
PeopleSoft HCM 9.2: Manage Labor Administration

January 2021

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs (including any operating system, integrated software, any programs embedded, installed or activated on delivered hardware, and modifications of such programs) and Oracle computer documentation or other Oracle data delivered to or accessed by U.S. Government end users are "commercial computer software" or "commercial computer software documentation" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, reproduction, duplication, release, display, disclosure, modification, preparation of derivative works, and/or adaptation of i) Oracle programs (including any operating system, integrated software, any programs embedded, installed or activated on delivered hardware, and modifications of such programs), ii) Oracle computer documentation and/or iii) other Oracle data, is subject to the rights and limitations specified in the license contained in the applicable contract. The terms governing the U.S. Government's use of Oracle cloud services are defined by the applicable contract for such services. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Inside are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Epyc, and the AMD logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

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: Preface.....	vii
Understanding the PeopleSoft Online Help and PeopleBooks.....	vii
Hosted PeopleSoft Online Help.....	vii
Locally Installed Help.....	vii
Downloadable PeopleBook PDF Files.....	vii
Common Help Documentation.....	vii
Field and Control Definitions.....	viii
Typographical Conventions.....	viii
ISO Country and Currency Codes.....	viii
Region and Industry Identifiers.....	ix
Translations and Embedded Help.....	ix
Using and Managing the PeopleSoft Online Help.....	x
Related Links for PeopleSoft HCM.....	x
Contact Us.....	x
Follow Us.....	x
Chapter 1: Getting Started with Manage Labor Administration.....	13
Understanding Manage Labor Administration.....	13
Manage Labor Administration Business Processes.....	13
Manage Labor Administration Integrations.....	13
Manage Labor Administration Implementation.....	14
Chapter 2: Navigating in Manage Labor Administration.....	15
Navigating in Manage Labor Administration.....	15
Pages Used to Navigate in Manage Labor Administration.....	15
Chapter 3: Setting Up Unions.....	19
Common Elements for Setting Up Unions.....	19
Setting Up Bargaining Units.....	19
Pages Used to Set Up Bargaining Units.....	20
General Bargaining Unit Data Page.....	20
Contact Information Page.....	20
(USF) Contract/Partnership Data Page.....	21
Setting Up Unions.....	22
Pages Used to Set Up Union Data.....	22
Understanding Union Data Setup.....	23
Union Location Page.....	23
Contract Data Page.....	25
Union Earnings Distribution Page.....	27
(USF) Setting Up Unions.....	28
Pages Used to Set Up U.S. Federal Government Union and Contract Information.....	28
Union Address Page.....	28
Union Address Information Page.....	29
Contact and Contract Info Page.....	30
Contact Info Page.....	31
Partnership Data/Steward Info Page.....	32
Union Agreement Page.....	33
Earnings Codes Page.....	34
Chapter 4: Setting Up Labor Administration Data.....	37

