and excluded jobs.

Calculated Number of Disabled Employees	Displays the calculated, theoretical number of disabled employees whom the company should hire to comply with the law.

Managing Elections and Running the Election Report

These topics provide an overview of French professional elections reporting and discuss managing elections and running the election report.

Pages Used to Manage Elections and Run the Election Report

Page Name	***Definition Name***	***Usage***
Maintain Election Data - Group Page	ELECTION_GROUP	Define the characteristics of an election.
Maintain Election Data - Roll Page	ELECTION_ROLL	Record candidacies for the groups in the election. Each trade union in the company delivers a list of candidates (incumbents and substitutes) for the election that you enter on this page.
Maintain Election Data - Votes Page	ELECTION_VOTES	Enter voting results.
Maintain Election Data - Results Page	ELECTION_RESULTS	Validate the election results by viewing the results for each roll in a group and the calculation of the number of seats obtained for each roll. You can modify the calculated results.
Maintain Election Data - Seats Page	ELECTION_SEATS	Determine which candidates are declared elected for each roll. Generally, the candidate display-order entered on this page is more important than the actual number of votes each candidate received.
Election Report Page	RUNCTL_ELE001	Run the Election report, which provides the results of the staff representative elections for employees and management.

Understanding French Professional Elections Reporting

Human Resources enables you to monitor professional elections for personnel representatives *(delegues du personnel)* and members of the work council*(comite d'enterprise)* in your organization if you are doing business in France.

Companies with more than 11 employees must elect personnel representatives to represent all of the employees before management. Companies with more than 50 employees must elect a work council to represent the employees in negotiations with management. Normally, the elections are every two years and follow stringent procedures.

Once you enter the election data, run the Election report to show the results of the elections to the employees and management.

Maintain Election Data - Group Page

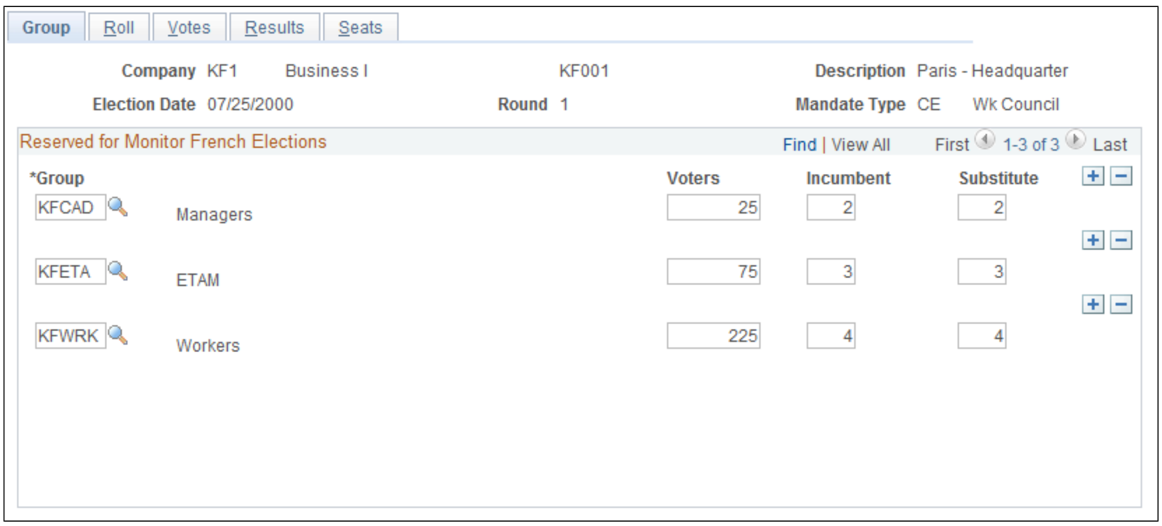
Use the Maintain Election Data - Group page (ELECTION_GROUP) to define the characteristics of an election.

Navigation

Workforce Monitoring > Meet Regulatory Rqmts FRA > Election Monitoring > Maintain Election Data > Group

Image: Maintain Election Data - Group page

This example illustrates the fields and controls on the Maintain Election Data - Group page. You can find definitions for the fields and controls later on this page.



Group	Select the groups that are present from the list of prompt values. To enter more than one group, insert additional data rows.
Voters	Enter the number of employee voters registered for this group.
Incumbent and **Substitute**	Enter the number of incumbents and substitutes affected by the election. The incumbent number is copied into the Substitute field, but you can overwrite this value.

Maintain Election Data - Roll Page

Use the Maintain Election Data - Roll page (ELECTION_ROLL) to record candidacies for the groups in the election.

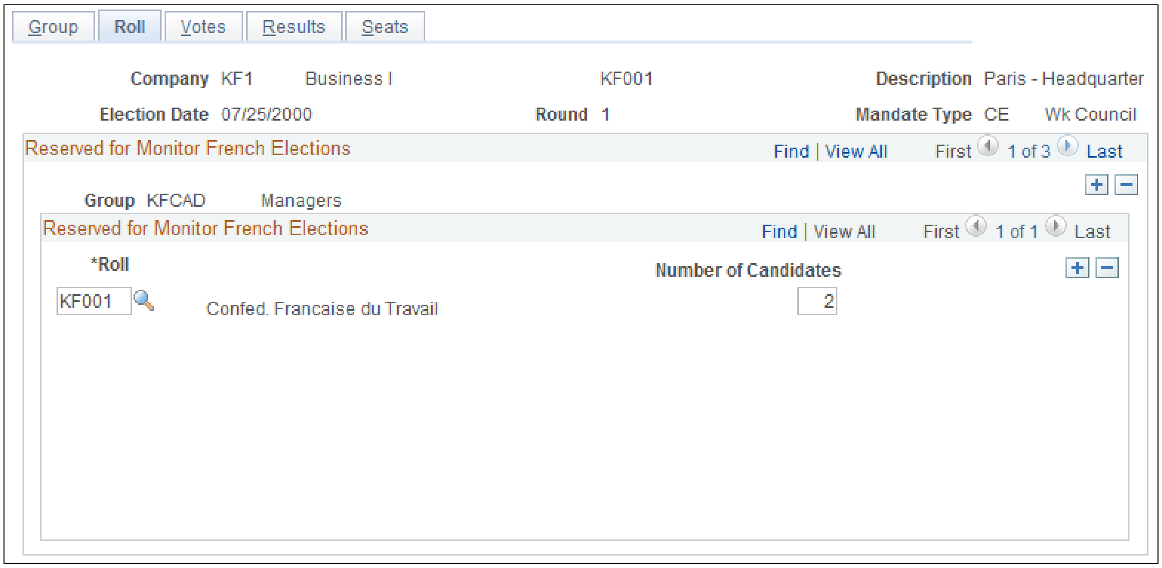
Each trade union in the company delivers a list of candidates (incumbents and substitutes) for the election that you enter on this page.

Navigation

Workforce Monitoring > Meet Regulatory Rqmts FRA > Election Monitoring > Maintain Election Data > Roll

Image: Maintain Election Data - Roll page

This example illustrates the fields and controls on the Maintain Election Data - Roll page. You can find definitions for the fields and controls later on this page.



Roll

Enter rolls for each group by selecting them from the list of prompt values. To enter more than one roll for a group, insert additional rows.

Number of Candidates

Displays the number of candidates. By default, this number corresponds to the numbers of incumbents to be elected in the group. You can override this value.

Note: If you change the number of candidates at the roll level on the Roll page, the system inserts or deletes rows on the Votes page. The number of Candidate rows on the Votes page is synchronized with the number of candidates that is defined at the roll level on the Roll page.

Maintain Election Data - Votes Page

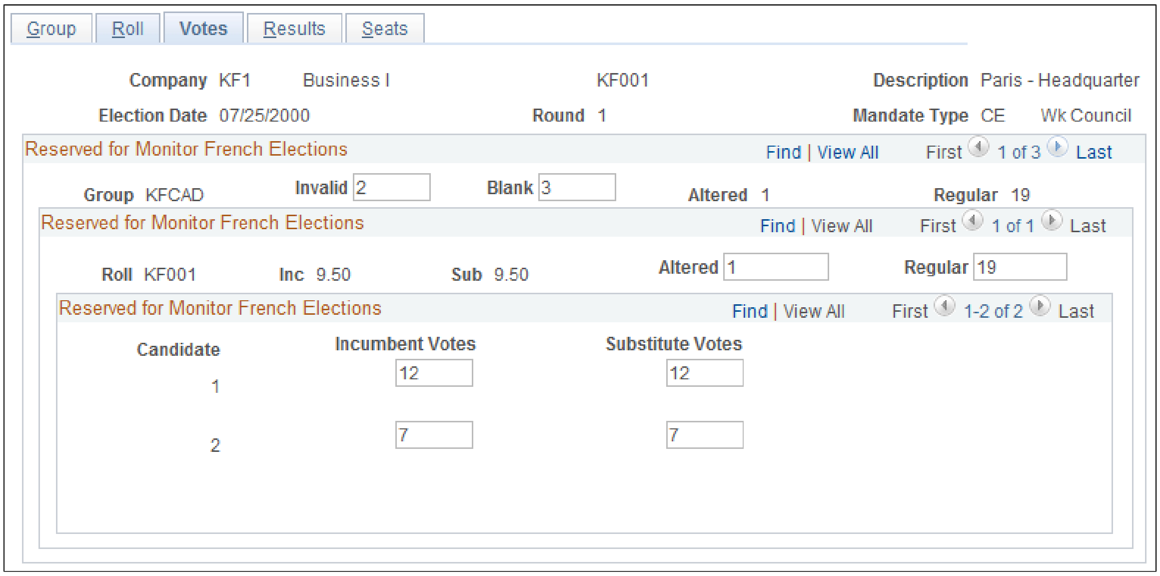
Use the Maintain Election Data - Votes page (ELECTION_VOTES) to enter voting results.

Navigation

Workforce Monitoring > Meet Regulatory Rqmts FRA > Election Monitoring > Maintain Election Data > Votes

Image: Maintain Election Data - Votes page

This example illustrates the fields and controls on the Maintain Election Data - Votes page. You can find definitions for the fields and controls later on this page.



This page shows three levels of the Reserved for Monitor French Elections group box.

Group

For the election in question, enter the number of Invalid, Blank, Altered, and Regular votes for each group.

Roll

Displays the roll as you entered it on the Roll page and the average number of Inc. (incumbent) andSub. (substitute) votes.

Enter the number of altered votes and the number of regular votes for each roll.

Candidate

If you enter the number of incumbent votes and substitute votes at the candidate level, the system displays the average number of votes for the incumbents and substitutes at the roll level.

If you enter no votes at the candidate level, the number of regular votes entered at the roll level appears by default as 0 in both the Incumbent Votes and Substitute Votes fields at the candidate level.

Maintain Election Data - Results Page

Use the Maintain Election Data - Results page (ELECTION_RESULTS) to validate the election results by viewing the results for each roll in a group and the calculation of the number of seats obtained for each roll.

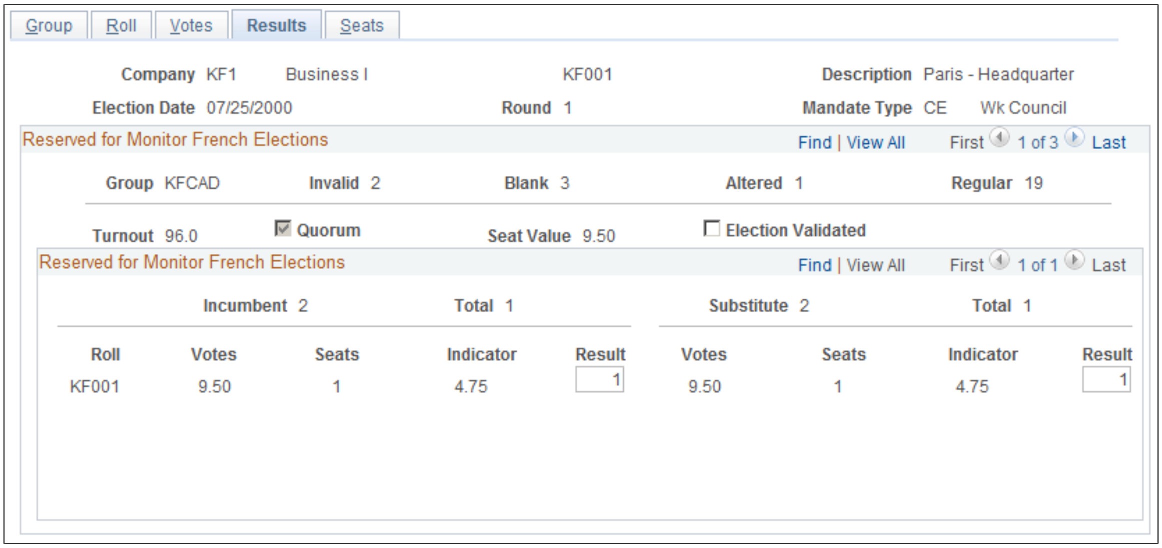
You can modify the calculated results.

Navigation

Workforce Monitoring > Meet Regulatory Rqmts FRA > Election Monitoring > Maintain Election Data > Results

Image: Maintain Election Data - Results page

This example illustrates the fields and controls on the Maintain Election Data - Results page. You can find definitions for the fields and controls later on this page.



Group

For the election in question and for each group, displays a summary of Invalid, Blank, Altered, and Regular votes.

Turnout

Displays the turnout for the roll, which is a ratio calculated by adding the invalid, blank, and regular votes at the group level and dividing this number by the number of voters defined on the Group page.

Quorum

Selected by default if voter turnout for the group is greater than 50 percent. That is, the number of votes for a group (invalid, blank, and regular) is greater than the number of voters defined on the Group page divided by two.

Seat Value

Displays the seat value (electoral quotient), which is calculated at the group level by dividing the number of regular votes by the number of incumbents defined on the Group page. The seat value must be the same for all rolls in a group.

Election Validated

Select to validate the election.

Roll

Displays the number of incumbent votes and substitute votes entered on the Votes page at the roll level for a particular group.

Seats

Displays the number of seats to be allocated for the roll. This number is equal to the number of incumbent and substitute votes at the roll level divided by the seat value.

Indicator

Displays the number that is calculated by dividing the number of incumbent and substitute votes by the number in the Incumbent Results field and theSubstitute Results field plus one.

Result

By default, displays the results from the calculation of the seats. You can change the results.

Maintain Election Data - Seats Page

Use the Maintain Election Data - Seats page (ELECTION_SEATS) to determine which candidates are declared elected for each roll.

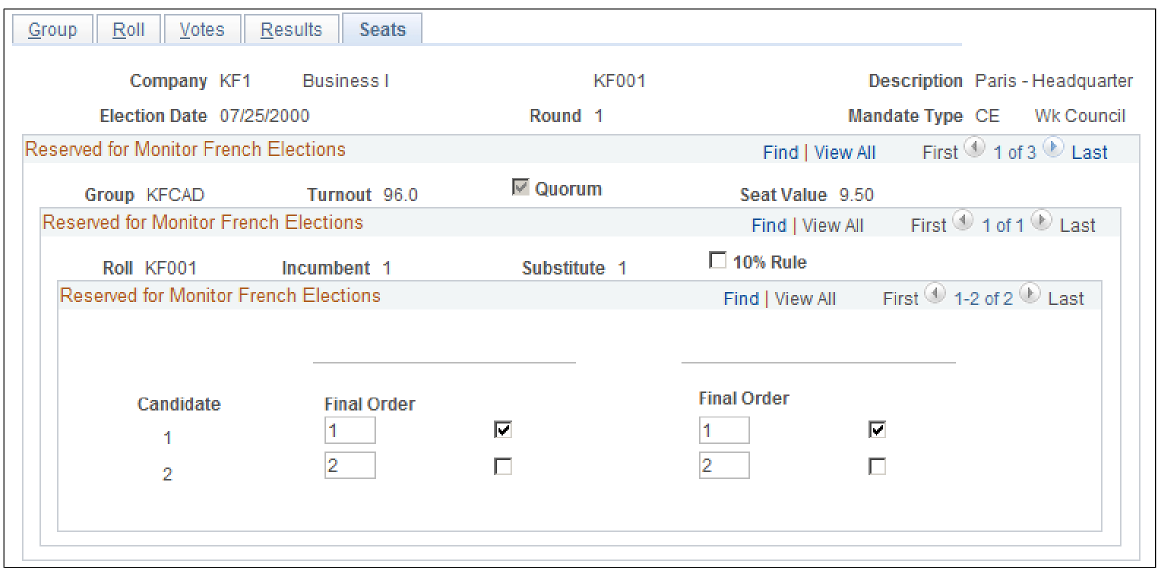
Generally, the candidate display-order entered on this page is more important than the actual number of votes each candidate received.

Navigation

Workforce Monitoring > Meet Regulatory Rqmts FRA > Election Monitoring > Maintain Election Data > Seats

Image: Maintain Election Data - Seats page

This example illustrates the fields and controls on the Maintain Election Data - Seats page. You can find definitions for the fields and controls later on this page.



Group

Displays a summary from the Results page for each group, indicating the turnout and seat value and whether a quorum was reached.

Roll

Displays the number of incumbent and substitute seats obtained for each roll. This is the value entered in the Results field on the Results page.

10% Rule (10 percent rule)	For each roll, select to indicate whether the decision to declare the candidates elected is made by applying the 10 percent rule.
Candidate	Displays the candidate number. For each incumbent or substitute candidate, indicate the final order on the roll and whether the candidate was elected.

Preparing and Running the Employee Survey Report

These topics provide an overview of the French Employee Survey reporting requirements and discuss the Employee Survey report.

Pages Used to Prepare and Run the Employee Survey Report

Page Name	*Definition Name*	*Usage*
Employee Survey Parameters Page	RUNCTL_EMSURVEY	Set up the Compute Employee Survey process.
Employee Survey Paygroups Page	RUNCTL_EMSURVEY2	Create a list of pay groups to refine the results of the Compute Employee Survey process.
Edit Employee Survey Page	EDIT_SHEET_FRA	Review, and modify if needed, the calculation results run by the Compute Employee Survey process on each of the indicators.
Employee Survey Report Page	RUNCTL_SOC001	Run the Employee Survey report (SOC001). This report gives an annual snapshot of a company based on the calculation of several indicators, such as the number of employees in the organization and their average salary.

Understanding French Employee Survey Reporting Requirements

The Employee Survey report *(le Bilan Social)* is an annual regulatory report that the French government requires from employers with more than 300 employees. The report is communicated to both labor unions and the government and provides an analysis of the company over the past three years for nearly 200 indicators.

There are three types of employee surveys for the three main types of industries. PeopleSoft delivers the most common type of employee survey—the one for the trade and services industry.

Indicators in that report include:

- The number of employees in the organization.
- The number of hires with an unlimited contract during a given year.

- The number of work accidents.

These indicators fall within seven groups set up by the French government: Employment, Compensation, Health and Safety, Work Conditions, Training, Professional Relations, and Others.

Here are the steps to prepare and run the Employee Survey report:

1. (Optional) Set up or modify the updating groups.
2. (Optional) Set up or modify the Employee Survey Indicators and link them with the application engines.
3. Run the Employee Survey process (HR_EMSURVEY) calculation for all indicators.
4. (Optional) Review the results of the process calculations.
5. Run the Employee Survey report to print the results of the process calculations, or export the data to a file.

Employee Survey Parameters Page

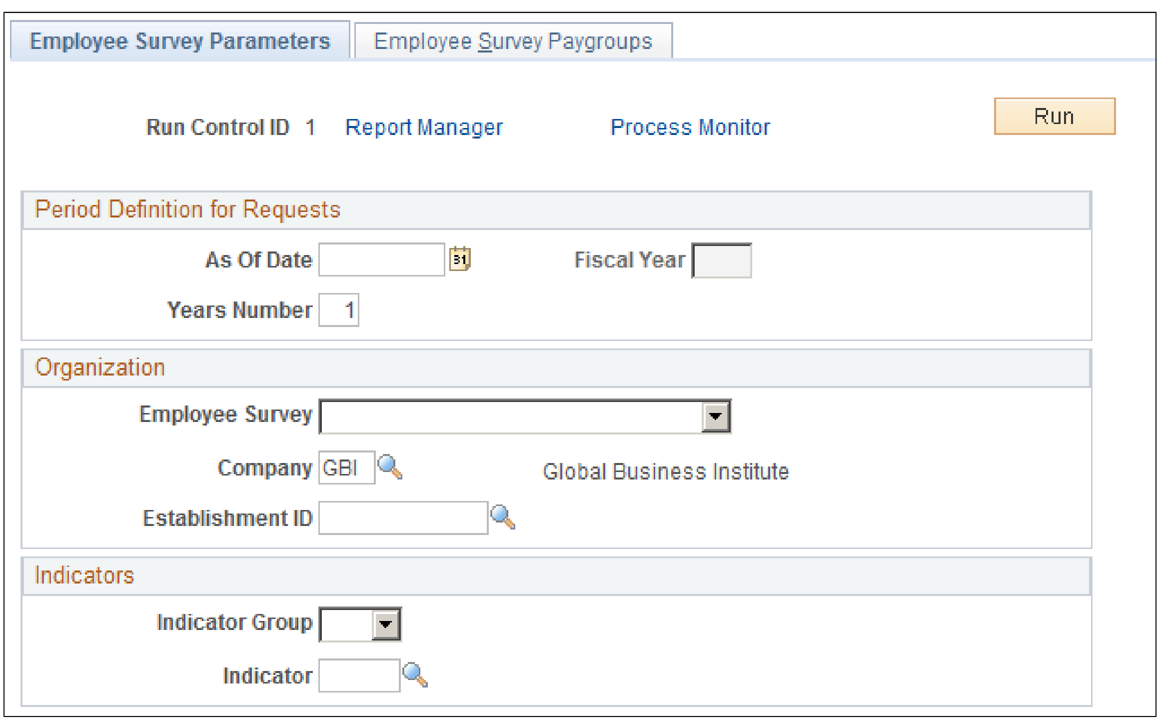
Use the Employee Survey Parameters page (RUNCTL_EMSURVEY) to set up the Compute Employee Survey process.

Navigation

Workforce Monitoring > Meet Regulatory Rqmts FRA > Employee Survey > Compute Employee Survey > Employee Survey Parameters

Image: Employee Survey Parameters page

This example illustrates the fields and controls on the Employee Survey Parameters page. You can find definitions for the fields and controls later on this page.



As of Date and **Years Number**

Enter the date for which you want to process the Employee Survey report. The report processes the calculation by civil years. For instance, to report on the year 2002, enter any date in 2002 and *1* in theYears Number field. To report on 2002, 2003 and 2004, enter any date in 2002 and *3* in the Years Number field. The maximum reporting period is three years.

Employee Survey

Select the type of survey to run.

Company

Select from the list of prompt values.

Establishment ID

Select from the list of prompt values. To run the calculation processes for all of the establishments in the company, leave this field blank.

Indicator Group and **Indicator**

To run one indicator, enter the indicator group and the indicator number. To run all of the indicators for an indicator group, specify the indicator group and leave the Indicator field blank. To run all of the calculation processes for the Employee Survey report, leave both the Indicator Group and Indicator fields blank.

Employee Survey Paygroups Page

Use the Employee Survey Paygroups page (RUNCTL_EMSURVEY2) to create a list of pay groups to refine the results of the Compute Employee Survey process.

Navigation

Workforce Monitoring > Meet Regulatory Rqmts FRA > Employee Survey > Compute Employee Survey > Employee Survey Parameters > Employee Survey Paygroups

Image: Employee Survey Paygroups page

This example illustrates the fields and controls on the Employee Survey Paygroups page. You can find definitions for the fields and controls later on this page.

See the product documentation for *PeopleTools: Process Scheduler*.

Edit Employee Survey Page

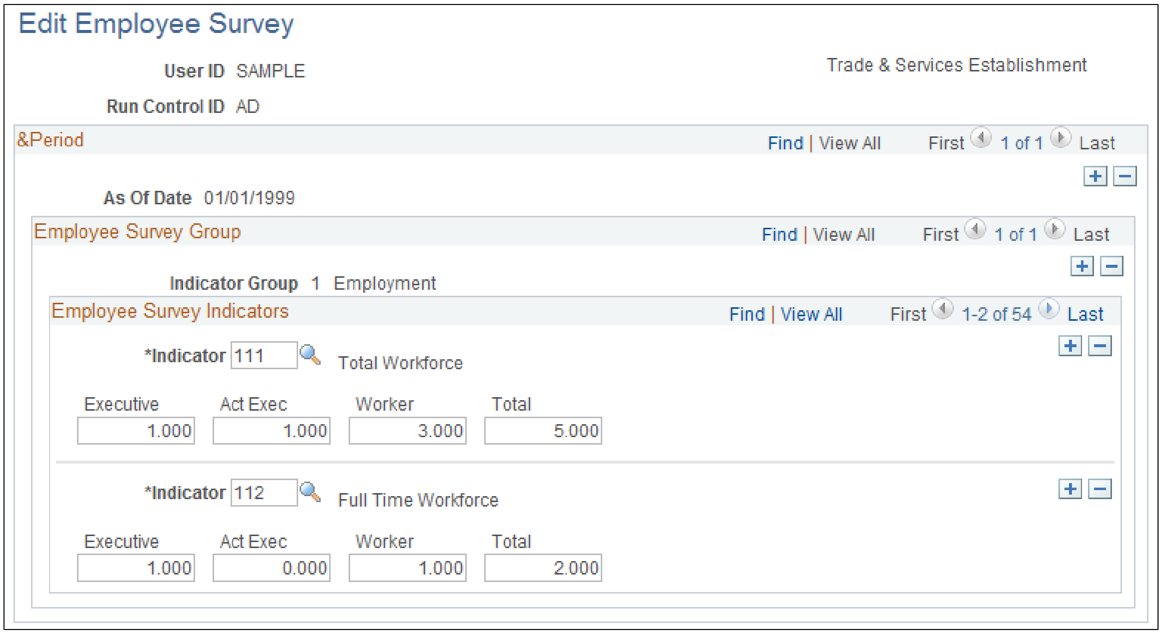
Use the Edit Employee Survey page (EDIT_SHEET_FRA) to review, and modify if needed, the calculation results run by the Compute Employee Survey process on each of the indicators.

Navigation

Workforce Monitoring > Meet Regulatory Rqmts FRA > Employee Survey > Edit Employee Survey

Image: Edit Employee Survey page

This example illustrates the fields and controls on the Edit Employee Survey page. You can find definitions for the fields and controls later on this page.



Type of Employee Survey — Displays the survey type.

As Of Date — Displays the date that you ran the Compute Employee Survey process. Use the outer scroll bar to navigate between processes that are run with different as of dates.

Indicator Group and **Indicator** — Displays the indicator and group. For each As Of Date process batch, you can review the results for each indicator group and each indicator for which you have run the Compute Employee Survey process. Use the middle scroll arrow to navigate between indicator groups and the inner scroll arrow to navigate between indicators. For each indicator, you can modify the data calculated by the process.

Employee Survey Report Page

Use the Employee Survey Report page (RUNCTL_SOC001) to run the Employee Survey report (SOC001).

This report gives an annual snapshot of a company based on the calculation of several indicators, such as the number of employees in the organization and their average salary.

Navigation

Workforce Monitoring > Meet Regulatory Rqmts FRA > Employee Survey > Employee Survey Report

Legally, the Employee Survey report can be administered by company or by establishment. The following table lists the delivered indicators for the establishment and company employee surveys using the trade and services model.

Indicator	***Description***	***AE Section***	***Employee Survey***	***Long Description***
111	Total Workforce	IND111	Establishment and Company	Total workforce as of December 31. Part-time workers are taken into account; non-employees are not retrieved.
112	Full Time Workforce	IND112	Establishment and Company	Full-time workers with an unlimited contract who were hired more than one year ago (as of December 31 of each year).
113	Limited Contract	IND113	Establishment and Company	All limited contractors are retrieved.
114	Workforce per Month	IND114	Establishment and Company	Monthly average headcount for a given year.
115A	Total Workforce: Male	IND115A	Establishment and Company	Distribution by gender of the total workforce as of December 31.
115B	Total Workforce: Female	IND115B	Establishment and Company	Distribution by gender of the total workforce as of December 31.
115C	Total Workforce: Unknown	IND115C	Establishment and Company	Distribution by gender of the total workforce as of December 31 when sex is unknown.
116A	< 25 Years Old	IND116A	Establishment and Company	Distribution by age of the total workforce as of December 31.
116B	< 30 Years Old	IND116B	Establishment and Company	Distribution by age of the total workforce as of December 31.
116C	< 35 Years Old	IND116C	Establishment and Company	Distribution by age of the total workforce as of December 31.
116D	< 40 Years Old	IND116D	Establishment and Company	Distribution by age of the total workforce as of December 31.

Indicator	Description	AE Section	Employee Survey	Long Description
116E	>= 40 Years Old	IND116E	Establishment and Company	Distribution by age of the total workforce as of December 31.
117A	< 1 Year of Service	IND117A	Establishment and Company	Distribution by company seniority date as of December 31.
117B	< 3 Years of Service	IND117B	Establishment and Company	Distribution by company seniority date as of December 31.
117C	< 5 Years of Service	IND117C	Establishment and Company	Distribution by company seniority date as of December 31.
117D	< 10 Years of Service	IND117D	Establishment and Company	Distribution by company seniority date as of December 31.
117E	>= 10 Years of Service	IND117E	Establishment and Company	Distribution by company seniority date as of December 31.
118A	French Employees	IND118A	Establishment and Company	Total workforce by nationality as of December 31 (French).
118B	Foreigner Employees	IND118B	Establishment and Company	Total workforce by nationality as of December 31: other.
119	Workforce Distribution	IND119	Establishment and Company	Workforce distribution by employee categorization as of December 31.
121	External Workforce	IND121	Establishment and Company	Non-employee workers as of December 31.
122	Student	IND122	Establishment and Company	Internship as of December 31.
123	Temporary Workforce	IND123	Establishment and Company	Monthly average number of leased workers for a given year.
124	Limited Contract Duration	Not delivered	Establishment and Company	
131	Unlimited Contract Hire	IND131	Establishment and Company	Number of employees hired with an unlimited duration contract during the given year.

Indicator	Description	AE Section	Employee Survey	Long Description
132	Limited Contract Recruitment	IND132	Establishment and Company	Number of employees recruited with a limited duration contract during a given year.
133	Seasonal Contract Hire	IND133	Establishment and Company	Number of employees recruited with a seasonal contract during a given year.
134	Under 25 Years Old Hired	IND134	Establishment and Company	Number of hired employees who are less then 25 years old during a given year.
141	Total Departure	IND141	Establishment and Company	Number of permanent departures during a given year.
142	Resignation	IND142	Establishment and Company	Number of permanent departures due to resignations during a given year.
143	Discharge - Redundancy	IND143	Establishment and Company	Number of permanent departures due to redundancy during a given year.
144	Discharge - Other	IND144	Establishment and Company	Number of permanent departures due to other reasons during a given year.
145	End of Limited Contracts	IND145	Establishment and Company	Number of end of limited contract during a given year.
146	End While Qualification	IND146	Establishment and Company	Number of departures due to end while qualification during a given year.
147	Move to another Establishment	IND147	Establishment	Number of moves to another establishment during a given year.
148	Retirement - Early Retirement	IND148	Establishment and Company	Number of departures due to retirement or early retirement during a given year.
149	Death	IND149	Establishment and Company	Number of deaths during a given year.