Defining Seniority Dates.....	37
Pages Used to Set Up Seniority Dates.....	37
Understanding Seniority Dates.....	37
Seniority Dates Page.....	38
Tie Breakers Page.....	39
Setting Up Layoff and Recall Control Tables.....	40
Pages Used to Set Up Layoff and Recall Control Tables.....	40
Understanding Recall Rights.....	41
Recall Expiration Rules Page.....	41
Layoff Exemption Reasons Page.....	43
Employee Roster Status Page.....	43
Recall Reason Page.....	44
Setting Up Labor Agreement Control Tables.....	45
Pages Used to Set Up Labor Agreement Control Tables.....	45
Labor Job Classes Page.....	45
Labor Facilities Page.....	46
Defining Labor Agreements.....	47
Pages Used to Define Labor Agreements.....	47
Labor Agreement Page.....	47
Job Codes Page.....	51
Seniority Rules Page.....	53
Facilities Page.....	55
Employee Categorization Page.....	55
Clone Labor Agreement Page.....	59
Setting Up Labor Administration Disciplinary, Grievance, and Resolution Classifications.....	60
Pages Used to Set Up Labor Administration Disciplinary, Grievance, and Resolution Classifications.....	61
Disciplinary Steps Page.....	61
(USF) Disciplinary Step Table Page.....	62
Disciplinary Type Page and Disciplinary Type USF Page.....	62
(USF) Disciplinary Offenses Table - Disciplinary Penalty Matrix 1 Page.....	63
(USF) Disciplinary Offenses Table - Disciplinary Penalty Matrix 2 Page.....	63
Disciplinary Events USF Page.....	64
Grievance Type Table Page.....	64
Grievance Step Table Page.....	64
Resolution Types Page.....	65
Chapter 5: Setting Up Works Councils.....	67
Setting Up Works Councils.....	67
Pages Used to Set Up Works Councils.....	67
Understanding the Works Councils Business Process.....	67
Works Council Page.....	68
Works Council Decision Page.....	69
Works Council Decision Group Page.....	69
Job Change by Reg Region Page.....	70
Workflow Parameters Page.....	72
(DEU) Setting Up German Works Councils Business Processes.....	73
Pages Used to Define German Labor Administration Codes.....	73
Understanding German Works Council Business Processes.....	74
Tariff Area Page.....	74
Speaker Committee DEU Page.....	75
Chapter 6: Managing Layoffs and Recalls.....	77

Common Elements for Managing Layoffs and Recalls.....	77
Defining Groups of Workers to Layoff or Recall.....	80
Pages Used to Define Groups.....	81
Labor Group Definition Page.....	81
Labor Group Members Page.....	83
Labor Group Security Page.....	84
Managing Layoffs.....	85
Pages Used to Manage Layoffs.....	86
Layoff Roster Setup Page.....	86
Layoff Roster List Page.....	87
Layoff Process Run Control Page.....	89
Managing Recall Rights.....	91
Pages Used to Manage Recall Rights.....	91
Process Recall Rights Page.....	91
Recall Rights Page.....	92
Managing Recalls and Reinstatements.....	94
Pages Used to Manage Recalls and Reinstatements.....	94
Understanding Reinstatements and Recalls.....	95
Recall Roster Setup Page.....	95
Recall Roster List Page.....	96
Reinstatement Roster Setup Page.....	97
Reinstatement Roster List Page.....	98
Process Recall/Reinstatement Page.....	99
Processing Layoffs and Recalls Using PeopleSoft Mass Update.....	101
Running Layoff and Recall Reports.....	102
Pages Used to Run Layoff and Recall Reports.....	102
Layoff Roster Report Page.....	103
Bumping Report Page.....	103
Seniority Report Page.....	104
Candidate List Report Page.....	105
Recall Roster Report page.....	106
Chapter 7: Managing Wage Progression.....	107
Understanding Wage Progression.....	107
Wage Progression Business Process.....	107
Setting Up Wage Progression Run IDs.....	108
Page Used to Set Up Wage Progression Run IDs.....	109
Understanding Wage Progression Run IDs.....	109
Wage Progression Run ID Page.....	109
Extracting Information from PeopleSoft Payroll for North America.....	110
Page Used to Extract Time Information.....	110
Understanding the Extract Payroll Data Process.....	110
Extract Payroll Data Page.....	111
Maintaining Worker Wage Progression Information.....	112
Pages Used to Maintain Worker Wage Progression Information.....	112
Understanding the Update Wage Progression Process.....	112
Update Wage Progression Page.....	116
Review Wage Progression Page.....	117
Review Time Details Page.....	124
Exception Messages Page.....	125
Wage Progression Exception Rpt Page.....	125
Approving and Processing Wage Advancements.....	126

Pages Used to Approve and Processing Wage Advancements.....	126
Understanding the Process Wage Progression Process.....	127
Approve Employees to Advance Page.....	127
Process Wage Progression Page.....	129
Chapter 8: Tracking Disciplinary Actions and Grievances.....	131
Tracking Disciplinary Actions.....	131
Pages Used to Track Disciplinary Actions.....	131
Disciplinary Action Page.....	131
Action Taken Page.....	133
Disciplinary Resolution Page.....	133
(USF) Tracking Disciplinary Actions.....	134
Pages Used to Track Disciplinary Actions.....	134
(USF) Disciplinary Offenses Page.....	135
Disciplinary Actions Page.....	136
Disciplinary Action Events Page.....	137
Tracking Grievances.....	138
Pages Used to Track Grievances.....	138
Grievance Page.....	138
Grievance Steps Page.....	140
Grievance Resolution Page.....	142
(USF) Entering Union Negotiability Appeals.....	142
Page Used to Enter Union Negotiability Appeals.....	142
Record Negotiability Appeal USF Page.....	142
Chapter 9: Requesting Works Councils Approval.....	145
Understanding the Works Councils Approval Business Process.....	145
Prerequisites.....	146
Entering a Job Change Request.....	147
Pages Used to Enter Job Change Requests.....	147
Understanding the Job Change Request Process.....	147
Job Change Request - Select Employee Page.....	151
Job Change Request Page.....	154
Decision Details Page.....	161
Review My Job Change Request Page.....	161
Review Job Change Request Page.....	162
Job Change Request Approval Page.....	162
WC Automatic Approval Page.....	163

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.

Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the [Oracle Help Center](#). The hosted PeopleSoft 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. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see [Configuring Context-Sensitive Help Using the Hosted Online Help Website](#).

Locally Installed Help

If you're setting up an on-premise PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. See [Configuring Context-Sensitive Help Using a Locally Installed Online Help Website](#).

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the [Oracle Help Center](#). 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.

<i>Typographical Convention</i>	<i>Description</i>
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.
& (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

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help
- Managing Hosted online help
- Managing locally installed PeopleSoft Online Help

Related Links for PeopleSoft HCM

[Oracle Help Center](#)

[PeopleSoft Information Portal](#)

[My Oracle Support](#)

[PeopleSoft Training from Oracle University](#)

[PeopleSoft Video Feature Overviews on YouTube](#)

[PeopleSoft Business Process Maps \(Microsoft Visio format\)](#)

[PeopleSoft Spotlight Series](#)

Contact Us

Send your suggestions to pssoft-infodev_us@oracle.com. Please include the applications update image or PeopleTools release that you're using.

Follow Us



[Facebook.](#)



[YouTube](#)



[Twitter@PeopleSoft_Info.](#)



[PeopleSoft Blogs](#)



LinkedIn

Chapter 1

Getting Started with Manage Labor Administration

Understanding Manage Labor Administration

In many countries, some, or maybe all, of your workers are organized under collective labor agreements. This makes labor management a critical element of legally employing your workforce.

Manage Labor Administration enables you to enter and track labor-related information for each worker. You can sort workers by seniority, manage layoffs and recalls, advance workers through wage progression, track disciplinary actions, and track grievances.

Manage Labor Administration Business Processes

Manage Labor Administration enables you to enter and track labor-related information for each worker in your organization. You can layoff or recall groups of workers, manage automatic wage progression in accordance with labor agreements, track disciplinary actions your organization takes against workers, as well as grievances filed by one or several people, including workers, applicants, and unions on behalf of several union members.

Manage Labor Administration provides these business processes:

- Manage labor agreements.
 - Manage union data.
 - Manage layoffs and recalls.
 - Manage wage progression.
 - Track disciplinary actions and grievances.
 - Requesting works councils approval.
-

Manage Labor Administration Integrations

Manage Labor Administration integrates with these PeopleSoft applications:

- PeopleSoft HR: Administer Workforce.
- PeopleSoft HR: Manage Base Compensation and Budgeting.

- PeopleSoft Payroll for North America.

Manage Labor Administration 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 PeopleBook documentation.