Indicator	***Description***	***AE Section***	***Employee Survey***	***Long Description***
151	Promotion	IND151	Establishment and Company	Number of employees who changed employee categorization during a given year.
161	Employees Lay Off	IND161	Establishment and Company	Number of employees having at least one layoff during a given year.
162A	Employees Lay Off With Pay	IND162A	Establishment and Company	Number of employee layoff pay hours during a given year.
162B	Employee Lay Off Without Pay	IND162B	Establishment and Company	Number of employee layoff hours without pay during a given year.
171	Disability	IND171	Establishment and Company	Number of disabled workers as of March 31.
172	Disability Due to Work Accidents	IND172	Establishment and Company	Number of disabled workers due to a work accident in the present company as of March 31.
181	Leave of Absence	IND181A	Company	Number of leaves of absence during a given year— public holidays and annual holidays excluded.
181A	Leave of Absence	IND181A **Note:** WA AE Section = PAYABSNO and WA AE Field = GPFR_ES_ LOA_DAY	Establishment	Number of leaves of absence during a given year— public holidays and annual holidays excluded.
181B	Theoretical Worked Days	Not Delivered **Note:** WA AE Section = PAYABSNO and WA AE Field = GPFR_ES_ WRK_DAY	Establishment	Theoretical Worked Days during a given year.
181C	Leave of Absence Rate	IND181C	Establishment	Ratio between Leave of Absence Days and Theoretical Worked Days.

Indicator	***Description***	***AE Section***	***Employee Survey***	***Long Description***
182	Leave of Absence - Sick	IND182 **Note:** WA AE Section = PAYABSNO and WA AE Field = GPFR_ES_ LOA_DAYSCK	Establishment and Company	Number of leave of absence days due to sickness during a given year.
183A	Leave of Absence - Sick : < 8 Days	IND183A **Note:** WA AE Section = PAYABSNO and WA AE Field = GPFR_ES_ LOA_COUNT1	Establishment and Company	Number of leave of absence days due to sickness that started during a given year —distribution by duration.
183B	Leave of Absence - Sick : < 30 Days	IND183B **Note:** WA AE Section = PAYABSNO and WA AE Field = GPFR_ES_ LOA_COUNT2	Establishment and Company	Number of leave of absence days due to sickness that started during a given year —distribution by duration.
183C	Leave of Absence - Sick : >= 30 Days	IND183C **Note:** WA AE Section = PAYABSNO and WA AE Field = GPFR_ES_ LOA_COUNT3	Establishment and Company	Number of leave of absence days due to sickness that started during a given year —distribution by duration.
184	Leave of Absence - Accident	IND184 **Note:** WA AE Section = PAYABSNO and WA AE Field = GPFR_ES_ LOA_DAYACC	Establishment and Company	Number of leave of absence days due to work accident, work illness, or accident when commuting during a given year.
185	Leave of Absence - Maternity	IND185 **Note:** WA AE Section = PAYABSNO and WA AE Field = GPFR_ES_ LOA_DAYMAT	Establishment and Company	Number of leave of absence days due to maternity during a given year.
186	Leave of Absence - Vacation	IND186 **Note:** WA AE Section = PAYABSNO and WA AE Field = GPFR_ES_ LOA_DAYVAC	Establishment and Company	Number of authorized leave of absence days for vacation during a given year.

Indicator	*Description*	*AE Section*	*Employee Survey*	*Long Description*
187	Leave of Absence - Other	IND187 **Note:** WA AE Section = PAYABSNO and WA AE Field = GPFR_ES_ LOA_DAYOTH	Establishment and Company	Number of unauthorized leaves of absence during a given year.
211	Annual Salary by Empl	Not delivered	Establishment and Company	
211A	Annual Total Compensation / Monthly Average Headcount – Male	Not Delivered **Note:** WA AE Section = IND211A and WA AE Field = GPFR_ES_ TOTAL_COMP	Establishment and Company	
211B	Annual Total Compensation / Monthly Average Headcount – Female	Not Delivered **Note:** WA AE Section = IND211B and WA AE Field = GPFR_ES_ TOTAL_COMP	Establishment and Company	
211C	Annual Total Compensation / Monthly Average Headcount – Unknown	Not Delivered **Note:** WA AE Section = IND211C and WA AE Field = GPFR_ES_ TOTAL_COMP	Establishment and Company	
211BA	Average Monthly Salary – Male	Not Delivered **Note:** WA AE Section = IND211BA and WA AE Field = GPFR_ES_ TOTAL_COMP	Establishment and Company	
211BB	Average Monthly Salary – Female	Not Delivered **Note:** WA AE Section = IND211BB and WA AE Field = GPFR_ES_ TOTAL_COMP	Establishment and Company	
211BC	Average Monthly Salary – Unknown	Not Delivered **Note:** WA AE Section = IND211BC and WA AE Field = GPFR_ES_ TOTAL_COMP	Establishment and Company	

Indicator	*Description*	*AE Section*	*Employee Survey*	*Long Description*
212A	December Average Compensation w/o Non-monthly Bonus for Permanent Full Time Employee – Male	Not Delivered **Note:** WA AE Section = IND212A and WA AE Field = GPFR_ES_DEC_COMP	Establishment and Company	
212B	December Average Compensation w/o Non-monthly Bonus for Permanent Full Time Employee – Female	Not Delivered **Note:** WA AE Section = IND212B and WA AE Field = GPFR_ES_DEC_COMP	Establishment and Company	
212C	December Average Compensation w/o Non-monthly Bonus for Permanent Full Time Employee – Unknown	Not Delivered **Note:** WA AE Section = IND212C and WA AE Field = GPFR_ES_DEC_COMP	Establishment and Company	
212BA	Non-monthly Bonus Percentage in Compensation Declaration – Male	Not Delivered **Note:** WA AE Section = IND212BA and WA AE Field = GPFR_ES_NMTH_BONUS	Establishment and Company	
212BB	Non-monthly Bonus Percentage in Compensation Declaration – Female	Not Delivered **Note:** WA AE Section = IND212BB and WA AE Field = GPFR_ES_NMTH_BONUS	Establishment and Company	
212BC	Non-monthly Bonus Percentage in Compensation Declaration – Unknown	Not Delivered **Note:** WA AE Section = IND212BC and WA AE Field = GPFR_ES_NMTH_BONUS	Establishment and Company	
213	Salary Scale	Not delivered	Establishment and Company	
221	Rate between Average Compensation of the 10% Highest Compensation and Average Compensation of the 10% Lowest Compensation	IND221	Establishment and Company	

Indicator	*Description*	*AE Section*	*Employee Survey*	*Long Description*
221AA	Average Compensation of the 10% Highest Compensation	Not Delivered **Note:** WA AE Section = IND221AA and WA AE Field = GPFR_ES_ TOTAL_COMP	Establishment and Company	10% Highest Average Compensation.
221AB	Average Compensation of the 10% Lowest Compensation	Not Delivered **Note:** WA AE Section = IND221AB and WA AE Field = GPFR_ES_ TOTAL_COMP	Establishment and Company	10% Lowest Average Compensation.
221B	Rate between Average Compensation of the Executive Employees and Average Compensation of the Qualified Workers	IND221B	Establishment and Company	Ratio between average compensation of the executive employees and average compensation of the qualified workers.
221BA	Average Compensation of the Executive Employees	Not Delivered **Note:** WA AE Section = IND221BA and WA AE Field = GPFR_ES_ TOTAL_COMP	Establishment and Company	
221BB	Average Compensation of the Qualified Workers	Not Delivered **Note:** WA AE Section = IND221BB and WA AE Field = GPFR_ES_ TOTAL_COMP	Establishment and Company	
222	Top 10 Highest Compensation Amount	Not Delivered **Note:** WA AE Section = IND222 and WA AE Field = GPFR_ES_ TOTAL_COMP	Company	
231	Performance-Related	Not delivered	Establishment and Company	
232	Hourly Wage Percentage	Not delivered	Establishment and Company	
241	Perks	Not delivered	Establishment	
242A	Expense for External Temporary	Not delivered	Establishment and Company	

Indicator	***Description***	***AE Section***	***Employee Survey***	***Long Description***
242B	Expense for External Others	Not delivered	Establishment and Company	
251	Total Compensation	Not delivered	Company	
261	Profit-Sharing Global Amount	IND261	Company	
262	Profit-Sharing Average Amount	IND262	Company	
263	Stock Percent	Not delivered	Company	
311A	Work Accident	IND311A	Establishment and Company	Number of work accidents that result in leave of absence days during a given year.
311B	Theoretical Worked Hours	Not Delivered **Note:** WA AE Section = PAYABSNO and WA AE Field = GPFR_ES_WRK_HOURS	Establishment	
311C	Work Accident Frequency	IND311C	Establishment	
312A	Lost Days	IND312A	Establishment and Company	Lost days due to work accidents during a given year.
312B	Theoretical Worked Hours	Not Delivered **Note:** WA AE Section = PAYABSNO and WA AE Field = GPFR_ES_WRK_HOURS	Establishment	
312	Lost Days	IND312A	Company	Lost days due to work accidents during a given year.
312C	Accident Severity Rate	IND312C	Establishment	The work accident severity equals the lost days due to work accidents times 10^6 divided by the theoretical worked hours.
313	Permanent Disability	IND313	Company	Number of permanent disabilities that are notified to the company during a given year.

Indicator	***Description***	***AE Section***	***Employee Survey***	***Long Description***
313A	Permanent Disability: French	IND313A	Establishment	Number of permanent disabilities that are notified to the company during a given year.
313B	Permanent Disability: Foreigners	IND313B	Establishment	Number of permanent disabilities that are notified to the company during a given year.
314A	Fatal Accident at Work	IND314A	Establishment and Company	Number of fatal accidents at work during a given year.
314B	Fatal Accident: Commuting	IND314B	Establishment and Company	Number of fatal accidents during commuting during a given year.
315	Stop Work Due to Accident	IND315	Establishment and Company	Number of accidents resulting in a stoppage of work during a given year.
316	Accident - Temporary	IND316	Establishment and Company	Number of nonemployee accidents at work during a given year.
317A	Social Security Contribution for Work Accident Rate	Not Delivered **Note:** WA AE Section = IND317A and WA AE Field = GPFR_ES_ACC_RATE	Establishment	Social Security Contribution for Work Accident Rate during a given year.
317B	Social Security Contribution for Work Accident Amount	Not Delivered **Note:** WA AE Section = IND317B and WA AE Field = GPFR_ES_ACC_AMNT	Establishment	Social Security Contribution for Work Accident Amount during a given year.
321	Accident - High Risk	IND321	Establishment and Company	Number of accidents linked to existing high risk during a given year.
322	Accident - Due to a Fall	IND322	Establishment and Company	Number of accidents classified as *due to a fall* during a given year.
323	Accident - Caused by a Machine	IND323	Establishment and Company	Number of accidents classified as *caused by a machine* during a given year.

Indicator	***Description***	***AE Section***	***Employee Survey***	***Long Description***
324	Road Accident	IND324	Establishment and Company	Number of accidents classified as *road accident* during a given year.
325	Accident - Caused by an Object	IND325	Establishment and Company	Number of accidents classified as *caused by an object* during a given year.
326	Accident - Others	IND326	Establishment and Company	Number of accidents classified as *other* during a given year.
331	Occupational Disease	Not delivered	Establishment and Company	
332	Disease Due to Work	Not delivered	Establishment and Company	
333	Jobs Can Cause Diseases	Not delivered	Establishment and Company	
341	Number of Security Meetings	Not delivered	Establishment and Company	
351	Security Training	Not delivered	Establishment and Company	
352	Security Budget	Not delivered	Establishment and Company	
353	Percentage Done	Not delivered	Establishment	
411	Worked Hours	Not delivered	Establishment and Company	
412A	Time Off in Lieu: Legal	IND412A	Establishment and Company	Number of employees who received legal time off during the given year.
412B	Time Off in Lieu: Conventional	IND412B	Establishment and Company	Number of employees who received conventional time off during the given year.
413	Flextime	IND413	Establishment and Company	Number of employees with flextime as of December 31.
414A	Part-time: 20 -30 hrs a Week	IND414A	Establishment and Company	Number of employees working between 20 and 30 hours a week as of December 31.

Indicator	Description	AE Section	Employee Survey	Long Description
414B	Part-time: Others	IND414B	Establishment and Company	Number of employees working part-time other than 20 to 30 hours a week as of December 31.
415	2 Days Time Off	Not delivered	Establishment and Company	
416	Annual Holidays - Average	IND416	Establishment and Company	Average number of annual holidays during the given year (time off in lieu not included).
417	Public Holidays Paid	Not delivered	Establishment and Company	
421	Alternate Hours	IND421	Establishment and Company	Number of employees with alternate hours as of December 31.
431	Noise >= 85 Db	Not delivered	Establishment and Company	
432	Toxic Products Analyses	Not delivered	Establishment and Company	
441	Working Environment Improvement	Not delivered	Establishment and Company	
451	Improvement Program Expenses	Not delivered	Establishment and Company	
452	Percentage Done	Not delivered	Establishment	
461	Medical Exam	IND461	Establishment	Number of medical exam as of December 31.
461A	Medical Exam: Supervised Work	Not delivered	Establishment	
461B	Medical Exam: Others	Not delivered	Establishment	
462	Additional Medical Exam	IND462	Establishment	Number of additional medical exams given during the year.
462A	Additional Medical Exam: Supervised	Not delivered	Establishment	
462B	Additional Medical Exam: Others	Not delivered	Establishment	
463	Medical Intervention	Not delivered	Establishment	

Indicator	*Description*	*AE Section*	*Employee Survey*	*Long Description*
471	Employees Unfit for Work	IND471	Establishment	Number of employees declared unfit for work by the work doctor during a given year.
472	Employees Regraded	IND472	Establishment	Number of regraded employees due to an incapacity during a given year.
511	Training Total Payroll	Not delivered	Establishment and Company	
512	Training Budget	Not delivered	Establishment and Company	
513	Trainees	Not delivered	Establishment and Company	
514A	Trainees Hours Paid	Not delivered	Establishment and Company	
514B	Trainees Hours Unpaid	Not delivered	Establishment and Company	
515	Training Categories	Not delivered	Establishment and Company	
521	Training With Pay	IND521	Establishment and Company	Number of employees with a paid training leave during a given year.
522	Training Without Pay	IND522	Establishment and Company	Number of employees with an unpaid training leave during the given year.
523	Training Demand Reject	Not delivered	Establishment and Company	
531	Apprenticeship Contr	Not delivered	Establishment and Company	
611	Turnout at Elections	Not delivered	Establishment and Company	
612	Time Allowed Used	Not delivered	Establishment and Company	
613	Union Representative Meetings	Not delivered	Establishment and Company	
614	Agreement	Not delivered	Company	

Indicator	***Description***	***AE Section***	***Employee Survey***	***Long Description***
615	Leave of Working Education	Not delivered	Company	
621	Hours for Meetings	Not delivered	Establishment and Company	
622	Reception Procedure	Not delivered	Establishment and Company	
623	Information Procedure	Not delivered	Establishment and Company	
624	Individual Interview	Not delivered	Establishment and Company	
631	Non Judicial Action	Not delivered	Establishment and Company	
632	Judicial Inquiry	Not delivered	Establishment and Company	
633	Labor Inspector Notification	Not delivered	Establishment and Company	
711	Expense	Not delivered	Establishment and Company	
712	Payment to Works Council	Not delivered	Establishment and Company	
721	Mutual Insurance: Health and Life	Not delivered	Company	
722	Mutual Insurance: Retirement	Not delivered	Company	

Running Workforce Reporting Statutory Reports

These topics provide prerequisites for the single hiring statement and discuss running workforce reporting statutory reports.

Pages Used to Run the Workforce Reporting Statutory Reports

Page Name	***Definition Name***	***Usage***
Monthly Workforce Page	RUNCTL_REG001_FRA	Run the Monthly Workforce report.
Workforce by Nationality Page	RUNCTL_REG003_FRA	Run the Workforce by Nationality report.
Personal Register Page	RUNCTL_REG002_FRA	Run the Personal Register report.

Page Name	***Definition Name***	***Usage***
Single Hiring Statement Page	SHS_FRA_RUN_CTL	Run the Single Hiring Statement report, which is a statutory report that is filed at the time of hiring new employees. The system uses information from your employee, company, and establishment tables to generate the report.
BIAF Page	RUNCTL_BIAF_FRA	Run the BIAF report.

Prerequisites for the Single Hiring Statement

The Single Hiring Statement retrieves information for new workers from your job data, company, and establishment tables. The following table lists the information that is required and the page where the information is entered for the worker.

Information	***Page***
Name and Prefix Gender Social security number Date of birth Nationality	Workforce Administration, Personal Information, Biographical, Modify a Person, Biographical Details
Employee address	Workforce Administration, Personal Information, Biographical, Modify a Person, Contact Information
Previous work situation	Workforce Administration, Personal Information, Biographical, Modify a Person, Regional
First start date	The system creates the first start date (the hire date) using the date of the first job data record created with the Action of *Hire*. Review the First Start Date on the Employment Information page: Workforce Administration > Job Information > Job Data > Employment Information
SIRET number APE code Establishment address Establishment phone and fax number Establishment activity Medical organization code and address Company name Company/establishment point of contact	Define the person's company and establishment on the Work Location page on the following menus: • Workforce Administration > Job Information > Add Employment Instance or, • Workforce Administration > Job Information > Add Contingent Worker Instance or, • Workforce Administration > Job Information > Job Data > Work Location The system retrieves the company and establishment details from the Company table and Establishment table.

Information	***Page***
Job category Working hours	Workforce Administration > Job Information > Job Data > Job Information The system retrieves job category information from the Job Code table.
Contract end date	Workforce Administration > Job Information > Contract Administration > Update Contracts > Contract Status/ Content
Contract type	Workforce Administration > Job Information > Contract Administration > Update Contracts > Contract Type/Clauses
Probation date	Workforce Administration > Job Information > Contract Administration > Update Contracts > Signature/Probation Info
Monthly gross salary	Workforce Administration > Job Information > Job Data > Compensation

Monthly Workforce Page

Use the Monthly Workforce page (RUNCTL_REG001_FRA) to run the Monthly Workforce report.

This report lists the monthly personnel changes for a given establishment of a company. This report is required for all organizations that employ 50 or more employees.

Before running this report, define which contract types to include in the report using the Contract Type Group page.

Navigation

Workforce Monitoring > Meet Regulatory Rqmts FRA > Required Reports > Monthly Workforce > Monthly Workforce Report

Workforce by Nationality Page

Use the Workforce by Nationality page (RUNCTL_REG003_FRA) to run the Workforce by Nationality report.

This report provides a comprehensive analysis of the foreign workforce employed in a company.

Navigation

Workforce Monitoring > Meet Regulatory Rqmts FRA > Required Reports > Workforce by Nationality > Workforce by Nationality

Personal Register Page

Use the Personal Register page (RUNCTL_REG002_FRA) to run the Personal Register report.

This report lists employees for a given establishment of a company. Run the report for a specific establishment within an organization or for all establishments of an organization.

Navigation

Workforce Monitoring > Meet Regulatory Rqmts FRA > Required Reports > Personal Register > Personal Register

Single Hiring Statement Page

Use the Single Hiring Statement page (SHS_FRA_RUN_CTL) to run the Single Hiring Statement report, which is a statutory report that is filed at the time of hiring new employees.

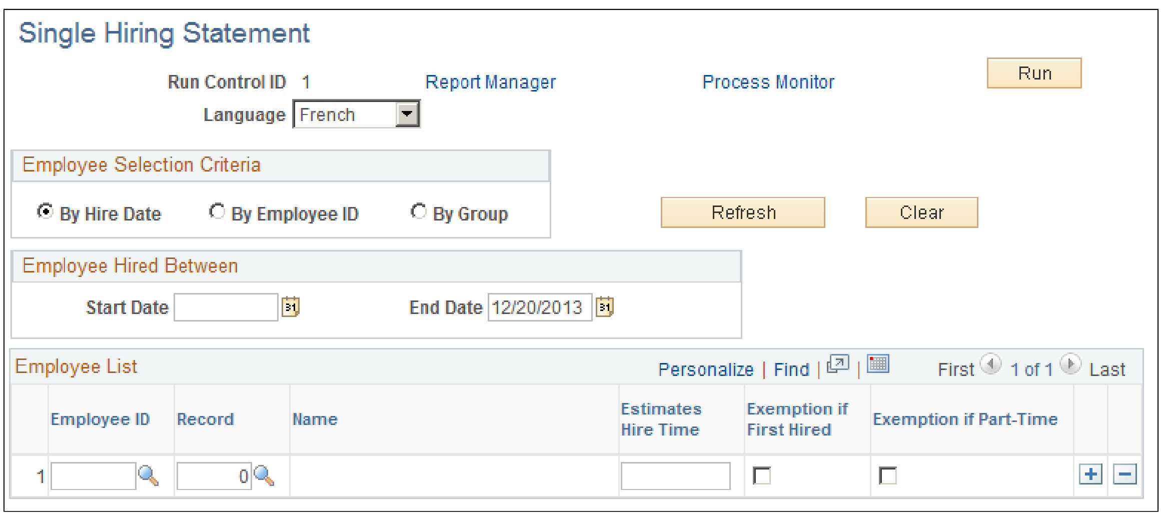
The system uses information from your employee, company, and establishment tables to generate the report.

Navigation

Workforce Monitoring > Meet Regulatory Rqmts FRA > Required Reports > Single Hiring Statement > Single Hiring Statement

Image: Single Hiring Statement page

This example illustrates the fields and controls on the Single Hiring Statement page. You can find definitions for the fields and controls later on this page.



You can automate the production of this report using workflow supplied by PeopleSoft. If you enable workflow, when an employee is hired, workflow adds an entry to the HR administrator's task list for the Single Hiring Statement.

Employee Selection Criteria

There are three ways to select the employees whom you want to include in the report. Depending on the method that you select, the system hides or displays fields.

By Hire Date	Select to generate the Single Hiring Statement report for all employees hired within a specified period. Enter the date range in the Employee Hired Between group box.

By Employee ID Select to run the report for selected employee IDs. Use this option if you know the new employee IDs. Select the employees in the Employee List group box.

By Group Select to generate the report for employees in a group. The system displays the Group ID field when you select this option.

Refresh When you have defined the selection criteria, click this button to populate the Employee List group box with new employees who meet the criteria.

Clear Click to deselect the Employee List. The system removes all employees listed.

Employees Hired Between

This group box appears if you select By Hire Date only. Select the start and end dates for the report. The system searches for employees who were hired between these dates.

Start Date The default start date is the end date entered the last time that the Single Hiring Statement was run.

Employee List

When you click the Refresh button, the system populates this group box with new employees who meet the criteria that you selected. You can also add employees to the list.

For each employee listed, complete the Estimates Hire Time field and select theExemption if First Hired and theExemption if Part-Time check boxes, if necessary. This information is printed on the report.

BIAF Page

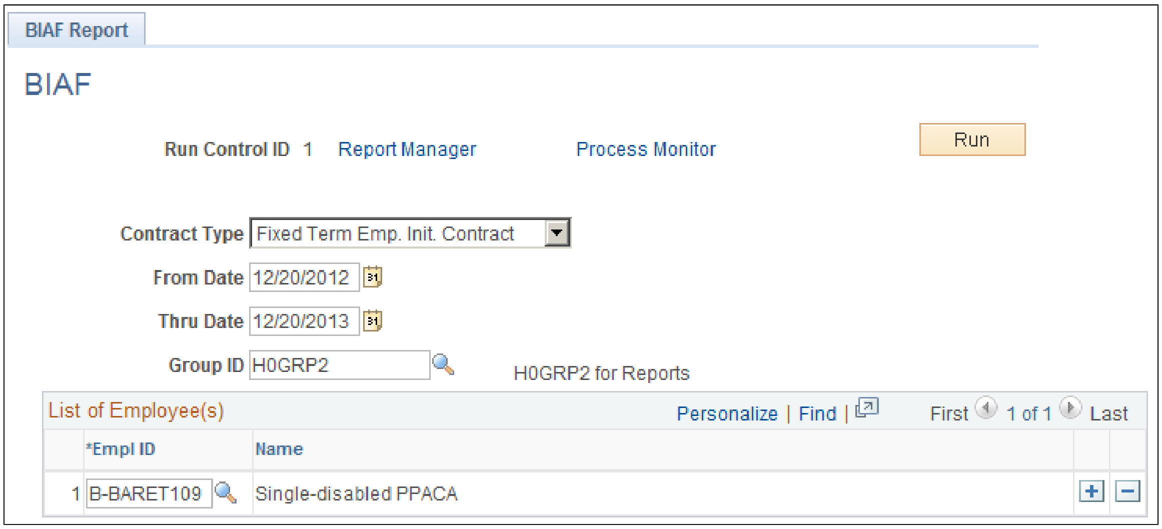
Use the BIAF page (RUNCTL_BIAF_FRA) to run the BIAF report.

Navigation

Workforce Monitoring > Meet Regulatory Rqmts FRA > Required Reports > BIAF > BIAF

Image: BIAF page

This example illustrates the fields and controls on the BIAF page. You can find definitions for the fields and controls later on this page.



This report is for employees on fixed-term contracts and details the employee's training entitlement. French employers are required to contribute towards employee training through payments to official training organizations. The BIAF report includes information about the training organization that receives the employer's contributions and the terms and conditions of the training entitlement. You can print this report at any time during the employee's contract period.

You can run the BIAF report for:

- Individual employees, by adding employees to the List of Employee(s) group box.
- A group of employees, by selecting a group in the Group ID field.

Note: You must complete the From Date andThru Date fields, whether you run the report for selected employees or for a group of employees.

Contract Type

Select the type of fixed term contract from the following options: *Limited Contract* or *Fixed Term Emp. Init Contract.* The report includes only employees with the selected contract type. If you leave this field blank, the report includes employees with any of these contract types.

From Date and**Thru Date**

Select the hiring period for the report. The system searches for employees on fixed-term contracts whose hiring date is between the dates you specify.

Group ID

Select the group of employees to include in the report. The system searches the group for employees who meet the criteria defined in the Contract Type andFrom/Thru Date fields.

List of Employee(s)

To run the BIAF report for certain employees, add the employees to this group box.

Related Links

"Understanding Group Build" (PeopleSoft HCM 9.2: Application Fundamentals)

Preparing and Running the Training 2483 Report

These topics provide overviews of the Training 2483 reporting requirements, classification of Training 2483 report indicators, and calculation of report indicators.

See the product documentation for *PeopleTools: Application Engine*.

Related Links

"Understanding the French Training Report 2483 Process" (PeopleSoft HCM 9.2: Human Resources Administer Training)

"(FRA) Meet Regulatory Requirements Reports for France" (PeopleSoft HCM 9.2: Application Fundamentals)

Pages Used to Run and Edit the Training 2483 Report

Page Name	***Definition Name***	***Usage***
Compute 2483 Page	RUNCTL_DEC2483	Calculate all the 2483 indicators and store them in 2483 records.
Edit 2483 Page	EDIT_2483_FRA	Edit the Training 2483 report.

Understanding the Training 2483 Reporting Requirements

The Training 2483 (also called the Declaration 2483 report) is a French regulatory report that compiles information about the amount of money that a company has spent on employee vocational training. PeopleSoft delivers the definition of the legal groups and indicators with the system.

To prepare the Training 2483 report:

1. Set up training report groups.
2. Set up training report indicators.
3. Enter training report parameters.
4. Run the Compute Training Report 2483 (DEC2483) process calculation for all indicators.
5. (Optional) Review and edit the results of the process calculations.
6. Run the Training Report 2483 (TRN029) to print (or export to a file) the results of the process calculations.

See "Understanding the French Training Report 2483 Process" (PeopleSoft HCM 9.2: Human Resources Administer Training).

Understanding Classification of Training 2483 Report Indicators

This topic contains information about the indicators that PeopleSoft provides for the Training 2483 report, and it discusses how these indicators are used. The indicators are classified by group and designated by letters *A* through *I.* Each letter represents a particular description. For example, *B* represents headcount while *C* represents total compensation. Indicators are either delivered by application process (calculated) or manually compiled.

List of PeopleSoft Indicators Classified by Group

The following table lists the indicators by group:

Group ID	***Indicator ID***	***Indicator Description***	***Comments***	***Delivery***
A	1	Monthly Average Headcount		Calculated
B	2(a)	Workers - Male		Calculated
B	2(b)	Workers - Female		Calculated
B	2(c)	Total number of male workers who attended training (including DIF, competency check and experience validation)		Calculated
B	2(d)	Total number of female workers who attended training (including DIF, competency check and experience validation)		Calculated
B	2(e)	Training Hours (including DIF, competency check and experience validation)		Calculated
B	2(f)	Total number of workers who attended DIF training		Calculated
B	2(g)	Total number of DIF training hours attended by workers		Calculated
B	2(h)	Total number of hours of DIF balance for workers		Calculated

Group ID	***Indicator ID***	***Indicator Description***	***Comments***	***Delivery***
B	3(a)	Employees - Male		Calculated
B	3(b)	Employees - Female		Calculated
B	3(c)	Total number of male employees who attended training (including DIF, competency check and experience validation)		Calculated
B	3(d)	Total number of female employees who attended training (including DIF, competency check and experience validation)		Calculated
B	3(e)	Total employee training hours		Calculated
B	3(f)	Total number of employees who attended DIF training		Calculated
B	3(g)	Total number of DIF training hours attended by employees		Calculated
B	3(h)	Total number of hours of DIF balance for employees		Calculated
B	4(a)	Technicians - Male		Calculated
B	4(b)	Technicians - Female		Calculated
B	4(c)	Total number of male technicians who attended training (including DIF, competency check and experience validation)		Calculated

Group ID	***Indicator ID***	***Indicator Description***	***Comments***	***Delivery***
B	4(d)	Total number of female technicians who attended training (including DIF, competency check and experience validation)		Calculated
B	4(e)	Total technician training hours		Calculated
B	4(f)	Total number of technicians who attended DIF training		Calculated
B	4(g)	Total number of DIF training hours attended by technicians		Calculated
B	4(h)	Total number of hours of DIF balance for technicians		Calculated
B	5(a)	Executives - Male		Calculated
B	5(b)	Executives - Female		Calculated
B	5(c)	Total number of male executives who attended training (including DIF, competency check and experience validation)		Calculated
B	5(d)	Total number of female executives who attended training (including DIF, competency check and experience validation)		Calculated
B	5(e)	Total executive training hours		Calculated
B	5(f)	Total number of executives who attended DIF training		Calculated

Group ID	***Indicator ID***	***Indicator Description***	***Comments***	***Delivery***
B	5(g)	Total number of DIF training hours attended by executives		Calculated
B	5(h)	Total number of hours of DIF balance for executives		Calculated
B	6(a)	Total number of males		Calculated
B	6(b)	Total number of females		Calculated
B	6(c)	Total number of males who attended training (including DIF, competency check and experience validation)		Calculated
B	6(d)	Total number of females who attended training (including DIF, competency check and experience validation)		Calculated
B	6(e)	Total training hours (including DIF, competency check and experience validation)		Calculated
B	6(f)	Total number of people who attended DIF training		Calculated
B	6(g)	Total number of DIF training hours		Calculated
B	6(h)	Total number of hours of DIF balance		Calculated
B	7	Professionalization Period Headcount		Calculated
B	8	Professionalization Period Training Hours		Calculated
B	9	Training allocation beneficiaries headcount		Calculated

Group ID	***Indicator ID***	***Indicator Description***	***Comments***	***Delivery***
B	10	Training allocation financed hours		Calculated
B	11	Number of competency checks		Calculated
B	12	Number of Experience Validation trainings		Calculated
C	1	Total Annual Salaries	May be retrieved from DADS reporting if PeopleSoft Global Payroll France is installed.	Manually entered
C	2	Reduction Rate		Manually entered
D	3	Participation rate for Training Leave (CIF)		Manually Entered
D	4	Employer participation rate for Training Leave (CIF)	C1 * D3	Calculated
D	5	OPCA Payments for Training Leave (CIF)		Manually Entered
D	6	Insufficiency	D4 – D5	Calculated
E	7	Participation rate for DIF, and professionalization contracts and period		Manually entered
E	8	Employer Participation for DIF, and professionalization contracts and periods	C1 * E7	Calculated
E	9	OPCA payment for DIF, and professionalization contracts and periods		Manually entered
E	10	Insufficiency	E8 – E9	Calculated
F	11	Employer Participation (Training Plan)	C1 * C2	Calculated

Group ID	***Indicator ID***	***Indicator Description***	***Comments***	***Delivery***
F	a	Internal Training Cost		Calculated
F	b	External Training Cost		Calculated
F	b-a	Training Agreement Cost		Manually entered
F	b-b	Competency Check Cost		Manually entered
F	b-c	Experience Validation Cost		Manually entered
F	c	Trainee Salary Costs for Regular Courses, Competency Checks, and Experience Validation		Calculated
F	d	Paid Training Allocations		Calculated
F	e	OPCA (CIF, Professionalization, DIF) payment	D5 + D9	Calculated
F	f	OPCA CIF (DIF) payment		Manually entered
F	g	OPCA - Training Plan Payment		Manually entered
F	h	Other Payments, Financing, Cost		Manually entered
F	i	Subsidy		Manually entered
F	12	Total Training Cost	Fa + Fb + Fc + Fd + Fe + Ff + Fg + Fh – Fi	Calculated
F	13	Expense Surplus	This indicator is equal to indicator F12 minus indicator F11, if F12 is greater than F11	Calculated

Group ID	***Indicator ID***	***Indicator Description***	***Comments***	***Delivery***
F	14	Expense Insufficiency	This indicator is equal to indicator F11 minus indicator F12, if F11 is greater than F12	Calculated
F	15	Surplus Carry Forward	The surplus comes from the surplus calculated in Group I	Calculated
F	16	Difference (F14 – (F15)	This indicator is equal to indicator F14 minus indicator F15, if F14 is greater than F15. If the result is less than zero, this indicator is set to zero.	Calculated
G	17	CDD Total Annual Salaries	May be calculated if PeopleSoft Global Payroll France is installed.	Manually entered
G	18	Employer Obligation	Based on the Employer Obligation Rate This indicator is equal to: Employer Obligation Rate * G17	Calculated
G	19	OPCA CIF Payments		Manually entered
G	20	Difference (18) – (19)	G18 – G19	Calculated
H	21	Training Cost Insufficiency	This indicator is equal to indicator E10	Calculated
H	22	Regularization Payment		Manually entered
H	23	Payment/Company Work Council		Manually entered
H	24	Total Insufficiency	D6 + F16 + (2 * G20)	Calculated
H	25	Total Contribution	H21 + H22 + H23 + H24	Calculated

Group ID	***Indicator ID***	***Indicator Description***	***Comments***	***Delivery***
I	Total	Total Carry-Forward Surplus		Either manually entered, or calculated if 2483 indicators have been calculated for the year before the declaring year and are stored in the system.
I	n – 1	Surplus of the previous year (Year minus 1 surplus		Either manually entered, or calculated if 2483 indicators have been calculated for the year before the declaring year and are stored in the system.
I	n – 2	Surplus of the year before the previous year (Year minus 2 surplus)		Either manually entered or calculated if 2483 indicators have been calculated for the year before the declaring year and are stored in the system.
I	n – 3	Surplus of two years before the previous year (Year minus 3 surplus)		Either manually entered or calculated if 2483 indicators have been calculated for the year before the declaring year and are stored in the system. Manually entered

Understanding Calculation of the Report Indicators

This topic is for implementers of the Training 2483 report. Some indicators are calculated based on the data existing in the Administer Training business process in HR. Others are calculated based on parameters that you input into the system through the Trn 2483 Parameters Setup (Training 2483 parameters setup) page.

Training costs are obtained from the Maintain Student Cost page, employee and instructor salary costs are obtained from the Trainees Salary Costs page, and the company costs are obtained from the Trn 2483 Parameters Setup page.

The Training 2483 report is complex. For some indicators, several conditions must be fulfilled for the indicators to be correctly calculated:

- The session start and end dates must be within a single calendar year.

  Sessions that start in December and end in January will not be processed and must be split into two sessions to assign the costs to the correct declaring year.

- Costs are only obtained from departments that are part of the declaring company.

The chargeable costs and the chargeability criteria are computed by the Compute Student Costs process (this process is run from the Compute Student Cost page (RUNCTL_TRN013). The Compute 2483 FRA process computes the total compensation and expense aggregation.

Note: If you have implemented PeopleSoft Learning Management and PeopleSoft HR Administer Training, set up the learning catalog, instructors, vendors, and so forth, as well as the tracking of learning costs, enrollment and other day-to-day tasks in Learning Management.

See *PeopleSoft Enterprise Learning Management* documentation, "(FRA) Managing French Regulatory Requirements"

Calculation of Indicator A

To calculate monthly average headcount for this indicator, only employees are counted—contract workers and persons of interest are excluded.

To calculate group A indicators:

- Set the HR status to *Active,* and set the payroll status to *Active, Leave of Absence, Leave With Pay, Suspended* or *Short Work Break.* HR and payroll status are defined in the Job Data component (JOB_DATA).

  See "Understanding the Process of Updating Person and Job Information" (PeopleSoft HCM 9.2: Human Resources Administer Workforce).

- Set the contract status to *Active.* The contract status is defined on the Contract Status/Content page (Workforce Administration, Job Information, Contract Administration, Update Contracts, Contract Status/Content).

  See "Tracking Workforce Contracts" (PeopleSoft HCM 9.2: Human Resources Administer Workforce).

- The employee category must be active in the Employee Categorization (EMPL_CTG_L1) component (Set Up HCM >Product Related >Workforce Administration >Labor Administration >Labor Agreement). Then an employee category must be assigned to the employee on the Job Data - Job Labor page.

Calculation of Group B Indicators

The selection for all group B indicators works in the same manner. It is based on the 2483–B-nn contract type group, where n is the indicator number.

To calculate indicators B2–B10, the following criteria are considered:

- Set up an employee contract and enter an employee category on the Contract Type Table page and link the employee to a labor agreement and enter an employee category on the Job Data - Job Labor page.

- Set the employee status to *Active, Leave of Absence, Leave With Pay, Suspended* or *Short Work Break.*
- Set up the 2483 Professional Category field as qualified worker or non-qualified worker (row 2), employee (row 3), technician (row 4), or executive (row 5) on the Employee Categorization page.
- For group B, employees and contract workers are taken into account, as well as a list of contract types defined on the Contract Type Group page (Set Up HCM >Product Related >Workforce Monitoring >Regulatory Requirements FRA >Contract Type Group). The contract type group used for group B is 2483–B–ALL.
- For the indicators dealing with courses, only sessions that are completed are taken into account, and the Attendance should be either *Completed* or *Incomplete.* These values are defined on the Course Session Enrollment page (Administer Training >Student Enrollment >Enroll Individually) or the Course Student Enrollment page (Administer Training >Student Enrollment >Enroll in Course).
- For columns (c) and (d), Professionalisation Period, Training Leave and Part Time Course are excluded. deselect the check boxes for those values on the Course Session Enrollment page or the Demand from Budget Training page (Administer Training >Student Enrollment >, Enroll in Course).
- For column (e), all training hours are added together.
- For columns (f) and (g), only DIF trainings are taken into account. Select the DIF check box on the Course Session Enrollment page or the Demand from Budget Training page.
- For column (h), the DIF balance hours are added up. This DIF balance is stored in TRN_DIFHIST_TBL record. If Global Payroll France is installed, this record can be updated by running the DIF Payroll Import application engine (Administer Training >Result Tracking >DIF Payroll Import FRA). Otherwise it can be updated with data coming from another system.

  The DIF balance can be checked on the Training Hours Details page (Administer Training >Student Enrollment >Enroll in Course >Demand from Budget Training, then click the Track Training Hours Details link).
- For indicators 7 and 8, only professionalisation period trainings are taken into account. This information is defined on the Course Session Enrollment page or the Demand from Budget Training page.
- For indicators 9 and 10, training allocation is paid if the student has followed some training hours out of the working schedule, if the training is a DIF training, or the Training Plan Category is *Skill Development.* Select this value on the Course Session Enrollment page or the Demand from Budget Training page.

  If Global Payroll France is installed, the training allocation amount and hours are imported from Global Payroll France when updating salary costs using the Update Salary Costs page (Administer Training >Define Budget >Update Salary Costs). The training allocation amount and hours can then be reviewed or updated on the Trainees Salary Costs page: Allocation tab (Administer Training >Define Budget >Trainees Salary Costs >Training Allocation tab).
- For indicator 11, only training with the Course Type *Comp Check* (competency check) selected are taken into account.
- Indicator 12 only takes experience validation into account.

To calculate indicators B11 and B12, the following criteria are also considered:

- The training must be financed entirely by the company. There should be no cost in the Financed Cost field on the Vendor page (Administer Training >Define Course/Cost Details >Course Session Costs).
- The training session must be chargeable. This is determined on the Course Profile page (Administer Training >Define Course/Cost Details >Courses).
- Training leave sessions and part time sessions are not reported in these indicators.
- Students who have an *Apprentice* contract type are not included.
- Students enrolled multiple times are reported only once.
- Students must have begun or completed a session during the year that the 2483 is based upon (session attendance = 'C'=Complete or 'I'=Incomplete).
- All session durations will be included for students enrolled multiple times.

  When the attendance status is *C,* the session duration is obtained from the Course Session Profile page. If the attendance status is*I,* the duration is obtained from theTime Spent at Training field on the Course Session Enrollment page.

To calculate indicators B11 and B12:

- Set the employee status to *Active, Leave of Absence, Leave With Pay, Suspended,* or *Short Work Break.*
- For indicator 11, only training with the Course Type *Comp Check* (competency check) selected are taken into account. Set this value on the Course Profile page (Administer Training >Define Course/Cost Details >Courses).
- For indicator 12, only training with the Course Type *Exp. Valid* (experience validation) selected are taken into account. Set this value on the Course Profile page.

Calculation of Group C Indicators

To calculate group C indicators:

- A value for indicator 1 can be entered manually.

  If Global Payroll France is installed, the total salaries can be imported from Global Payroll. To import the salaries from Global Payroll, select the Interface with Payroll System check box in the C–Total Compensation section of the 2483 parameters - Trn 2483 Parameters Setup page (Set Up HCM >Product Related >Workforce Monitoring >Regulatory Requirements FRA).
- Enter a value for indicator 2. The default value is 1.60, which is applicable to a company that has more than 20 employees.

Calculation of Group D Indicators

To calculate group D indicators:

- Enter a value for indicator D3. The default value is 0.20.
- Indicator 4 is equal to the rate defined in D3 multiplied by the value of C1.
- Enter a value for indicator D5 manually.

- Indicator D6 is equal to the value of D4 minus the value of D5.

Calculation of Group E Indicators

To calculate group E indicators:

- Enter a value for indicator E7. The default value is 0.50.
- Indicator E8 is equal to the rate defined in E7 multiplied by the amount in C1.
- Enter a value for indicator E9 manually.
- Indicator E10 is equal to the value of E8 minus the value of E9.

Calculation of Indicator F11 – Employer Participation (Training Plan)

Indicator F11 is equal to the rate defined in C2 multiplied by the amount in C1.

Calculation of Indicator Fa – Internal Training Cost: Instructor and Non-Instructor Expenses

Indicator Fa is the sum of the instructor expenses, non-instructor personnel expenses, and furniture expenses. The calculation rules for indicator Fa – Internal Training Cost are based on the following costs:

- Internal instructor costs are defined on the Course Session Costs component and the Instructors pages.
- Non-Instructor Employee Expense Costs are defined on the Course Session Costs component and according to the 2483 indicator on the Tuition Expense Type Table page.
- Non-Instructor Session Expense Costs are defined on the Course Session Costs component and according to the 2483 indicator on the Tuition Expense Type Table page.
- Furniture and equipment expenses.

  This cost category includes equipment and furniture required for the training. Furniture Employee Expense Costs are defined on the Course Session Costs component and according to the 2483 indicator on the Tuition Expense Type Table page.
- Other expenses.

  This cost category includes all of the expenses that do not fall into the previous categories and are chargeable for the 2483 report. For example:

  - Facility rental, cleaning, heating, and electricity.
  - Expense related to the training organization, such as book rental, furniture rental, and document duplication.
  - Magazine subscriptions.
  - Administrative organization, which would include stamps, envelopes, telephones, and others.
  - Costs related to training demand evaluation and Training Plan elaboration.
  - Transport and lodging for instructors.

To calculate indicator Fa expenses:

- Set the employee status to *Active, Leave of Absence, Leave With Pay, Suspended,* or *Short Work Break.*
- Terminate the training session in which the employees were enrolled.
- Organize the training session by the company (SESSN_ORGANIZER = Y).

Calculation of Indicator Fb - Competency Checks, Experience Validation, Annual Agreements, and Multi-Annual Agreements

To calculate indicator Fb - Competency Checks, Experience Validation, Annual Agreements, and Multi-Annual Agreements, the following costs are considered:

- For indicator Fb, only vendors with types set to *Consulting Firm* or *Training Provider* are taken into account. Enter these values on the Vendor Profile page (Administer Training >Define Training Resources >Vendors).
- Vendor costs should be chargeable. Set the vendor cost on the Course Session Costs - Vendor page (Administer Training >Define Course/Cost Details >Course Session Costs). This info can also be modified in the Maintain Student Costs component (Administer Training >Cost Analysis).
- Set the employee status to *Active, Leave of Absence, Leave With Pay, Suspended,* or *Short Work Break.*
- Terminate the training session in which the employees were enrolled.
- Set the course type to *Competency Check* in the Course Table report.
- The vendor type must be annual or multi-annual.
- Ensure that the vendor is chargeable, certified, billed and the date of the bill is filled. Set these values in the Course Session Cost - Vendor page.
- Three kinds of external costs are calculated in the indicator Fb—Fb-a, Fb-b, and Fb-c:
  - Indicator Fb-a includes external costs for all course types except competency check and experience validation.
  - Indicator Fb-b includes external costs for competency check courses. In this case, the Financing Type of the vendor should be *Financing Training Leave Fund.* This value is set on the Vendor Profile page (Administer Training >Define Training Resources >Vendors >Vendor Profile).
  - Indicator Fb-c includes external costs for experience validation courses.

Calculation of Indicator Fd – Paid Training Allocations

The following criteria are used to calculate paid training allocations in this indicator:

- A training allocation is paid if the student has followed some training hours out of the working schedule, if the training is a DIF training or the Training Plan Category is *Skill Development.* TheTraining Plan Category value is set on the Course Session Enrollment page or the Demand from Budget Training page.

- If Global Payroll France is installed, the training allocation amount and hours are imported from Global Payroll France when updating salary costs using the Update Salary Costs page (Administer Training, Define Budget, Update Salary Costs). The training allocation amount and hours can then be reviewed or updated on the Trainees Salary Costs page: Allocation tab (Administer Training, Define Budget, Trainees Salary Costs, Training Allocation tab).

Calculation of Indicators Fe – Fi

The following criteria are used to calculate these indicators:

- Indicator Fe is equal to the sum of D5 and E9.
- Indicator Ff is entered manually.
- Indicator Fg is entered manually.
- Indicator Fh includes all chargeable costs with a type different from *Furniture, Instructor, Instructor Lodging & Transport,* or *Non Instructor.* Set these values in the2483 Type field on the Tuition Expense Type Table page (Administer Training, Define Course/Cost Details, Tuition Expense Type).

  The costs include the session and employee costs determined on the Course Session Costs - Expense page (Administer Training, Define Course/Cost Details, Course Session Costs) and Employee Expense page (Administer Training, Cost Analysis, Maintain Student Costs, Employee Expense).
- Indicator Fi is entered manually.
- Indicator F12 is equal to the sum of FA, FB, FC, FD, FE, FF, FG, and FH minus FI.
- Indicator F13 equals F12 minus F11, if F12 is higher than F11.
- Indicator F14 equals F11 minus F12, if F11 is higher than F12.
- Indicator F15 is subtracted from the number calculated in the final indicator reported in Group I.
- Indicator F16 equals F14 minus F15, if F14 is higher than F15.

Calculation of Group G Indicators

To calculate group G indicators:

- Enter a value for indicator G17 in the CDD Total Annual Salaries (17) field, or extract it from PeopleSoft Global Payroll France. To extract indicator G17 from Global Payroll France, select the Interface with Payroll check box in the G-CDD Training Leave Financing section on the Trn 2483 Parameters Setup page (Set Up HCM >Product Related >Workforce Monitoring >Regulatory Requirements FRA >2483 Parameters).
- Indicator G18 is equal to the amount displayed in indicator G17 multiplied by the rate defined in the Employer Obligation Rate (18) field on the Trn 2483 Parameters Setup page. The default rate is 1.00.
- Enter a value for indicator G19 in the OPCA CIF Payments (19) field.
- Indicator G20 is equal to the value of indicator 18 minus the value of indicator 19.

Calculation of Group H Indicators

Group H indicators are calculated using the following criteria:

- Indicator H21 is equal to the amount calculated in E10.
- Enter a value for indicator H22 in the Regularization Payment (22) field.
- Indicator H23 is equal to the amount calculated in F11 multiplied by 50 percent if the Payment/ Company Work Council is null. You can modify the Payment/Company Work Council on the Trn 2483 Parameters Setup page. If the Payment/Company Work Council value is not null, then indicator H23 is set to 0.
- Indicator H24 equals D6 added to F16 and to twice G20.
- Indicator H25 is equal to the sum of H21, H22, H23 and H24.

Calculation of Group I Indicators

Group I indicators are calculated using the following criteria:

- If the training expenses spent by the company during the years preceding the declaring year have exceeded the amount that is expected by the government, this surplus can be carried forward. The surplus is equal to the indicator F13 if this value is not zero.
- The indicators I (N-1), I (N-2), and I (N-3) are calculated using 2483 indicators that are determined the previous year. The surplus for the year prior to the declaring year is equal to the indicator F13 amount calculated the year before. Then the surplus calculated for the previous year to fill indicators I (N-1) and I (N-2) can be used to fill I (N-2) and I (N-3) of the declaring year.

  For example, when declaring the 2006 training expenses/costs, indicator I (N-1) is updated with the indicator F13 calculated for 2005. I (N-2) and I (N-3) reported for 2006 are equal to I (N-1) and I (N-2) determined for 2005.

Chapter 5

(GBR) Meeting Regulatory Requirements for the United Kingdom

Understanding U.K. Regulatory Requirements

The PeopleSoft system provides the following U.K. regulatory reports to help you perform equal opportunity monitoring of a U.K. workforce by classifying job applicants, job offers, positions filled, and employees in specific gender and ethnic groups:

- Adverse Impact.
- Job Group Roster.
- Joint Staffing Report.
- Northern Ireland Report.
- Termination Analysis.
- Workforce Analysis.

Prerequisites

Before you manage fair employment, equal opportunity, and disability discrimination issues for a U.K. workforce, enter the following employee information:

- Gender information on the Modify a Person - Biographical Details page.
- Ethnicity codes on the Modify a Person - Regional page.
- Disability information on the Disability page.

For the Northern Ireland Fair Employment Monitoring Return, set up additional organization, employee, and applicant data.

You need to:

- Identify the locations that are required to submit a Fair Employment Monitoring Return by selecting the Northern Ireland Reportable check box on the Location Profile page.
- Assign a Standard Occupational Classification (SOC) code to each of the organization's job codes on the Job Code Profile page.
- Assign an employee class on the Job Data - Job Information page.

  The PeopleSoft system delivers the codes required on the Fair Employment Monitoring Return.

- Record employees' community background on the Modify a Person - Regional page.
- Record applicants' community background on the Applicant Eligibility/Identity page.

Warning! By law, Northern Ireland community background data for employees can be seen by a designated monitoring officer only. The PeopleSoft system includes a special role called HR Administrator NI (human resources administrator Northern Ireland) for this purpose.

Related Links

(GBR) Understanding Disability and Discrimination Act Regulatory Requirements in the U.K.

Meeting Working Time Directive Requirements

To set up working time directives, use the Working Time Directive UK (WRK_TIME_PARAM_UK) component.

The European Working Time Directive as legislated in the U.K. restricts employers from requiring employees to work more than an average of 48 hours a week in any 17-week period. The legislation provides an opt-out provision in which employees choosing to work more than the legally allowed hours can do so by notifying the employer of this choice *in writing.* The directive also makes it illegal to discriminate, in pay or promotion, against employees exercising their right not to work more than 48 hours a week. Finally, the directive requires employers to provide 20 days of paid leave and standard daily break time allowances.

The system provides Working Time Directive components that enable parameters to be set and adjusted, employee work hours per week to be set, and work hours by employee and department to be monitored. The system enables exceptions to be noted for each employee if an employee requests exceptions.

These topics discuss Working Time Directive requirements.

Pages Used to Monitor Working Time Directive Requirements

Page Name	***Definition Name***	***Usage***
Working Time Directive UK Page	WRK_TIME_PARAM_UK	Set up the Working Time Directive parameters. Although the directive provides guidelines for employers to follow and the system uses these parameters, the directive can change. In that case, the parameters need to be adjusted.
Working Hours Per Week (Employee) Page	WRK_TIME_EXCEP_UK	Set standard weekly working hours for employees and note exceptions.
Daily Exceptions - Working Hours Per Week Page	WRKTIMEEXC_SEC_UK	Enter exceptions to the expected work schedule.
Hours Worked Per Reference Period (Department) Page	WRKTIME_DEPTINQ_UK	Monitor Working Time Directive compliance by department.

Page Name	***Definition Name***	***Usage***
Hours Worked Per Reference Period (Employee) Page	WRK_TIME_EEINQ_UK	Review Working Time Directive compliance by employee.

Working Time Directive UK Page

Use the Working Time Directive UK page (WRK_TIME_PARAM_UK) to set up the Working Time Directive parameters.

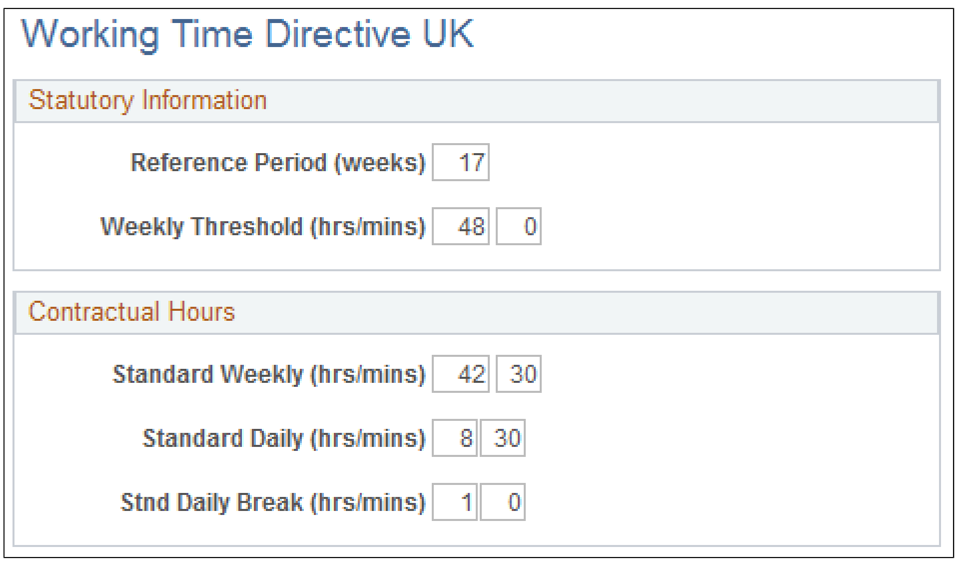
Although the directive provides guidelines for employers to follow and the system uses these parameters, the directive can change. In that case, the parameters need to be adjusted.

Navigation

Set Up HCM > Product Related > Workforce Monitoring > Regulatory Requirements > Working Time Directive UK > Working Time Directive UK

Image: Working Time Directive UK page

This example illustrates the fields and controls on the Working Time Directive UK page. You can find definitions for the fields and controls later on this page.



Statutory Information

Reference Period (weeks)	The directive requires average hours to be calculated on a reference period of 17 weeks.
Weekly Threshold (hrs/mins)(weekly threshold [hours/minutes])	The directive requires no more than 48 hours worked in a week period.

Contractual Hours

Use this group box to define standard working hours for the organization if you are not using the Work Schedule component for this purpose. When you enter work schedule information here, the system uses information from this page if working time data is updated; therefore, the employee doesn't have to enter information in the Work Schedule component.

Standard Weekly (hrs/mins) (standard weekly [hours/minutes])	Enter the default standard weekly hours for contract employment.
Standard Daily (hrs/mins) (standard daily [hours/minutes])	Enter the default standard daily hours for contract employment.
Std Daily Break (hrs/mins) (standard daily break [hours/minutes])	Enter the standard daily minimum break allowance.

Working Hours Per Week (Employee) Page

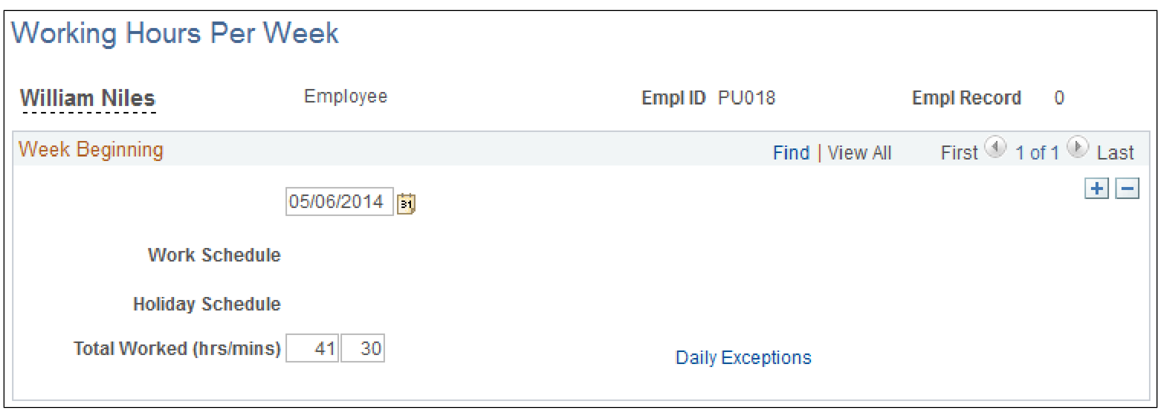
Use the Working Hours Per Week (Employee) page (WRK_TIME_EXCEP_UK) to set standard weekly working hours for employees and note exceptions.

Navigation

Workforce Monitoring > Meet Regulatory Rqmts UK > Monitor Working Time > Working Time Directive > Working Hours Per Week (Employee)

Image: Working Hours Per Week (Employee) page

This example illustrates the fields and controls on the Working Hours Per Week (Employee) page. You can find definitions for the fields and controls later on this page.



Enter an employee ID to access the page. If information is entered in the Work Schedule Table component, the system displays the work schedule and holiday schedule as entered on the Work Schedule page in the Assign Work/Holiday Schedules component. If no data is entered in the Work Schedule Table component, these fields do not appear.

Week Beginning	Click the calendar button to enter a date for the week.
Total Worked (hrs/mins) (total worked [hours/minutes])	Enter the total time worked for the week in hours and minutes. When you refresh the page, the system calculates the total time worked, adjusting for all absences (general, holidays, vacations, parental, and maternity). This calculation can be changed or corrected manually. If daily exceptions were added, the field

is display-only. To change totals, you must click the Daily Exceptions link.

Daily Exceptions - Working Hours Per Week Page

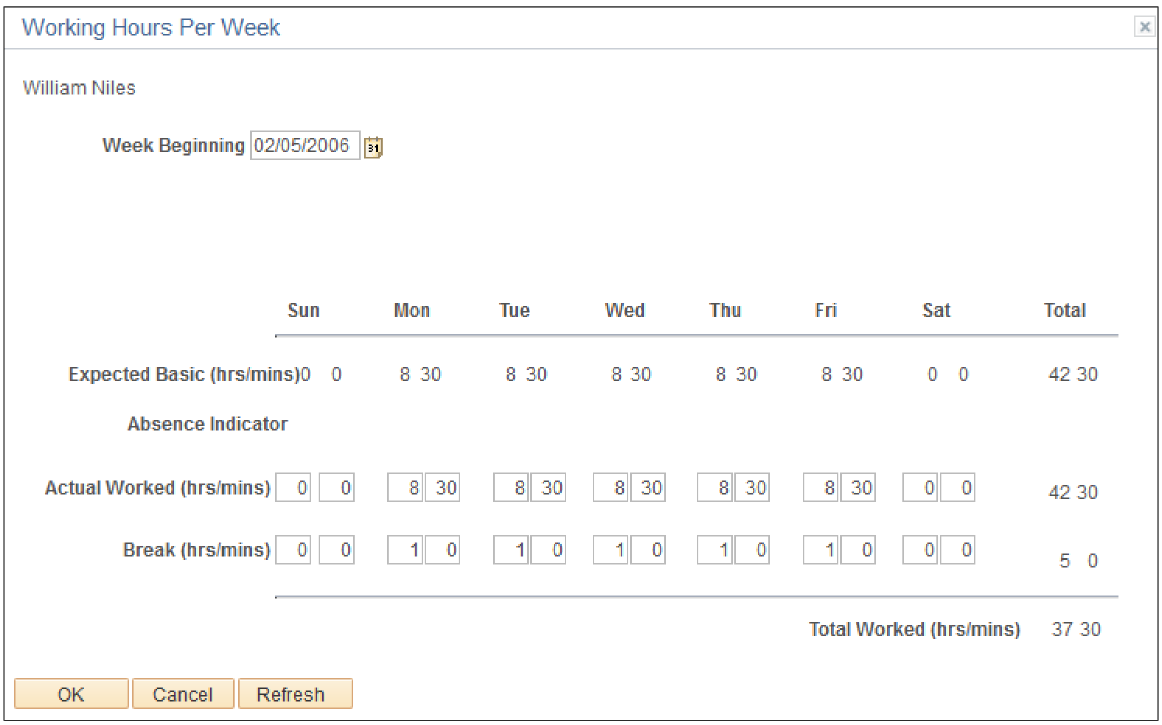
Use the Daily Exceptions - Working Hours Per Week page (WRKTIMEEXC_SEC_UK) to enter exceptions to the expected work schedule.

Navigation

Click the Daily Exceptions link on the Working Hours Per Week (Employee) page.

Image: Daily Exceptions - Working Hours Per Week page

This example illustrates the fields and controls on the Daily Exceptions - Working Hours Per Week page. You can find definitions for the fields and controls later on this page.



Use this page to note exceptions, particularly those provided by the employee in writing. Update the working hours by entering daily exception hours in the Actual Worked andBreak fields.

The page displays the expected work schedule as entered in either the Work Schedule Table component or the Contractual Hours group box on the Working Time Directive UK page. It displays absences entered in the Absence component or the Parental or Maternity Leave component.

Hours Worked Per Reference Period (Department) Page

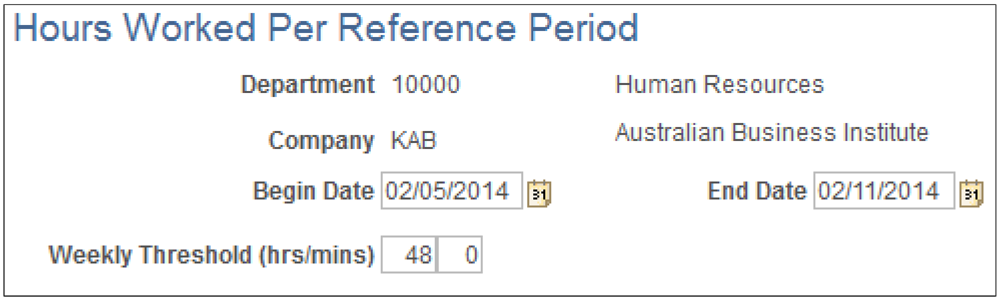
Use the Hours Worked Per Reference Period (Department) page (WRKTIME_DEPTINQ_UK) to monitor Working Time Directive compliance by department.