Manage Labor Administration also provides component interfaces to help you load data from your existing system into Manage Labor Administration. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

Component	Component Interface	References
Disciplinary Step Table (DISCIP_STEP_TABLE)	DISCIP_STEP_TABLE	See Setting Up Labor Administration Disciplinary, Grievance, and Resolution Classifications .
Grievance Step Table (GRIEV_STEP_TABLE)	GRIEV_STEP_TABLE	See Setting Up Labor Administration Disciplinary, Grievance, and Resolution Classifications .

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.

In the planning phases of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides and table-loading sequences. A complete list of these resources appears in the preface in the *PeopleSoft HCM Application Fundamentals PeopleBook*, with information about where to find the most current version of each.

Chapter 2

Navigating in Manage Labor Administration

Navigating in Manage Labor Administration

In addition to using standard PeopleSoft navigation, Manage Labor Administration provides a custom navigation page that contains groupings of folders that support a specific business process, task, or user role. This topic describes navigation pages for union workforce management.

Pages Used to Navigate in Manage Labor Administration

This table lists the custom navigation pages that are used to navigate in Manage Labor Administration.

Page Name	Navigation	Usage
Seniority	Workforce Administration > Labor Administration > Union Workforce Mgmt Centre > Seniority	Access the: • Job Data component • Seniority Dates component • Seniority Report component • Tie Breakers component
Labor Agreement	Workforce Administration > Labor Administration > Union Workforce Mgmt Centre > Labor Agreement	Access the: • Labor Agreement component • Employment Categorization component • Labor Job Classes component • Labor Facilities component • Bargaining Unit component • Unions component

Page Name	Navigation	Usage
Wage Progression	Workforce Administration > Labor Administration > Union Workforce Mgmt Centre > Wage Progression	Access the: • Review Wage Progression component. • Update Wage Progression component. • Approve Employees to Advance component. • Wage Progression Exception Rpt component. • Process Wage Progression component. • Extract Payroll Data component. • Review Time Details component. • Wage Progression Run ID component. • Define Wage Plans component. • Define Wage Grades component.
Layoffs and Recalls	Workforce Administration > Labor Administration > Union Workforce Mgmt Centre > Layoffs and Recalls	Access the: • Layoff Roster component. • Recall Roster component. • Reinstatement Roster component. • Recall Rights component. • Process Recall Rights component.
Reports	Click Reports on the Layoffs and Recalls page.	Access the • Layoff Roster Report • Bumping Report • Seniority Report • Candidate List Report • Recall Roster Report

<i>Page Name</i>	<i>Navigation</i>	<i>Usage</i>
Set Up	Click Set Up on the Layoffs and Recalls page.	Access the: • Labor Group Definition component. • Layoff Exemption Reasons component. • Recall Reason component. • Recall Expiration Rules component. • Employee Roster Status component.

Setting Up Unions

Common Elements for Setting Up Unions

Union Contact Number	The union contact number (the primary contact is number 1).
Contact Name	The union or bargaining unit's contact name.
Union Steward	Enter the name of the person who serves as the liaison between your company and the union.
Life Insurance	Indicate the amount of life insurance the union or bargaining unit offers for its members.
Vacation Plan	Enter the vacation plan that this union offers to its members.
Sick Leave Plan	Enter the sick leave plan that this union offers to its members.
Callback Minimum Hours	Enter the callback minimum hours per day for which bargaining unit members get paid if they are called in to a job.
Partnership Council	Select if this union is a member of a partnership council.
Partnership Council Date	If this union is or will be a member of a partnership council, enter the date this event took or will take place.
Partnership Agreement	Select if this union has entered into a partnership agreement.
Partnership Agreement Date	If this union is or will enter into a partnership agreement, enter the date this event took place or will take place.
Days To Complete	Use for establishing follow-up dates and other suspense items.

Setting Up Bargaining Units

To set up bargaining units use the Bargaining Unit component (BARG_UNIT_TBL) or Bargaining Unit Table USF (GVT_BARG_UNIT_TBL).