Navigation

Workforce Monitoring > Meet Regulatory Rqmts UK > Monitor Working Time > Review Dept Time Directive > Hours Worked Per Reference Period (Department)

Image: Hours Worked Per Reference Period (Department) page

This example illustrates the fields and controls on the Hours Worked Per Reference Period (Department) page. You can find definitions for the fields and controls later on this page.



Select a department to access the page. Enter the beginning date for the reference period. By default, the system calculates an end date based on the 17-week parameter. Although the system applies values by default for the dates and weekly threshold as entered on the Working Time Directive UK page, these can be modified manually. Click the Refresh button to update the page when the fields are complete.

Hours Worked Per Reference Period (Employee) Page

Use the Hours Worked Per Reference Period (Employee) page (WRK_TIME_EEINQ_UK) to review Working Time Directive compliance by employee.

Navigation

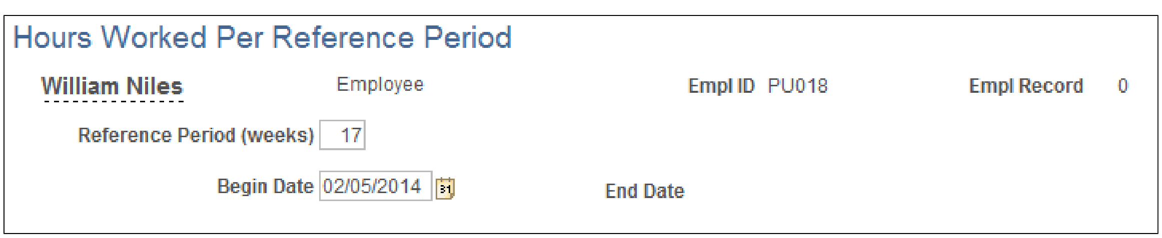
Workforce Monitoring > Meet Regulatory Rqmts UK > Monitor Working Time > Review Employee Time Directive > Hours Worked Per Reference Period (Employee)

The page displays any employees for whom exceptions are entered, indicating that the exceptions may exceed the established working hours. Click the employee name link to view the weekly details for that employee.

If exceptions were entered at the daily level, the Daily Detail link appears on the line corresponding to the week for which the exceptions apply. Click theDaily Detail link to display the daily exceptions for that week.

Image: Hours Worked Per Reference Period (Employee) page

This example illustrates the fields and controls on the Hours Worked Per Reference Period (Employee) page. You can find definitions for the fields and controls later on this page.



By default, the system uses the 17-week reference period. You can change the value by entering a begin date for the period and clicking the Refresh button. The system automatically calculates the end date based on the reference period designated.

The system displays a Daily Detail link for the weeks for which daily exceptions were entered.

Running the U.K. Regulatory Reports

This topic discusses how to run the regulatory reports for the U.K.

Pages Used to Run the U.K. Regulatory Reports

Page Name	***Definition Name***	***Usage***
Adverse Impact Page	RUNCTL_FROMTHRU	Run the Adverse Impact report (APP001UK). This report displays job offers versus applications by UK-specific ethnic groups and by gender.
Termination Analysis Page	RUNCTL_FROMTHRU	Run the Termination Analysis report (PER019UK). This report displays the current employee count and the number of terminations.
Workforce Analysis Page	RUNCTL_PER025UK	Run the Workforce Analysis report (PER025UK). This report tracks hiring practices by department, or other organizational units, based on job titles in the department.
Job Group Roster Page	RUNCTL_PER030UK	Run the Job Group Roster report (PER030UK). This report lists employees by job groups.
Joint Staffing Page	RUNCTL_ASOFDATE	Run the Joint Staffing report (PER037UK). This report displays the workforce by job code, gender, and full-time or part-time status.
NI Fair Employments Page	RUNCTL_UKNI	Run the Northern Ireland Fair Employments report (UKNI001). This report indicates the religious composition of the workforce, job applicants, and appointees. This report format emulates the Monitoring return, which is required by organizations operating in Northern Ireland.

NI Fair Employments Page

Use the NI Fair Employments (Northern Ireland fair employment) page (RUNCTL_UKNI) to run the Northern Ireland Fair Employments report (UKNI001).

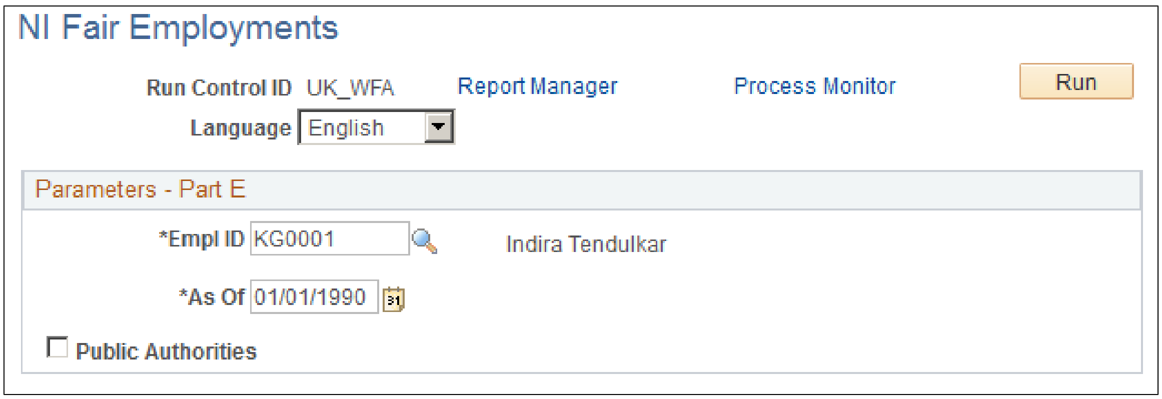
This report indicates the religious composition of the workforce, job applicants, and appointees. This report format emulates the Monitoring return, which is required by organizations operating in Northern Ireland.

Navigation

Workforce Monitoring > Meet Regulatory Rqmts UK > Reports > NI Fair Employments > NI Fair Employments

Image: NI Fair Employments page

This example illustrates the fields and controls on the NI Fair Employments page. You can find definitions for the fields and controls later on this page.



Empl ID

Select the employee who is responsible for submitting the Fair Employment Monitoring Return. This is the person who signs the form and whose name appears in Part E of the form.

The system uses the selected employee's job data to determine the company for which the report is run.

As Of

Select the end date for the report. The system generates the report for the year ending on the date that you enter here.

Chapter 6

(NZL) Meeting Regulatory Requirements for New Zealand

Setting Up the ARCI Table

To set up the ARCI table, use the Class Units NZL(CLS_UNT_TBL_NZL) component.

ARCI is administered by the Accident Rehabilitation and Compensation Corporation, which regulates and administers a no-fault workers compensation plan. The codes in the ARCI table are used on the Company Table - Default Settings page. These codes identify an organization's employment risk level and provide the basis for determining the premium amounts paid to ARCI.

Note: The PeopleSoft system provides the standard classification units for ARCI.

This topic discusses how to create or modify classification units.

Page Used to Set Up the ARCI Table

Page Name	*Definition Name*	*Usage*
Class Units NZL Page (classification units New Zealand)	CLS_UNT_TBL_NZL	Create or modify the classification units used to calculate ARCI premiums.

Class Units NZL Page

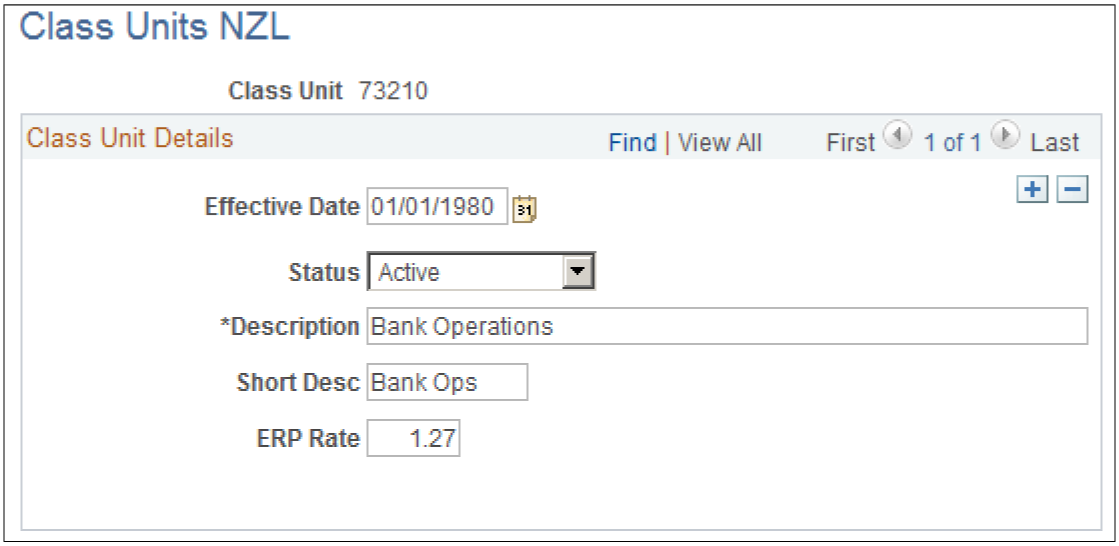
Use the Class Units NZL (classification units New Zealand) page (CLS_UNT_TBL_NZL) to create or modify the classification units used to calculate ARCI premiums.

Navigation

Set Up HCM > Product Related > Workforce Monitoring > Regulatory Requirements > Class Units NZL > Class Units NZL

Image: Class Unit NZL page

This example illustrates the fields and controls on the Class Unit NZL page. You can find definitions for the fields and controls later on this page.



ERP Rate (employment risk premium rate)	Enter the rate based on the industry and the level of risk associated with that industry. The government provides these rates as set by regulation.

Chapter 7

(USA) Meeting Regulatory Requirements for the United States

Understanding U.S. Regulatory Requirements

If U.S. government employment regulations apply to your company, you need to implement plans and practices to ensure that your company consistently meets U.S. reporting requirements.

HR provides tables to help you manage the information that you need to comply with the Americans with Disabilities Act (ADA). Veterans Employment and Training Service (VETS) is the only report in which disabled employees are counted.

Additionally, PeopleSoft provides the following regulatory reports:

- Adverse Impact.
- EEO-1 Employer Information.
- EEO-1 Job Analysis.
- EEO-4 State and Local Govt.
- EEO-5 Job Analysis.
- IPEDS-S Report.
- Job Group Analysis.
- Job Group Analysis Summary.
- Job Group Movement Analysis.
- Job Group Roster.
- PRWORA - New Hire.
- OSHA-200 Log.
- OSHA-300 Incident Log.
- OSHA-300A Annual Summary.
- OSHA-301 Incident Report.
- Terminations Analysis.
- VETS Report.

- Workforce Analysis.

Related Links

"Understanding Health and Safety Incidents" (PeopleSoft HCM 9.2: Human Resources Monitor Health and Safety)

Setting Up Control Tables for Regulatory Requirements

To set up the control tables for regulatory requirements, use the Affirmative Action Plan (AAP_TBL), Establishment Table (ESTAB_TBL1_GBL), Location Profile (LOCATION_TBL2_GBL), Job Groups (EEO_JOB_GROUP), Job Tasks (JOB_TASK_TABLE), Job Code Task Table (JOBCODE_TASK_TABLE), Review Controlled Estb Ids (CONTROLLED_ESTABS), and Occupational Classif. Codes (US_OCC_TBL) components.

You must set up information in the Establishment table to meet U.S. regulatory requirements.

These topics discuss setting up control tables for regulatory requirements.

Pages Used to Set Up Control Tables for Regulatory Requirements

Page Name	***Definition Name***	***Usage***
Affirmative Action Plan Page	AAP_TBL	Define the affirmative action plans. Affirmative action plans are defined by establishment ID.
Establishment Address Page	ESTAB_TBL1_GBL	Identify the establishment, indicate its regulatory region, and enter the address and other country-specific information. Set parameters for electronic filing.
Establishments - Phone Numbers Page	ESTAB_TBL2_GBL	Identify phone numbers for the establishment.
Location Address Page	LOCATION_TABLE1	Enter address information for a specific location.
Location Profile Page	LOCATION_TBL2_GBL	Specify a salary administration plan for the location, as well as tax and country-specific location information.
Job Groups Page	EEO_JOB_GROUP	Set up Job Groups codes.
Job Tasks Page	JOB_TASK_TABLE	Define job task outcomes. For example, if a job requires an employee to pick up heavy boxes and move them, then define *moving* heavy boxes as the essential job task. Do not define the job task as *lifting* heavy boxes because an employee with a disability could use a forklift to move them.

Page Name	***Definition Name***	***Usage***
Job Code Tasks Page	JOBCODE_TASK_TABLE	Define job tasks associated with each job code.
Review Controlled Estb Ids Page(review controlled establishment IDs)	CONTROLLED_ESTABS	Shows all establishments that have designated the selected headquarters unit as their controlling establishment.
Occupational Classif. Codes Page (occupational classification codes)	US_OCC_TABLE	Define occupation classification codes.

Affirmative Action Plan Page

Use the Affirmative Action Plan page (AAP_TBL) to define the affirmative action plans.

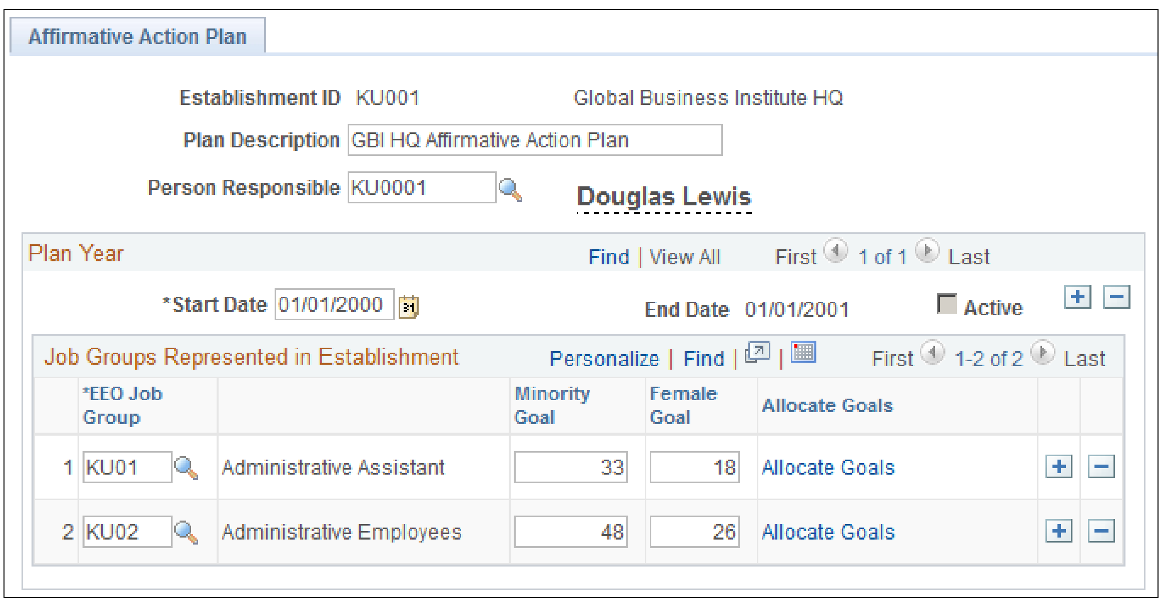
Affirmative action plans are defined by establishment ID.

Navigation

Workforce Monitoring > Meet Regulatory Rqmts > Maintain Affirmative Actn Plan > Affirmative Action Plan

Image: Affirmative Action Plan page

This example illustrates the fields and controls on the Affirmative Action Plan page. You can find definitions for the fields and controls later on this page.



Plan Description

Enter a description of this affirmative action plan.

Person Responsible

Select the employee ID of the person responsible for administering this plan.

Plan Year

Start Date, End Date, and **Active**	Enter the start date of this plan. The system calculates the end date and selects the Active check box if this is the current year plan.

Job Groups Represented in Establishment

EEO Job Group, Minority Goal and **Female Goal**	Select an EEO job group and enter the minority goal and female goal for that job group.
Allocate Goals	Click the Allocate Goals link to accessEthnic Group, Total Goal and Female Goal fields.

Allocate Goals

Ethnic Group, Total Goal and **Female Goal**	Enter the plan's total and female goals for the selected ethnic group. Click the Roll Up Values links to add the goals for the Minority Goal and Female Goal. Click theDone button to return to the main page. These values will be rolled forward to the EEO Job Group Goals in theJob Groups Represented in Establishment group box.

Establishment Address Page

Use the Establishment Address page (ESTAB_TBL1_GBL) to Identify the establishment, indicate its regulatory region, and enter the address and other country-specific information.

Set parameters for electronic filing.

Navigation

Workforce Monitoring > Meet Regulatory Rqmts > Define Regulatory Rqmts Data > Establishments > Establishment Address

Image: Establishment Address page (1 of 2)

This example illustrates the fields and controls on the Establishment Address page (1 of 2). You can find definitions for the fields and controls later on this page.

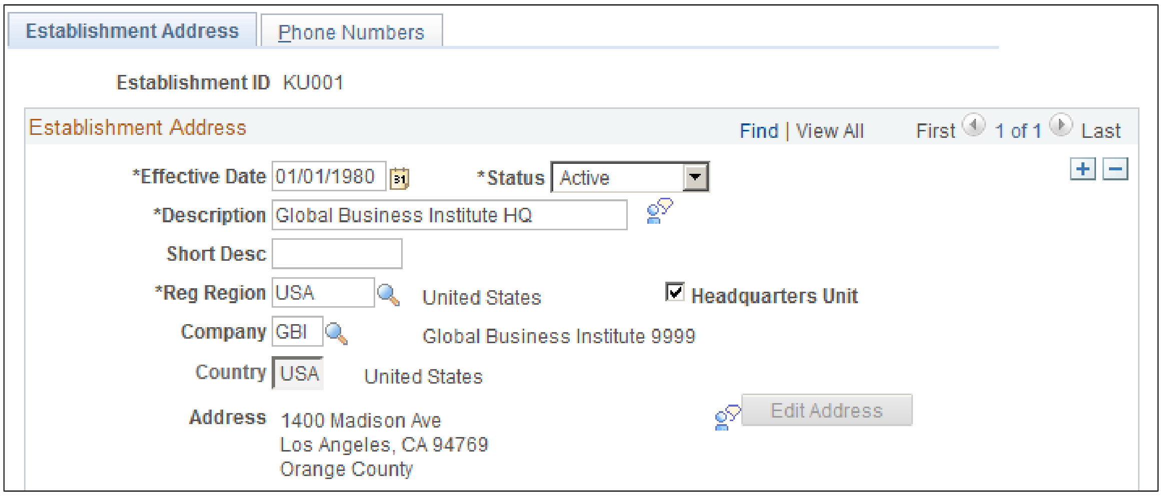
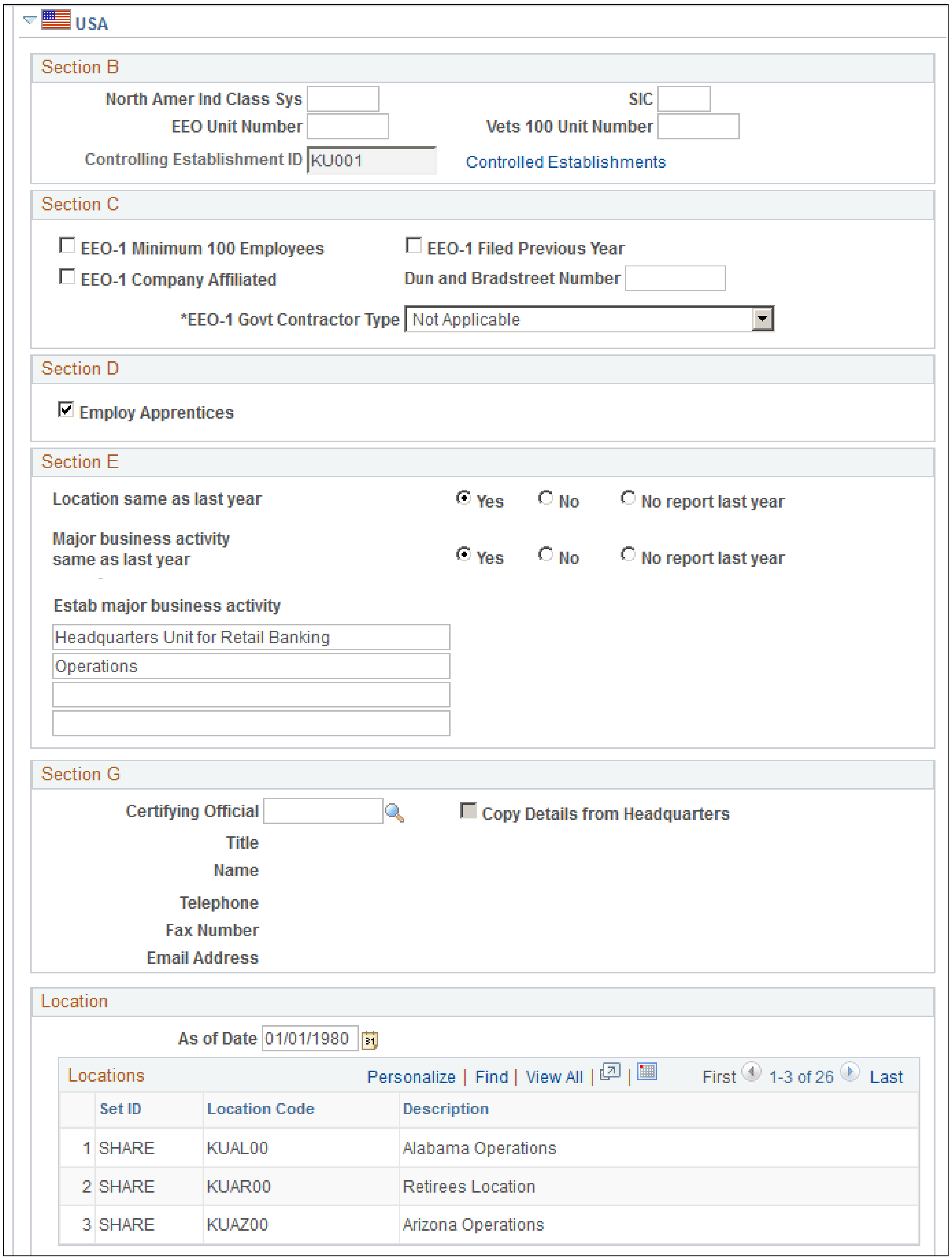


Image: Establishment Address page (2 of 2)

This example illustrates the fields and controls on the Establishment Address page (2 of 2). You can find definitions for the fields and controls later on this page.



Beginning in 2005, the U.S. Equal Employee Opportunity Commission only accepts EEO-1 Report submissions through their web-based filing system. Previously, the Commission accepted computer-generated printouts of the EEO-1 Report. For employers required to submit the annual EEO-1 Report, PeopleSoft provides a process for submitting the report via a Data File uploaded through the EEO-1 Web Application. While the submission of the EEO-1 report using Alternate Reporting Format (ARF) is voluntary, employers who elect to use this method must comply with all of its requirements without exception.

Establishment ID	In order for the system to select a valid list of EEO-1 employees, this field must *not* be blank on the employee's Job record.

Section C

EEO-1 Govt Contractor Type	Select a government contractor type. In order for the system to select a valid list of EEO-1 establishments, this field value should be any value other than *Not Applicable.*

Section G

Certifying Official	Select a certifying official to populate the certification information of the EEO-1 report. Section G certification is associated with each establishment ID for the company. This allows unique certifying official data to be associated with the EEO-1 report for each establishment.
Copy Details From Headquarters	Select this check box to populate the certification information of the EEO-1 report from headquarters data if one certifying official is appointed to complete all establishment EEO-1 reports.

For more information about establishments, see "Defining Establishments" (PeopleSoft HCM 9.2: Application Fundamentals)

Job Code Tasks Page

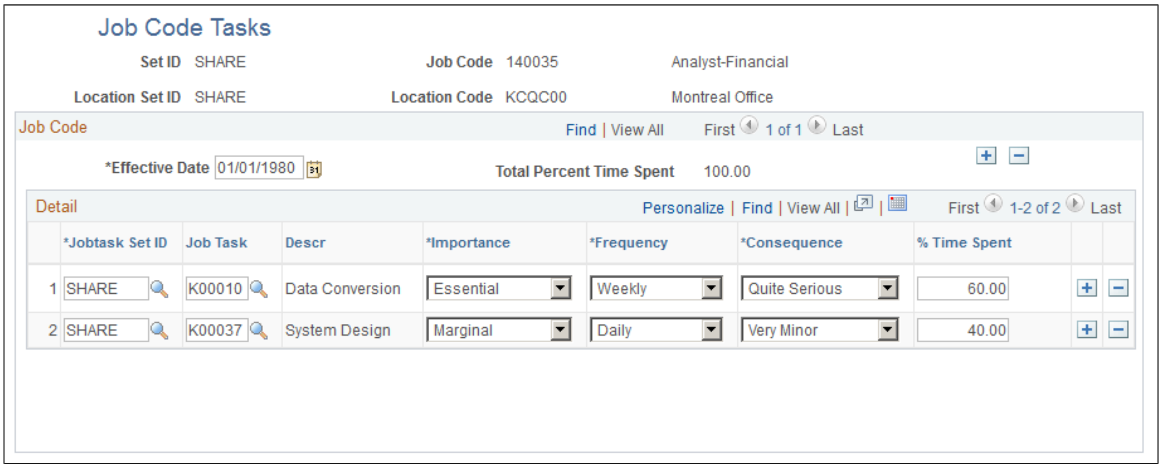
Use the Job Code Tasks page (JOBCODE_TASK_TABLE) to define job tasks associated with each job code.

Navigation

Workforce Monitoring > Meet Regulatory Rqmts > Define Regulatory Rqmts Data > Job Code Tasks > Job Code Tasks

Image: Job Code Tasks page

This example illustrates the fields and controls on the Job Code Tasks page. You can find definitions for the fields and controls later on this page.



Total Percent Time Spent — The system calculates and displays this when you move out of the % Time Spent field. The total cannot exceed 100%.

Jobtask Set ID — Select a jobtask set ID. Values come from the TableSet ID page.

Job Task — Select a job task. Values come from the Job Tasks page.

Importance — Select the importance of the job task to the particular job code.

Frequency — Enter how often the job task occurs for each job code. Values come from the Frequency table.

Consequences — Select the result that occurs if the job task isn't performed.

% Time Spent (percentage time spent) — Enter the percentage of time that is spent on the job task.

Note: Once created, this information is particularly useful for discussing job requirements with applicants. Although the ADA prohibits you from asking applicants if they have disabilities, you can show them a job's task list and ask them if they might have difficulties in completing the tasks. This way, you offer the applicants the opportunity to describe their disabilities and any accommodations that they need to perform the job tasks.

Setting Up Personal Responsibility and Work Opportunity Reconciliation Act (PRWORA) Reporting

To set up the PRWORA report, use the Record Definition component (HR_RFW_RECDEFN), Variable Definition component (HR_RFW_SYSVAR), Data Definition component (HR_RFW_DSODEFN), Report Type Definition component (HR_RFW_RPTDEFN), Clone Report Type component (HR_RFW_RPTCLONE), and New Hire Report Configuration component (HR_RFWPRW_CONFIG).

These topics provide an overview of the PRWORA report and discuss setting up the New Hire report.

Pages Used to Set Up the New Hire Report and Layout

Page Name	Definition Name	Usage
Record Definition Page	HR_RFW_RECDEFN	Define the PeopleSoft records used as a source for the reporting layout's required fields.
Variable Definition Page	HR_RFW_SYSVAR	Define variables (or tokens) used to calculate (or specify) a field.
Data Object Definition Page	HR_RFW_DSODEFN	Specify the database record and relationships between other database records to retrieve data from the database. This definition is used to extract the data from the database to generate the file layout and reports.
Data Definition - Relationships Page	HR_RFW_DSOREL	Define child and related data objects.
Report Type Definition Page	HR_RFW_RPTDEFN	Define specific report attributes that apply across the entire report. This information is specified by the reporting agency.
Report Columns Page	HR_RFW_RPTCOLS	Define the required columns as records and fields in the report layout (header, body, and trailer records) as specified by the reporting agency. Attributes of the column can also be specified as a variable. Customer-specific values may be necessary in the "Override" column.
Clone Report Type Page	HR_RFW_RPTCLONE	Copy an entire existing report layout to a new report.
New Hire Report Configuration Page	HR_RFWPRW_CONF	The list of reporting entities (by state or federal) defined in the database. You can view the layout directly from this page. This information is used as a prompt for selecting which type of report and electronic file layout must be generated.

Understanding the Personal Responsibility and Work Opportunity Reconciliation Act (PRWORA) Report

The Personal Responsibility and Work Opportunity Reconciliation Act (PRWORA) was enacted as a means of locating individuals and recovering delinquent child support payments through wage garnishment. Consequently, employers are required to report specific information on all newly hired salaried employees generally within 20 days of their date of hire. States are responsible for collecting the data and administering the program.

Note: The PRWORA reporting feature provides the flexibility to maintain and manage state-specific regulatory reporting requirements. You must review and modify the Report Type Definitions to add information specific to your organization.

At the very minimum, employers must submit a report to the state that includes the following information :

- Employee name.
- Employee address.
- Employee Social Security number.
- Federal Employer Identification number.

Some states require more information such as:

- Employee's first day of work.
- Employee telephone number.
- Employee state of hire.
- Employee date of birth.
- Employer's State Identification number.
- Medical insurance coverage.

Additionally, some states require reporting of independent contractors who meet particular criteria. For example, the state of Massachusetts requires persons with earnings greater than $600 per year be reported.

Note: It is the customer's responsibility to review the laws in your respective filing state and confirm the report layout is correct for your organization. Many states require organization-specific details that are not stored in your PeopleSoft system. This information must be entered in the "Override" field on the Report Type Definition page for the respective fields.

Report Assumptions

The following assumptions and defaults are made by the system when generating the PRWORA New Hire report:

- Primary name will be used (where name type = "PRI").
- Different telephone types may need to be reported. PeopleSoft has created views for the Business Phone where phone type = "BUSN". Home phone type will use "HOME". If you need to use "MAIN" as the primary business phone in your implementation, you only need to modify the view's WHERE clause to get this phone type.
- If there is a difference between the PeopleSoft Application Designer field definition and the state file layout definition, values may be truncated—for example, if the PeopleSoft Company Name and Address files are different lengths from the reporting agency's requirements.

- Some states require certain payroll- and benefits-related information to be reported on the New Hire submission file. In order to be reported correctly, PeopleSoft assumes the data coming from these tables is populated and maintained during the course of "on-boarding" employees.
- Foreign address information refers to the U.S. Department of Commerce FIPS Code Manual, National Institutes of Standards and Technology, FIPS PUB 10-4 to derive all country codes.
- Delivered new hire configurations will have an initial effective date of January 1, 2005.

  As states (or territories) publish updates, the system will reflect the appropriate effective date. Only one configuration can be active at a time; be sure to inactivate prior rows.
- Some states require information that is specific to the reporting organization, so be sure to validate all the variables on the Report Type Definition that you use.

  For example, you must validate the actual, physical Transmitter of the PRWORA data file, which may not be the same as the company defined within the PeopleSoft system. You are expected to go to the Report Type Definition page and update the Report Columns page and update the Override column with the applicable information.
- You are ultimately responsible for verifying the layout content prior to submitting to your reporting entities.

Setting up the New Hire Report

The New Hire Report provides an online method of defining the PRWORA Federal- and State-level reporting requirements. With it, you can select the fields you want included in your New Hire Report, define records and variables, set up report columns, and clone copies of a report. Once the report is customized for your purposes, you can generate the appropriate data/text file for electronic reporting.

Setting up the New Hire Report Layout

The New Hire Configuration page contains the federal and state report definitions used by PeopleSoft HCM to generate the electronic reporting files for a particular regulatory region or state. From this page you can view and customize the report definition layout. Only those states supporting electronic filing are listed.

Adding Fields to Reports

The Data Object definition is used to extract data from the database to generate the file layout and reports. Therefore, fields in the report must be part of a record that is defined as a child data object or a related data object in the Data Object definition for the report.

For example, PERSON_NAME is defined as a child in the PERSON Data Object definition, but neither PERSON nor PERSON_NAME is a related object for the JOB Data Object definition. To use the PERSON_NAME field in the report, you can relate it to the Data Object definition JOB, or you can add it as a child of PERSONAL_DATA, which is already a child of JOB.

You can see an example of this with PERS_NID_VW, which is defined as a child of HR_PERS_US_VW which in turn is used in the data definition for JOB.

Related Links

"Basic PeopleSoft HCM Reports: A to Z" (PeopleSoft HCM 9.2: Application Fundamentals)

Record Definition Page

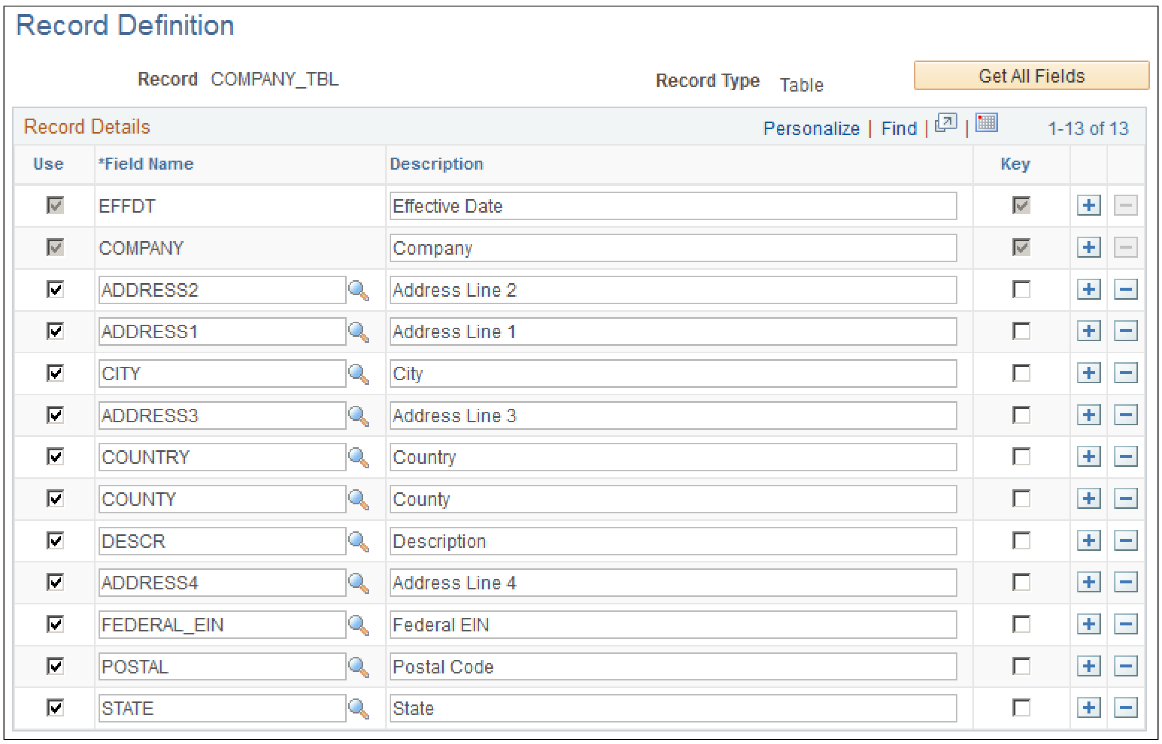
Use the Record Definition page (HR_RFW_RECDEFN) to define the PeopleSoft records used as a source for the reporting layout's required fields.

Navigation

Set Up HCM > Common Definitions > Electronic Reporting > Record Definition > Record Definition

Image: Record Definition page

This example illustrates the fields and controls on the Record Definition page. You can find definitions for the fields and controls later on this page.



Get All Fields	Select this button to bring in all fields of record.
Use	Select this check box to use this field in the report. deselect this check box to not use this field in the report layout.
Field Name	Actual database field name.
Description	This field defaults with the field description from the database object. This can optionally be overwritten to be more informative or to reflect the field description used by the reporting entity.
Key	Indicates whether the field is a database key on this record. PeopleSoft will default the keys of the record when it is initially defined. All key fields are grayed out and not editable by users.

Variable Definition Page

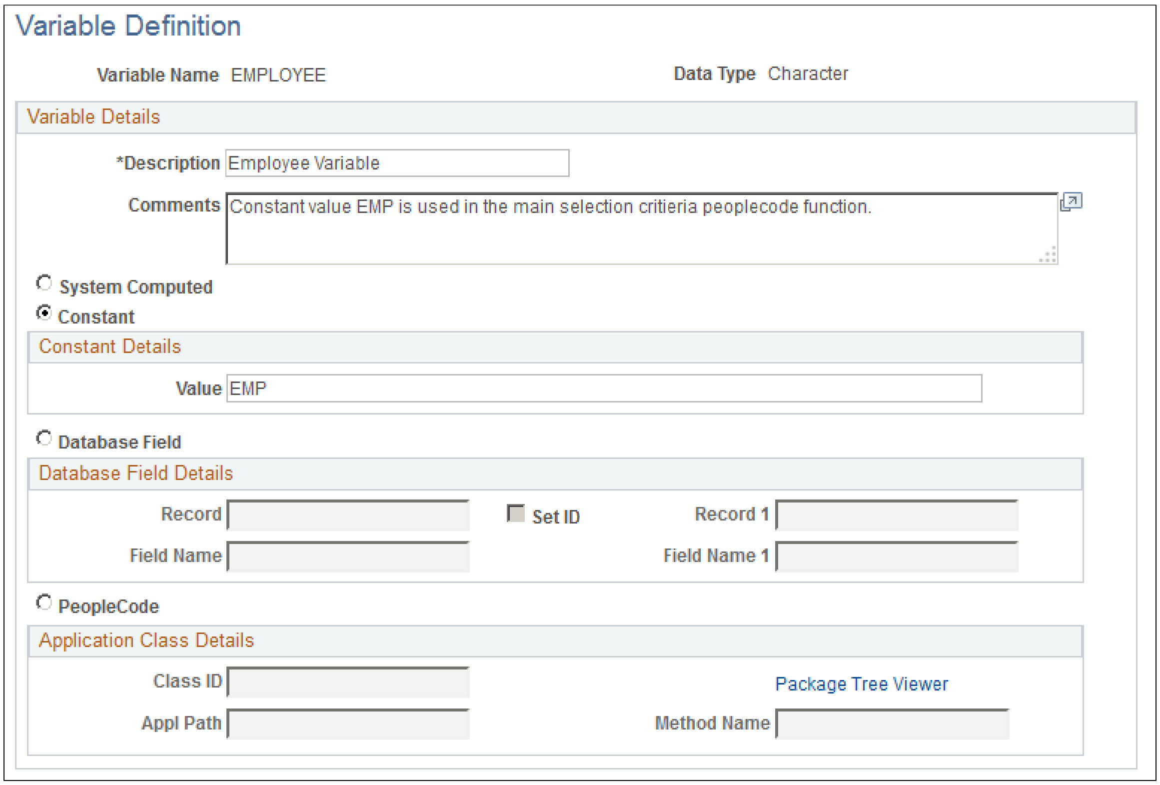
Use the Variable Definition page (HR_RFW_SYSVAR) to define variables (or tokens) used to calculate (or specify) a field.

Navigation

Set Up HCM > Common Definitions > Electronic Reporting > Variable Definition > Variable Definition

Image: Variable Definition page

This example illustrates the fields and controls on the Variable Definition page. You can find definitions for the fields and controls later on this page.



Use the Variable Definition page to define the variables that will be used in the creation of the New Hire Report. Variables are defined to address particular attributes of the file layout required by the reporting entity. Reporting entities can specify on their required file layouts general, report-wide attributes, or attributes specific to an individual field.

An example of a report-wide variable may be that the report requires only Employees to be contained in the report population. Other states may require that Contingent Workers (for example, consultants) also be included in the report population. Variables are defined for constant values (EMP or CWR, respectively). Another example of a report-wide variable is if all date fields must use a specific format (for example, MMDDYYYY). Variables are defined specifying each possible format.

Variables are later specified on the Report Type Definition and Report Columns layout pages.

The Database Field Details define which variable value will be resolved whenever data is fetched from the appropriate record.

Data Type	Specify the type of data required by the reporting entity.
System Computed	Indicate a variable is system-computed if the variable content is generated at run time by the New Hire process. These values are delivered and maintained by PeopleSoft.
Constant	Select if the variable must always have a designated value. Selecting this option enables you to enter data into the Constant Details section. Define a variable as a constant. Examples include: • Employees are always indicated with EMP. • Contingent workers are always indicated with CWR. • A hire action is always 'HIR'.
(Constant) Value	Enter the value of the Constant.
Database Field	Select to make the field available for entry and define the Database Field Details.
Record	If Database Field is selected, specify the database Record and Field Name from which the variable's value will be resolved.
Field Name	If Database Field is selected, specify the database Record and Field Name from which the variable's value will be resolved.
Set ID	Select this check box if the Record and Field Name are dependent upon the Set ID of another record and field being populated first in order to resolve the Record and Field.
Record 1	Populate this field when Set ID is selected. The set ID Record 1 and Field Name 1 must be resolved prior to deriving the value of Record and Field.
Field Name 1	Populate this field when Set ID is selected. The set ID Record 1 and Field Name 1 must be resolved prior to deriving the value of Record and Field.
PeopleCode	Choose this button in order to define the Application Class Details. This type of variable is created when more complex logic must be applied in order to determine the variable's value.
Class ID	Select the Class ID of the PeopleSoft Application Class. The application class must be written before defining this variable.
Package Tree Viewer	Click the *Package Tree Viewer* link to access the Application Packages Lookup page.
Path	Select the PeopleSoft Application Class Path of the Class ID. The application class must be written before defining this variable.

Method Name

Select the PeopleSoft Application Class Method Name of the Class ID. The application class must be written before defining this variable. Several methods are delivered, but you might have to add your own depending on the state's requirements.

Data Object Definition Page

Use the Data Object Definition page (HR_RFW_DSODEFN) to specify the database record and relationships between other database records to retrieve data from the database.

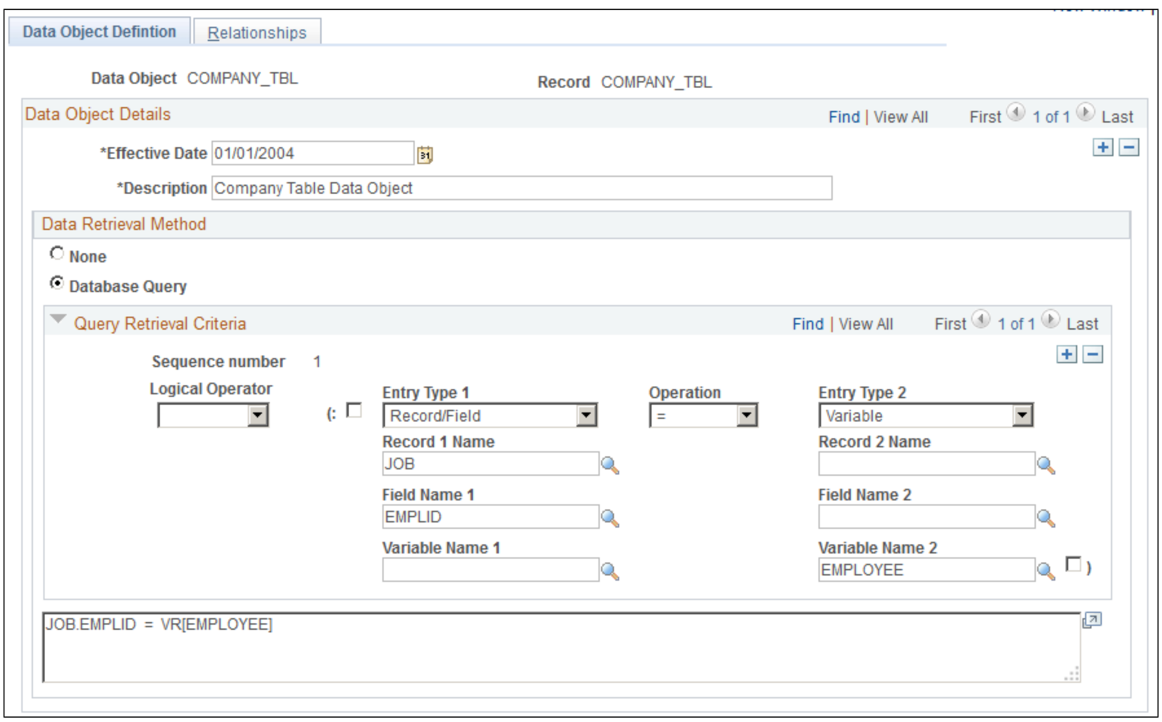
This definition is used to extract the data from the database to generate the file layout and reports.

Navigation

Set Up HCM > Common Definitions > Electronic Reporting > Data Definition > Data Object Definition

Image: Data Object Definition page

This example illustrates the fields and controls on the Data Object Definition page. You can find definitions for the fields and controls later on this page.



The Data Object Definition page defines which main record is used and the criteria used to select information from the database. It also indicates whether the data object will be used as Level Zero or main driving object to generate the report. Data is fetched from the database based on the selection criteria entered for the data object.

Record

The actual PeopleSoft record name.

Database Query

Select this radio button in order to build the query retrieval criteria.

Logical Operator

(AND, OR) These are logical operators. You use them within an IF statement. AND is used between two conditions. It indicates that both statements must be met for the selection to be made. For example, A and B must be true for a selection.

OR is used between two conditions. It indicates that only one of the statements must be met for selection to be made. For example, A OR B can be true for a selection.

Entry Type 1

Specify Record/Field or Variable type.

Operation

Relational Operators: Equal (=), Less than (<), Less than or equal (<=), Greater than (>), Greater than or equal (>=), Less than or Greater than (< >) (for example, not equal).

Relational operators compare two expressions and provide a truth value. You can use parentheses to group expressions or to enhance readability.

Record 1 Name

When the entry type is "Record/Field," specify the record in the condition.

Field Name 1

When the entry type is "Record/Field," specify the field in the condition.

Variable Name 1

When the entry type is "Variable," specify the variable in the condition.

Entry Type 2

Specify Record/Field or Variable type for comparison to Entry Type 1 values.

Record 2 Name

When the entry type is "Record/Field," specify the record in the condition.

Field Name 2

When the entry type is "Record/Field," specify the field in the condition.

Variable Name 2

When the entry type is "Variable," specify the variable in the condition.

Query

The actual query generated by the conditions defined in the Query Retrieval Criteria section. This area is read-only.

Data Definition - Relationships Page

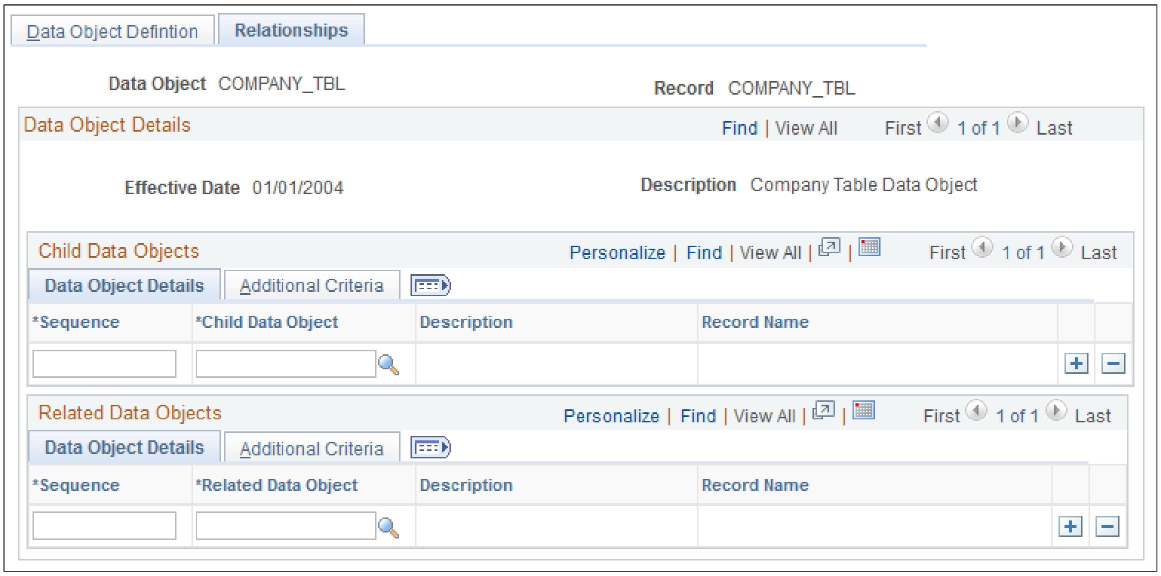
Use the Data Definition - Relationships page (HR_RFW_DSOREL) to define child and related data objects.

Navigation

Set Up HCM > Common Definitions > Electronic Reporting > Data Definition > Relationships

Image: Data Definition - Relationships page

This example illustrates the fields and controls on the Data Definition - Relationships page. You can find definitions for the fields and controls later on this page.



The Data Definition - Relationships page is used to define child and related data objects. More criteria can be used to define additional conditions required to fetch the data from the child and related data objects.

Sequence A unique number assigned to each child data object.

Child Data Object A pre-defined data object that is a child of the current data object.

Related Data Object A pre-defined data object that has a relationship to the current data object.

Additional Criteria Define additional conditions required to fetch the data from child and related objects.

Report Type Definition Page

Use the Report Type Definition page (HR_RFW_RPTDEFN) to define specific report attributes that apply across the entire report.

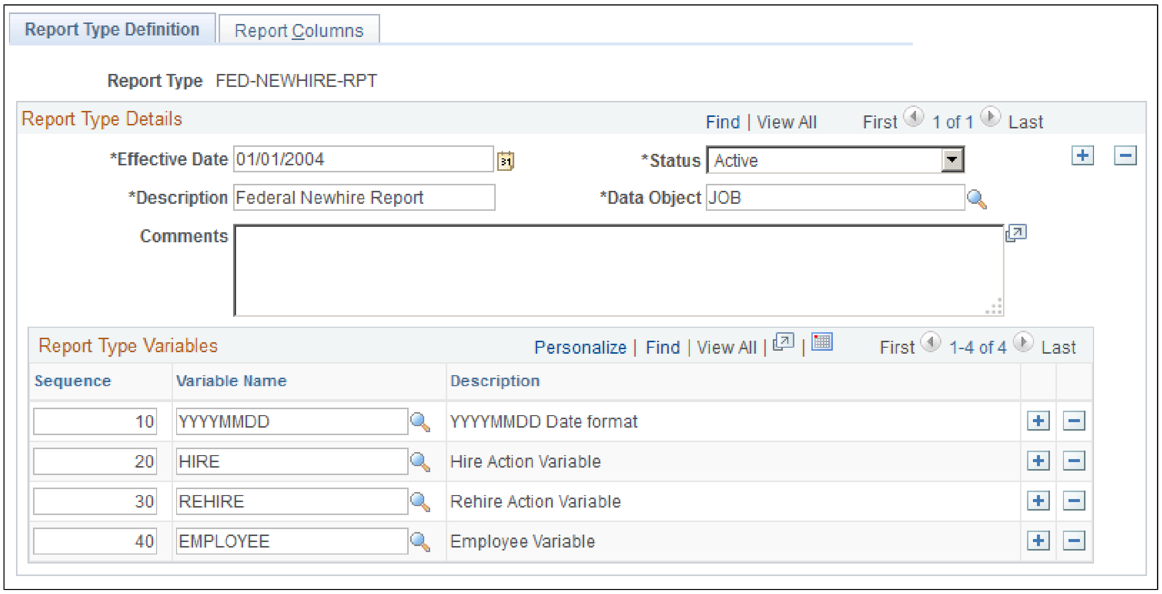
This information is specified by the reporting agency.

Navigation

Set Up HCM > Common Definitions > Electronic Reporting > Report Type Definition > Report Type Definition

Image: Report Type Definition page

This example illustrates the fields and controls on the Report Type Definition page. You can find definitions for the fields and controls later on this page.



This is the primary component used to define the electronic file layout definition template as required by the reporting entity (for example, the state or federal agency). There is a template defined for each state in this table. You probably need to modify the information on the Report Columns page where information is specific to your organization, particularly in the variable override field values.

On the Report Type Definition page, define any attributes that apply across the entire report. Attributes might include, for example, requiring that: any date fields are formatted YYYYMMDD, all numbers are left justified, and the report population should include all employees who are hired or rehired.

Effective Date Enter the best-known effective date of the state's file specification layout.

Status Indicate if a report type is *Active* or *Inactive.* There can be only one *Active* report type definition row.

Note: State reporting agencies will accept only one reporting format at a time. The system will issue an error message to enforce this business rule.

Data Object The primary record used as a basis to select the majority of information. New Hire Reporting (PRWORA) would most likely be the JOB record data object, where EEO or I-9 electronic reporting may be based on the PERSON record.

Sequence Enter a unique sequence number to control the order in which the table rows are read into the program

Variable Name Enter the name of the report-wide variable.

Note: PeopleSoft recommends that you leave gaps between the sequence numbers. Then if it becomes necessary to insert new rows between existing rows, you do not have to alter the sequence numbers in the subsequent rows.

Note: If your company is aware of up-coming changes to your state's file submission specifications, please contact Oracle Software Support (OSS) to log a case to inform us of the changes and give us time to react to the changes.

Report Columns Page

Use the Report Columns page (HR_RFW_RPTCOLS) to define the required columns as records and fields in the report layout (header, body, and trailer records) as specified by the reporting agency.

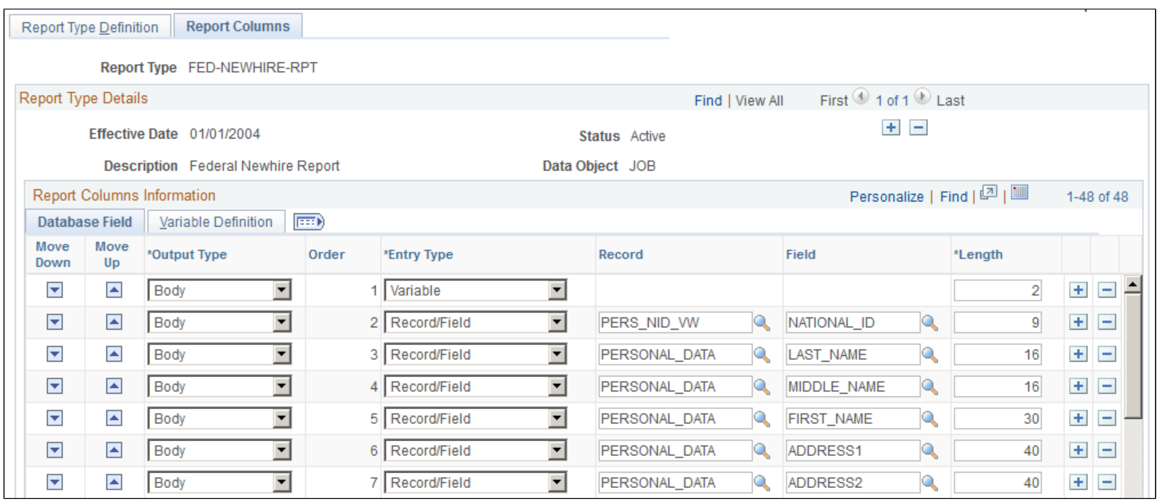
Attributes of the column can also be specified as a variable. Customer-specific values may be necessary in the "Override" column.

Navigation

Set Up HCM > Common Definitions > Electronic Reporting > Report Type Definition > Report Columns

Image: Report Columns page

This example illustrates the fields and controls on the Report Columns page. You can find definitions for the fields and controls later on this page.



On the Report Columns page, define all headers, body, and trailers of the actual report. List all fields (for example, columns) and any specific formatting required for each field. Use this page to define the various attributes like the column length, output type, column number (sequence) and if any special processing is required.

In case file layouts change over time, simply insert a new, effective-dated row and all the Report Type Details will be copied forward to the new row. Update the new row accordingly. Keep the original row intact, in case a retroactive electronic file submission is necessary at a later date.

Down Arrow	Used to move the active row down one (1) row at a time.

Up Arrow Used to move the active row up one (1) row at a time.

Output Type Specify if this row is for the *Header1, Header, Body, Trailer,* or *Trailer1*. The default is *Body.*

The output file is generated in this order:

```
HEADER 1 CONTENT
     HEADER CONTENT
          BODY CONTENT
     TRAILER CONTENT
TRAILER 1 CONTENT
```

Entry Type Select *Variable* or *Record/Field.* If *Record/Field* is selected, then the Record and Field combination values must be entered. If *Variable* is selected, the record and field combinations are unavailable for entry. The variable is then editable on the Variable tab, or when the fields are expanded.

Record The database record used as a prompt for on-line PRWORA processing. This is a prompt table for the Record Definition.

Field Valid values are any field defined on the PRWORA Field Definition table for the chosen record.

Length Indicate the length of the field to be used on the text file. This should be the length mandated by the reporting entity. This is specified here on the layout template, not at the PRWORA field definition page, because lengths can vary from state to state.

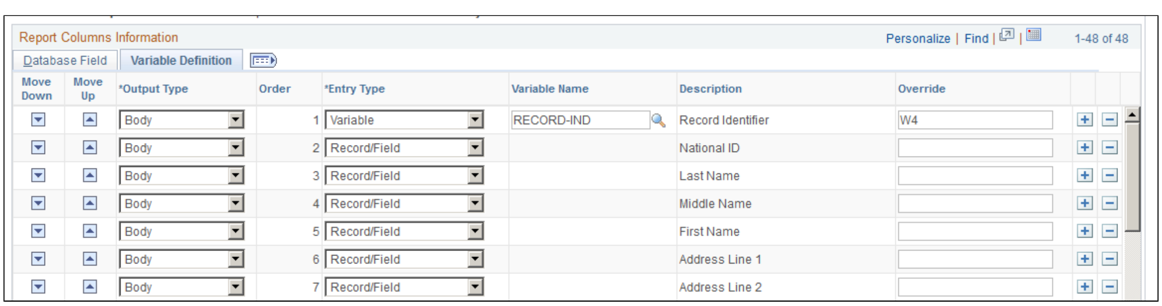
If the PeopleSoft field is longer than the Reporting Entity's defined length, the value will be truncated in the output file.

Report Columns page: Variable Definition Tab

Access the Report Columns: Variable Definition tab. Select the Variable Definition tab on the Report Columns page.

Image: Report Columns page: Variable Definition tab

This example illustrates the fields and controls on the Report Columns page: Variable Definition tab. You can find definitions for the fields and controls later on this page.



Variable Name Select from the pre-defined list of variables that will represent the required reporting content. At a minimum, become familiar with the variables that are referenced on the Report Type Definition you'll be using for your PRWORA file generation.

See Variable Definition Page.

Override

This field is visible and becomes available when it is necessary to provide a value that is specific to your organization and is applicable to all rows reported in the electronic file. This constant will be the value used during the PRWORA processing.

Note: Select Show All Columns to view all the report columns on one page.

Clone Report Type Page

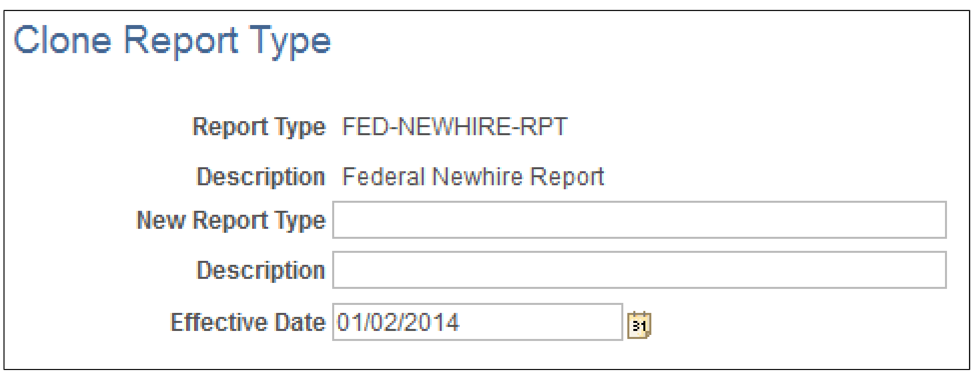
Use the Clone Report Type page (HR_RFW_RPTCLONE) to copy an entire existing report layout to a new report.

Navigation

Set Up HCM > Common Definitions > Electronic Reporting > Clone Report Type > Clone Report Type

Image: Clone Report Type page

This example illustrates the fields and controls on the Clone Report Type page. You can find definitions for the fields and controls later on this page.



Use this feature to copy an entire report type definition to a new report type.

Report Type

The report type template (and description) selected to be copied.

New Report Type

Provide a name for the new report type template along with a description.

Effective Date

Provide the effective date the new report type definition will become effective.

New Hire Report Configuration Page

Use the New Hire Report Configuration page (HR_RFWPRW_CONF) to the list of reporting entities (by state or federal) defined in the database.

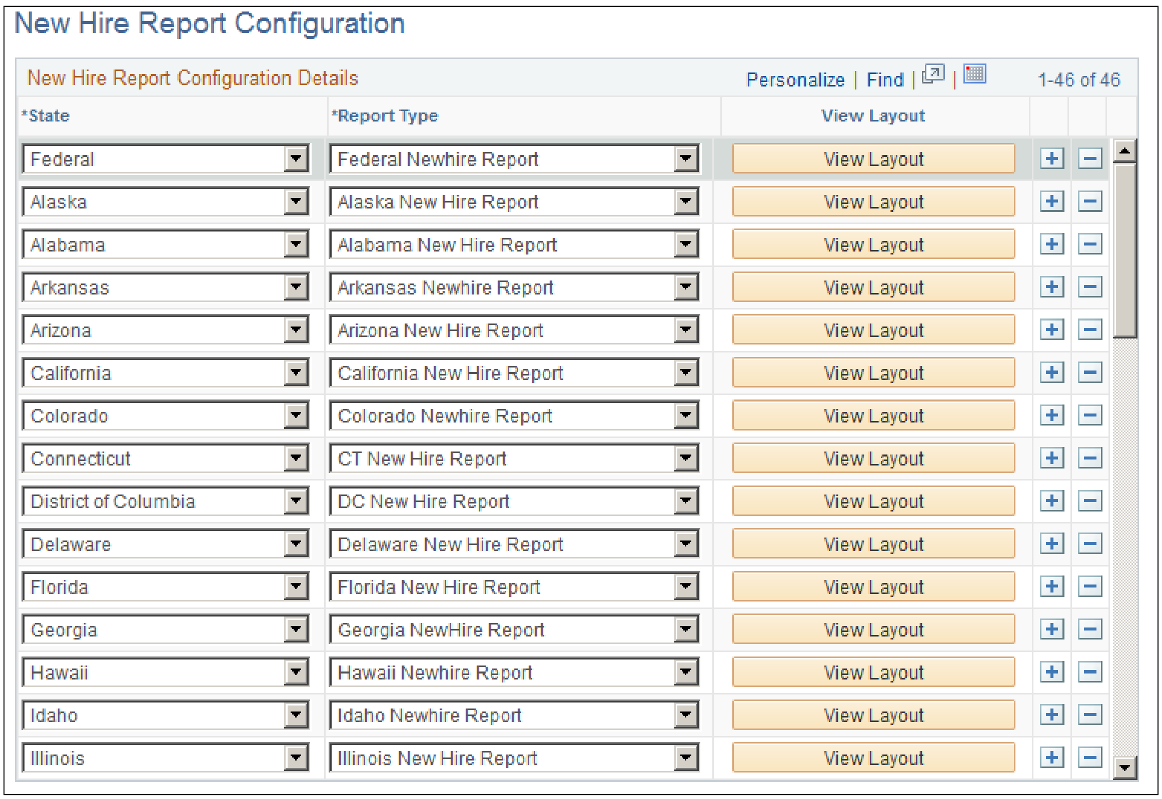
You can view the layout directly from this page. This information is used as a prompt for selecting which type of report and electronic file layout must be generated.

Navigation

Set Up HCM > Product Related > Workforce Monitoring > Regulatory Requirements > New Hire Report Configuration > New Hire Report Configuration

Image: New Hire Report Configuration page

This example illustrates the fields and controls on the New Hire Report Configuration page. You can find definitions for the fields and controls later on this page.



The New Hire Configuration page contains the actual file layout definitions which specify the content and layout of the resulting ASCII text output files. This page stores all federal and state report definitions used by PeopleSoft HCM and lists the entities currently supporting the New Hire (PRWORA) electronic reporting feature. If a state (or territory) does not submit new hire data electronically, that state (or territory) will not be listed.

This page is used later when selecting which layout to generate during the report generation process.

State	Select the state (or territory) or Federal reporting entity.
Report Type	Select the pre-defined report type definition that applies to the selected state (or reporting entity).
View Layout	Click to access the Report Type Definition page for the selected report type.

Meeting Equal Employment Opportunity and Affirmative Action Plan Reporting Requirements

Human Resources supports Equal Employment Opportunity/Affirmative Action Plan (EEO/AAP) reporting requirements by enabling you to classify jobs and positions filled by applicants and employees in specific gender and ethnic groups. Use this information to define affirmative action goals and timetables and generate the necessary government reports.

Requirements that have been set forth by the U.S. government have made it necessary that Affirmative Action plan and goal information be reported based on establishments and job groups. Regulations pertaining to EEO/AAP reporting are Executive Order 11246 (EEO) and Public Law 88-352, Title VII of the Civil Rights Act of 1964, as amended by the Equal Employment Act of 1972. Recordkeeping and reporting requirements have been amended by Title 41 of the Code of Federal Regulations part 60-2 (AAP reporting) and part 61-250 (VETS reporting).

Human Resources supplies standard reports with the appropriate information in the standard federal reporting format.

These topics discuss:

- Using U.S. establishment functionality.
- Setting up EEO reporting requirements.
- Understanding adverse impact reporting requirements.

Using U.S. Establishment Functionality

The U.S. government set requirements for Affirmative Action plan and goal information reporting based on establishments and job groups. The establishment/location allows for a many-to-many relationship to exist between location and establishment ID.

You can enter the regulatory region that is associated with the location. Select one or more establishment IDs for the location. You can also use the establishment-location relationship for Affirmative Action planning, EEO, Occupational Safety and Health Administration (OSHA), and other U.S. federal reporting regulations. Enter one or more location codes to associate with the establishment.

Note: In order for reports to be counted, populate the establishment ID on the job record for employees in U.S. locations.

See "Defining Establishments" (PeopleSoft HCM 9.2: Application Fundamentals).

See "Establishing Locations" (PeopleSoft HCM 9.2: Application Fundamentals).

Establishments in Affirmative Action Reporting

EEO reports are organized by *establishment.* A company's headquarters unit and each of its hiring locations are considered separate establishments. A single-establishment employer is required to file a single report.

A multi-establishment employer (doing business at more than one hiring location) files separate reports for each of the following locations:

- The organization's principal or headquarters office.
- Each hiring location employing 50 or more persons.

In addition, multi-establishment employers must file a consolidated report covering all establishments, as well as a list of all the establishments with less than 50 employees that are included in the tabulations on the consolidated report but for which no individual establishment report is filed.

Note: Human Resources does not provide consolidated reporting information for companies with a total of fewer than 50 persons if all establishments are located in a single state.

Setting Up EEO Reporting Requirements

The Equal Employment Opportunity Commission (EEOC) requires that most companies file one or more reports from the series EEO-1 through EEO-5. These reports count male and female employees in certain ethnic groups by federal employment categories. Before running the EEO reports, you need to set up the following data about your organization's establishments and EEO job categories:

1. Create U.S. establishments on the Establishment - Establishment Address page (Workforce Monitoring > Meet Regulatory Rqmts > Define Regulatory Rqmts Data > Establishments > Establishment Address).
2. Enter EEO job categories on the Job Code Table - Job Code Profile page (Set Up HCM > Foundation Tables > Job Attributes > Job Code Table > Job Code Profile).
3. Assign establishment IDs on the secondary page of the Location Table - Location Profile page (Workforce Monitoring > Meet Regulatory Rqmts > Define Regulatory Reqmts Data > Establishments > Go to Locations > Location Profile).

Understanding Adverse Impact Reporting Requirements

The Adverse Impact report (HRS001) provides analysis information on recruitment and hiring practices to help determine whether specific actions by an employer are influenced by ethnicity, sex, or other EEO/AA issues. The report compares employment hiring decisions for white males to members of ethnic minorities and females. The government requires certain employers to assess adverse impact annually. This report helps in determining the effect of EEO/AA issues on hiring practices and employee movements in an organization, such as promotions, transfers, and terminations.

Use the report to detect evidence of adverse selection within ethnic groups in the recruitment and hiring activities. The report compares white males, selected ethnic groups, and sex, and includes a total for each group and for each category as a whole. In addition to the count totals, the report calculates the ratio of total offers in each group to the total applicants in the group, and the impact on ethnic minorities as compared to white males.

Entering Applicant Data for the Adverse Impact Report

You need to enter certain data for job applicants and employees before you run the Adverse Impact report. The system recognizes a person as both a new hire and an applicant for purposes of the Adverse Impact report if you hire the person through the Hire component in PeopleSoft HR Administer Workforce.

However, if you enter a person as an applicant through PeopleSoft Talent Acquisition Manager, the system only counts the applicant for the Adverse Impact report if you complete certain fields on the

Applicant Personal Data page and the Application Data page. The following table shows the recruiting pages and fields that you must complete for the Adverse Impact report to run properly.

Affected Page	***Affected Fields***	***Comments***
Create Applicant page: Personal Information tab. (This is also available as the Manage Applicant page: Applicant Data tab: Personal Information subsection.)	First Name and Last Name	Must be completed.
Create Applicant page: Eligibility and Identity tab. (This is also available as the Manage Applicant page: Applicant Data tab: Eligibility and Identity subsection.)	Gender Ethnic Group (in the USA section of the page)	Must be completed.
Add Application Details page or Edit Application Details page.	Eligible to Work in U.S.	Value must be *Yes*.
Manage Job Opening page: Applicant Screening tab: Screening Results subsection.	Apply Results button Results Applied field in grid (read-only)	The application must have been through a standard screening process (not prescreening or online screening) and had the screening results applied.

Related Links

"Understanding Applicant Records" (PeopleSoft HCM 9.2: Talent Acquisition Manager)
"Understanding Profile Information in Job Applications" (PeopleSoft HCM 9.2: Talent Acquisition Manager)
"Entering Applicant Data" (PeopleSoft HCM 9.2: Talent Acquisition Manager)
"Understanding the Screening Process" (PeopleSoft HCM 9.2: Talent Acquisition Manager)

Meeting Job Group Movement Analysis Reporting Requirements

This topic provides an overview of the Job Group Movement Analysis report and discusses how to enter applicant data.

Understanding the Job Group Movement Analysis Report

The AAP Job Group Movement Analysis report helps you analyze which gender and ethnic groups are moving in and out of your organization or which groups are offered opportunities to advance. It reports the number of people in protected classes that are affected by specific job action categories. Use this report to see how employees move through career progressions within your company, especially if you are initiating or complying with affirmative action plans. It shows the number of people by ethnic group and gender being affected by specific personnel actions, including applications, offers, hires, promotions, and terminations in each job group.

Entering Applicant Data

The system recognizes a person as both a hire and an applicant for purposes of the Job Group Movement Analysis report if you hire the individual through the Hire component in Administer Workforce.

However, if you enter a person as an applicant through PeopleSoft Talent Acquisition Manager, the system only counts the applicant for the Job Group Movement Analysis report if you complete certain fields on the Applicant Personal Data page and the Application Data page. The following table shows the pages and fields in HR Recruiting that relate to the Job Group Movement Analysis report.

Affected Page	***Affected Fields***	***Comments***
Add New Applicant - Contact Details	Name	Must be completed.
Add New Applicant - Eligibility & Identity	Gender	Must be completed.
Applicant Data - Eligibility & Identity Page	Ethnic Group	Must be completed.
Application Details page	Eligible to Work in U.S.	Check box must be selected.
Job Opening - Screening Results Page	Apply Results button Results Applied field in grid (read-only)	The application must have been through a standard screening process (not prescreening or online screening) and had the screening results applied.

Related Links

"Understanding Applicant Records" (PeopleSoft HCM 9.2: Talent Acquisition Manager)

"Understanding Profile Information in Job Applications" (PeopleSoft HCM 9.2: Talent Acquisition Manager)

"Entering Application Details" (PeopleSoft HCM 9.2: Talent Acquisition Manager)

"Understanding the Screening Process" (PeopleSoft HCM 9.2: Talent Acquisition Manager)

Meeting VETS Reporting Requirements

These topics provide an overview of VETS reporting and discuss VETS reporting requirements.

Understanding VETS Reporting

VETS-4212 Report

If you are a federal contractor or subcontractor who hires and employs veterans under provisions of the Vietnam Era Veteran’s Readjustment Assistance Act (VEVRAA), and you have contracts or subcontracts totaling $100,000 or more, you need to file the VETS-4212 report annually to the Department of Labor (DOL) by September 30 of the following year.

Effective August 1, 2015, the VETS-4212 report replaces the VETS-100A report as a result of a final rule published by DOL. The new report has a simpler format and contains fewer reporting elements than the old report. As a contractor, you are required to report the total number of protected veterans in your workforce in the aggregate, as opposed to listing the number for each category of veterans protected under the statute.

Under the VEVRAA, the term *protected veterans* includes disabled veterans, veterans who served on active duty during war or campaign for which a campaign badge was authorized, veterans who were awarded an Armed Forces Service Medal, and recently separated veterans.

Beginning with the 2015 filling cycle, the DOL accepts the VETS-4212 report format only. You will use the VETS Reports components to select the appropriate report type for a given period and generate the relevant data, informational report, and the respective electronic report.

VETS-100A Report

Note: The VETS-100A report applies to covered contracts entered into or modified on or after December 1, 2003. Effective August 1, 2015, the VETS-100A report is no longer used for veteran employment reporting. However, you can still generate them with historical data for internal use, if needed.

VETS-100 Report

Note: The VETS-100 report applies to covered contracts entered into before December 1, 2003. Effective August 1, 2015, the VETS-100 report is no longer used for veteran employment reporting. However, you can still generate them with historical data for internal use, if needed.

Setting Up the VETS Report

If you are a federal contractor subject to VETS reporting requirements, you must set up specific company, establishment, job code, and employee information in your system before you run the VETS report. For a list of tables and fields that need to be completed prior to running the VETS report, see the Entering Data for the VETS Report topic.

After the core tables have been set up, you will need to perform the following tasks to create and submit the VETS-4212 file for submission:

1. Run the VETS Process for report type VETS-4212 to perform the calculations and load the values into a temporary table
2. Run the VETS Analysis process to generate an information report of the findings (optional and for internal use). This displays the data that would get submitted to the government when completing the submit process and can be used for validation purposes.
3. Run the VETS Submit process that uses the temporary file data to create the digital file for submission. Note that this does not automatically submit the report to the DOL website.

For page information, see Pages Used to Run the U.S. Regulatory Reports.

Note: Because the VETS report is complex and time consuming to run, you should run the process on a high-powered server at a time when it is not heavily used. You can also run the process by establishment over the course of a few days, rather than running it for all employees at once.

Using Military Discharge Date

Use the Military Discharge Date to enter the discharge date for employees. This date is used to determine which veterans qualify for the Recently Separated Veteran designation. The Military Discharge Date provides accurate data for the following year's reporting cycle. Recently Separated Veterans are determined by verifying that a valid military status is selected and that the military discharge date is within 365 days of the reporting date.

Establishments in VETS Reporting

VETS reporting is organized by establishment. A company's headquarters unit and each of its hiring locations are considered separate establishments. A single-establishment employer files a single completed form.

A multi-establishment employer (doing business at more than one hiring location), files separate forms for each of the following locations:

- The organization's principal or headquarters office.
- Each hiring location employing 50 or more persons.
- Each hiring location employing fewer than 50 persons.

The USF Vets-100 by POI (U.S. federal veterans-100 by personnel office identifier) report generates a Veterans employment report by POI.

The USF Vets-100 by Sub-Agency report generates a Veterans employment report by sub-agency.

VETS Process

Because the VETS report is complex and time consuming to run, PeopleSoft has separated the process from the report. Run the process on a high-powered server at a time when it is not heavily used. You can also run the process by establishment over the course of a few days, rather than running it for all employees at once.

The VETS Process collects the data and stores it in a temporary table. No report is created for viewing in this process. The data stays in this table until you run the VETS Analysis or VETS Submit process for it. Running the VETS Process successive times does not delete or overwrite data unless you run it twice for the same establishment or fail to run the VETS Submit process between reporting years.

VETS Analysis

The VETS Analysis process generates an informational, easy-to-read version of the veterans employment report in the PDF format for analysis and referencing purposes. Running this report does not affect the data in the temporary table. Make sure to run the VETS Process before running this report. You can also use the VETS Analysis process to report on VETS history; however, you cannot report on years before 2000.

Run the VETS Submit process to create a formatted text file for the veterans employment report and submit it to the government.

VETS Submit

The VETS Submit process creates a digital file that meets the VETS specifications using the data in the temporary table and transfers the data from the temporary table to a history table. The VETS Submit process only removes data from the temporary table that should be written to the digital file. If the temporary table contains data for the entire organization and you run the VETS Submit process for the headquarters only, data for establishments outside of headquarters remains in the temporary table until you run the VETS Submit process to capture it. You can also use the VETS Submit process to recreate a digital file based on VETS history.

When calculating the minimum and maximum employee counts, PER027.SQR uses a method in which the first day of the selected reporting period is compared to the last day of the reporting period. The day with the most employees is considered the maximum count, while the day with the fewest is considered the minimum count. This method is very broad and VETS does not prefer this method. However, the preferred method according to VETS regulation is not required and the method used is subject to the discretion of the employer reporting the data.

Entering Data for the VETS Report

Before you run the VETS Process, complete the tables and fields required for the report.

Affected Page	***Affected Fields***	***Comments***
"Company - Company Location Page" (PeopleSoft HCM 9.2: Application Fundamentals)		The company must be set up for the report to run properly.
Company - "Default Settings Page" (PeopleSoft HCM 9.2: Application Fundamentals)	Federal EIN (federal employer's tax identification number)	This nine-digit number assigned by the Internal Revenue Service is required for VETS reporting.
Establishment - "Establishment Address Page" (PeopleSoft HCM 9.2: Application Fundamentals)	Establishment Description Address Headquarters Unit	Each company for which you perform VETS reporting must identify an establishment as its headquarters unit. A company is a single-establishment company, if this establishment is also the headquarters unit. If the company is a multi-establishment company, you must designate an establishment as the headquarters unit. This setup is essential for the VETS Process to work properly.
Establishment - "Establishment Address Page" (PeopleSoft HCM 9.2: Application Fundamentals)	North American industrial classification system code (NAICS code) Vet 100 Unit Number Dun and Bradstreet Number EEO-1 Govt Contractor Type	This is a six-digit classification code that identifies the industrial classification of your company's primary economic activity. This information appears on the VETS report. If the government requires you to provide a standard industrial classification (SIC) code instead of a NAICS code, enter it in the NAICS field. The government no longer uses the Vet 100 Unit Number for VETS reporting. Use this field to enter the company number provided by the Department of Labor. The Dun and Bradstreet number is also referred to as the DUNS number or the Dun and Bradstreet Universal Numbering System. Select a contractor type in the EEO-1 Govt Contractor Type field. Do not select *Not Applicable.*

Affected Page	***Affected Fields***	***Comments***
Job Code Table - "Job Code Profile Page" (PeopleSoft HCM 9.2: Application Fundamentals)	Job code EEO-1 Job Category	If you are a federal contractor subject to VETS reporting requirements, you must report on all employees within your company. All of the job codes must be linked to an EEO-1 job category, and all employees must be assigned a job code. Do not select *No EEO-1 Reporting* in the EEO-1 Job Category field. When you assign a job code to an individual employee in the Job Data component, the employee is automatically linked to an EEO-1 job category. When you run the VETS report, the system processes the employee's veteran status information and combines it with other employees within the same EEO-1 job category. The system selects the EEO-1 job category information as of the report run date.
Add New Applicant - Eligibility/Identity Page	Military Status	(For VETS-100 report only) If you select *Vietnam-Era Veteran* as an employee's military status, the system includes the employee in the count for the Vietnam Era Veterans column of the VETS-100 report. You can also select *Other Protected Veteran* for a valid employee to be included in the VETS-100 report.
"Add a Person or Modify a Person - Regional Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)	Military Status	Select *Armed Forces Service Medal Vet, Veteran of the Vietnam Era, Other Protected Veteran,* or *Vietnam & Other Protected Vet* for a valid employee to be included in the VETS report.
"Maintain Military Dischrg Date Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)	Military Discharge Date	When you select *Recently Separated Veteran* as the military status of an employee on the "Add a Person or Modify a Person - Regional Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce), the system includes the employee in the report, if the specified military discharge date is within the 3-year period prior to the report start date (VETS report).
"Work Location Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)	Establishment ID	A valid employee must be associated to an establishment to be included in the report.
"Disability Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)	All	If you select the Disabled Veteran check box for an employee, the system includes the employee in the Protected Veterans column of the VETS report.

Related Links

(USA, USF) Understanding ADA Regulatory Requirements in the U.S.

Running the U.S. Regulatory Reports

This topic discusses U.S. regulatory reports and how to run the EEO-1 Job Analysis report.

Pages Used to Run the U.S. Regulatory Reports

Page Name	***Definition Name***	***Usage***
Adverse Impact Analysis Page	RUN_CNTL_REG	Run the Adverse Impact report (HRS001) to provide information on recruitment and hiring practices.
Job Group Movement Analysis Page	RUN_CNTL_REG	Run the Job Group Movement Analysis report (HRS002) to provide gender and ethnic group movements in and out of an organization and track career patterns.
Terminations Analysis Page	RUN_CNTL_REG	Run the Terminations Analysis report (PER019) which analyzes terminations within your organization.
Job Group Analysis Page	RUN_CNTL_REG2	Run the Job Group Analysis report (PER024) to analyze the makeup of your workforce based on skills groups.
Job Group Analysis Summary Page	RUN_CNTL_REG2	Run the Job Group Analysis Summary report (PER024A) to analyze the makeup of your workforce based on job groups.
Workforce Analysis Page	RUN_CNTL_REG2	Run the Workforce Analysis report (PER025). This report tracks hiring practices by department based on job titles.
Job Group Roster Page	RUN_CNTL_REG2	Run the Job Group Roster report (PER030), which lists employees in job groups in job title order. It includes the ethnic background and the current salary information.
EEO-1 Employer Info Page	RUNCTL_PER016	Run the EEO-1 Employer Information report (PER016). Use EEO Report Run Type to distinguish between a formal Government run *(Govt Run)* or an Informational run *(Info Rpt)*. Select *Govt Run* as the type only when preparing reports for the government. At any other time, select *Info Rpt.*
EEO-1 Job Analysis Report Page	RUNCTL_PER017	Run the EEO-1 Job Analysis report (PER017). This report supplies standard job category counts instead of employee counts for the private sector.
EEO-4 State/Local Govt Page	RUNCTL_PER031	Run the EEO-4 State and Local Government report (PER031). This report provides employment counts in the prescribed format for state and local governments.

Page Name	***Definition Name***	***Usage***
EEO-5 Job Analysis Page	RUNCTL_PER022	Run the EEO-5 Job Analysis report (PER022). This report supplies standard job category counts for school-related categories.
OSHA-200 Log Page (Occupational Safety and Health Administration – 200 log)	RUNCTL_CALENDARYR	Run the OSHA-200 Log report (OHS001). This report lists the case numbers and details of each injury and illness that occurred during a particular calendar year.
OSHA 301 Incident Report - Report Data Page	OSHA_301_SELECT	Create OSHA-301 incident reports. To create a new OSHA-301 incident, you must have an incident that has been specified as being OSHA reportable. The OSHA-301 data is kept distinct from your incident data, but uses the incident data as a starting point. This allows you to tailor the data in your OSHA-301 report to make sure it meets OSHA requirements without having to make changes to the original incident data.
OSHA 300 Incident Log Page	RUN_CNTL_OSHA_REG1	Generate the OSHA 300 log. The OSHA-300 Log is calculated from Incident and Injury data stored in your system, and not from the data entered in the OSHA-301 report. The report includes all incidents that resulted in injuries specified as OSHA Reportable. Reports are run by establishment, so the establishment value should be populated for all incidents with reportable injuries.
OSHA 300A Annual Summary Page	RUN_CNTL_OSHA_REG1	Generate the OSHA 300A Summary report. This report provides an overview of the data contained in the OSHA-300 Incident Log. The values in this summary are determined using the same algorithms and the same source data as the OSHA-300 report. This report can be run separately for each establishment, run for all establishments, run for establishments in a company, or run for headquarter and controlled establishments. A PDF report will be generated separately for each establishment. The OSHA 300A Annual Summary run control page also enables the user to generate a single consolidated csv file to support electronic filing. The file content is based on the filter criteria selected on the run control page.

Page Name	***Definition Name***	***Usage***
VETS Process Page	RUNCTL_PER027	Run the VETS Process (PER027). This report lists federal job categories and the number of employees and new hires in the last 12 months who are disabled veterans or Vietnam veterans.
VETS Analysis Page	RUNCTL_PER027C	Run the VETS Analysis report (PER027C). This reports on the VETS data created by the VETS process.
VETS Submit Page	RUNCTL_PER027C	Run the VETS Submit report (PER027C). This report creates the digital file ready for submission to the government.
IPEDS-S Report Page (Integrated Postsecondary Education Data System-Full Staff Survey report)	RUNCTL_PER040	Run the IPEDS-S (Fall Staff Survey) report (PER040). This report is a mandatory report for U.S. higher education institutions that receive funding from a U.S. Federal government program. The report is divided into separate parts for different types of employee: full-time faculty members, other full-time employees, part-time employees, and new hires.

EEO-1 Job Analysis Report Page

Use the EEO-1 Job Analysis Report page (RUNCTL_PER017) to run the EEO-1 Job Analysis report (PER017).

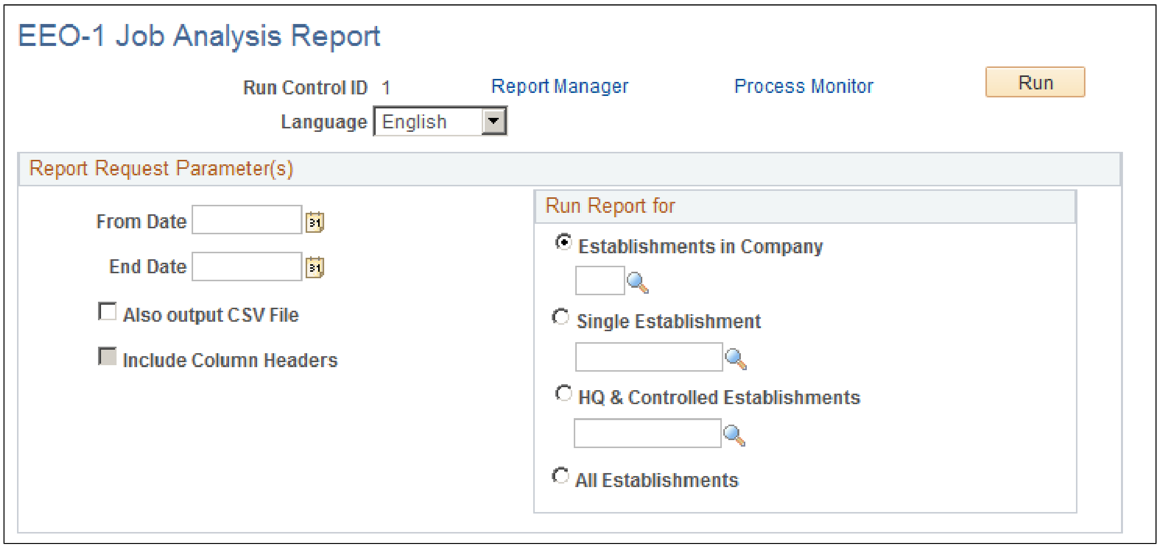
This report supplies standard job category counts instead of employee counts for the private sector.

Navigation

Workforce Monitoring > Meet Regulatory Rqmts > EEO Reports > EEO-1 Job Analysis Report > EEO-1 Job Analysis Report

Image: EEO-1 Job Analysis Report page

This example illustrates the fields and controls on the EEO-1 Job Analysis Report page. You can find definitions for the fields and controls later on this page.



From Date and **End Date**	Use to set the date parameters of the report. Results are retrieved only for job categories filled between these dates.
Also output CSV file (also output to comma-separated value file)	Select to print the CSV file along with the EEO-1 Job Analysis report.
Include Column Headers	Select to include column headings in the CSV file. This check box becomes available when Also output CSV file is selected.
Establishments in Company	Enter a three character company code to run the EEO-1 report for a single company. The report will be run for all establishments associated with the company code and an electronic data file will be created for each company's report. The company code provided is appended to the data file name.
Single Establishment	Enter an establishment code to run the EEO-1 report for a single, non-controlled establishment.

Related Links

"Meet Regulatory Requirements Reports" (PeopleSoft HCM 9.2: Application Fundamentals)

VETS Process Page

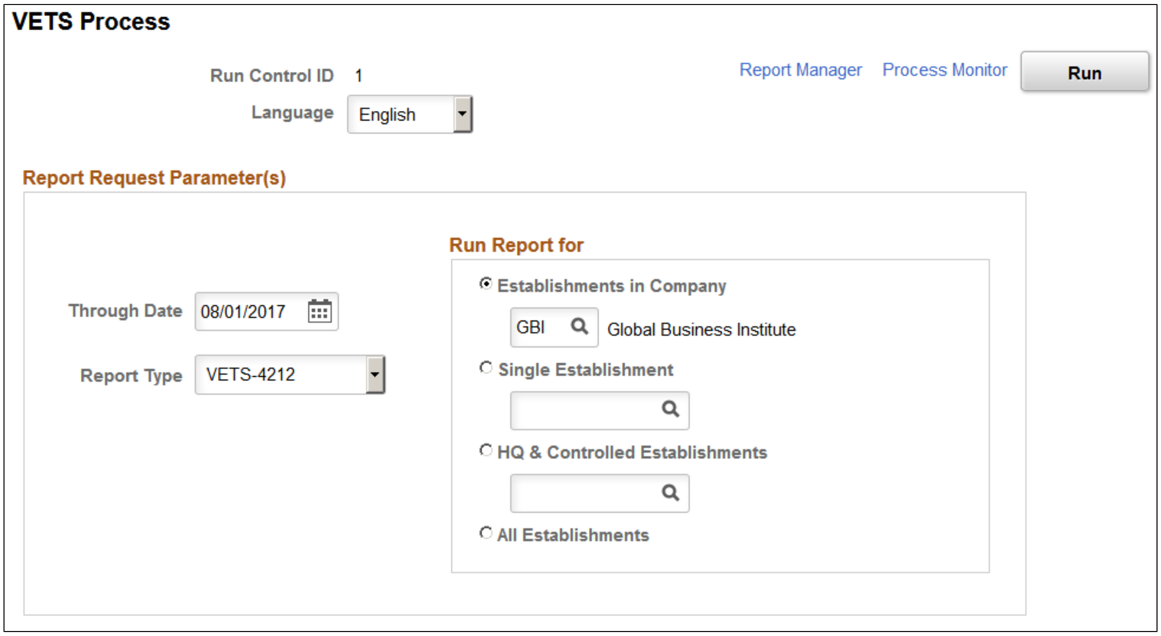
Use the VETS Process page (RUNCTL_PER027) to run the VETS Process (PER027). This report lists federal job categories and the number of employees and new hires in the last 12 months who are classified as protected veterans.

Navigation

Workforce Monitoring >Meet Regulatory Rqmts >VETS Reports >VETS Process

Image: VETS Process page

This example illustrates the fields and control on the VETS Process page.



Report Type

Select from one of the following report types: *VETS-4212*, *VETS-100*, or *VETS-100A*.

Note: As of the August 1, 2015 filing cycle, the governemnt will accept on ly the VETS-4212 rpoert. However, the PeopleSoft application will maintain the functionality to generate the VETS100 and VETS-100A reorts for organiztaion that wish to generate rpeorts on older data, if needed.

When you select the *VETS-4212* report type, the process will retrieve and store relevant data needed for the VETS-4212 report in the temporary tables. This data will then be used by the VETS Analysis process to generate an informational report and then by the VETS Submit process to generate the electronic report that can be submitted to the VETS.

Note: No report is created for viewing in this process. Also, the data stays in the temporary tables until you run the VETS Analysis or VETS Process for it. Running the VETS Process successive times does not delete or overwrite data unless you run it twice for the same establishment or fail to run the VETS Submit process between reporting years.

VETS Analysis Page

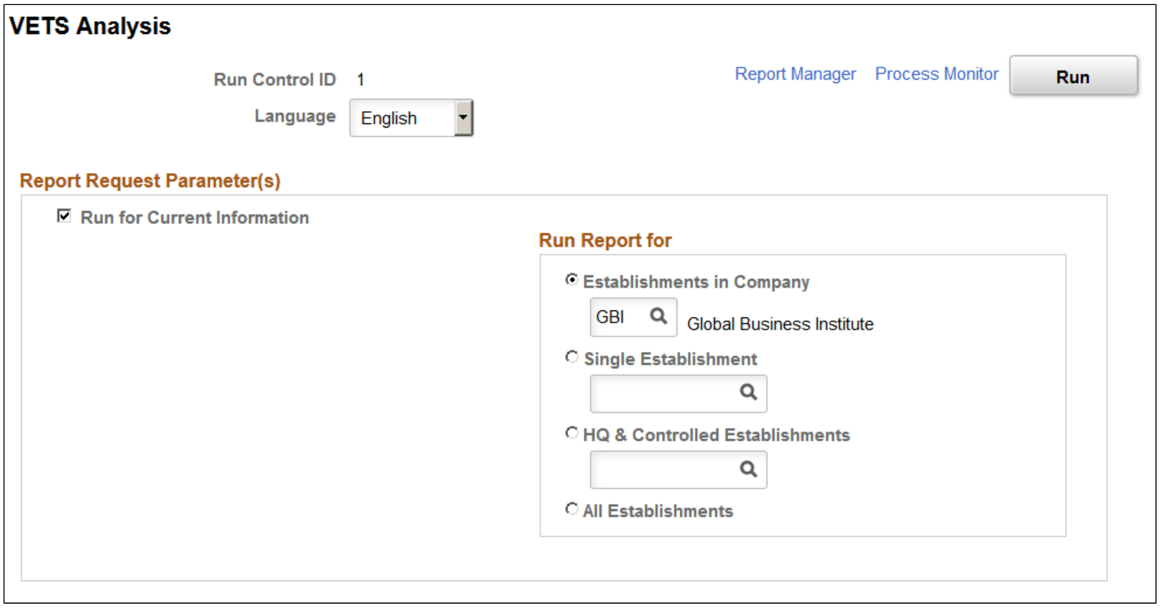
Use the VETS Analysis page (RUNCTL_PER027C) to run the VETS Analysis report (PER027B) to generate a report on the VETS data created by the VETS Process.

Navigation

Workforce Monitoring >Meet Regulatory Rqmts, >VETS Reports >VETS Analysis

Image: VETS Analysis page

This example illustrates the fields and control on the VETS Analysis page.



The VETS Analysis process generates an informational, easy-to-read version of the veterans employment report in the PDF format for analysis and referencing purposes. Running this report does not affect the data in the temporary table. Make sure to run the VETS Process before running this report.

You can also use the VETS Analysis process to report on VETS history; however, you cannot report on years before 2000. To run historical data, deselect the Run for Current Information check box to display the History Year to Run for and Report type fields and enter the specified information.

Note: You will still need to run the VETS Submit process to create the formatted text file for the veterans employment report to submit to the government.

Note: For the VETS-4212 report, contractors offer self-identification only as a Protected Veteran instead of being listed within individual categories, as they do for the VETS-100 or VETS-100A reports. Therefore, in the VETS-4212 report, a person should only be counted once as a Protected Veteran, even if he or she is identified in multiple categories. In the VETS-100 and VETS-100A reports, if a veteran falls into multiple categories they are counted in each category of the report for which they meet the defined criteria.

VETS Submit Page

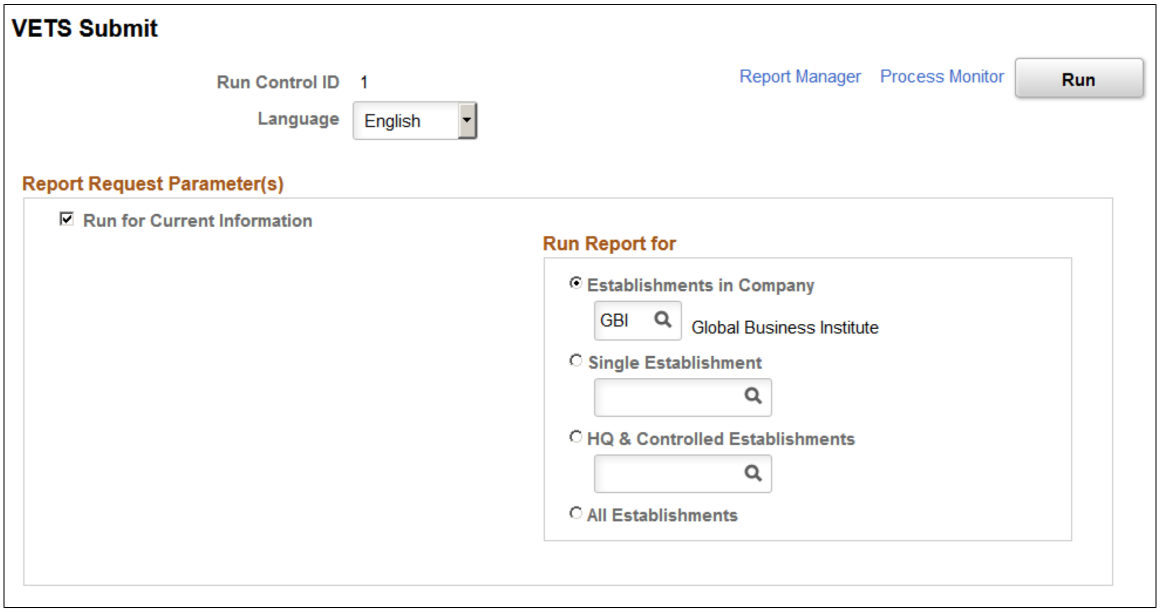
Use the VETS Submit page (RUNCTL_PER027C) to run the VETS Submit report (PER027C) to create the digital file ready for submission to the government.

Navigation

Workforce Monitoring >Meet Regulatory Rqmts, >VETS Reports >VETS Submit

Image: VETS Submit page

This example illustrates the fields and control on the VETS Submit page.



The VETS Submit process creates a digital file that meets the VETS-4212 record specifications using the data in the temporary table and transfers the data from the temporary table to a history table. The electronic file can then be submitted to the government.

Note: The VETS Submit process only removes data from the temporary table that should be written to the digital file. If the temporary table contains data for the entire organization and you run the VETS Submit process for the headquarters only, data for establishments outside of headquarters remains in the temporary table until you run the VETS Submit process to capture it.

You can also use the VETS Submit process to recreate a digital file based on VETS history. To run historical data, deselect the Run for Current Information check box to display the History Year to Run for and Report type fields and enter the specified information.

When calculating the minimum and maximum employee counts, PER027.SQR uses a method in which the first day of the selected reporting period is compared to the last day of the reporting period. The day with the most employees is considered the maximum count, while the day with the fewest is considered the minimum count. This method is very broad and VETS does not prefer this method. However, the preferred method according to VETS regulation is not required and the method used is subject to the discretion of the employer reporting the data.

Generating the PRWORA New Hire Report and Electronic File

These topics discuss running the PRWORA New Hire report.

Page Used to Generate the New Hire Report and Electronic File

Page Name	***Definition Name***	***Usage***
New Hire Report Generation Page	RUN_RFWPRW_HR	Provide the criteria necessary to create the electronic report, along with a standard state (or Federal) PRWORA New Hire Report. This report is generated as an Adobe (PDF) file.
New Hire Report Log Page	HR_RFWPRW_LOG	Provide basic information about the resulting electronic file (who ran it, run date, PID, State format used, From/Thru Dates and File name).

Running the New Hire Report and Electronic File Process

The Generate New Hire Report & Electronic File Application Engine process (HR_RFWPRW_AE) creates an electronic file based on the current State and Federal configuration data defined in the Electronic Configuration Definitions.

Your organization is responsible for physically getting this data file to the Department of Health & Human Services (DHHS) and/or to the respective state Welfare/New Hire Reporting agency.

New Hire Report Generation Page

Use the New Hire Report Generation page (RUN_RFWPRW_HR) to provide the criteria necessary to create the electronic report, along with a standard state (or Federal) PRWORA New Hire Report.

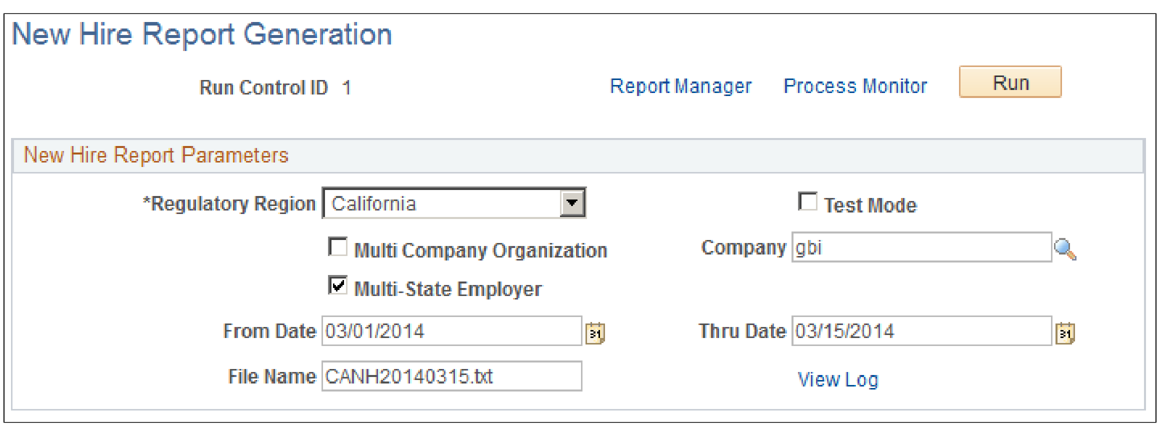
This report is generated as an Adobe (PDF) file.

Navigation

Workforce Monitoring > Meet Regulatory Rqmts > Regulatory Reports > PRWORA-Newhire > New Hire Report Generation

Image: New Hire Report Generation page

This example illustrates the fields and controls on the New Hire Report Generation page. You can find definitions for the fields and controls later on this page.



Regulatory Region	Select the format of the electronic report you wish to generate.
Test Mode	Select this check box to insert an asterisk in place of a space. This is used when verifying the actual content of the electronic file. When the New Hire Report is created, not in test mode, spaces will exist where intended.
Multi Company Organization	Select this check box if your implementation applies for multiple companies. The system will then select all New Hires according to the Report Type Definition for all companies.
Company	Provide a company name if the New Hire process is for a single company.
Multi-State Employer	Select to indicate that your company has multiple locations, but reports all employees only to a single state in that state's specified format.
From Date and**Thru Date**	Select the date range of the New Hire Report.
File Name	Provide the name of the resulting output filename to be specified by the user. State file submission requirements provide guidelines for this naming convention. Organizations are responsible for providing a compliant file name. This field is unavailable for entry out if this is for a Federal report.
View Log	Click to access the New Hire Report Log page.
Run	Click to run the application engine program (HR_RFWPRW _AE). This process generates the electronic file along with a standard state or Federal New Hire listing (as an Adobe Acrobat file), depending on the reporting agency.

New Hire Report Log Page

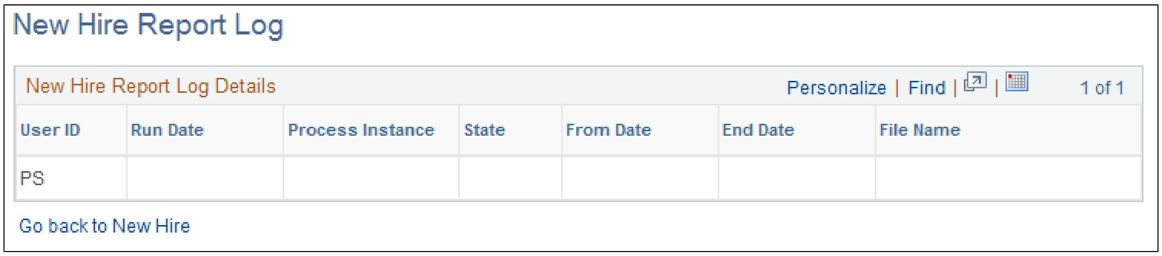
Use the New Hire Report Log page (HR_RFWPRW_LOG) to provide basic information about the resulting electronic file (who ran it, run date, PID, State format used, From/Thru Dates and File name).

Navigation

Click View Log on the New Hire Report Generation page.

Image: New Hire Report Log page

This example illustrates the fields and controls on the New Hire Report Log page. You can find definitions for the fields and controls later on this page.



When the New Hire Report & Electronic File process is run, the New Hire Report Log is updated with basic information about the electronic file, including output filename, reporting period, number of employee and employer records, date time stamp and what user ID ran the report.

It is up to the implementation team to purge the log files as necessary.

Related Links

"Meet Regulatory Requirements Reports" (PeopleSoft HCM 9.2: Application Fundamentals)

Chapter 8

(USF) Performing Regulatory Processing and Reporting

Understanding Regulatory Requirements for U.S. Federal Agencies

The PeopleSoft system provides these U.S. federal agency regulatory reports and submissions:

- CPDF Error.
- CPDF Dynamics Submission.
- CPDF Status Submission.
- EEO Groups by PATCOB/POI.
- EEO Groups by PATCOB/SubAgency.
- EEO Groups by Series/POI.
- EEO Groups by Series/Sub-Agency.
- Monthly Report of Federal Civilian Employment (SF113-A).
- Full-time Equivalent/Work-Year Civilian Employment (SF113-G).
- VETS - 100 by POI.
- VETS - 100 by Sub-Agency.

Related Links

Understanding U.S. Regulatory Requirements

Setting Up Control Tables for Regulatory Reports

To set up the control tables to meet U.S. federal regulatory requirements, use the CPDF Fields USF (GVT_CPDF_FIELDS) and Regulatory Edits USF (GVT_CPDF_EDIT) components.

Set up information in the following tables to meet U.S. federal regulatory requirements.

These topics discuss setting up control tables for regulatory reports.

Pages Used to Set Up Control Tables for Regulatory Reports

Page Name	***Definition Name***	***Usage***
CPDF Fields USF Page	GVT_CPDF_FIELDS	Verify or add fields for CPDF processing. Complete the CPDF Fields USF page for every data element required in your agency's CPDF submissions.
Prefixes and Fields Page	GVT_CPDF_PREFIX	Specify the CPDF edit prefix, category and ID, and fields used in the edit. The three-digit edit prefix identifies the data element subject to the edit.
Edits Page	GVT_CPDF_EDIT	Specify the edit content.
OPM CPDF Maint Details Page (Office of Personnel Management CPDF Maintenance Details)	GVT_OPM_EDITUPDT	Track Office of Personnel Management (OPM) update maintenance details and history.

CPDF Fields USF Page

Use the CPDF Fields USF page (GVT_CPDF_FIELDS) to verify or add fields for CPDF processing.

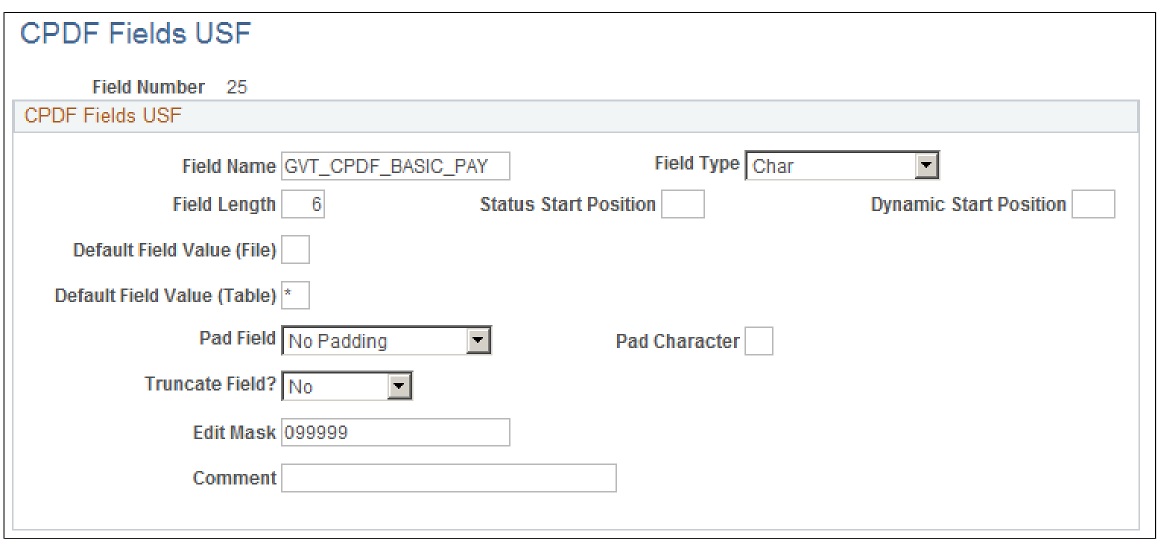
Complete the CPDF Fields USF page for every data element required in your agency's CPDF submissions.

Navigation

Set Up HCM > Product Related > Workforce Monitoring > Regulatory Requirements > CPDF Fields USF > CPDF Fields USF

Image: CPDF Fields USF page

This example illustrates the fields and controls on the CPDF Fields USF page. You can find definitions for the fields and controls later on this page.



Field Number	Each CPDF field is assigned a field number. The OPM specifies most of the field numbers, however, there are occasions where formatting information is included in the table for fields not specified by the OPM. These special fields are assigned decreasing numbers starting with 999 (for example., 999, 998, 997, and so forth) while the OPM-specified fields are assigned increasing numbers starting with 1.
Field Name	Enter the field name that corresponds to the field number as it is referenced in the CPDF programs.
Field Type	Define the field type. Values are *Char* (character),*Date,* and *Number.* This field is for informational purposes only at this time.
Field Length	Enter the length of the field as it needs to be reported the OPM. The system uses this field to verify the length of the formatted data before writing to the Dynamics and Status working tables.
Status Start Position	This field is reserved for future use.
Dynamic Start Position	This field is reserved for future use.
Default Field Value (File)	Enter the value that you want this field to contain in the case of NULL data during flat file generation.
Default Field Value (Table)	Enter the value that you want this field to contain in the case of NULL data during Dynamics and Status working table creation.
Pad Field	Enter the type of field padding. Options are *Left, Right,* or *No Padding.* If you select *Left* or *Right,* provide a pad character.
Pad Character	If a field is to be padded, enter the character used for padding. For example, you might use *0* to left pad a numeric field.
Truncate Field?	Specify whether a field should be truncated by selecting *Yes* or *No.* Data will be truncated if the content exceeds the field length.
Edit Mask	Provide an edit mask for field formatting the CPDF tables. CPDF programs support all the standard edit masks available in Structured Query Reports.

Prefixes and Fields Page

Use the Prefixes and Fields page (GVT_CPDF_PREFIX) to specify the CPDF edit prefix, category and ID, and fields used in the edit.

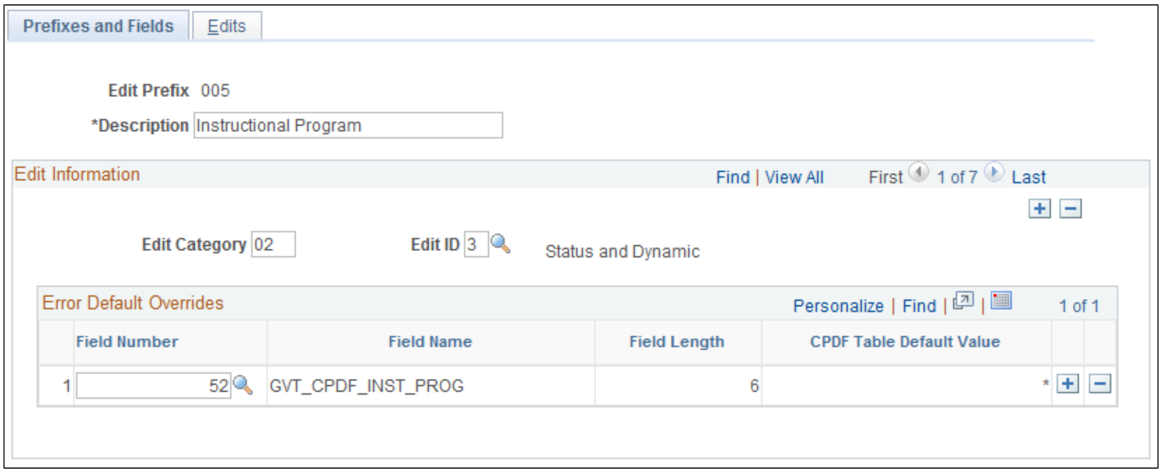
The three-digit edit prefix identifies the data element subject to the edit.

Navigation

Set Up HCM > Product Related > Workforce Monitoring > Regulatory Requirements > Regulatory Edits USF > Prefixes and Fields

Image: Prefixes and Fields page

This example illustrates the fields and controls on the Prefixes and Fields page. You can find definitions for the fields and controls later on this page.



Edit Category

Enter a two-digit edit category to identify the data element edit. This number corresponds to the OPM designated value.

Edit ID

Select *Status, Dynamic, Status and Dynamic,* or *Pine.* The edit ID identifies the file to which this edit applies. The edit ID identifies the regulatory reporting source to which this edit applies (for example., OPM or NFC). These edits, including those with the status of *PINE,* will be run against on-line PAR (personnel action request) data when the Validate Edits process is initiated on the Data Control (GVT_JOB0) page.

Enter additional combinations of edit category and edit ID for this edit prefix by using the arrows in the Edit Information group box to scroll among combinations.

See "Add Employment Instance USF Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce).

Field Number

Enter the number of the corresponding field affected by this edit.

When you move out of the field, the system populates the Field Length field andDefault Field Value field with the values that you entered in the CPDF Fields page. Enter additional fields for this edit by using the arrows in theError Default Overrides group box.

Edits Page

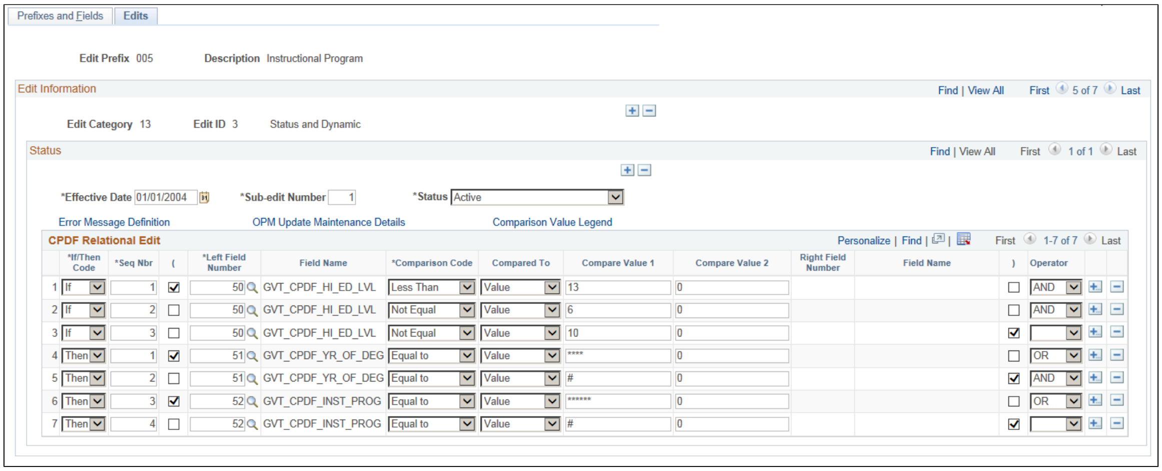
Use the Edits page (GVT_CPDF_EDIT) to specify the edit content.

Navigation

Set Up HCM > Product Related > Workforce Monitoring > Regulatory Requirements > Regulatory Edits USF > Edits

Image: Edits page

This example illustrates the fields and controls on the Edits page. You can find definitions for the fields and controls later on this page.



Note: Not all page elements are visible on this page. See additional elements by scrolling horizontally.

The Edit Prefix, Description, Edit Category, and Edit ID appear by default from the Prefixes & Fields page. Use the arrows in the Edit Information group box to view edits with the same prefix.

Sub-edit Number

Enter a sub-edit number. Most edits have one sub-edit number: *1.* For complicated edits with multiple or nested If/Then statements, insert rows with higher sub-edit numbers. Keep the same effective date for multiple sub-edits.

Create an edit by concatenating If and Then statements. Scroll among If and Then statements using the arrows in the Status group box. Compose the body of the If/Then statement in the CPDF Relational Edit grid area.

Status

Add data rows and use the middle scroll arrow, the Effective Date field, and theStatus field to maintain edit history data for information that changes over time. For example, to inactivate the edit based on OPM updates, insert an effective-dated row with a status of *Inactive.*

Error Message Definition

Click this link to create or customize an error message for this edit.

Comparison Value Legend

Click this link to view the legend of special characters used in the Compare Value fields.

CPDF Relational Edit

If/Then Code and **Seq Nbr** (sequence number)

Select either *If* or *Then,* and assign a sequence number for each separate condition to be edited. The *If* statements have sequence numbers *1, 2,* and *3*; the reciprocal *Then* statements have sequence numbers *1, 2, 3,* and *4.* The pieces can be connected by either *OR* or *AND*. For this example, the equation reads "If *1* and *2* and *3*, then *1* OR *2* and *3* OR *4*. In other words, if the education level is less than 13 and is not equal to 6 and 10, then the instructional program and year degree or certificate attained must be spaces or asterisks.

Left Field Number

Select a field number for comparison from the list of valid values. You enter field numbers in the CPDF Fields page.

Comparison Code

Select from the list of translate values: *Between, Equal to, Greater Than or Equal To, Greater Than, Less Than or Equal To, Less Than,* or *Not Equal.*

Compared To, Compare Value 1, Compare Value 2, and **Right Field Number**

Select what the left field number is compared to: *Field, Table,* or *Value.* Depending on what you select, the system makes either the Right Field Number or Compare Value 1 and Compare Value 2 fields available for you to enter the appropriate values. Values may be alphanumeric.

To indicate an unspecified numeric value, enter #. You only need to enter a value in the Compare Value 2 field if the comparison code is *Between.*

For example, consider CPDF Edit 700.12.3. If pay plan is VN, then step or rate must be between 0 and 28 or asterisks.

Operator

Select *AND* if this and the next statement are true. Select *OR* if either this or the following statement are true.

This table shows how to set up Edit 560.02.2. If Nature of Action Code is 741, then Prior Pay Rate Determinant must be A, B, E, F, M, U, V, or asterisks.

If/Then Code	***Seq Nbr***	***Left Field Number***	***Comparison Code***	***Compared to***	***Compare Value 1***	***Compare Value 2***
If	1	56 Nature of Action Code	Equal to	Value	741	0
Then	1	71 Prior Pay Rate Determinant	Between	Value	A	B
Then	2	71 Prior Pay Rate Determinant	Between	Value	E	F

If/Then Code	Seq Nbr	Left Field Number	Comparison Code	Compared to	Compare Value 1	Compare Value 2
Then	3	71 Prior Pay Rate Determinant	Equal to	Value	M	0
Then	4	71 Prior Pay Rate Determinant	Between	Value	U	V
Then	5	71 Prior Pay Rate Determinant	Equal to	Value	*	0

OPM CPDF Maint Details Page

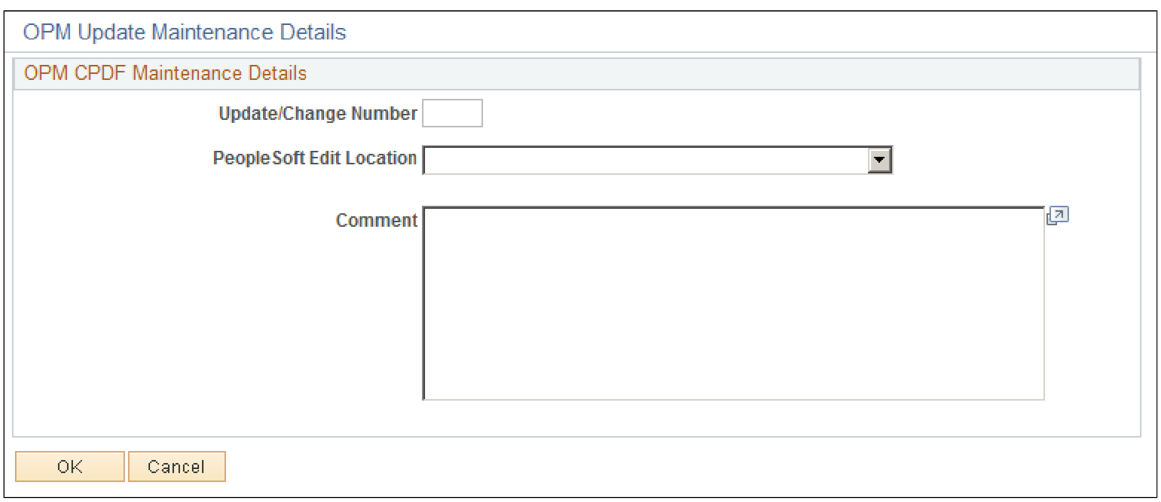
Use the OPM CPDF Maint Details Page (Office of Personnel Management CPDF Maintenance Details) page (GVT_OPM_EDITUPDT) to track Office of Personnel Management (OPM) update maintenance details and history.

Navigation

Click the OPM Update Maintenance Details link on the Edits page.

Image: OPM CPDF Maint Details page

This example illustrates the fields and controls on the OPM CPDF Maint Details page. You can find definitions for the fields and controls later on this page.



Update/Change Number Indicates the changes received from the CPDF Edit Manual Updates. For example, if you want to change 8 to CPDF Edit Manual Update 13, then enter it as 13.08.

PeopleSoft Edit Location Specify where this edit is enforced. Options are:

- *COBOL*: the edit is enforced in the COBOL program.

- *Dynamic*: the edit is enforced in the Dynamics SQR.
- *PeopleCode*: the edit is enforced by PeopleCode.
- *Prompt Tbl* (Prompt Table): the edit is enforced by a prompt table.
- *Shared Pgm* (Shared Program): the edit is enforced by the FGHR019S.SQR program.
- *Status*: the edit is enforced in the Status SQR.
- *Table Edit*: the edit is enforced on this page.

Processing CPDF Files

These topics provide an overview of CPDF reporting requirements and discuss CPDF files.

Pages Used to Process CPDF Files

Page Name	***Definition Name***	***Usage***
Edit Validation Page	RUNCTL_FGCPDF	Generate a table of the CPDF edit errors found in the CPDF Status and Dynamic tables.
Error Report Page	RUNCTL_FGHR019B	Run the Error report (FGHR019B). This report lists the CPDF errors identified by the CPDF Validation process.
Dynamic Table Page	RUNCTL_FGHR019A	Generate the Dynamics working table containing employee information. This is eventually used to create the Dynamics submission flat file.
Dynamic/Status File Page	RUNCTL_FGHR019C	Generate the Dynamic file, Status file, or both, or the Status file for submission to the OPM.
Organizational Component File Page	RUNCTL_FGHR019D	Report on codes, titles, and hierarchical relationships for organizations within an agency as of the end of the reporting period.
Status Table Page	RUNCTL_FGHR019E	Generate the Status working table containing employee information. This is eventually used to create the Status submission flat file.

Understanding CPDF Reporting Requirements

Most agencies in the executive branch of the U.S. federal government—and selected agencies in the legislative branch—participate in the CPDF. CPDF edits provide the OPM with the means to standardize federal government personnel data, monitor quality of data provided by federal government agencies, and produce a series of government-wide reports.

Because you must comply with government requirements when filing CPDF reports, PeopleSoft HR Management contains reports with appropriate information in the standard federal reporting format.

The edit submissions are:

- CPDF Status submission.

  This submission includes a single record for each active employee. It shows the current status of each employee as of the end date of the submission period. The OPM requires a quarterly status file submission in March, June, September, and December.

- CPDF Dynamics submission.

  This submission consists of all personnel actions processed by the PeopleSoft system during the reporting period. The normal reporting period is the calendar month; however, the period may end as of the last full pay period of the month. Actions that are more than two years past the current effective date or more than six months ahead of the current effective date aren't reported.

- Organizational Component Translations (OCT) submission.

  This submission consists of the organizational segments of the agency. The OPM requires that an agency submit this file semi-annually in March and September.

When executing the CPDF error processing, the system uses the CPDF edit processing rules as mandated by the OPM. Then, in the CPDF edit processing, it identifies the fields and records that don't meet the OPM's quality standards.

Note: For administering CPDF edits, understanding how they apply to your agency, and running the related reports, this discussion assumes that you are familiar with the *Federal Workforce Reporting Systems Operating Manual* and have a working knowledge of the CPDF edits and processes.

Related Links

"Add Employment Instance USF Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)
"Adding an Employment Instance" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)

Defining Additional CPDF Reporting Controls

Before you begin to run the CPDF reporting process, you will need to ensure that certain codes are correctly defined so that they are included with your submissions. This table describes the data and where you enter it in the system.

Data	***Page***
Indicate if earnings are reported to the CPDF.	Earnings Table 1

Data	***Page***
Indicate the CPDF earnings type to identify retention allowance, supervisory differential, or staffing differential code types.	Earnings Table 1
Indicate whether the subagency should report its employees to the CPDF.	Sub-Agency Table
Indicate whether or not the personnel action should be reported to the CPDF.	Nature of Action (NOA) Code Table

Producing the CPDF Files

To produce the CPDF files:

1. Generate the CPDF Dynamics table (monthly) or generate the CPDF Status table (quarterly).
2. Perform CPDF edit validation processing.
3. Produce the CPDF Error report.

   Review and clean up the data errors identified in the error report. Repeat the processes in steps 1 through 3 until the data satisfactorily meets your organizational reporting standards.
4. Generate the CPDF Dynamics/Status flat file.
5. Generate the CPDF Organizational Component Translation submission.

Note: Processing CPDF edits deletes existing data in the CPDF Error table before adding new records. If you need to save existing CPDF Error table data, back up the table before running this process.

Related Links

"(USF) Meet Regulatory Requirements Reports for the US Federal Government" (PeopleSoft HCM 9.2: Application Fundamentals)

Edit Validation Page

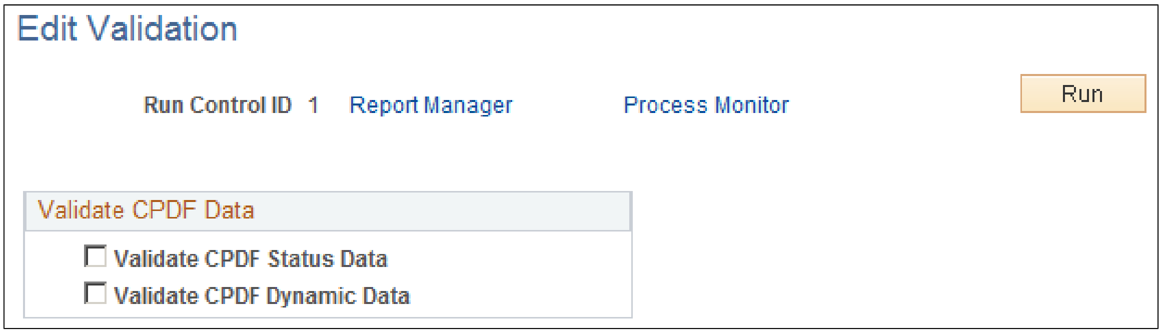
Use the Edit Validation page (RUNCTL_FGCPDF) to generate a table of the CPDF edit errors found in the CPDF Status and Dynamic tables.

Navigation

Workforce Monitoring > Meet Regulatory Rqmts > Regulatory Processing USF > Edit Validation > Edit Validation

Image: Edit Validation page

This example illustrates the fields and controls on the Edit Validation page. You can find definitions for the fields and controls later on this page.



Validate CPDF Data	Select Validate CPDF Status Data orValidate CPDF Dynamic Data to create the respective files.
Run	Click this button to process CPDF edits.

Error Report Page

Use the Error Report page (RUNCTL_FGHR019B) to run the Error report (FGHR019B).

This report lists the CPDF errors identified by the CPDF Validation process.

Navigation

Workforce Monitoring > Meet Regulatory Rqmts > Regulatory Processing USF > Error Report > Error Report

Note: After running the Edit Errors process, the working file contents can be viewed online using the Query Manager.

See Viewing CPDF Processing Results Using the Query Manager.

Dynamic Table Page

Use the Dynamic Table page (RUNCTL_FGHR019A) to generate the Dynamics working table containing employee information.

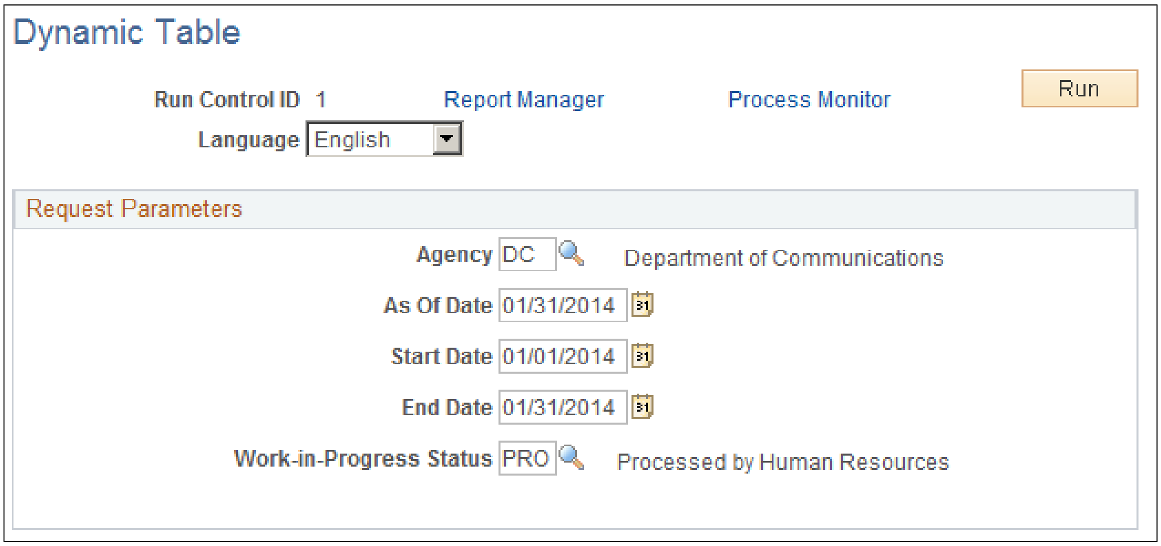
This is eventually used to create the Dynamics submission flat file.

Navigation

Workforce Monitoring > Meet Regulatory Rqmts > Regulatory Processing USF > Dynamic Table > Dynamic Table

Image: Dynamic Table page

This example illustrates the fields and controls on the Dynamic Table page. You can find definitions for the fields and controls later on this page.



Generating the CPDF Dynamics table enables you to run the CPDF Edits process against the table and generate the CPDF Dynamics submission. You must generate the CPDF Dynamics table in order to continue processing the CPDF Dynamics edits.

Note: The process deletes any existing data in the CPDF Dynamics table before adding any new records. To save existing CPDF Dynamics table data, you must back up the table before running this process. After running the Edit Errors process, the working file contents can be viewed online using the Query Manager.

See Viewing CPDF Processing Results Using the Query Manager.

As Of Date

Select to define the transactions selected by the CPDF Dynamics Table process. The process selects all transactions with an effective date two years before and six months after the as of date.

Start Date

Enter the starting date when the program should select personnel actions that were last worked on or modified. This field is based on the tracking date from the personnel action.

End Date

Enter the ending date when the program should select personnel actions that were last worked on or modified. This field is based on the tracking date from the personnel action.

Work-in-Progress Status

Select any work-in-progress status for reporting on the CPDF Dynamics table. For a CPDF submission, select *PRO* (Processed by HR.

Status Table Page

Use the Status Table page (RUNCTL_FGHR019E) to generate the Status working table containing employee information.

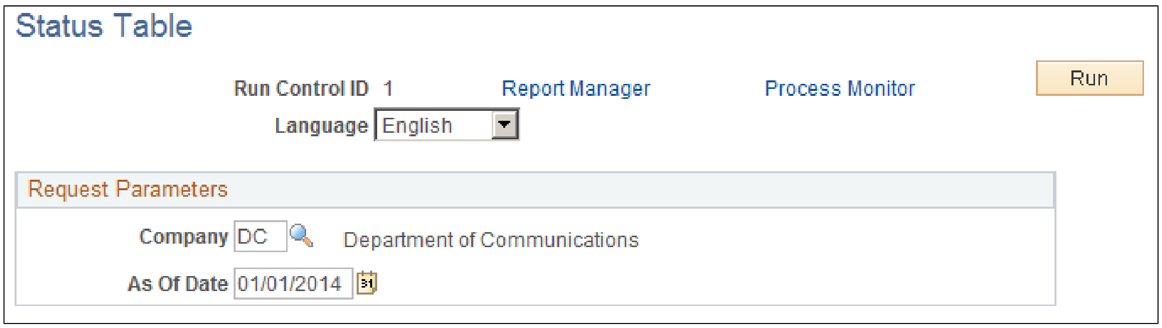
This is eventually used to create the Status submission flat file.

Navigation

Workforce Monitoring > Meet Regulatory Rqmts > Regulatory Processing USF > Status Table > Status Table

Image: Status Table page

This example illustrates the fields and controls on the Status Table page. You can find definitions for the fields and controls later on this page.



You must first generate the Status Table in order to perform the CPDF status edits processing. Generation of the CPDF Status table enables you to run the CPDF edits process against the table and create the CPDF status submission.

Note: This process deletes existing data in the CPDF Status table before adding new records. If the organization needs to retain and save existing CPDF Status table data, you must back up the table before running this process.
After running the Edit Errors process, the working file contents can be viewed online using the Query Manager.

See Viewing CPDF Processing Results Using the Query Manager.

As Of Date	Select to restrict your selection to those employees active on that date.

Dynamic/Status File Page

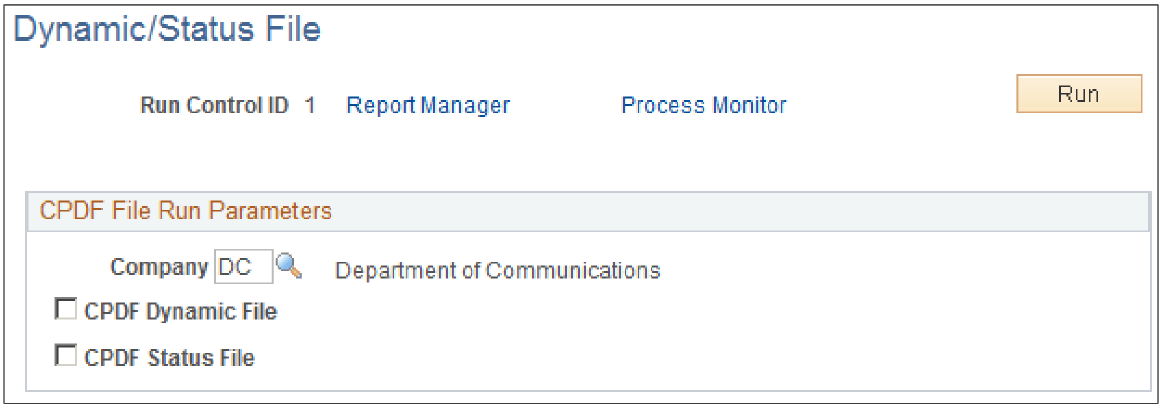
Use the Dynamic/Status File page (RUNCTL_FGHR019C) to generate the Dynamic file, Status file, or both, or the Status file for submission to the OPM.

Navigation

Workforce Monitoring > Meet Regulatory Rqmts > Regulatory Processing USF > Dynamic/Status File > Dynamic/Status File

Image: Dynamic/Status File page

This example illustrates the fields and controls on the Dynamic/Status File page. You can find definitions for the fields and controls later on this page.



The CPDF Dynamics/Status File Generation process builds the CPDF status and dynamic submissions. The process generates these flat files from the CPDF Status table and CPDF Dynamics table, respectively. If the process finds that field defaults are necessary, it uses the CPDF field default table to supply the values.

You must have already entered agency parameters before using this page.

CPDF Dynamic File and**CPDF Status File**	Select one or both of these fields to generate the correct submission file.

Updating CPDF Edits

When you receive CPDF Edit Manual Updates from the OPM, you must maintain the edits in your system.

Organizational Component File Page

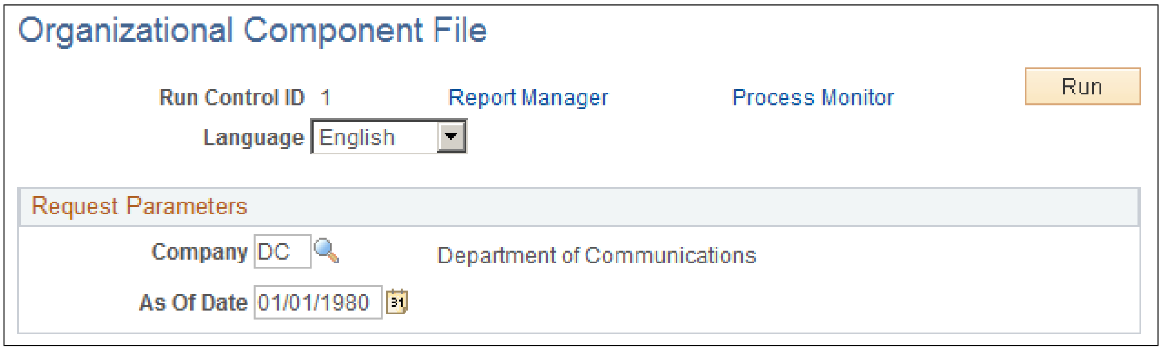
Use the Organizational Component File page (RUNCTL_FGHR019D) to report on codes, titles, and hierarchical relationships for organizations within an agency as of the end of the reporting period.

Navigation

Workforce Monitoring > Meet Regulatory Rqmts > Regulatory Processing USF > Organizational Component File > Organizational Component File

Image: Organizational Component File page

This example illustrates the fields and controls on the Organizational Component File page. You can find definitions for the fields and controls later on this page.



The CPDF OCT consists of codes, titles, and hierarchical relationships for organizations within an agency as of the end of the reporting period. The OCT is reported twice a year, in March and September, and must match the organizational component codes used in the employee records in status submissions for the agency.

You must have already set up agency and language parameters before using this page.

As Of Date Select so that the file contains organizational components that are effective for a given date.

Viewing CPDF Processing Results Using the Query Manager

The PeopleSoft system provides three query definitions designed to display online results of certain CPDF processes. The following predefined queries can be access through the Query Manager:

Query Name	***Description***	***Usage***
FGCPDFDYNAMICS	Federal CPDF Dynamics	Use to view the content of the Dynamics process run.
FGCPDFERRORTBL	Federal CPDF Error List	Use to view error results after running the CPDF edit validation process.
FGCPDFSTATUSTBL	Federal CPDF Status Table	Use to view results after running the CPDF Status program.

See the product documentation for *PeopleTools: Query*.

Submitting Parent Locator Information

Government agencies are required by law to send a biweekly and quarterly file containing data on new hires to the Federal Parent Locator Service, a part of the Social Security Administration. The Federal Parent Locator Service uses the data to track and enforce child support payments.

To submit parent locator information:

1. Create an interface file using the New Hire Reporting run control page.
2. Send the file to the Social Security Administration.

   You will receive the file back from the Social Security Administration.
3. Process the file received from the Social Security Administration using the New Hire Error Reporting run control page.

   The report created by this process lists errors that were sent previously so that they can be corrected for the next time you send the file.

At any point in the process, you can use the New Hire Reporting Stats page to view statistics about the new hire data exports.

Page Used to View New Hire Data Export Statistics

Page Name	***Definition Name***	***Usage***
Review New Hire Stats USF Page	GVT_NH_CONTROL	Display statistical information about new hire data exports generated by the New Hire Reporting report.

Related Links

Setting Up Personal Responsibility and Work Opportunity Reconciliation Act (PRWORA) Reporting

"Meet Regulatory Requirements Reports" (PeopleSoft HCM 9.2: Application Fundamentals)

Running EEO Reports

This topic discusses how to run the EEO reports that are for U.S. federal government users only.

Pages Used to Run EEO Reports

Page Name	***Definition Name***	***Usage***
EEO Groups by PATCOB/POI USF Page	RUNCTL_FGHR012	Run the EEO Groups by PATCOB/POI USF report (FGHR012A), which details the distribution of EEO groups and comparison by PATCOB and POI.
EEO Grps by PATCOB/SubAgcy USF Page	RUNCTL_FGHR012	Run the EEO Grps by PATCOB/SubAgcy USF report (FGHR012B) to see the distribution of EEO groups and comparison by PATCOB and sub-agency.
EEO Groups by Series/POI USF Page	RUNCTL_FGHR014	Run the EEO Groups by Series/POI report (FGHR014A). This report details the distribution of EEO groups and comparison by occupation and POI.

Page Name	*Definition Name*	*Usage*
EEO Grps by Series/SubAgcy USF Page	RUNCTL_FGHR014	Run the EEO Grps by Series/SubAgcy USF report (FGHR014B), which details the distribution of EEO groups and comparison by series and sub-agency.

Related Links

Setting Up EEO Reporting Requirements

Running VETS Reports

This topic discusses how to run the VETS reports that are for U.S. federal government users only.

Pages Used to Run VETS Reports

Page Name	*Definition Name*	*Usage*
VETS-100 by POI USF Page	RUNCTL_FGHR013	Run the VETS-100 by POI report (FGHR013B), which generates a veterans employment report by POI.
VETS-100 by Sub Agency USF Page	RUNCTL_FGHR013	Run the VETS-100 by SubAgency USF report (FGHR013A), which generates a veterans employment report by sub-agency.

Related Links

Meeting VETS Reporting Requirements

Running the Monthly Report of Federal Civilian Employment (SF113-A) and Full-time Equivalent/Work-Year Civilian Employment (SF113-G) Reports

This topic discusses how to run the SF113–G report.

Pages Used to Run SF113-A and SF113-G Reports

Page Name	*Definition Name*	*Usage*
SF113-A USF Page	RUN_FGSF113A	Run the SF113-A USF report (FGSF113A), which generates a monthly report of federal civilian employment.

Page Name	***Definition Name***	***Usage***
SF113-G USF Page	RUN_FGSF113G	Run the SF113-G USF (FGSF113G), which generates a monthly report of full-time equivalent and work-year civilian employment.

SF113-G USF Page

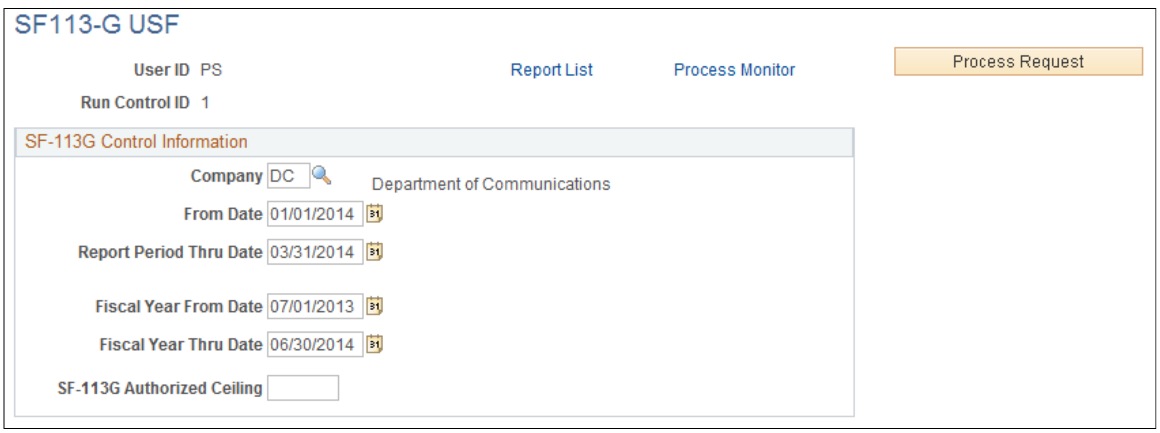
Use the SF113-G USF page (RUN_FGSF113G) to run the SF113-G USF (FGSF113G), which generates a monthly report of full-time equivalent and work-year civilian employment.

Navigation

Workforce Monitoring > Meet Regulatory Rqmts > Regulatory Reports > SF113-G USF > SF113-G USF

Image: SF113-G USF page

This example illustrates the fields and controls on the SF113-G USF page. You can find definitions for the fields and controls later on this page.



SF-113G Authorized Ceiling — If you enter a value here, it is included in the Ceiling column of the report. This field is optional but recommended if you want to report an employee on the SF-113G report.

Related Links

"(USF) Meet Regulatory Requirements Reports for the US Federal Government" (PeopleSoft HCM 9.2: Application Fundamentals)

Chapter 9

(GBR, USA, and USF) Meeting Disability Regulatory Requirements

(GBR) Understanding Disability and Discrimination Act Regulatory Requirements in the U.K.

The Disability and Discrimination Act of 1995 makes it unlawful for any U.K. employer to discriminate in relation to recruitment, promotion, training, benefits, terms and conditions of employment, and dismissal against individuals based on their disability. It requires companies of 20 or more workers to hire a specified percentage of disabled persons.

In addition, employers are required to make reasonable adjustments and accommodations for the disabled worker, such as adjusting the premises, altering working hours, allocating duties to another person, and acquiring or modifying equipment.

Use the Accommodation Data component in Report Regulations (UK) to track and document the company's efforts to make accommodations for disabled employees.

Prerequisites

Before using this component, set up codes in these tables:

- Accommodation Type table.
- Diagnosis table.
- Job Tasks table.
- Job Code Task table.

Disability Accommodations Tracking

You use three pages—the Accommodation Request page, the Accommodation Option page, and the Accommodation Job Task page—to track data showing that the company has no discriminatory practices against people with disabilities. When employees or applicants request that you make accommodations that enable them to perform job tasks, you can track the steps that bring those requests to resolution.

(USA, USF) Understanding ADA Regulatory Requirements in the U.S.

Title I of the ADA prohibits employers with U.S. operations from discriminating against job applicants or employees with disabilities. Discrimination is forbidden in job applications, testing, hiring, assignments, evaluations, disciplinary actions, promotions, compensation, leave and benefits, and other employee concerns. The ADA, however, doesn't have specific reporting requirements, which makes it difficult to prove that the company doesn't discriminate against people with disabilities.

Prerequisites

Before you track accommodation requests made by employees and applicants, set up data in the Accommodation Type table, the Job Tasks table, the Job Code Task table, and the Diagnosis table.

After you create accommodation types and essential job functions, link job functions with job codes, and create diagnosis codes, use the Accommodation Data component to track requests that employees and applicants make for disability accommodations. Complete the pages in the order that they appear in the next topic.

Managing Accommodation Data

These topics discuss accommodation data.

Pages Used to Manage Accommodation Data

Page Name	***Definition Name***	***Usage***
Accommodation Request Page	ACCOMM_REQUEST	Enter accommodation requests that an employee or applicant makes of the organization, and enter diagnosis codes for employee disabilities.
Accommodation Option Page	ACCOMM_OPTION	Enter accommodation options that the organization or the person with a disability is considering in order to resolve each accommodation request.
Accommodation Job Task Page	ACCOMM_JOB_TASK	Enter the job tasks that you are accommodating, classified by job code and (if necessary) by location. If you create essential job tasks in the Job Code Task table, you can enter multiple job tasks for each accommodation.
Accommodation Types Page	ACCOM_TYPE_TABLE	Identify the types of accommodations that the organization can make for employees or applicants with disabilities.

Accommodation Request Page

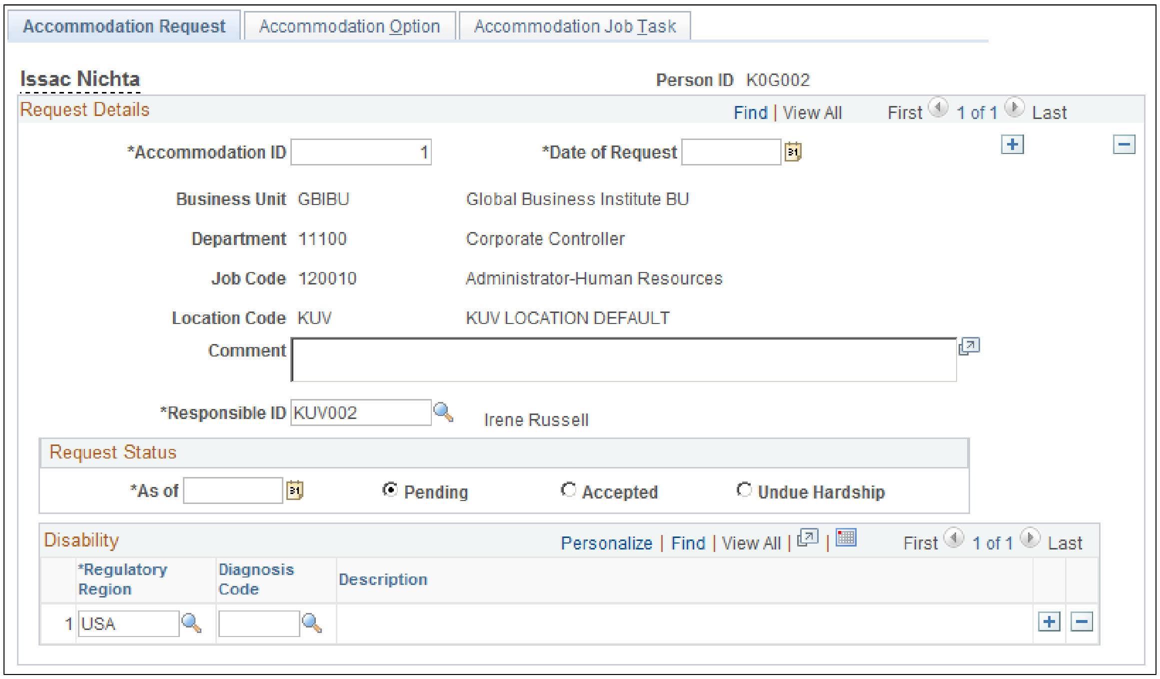
Use the Accommodation Request page (ACCOMM_REQUEST) to enter accommodation requests that an employee or applicant makes of the organization, and enter diagnosis codes for employee disabilities.

Navigation

Workforce Monitoring > Meet Regulatory Rqmts > Maintain Accommodation Data > Accommodation Request

Image: Accommodation Request page

This example illustrates the fields and controls on the Accommodation Request page. You can find definitions for the fields and controls later on this page.



The system prompts you for an employee ID.

The system displays the business unit, department, job code, and location code associated with the employee on the Job Data pages.

Accommodation ID	Displays a system-generated sequential number, which you can override.
Date of Request	Enter the date of request for the accommodation.
Comment	Enter comments applicable to the request.
Responsible ID	Select the employee responsible ID.
As Of	Enter the request status date.
Regulatory Region	Select from the list of Regulatory Region page prompt values.
Diagnosis Code	Select any that apply. You create diagnosis codes in the Diagnosis table.

Accommodation Option Page

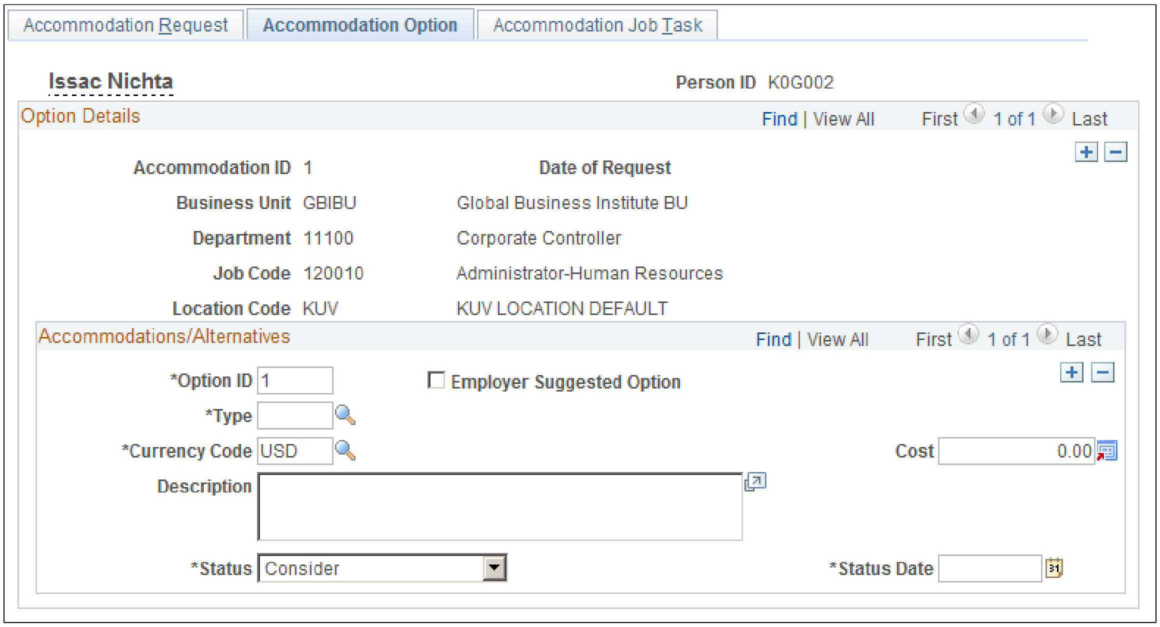
Use the Accommodation Option page (ACCOMM_OPTION) to enter accommodation options that the organization or the person with a disability is considering in order to resolve each accommodation request.

Navigation

Workforce Monitoring > Meet Regulatory Rqmts > Maintain Accommodation Data > Accommodation Option

Image: Accommodation Option page

This example illustrates the fields and controls on the Accommodation Option page. You can find definitions for the fields and controls later on this page.



Option ID

Displays a system-generated sequential number for the option ID, which you can override.

Click the Insert Row button to add new data rows for additional accommodation options or alternatives.

Employer Suggested Option

Select to indicate whether the information that you enter is an option suggested by the employer.

Currency Code

Select a currency code if you are tracking the costs of this accommodation option in a different currency. Values are located on the Currency Code page.

If you did not define multiple currencies in the Installation table, the Currency Code field doesn't appear.

Type

Select an accommodation type, which you define on the Accommodation Type Table page.

Cost

Enter the estimated cost of the option.

Status

Select the status from the list of values.

Status Date

Enter the accommodation status date. The default value is the accommodation request date.

Accommodation Job Task Page

Use the Accommodation Job Task page (ACCOMM_JOB_TASK) to enter the job tasks that you are accommodating, classified by job code and (if necessary) by location.

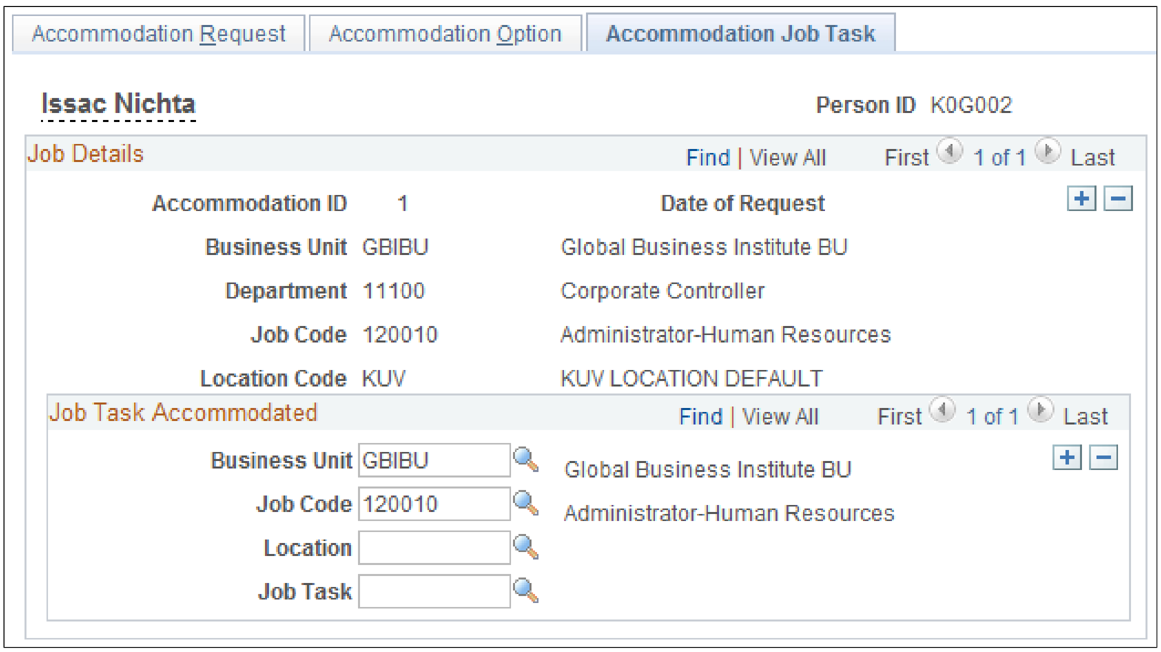
If you create essential job tasks in the Job Code Task table, you can enter multiple job tasks for each accommodation.

Navigation

Workforce Monitoring > Meet Regulatory Rqmts > Maintain Accommodation Data > Accommodation Job Task

Image: Accommodation Job Task page

This example illustrates the fields and controls on the Accommodation Job Task page. You can find definitions for the fields and controls later on this page.



Business Unit

Select from the Business Unit - Business Unit page list of prompt values.

Job Code

Select the job code that you are accommodating. Create these codes on the Job Code Table - Job Code Profile page.

Location and **Job Task**

Select a location and job task for the request that you are accommodating. Create these codes on the Location - Location Address page and the Job Tasks page.