This topic discusses how to enter bargaining unit details.

Note: Bargaining units have a one to one relationship with labor agreements. You cannot use the same bargaining unit for multiple labor agreements.

Pages Used to Set Up Bargaining Units

Page Name	Definition Name	Usage
<u>General Bargaining Unit Data Page</u>	GVT_BARG_UNIT1	Enter bargaining unit details.
<u>Contact Information Page</u>	GVT_BARG_UNIT2	Enter union contact information.
<u>(USF) Contract/Partnership Data Page</u>	GVT_BARG_UNIT3	Define contract and partnership information for a bargaining unit.

General Bargaining Unit Data Page

Use the General Bargaining Unit Data page (GVT_BARG_UNIT1) to enter bargaining unit details.

Navigation

- Set Up HCM > Product Related > Workforce Administration > Labor Administration > Unions > Bargaining Unit > General Bargaining Unit Data
- Set Up HCM > Product Related > Workforce Administration > Labor Administration > Unions > Bargaining Unit Table USF > General Bargaining Unit Data

Image: General Bargaining Unit Data page

This example illustrates the General Bargaining Unit Data page.

The screenshot displays the 'General Bargaining Unit Data' page. At the top, there are tabs for 'General Bargaining Unit Data' and 'Contact Information'. Below the tabs, the 'Bargaining Unit' is set to '0055'. The 'Effective Date' is '01/01/1980', 'Status' is 'Active', and 'Date Union Recognized' is '01/01/1980'. The '*Description' is 'Natl Assoc of Govt Employees' and 'Short Description' is 'NAGE'. The 'Address' section shows 'Country' as 'USA' (United States) and 'Address' as '16222 West Alexandria Street, Suite 17, Mechanicsburg, OH, Wyandotte'. There is an 'Edit Address' button. At the bottom, 'Phone' is '513/227-0922' and 'Fax Number' is '513/225-5564'.

Date Union Recognized

Enter the date the union was recognized by your organization.

Contact Information Page

Use the Contact Information page (GVT_BARG_UNIT2) to enter union contact information.

Navigation

- Set Up HCM > Product Related > Workforce Administration > Labor Administration > Unions > Bargaining Unit > Contact Information
- Set Up HCM > Product Related > Workforce Administration > Labor Administration > Unions/Unions > Bargaining Unit Table USF > Contact Information

Image: Contact Information page

This example illustrates the Contact Information page.

Effective Date	Contact Name	Union Title	Phone
01/01/1980	Mr. James Cooper	Secretary/Treasurer	513/227-0922
	Ms. Rolanda Barnes	Vice President	513/227-3520

Enter the contact information for this bargaining unit.

(USF) Contract/Partnership Data Page

Use the Contract/Partnership Data page (GVT_BARG_UNIT3) to define contract and partnership information for a bargaining unit.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Unions > Bargaining Unit Table USF > Contract/Partnership Data

Image: Contract/Partnership Data page

This example illustrates the Contract/Partnership Data page.

Contracts

Contract Begin Date and Contract End Date Enter the begin and end date for this contract.

Partnership Council and Partnership Council Date Select if there is a partnership council and enter the date of the partnership council.

Partnership Agreement and Partnership Agreement Date Select if there is a partnership agreement and enter the date of the partnership agreement.

Setting Up Unions

To set up union data use the Unions component (UNION_TABLE).

This topic provides an overview and discusses how to set up union data.

Pages Used to Set Up Union Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Union Location Page</u>	UNION_TABLE1	Enter general details for a union.
<u>Contract Data Page</u>	UNION_TABLE2	Enter information on union contract benefit terms.

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Union Earnings Distribution Page</u>	UNION_TABLE3	Enter additional contract terms, such as callback hours and allowable earnings codes.

Understanding Union Data Setup

If you're administering a workforce, you or others in your company might need information on union workers for collective bargaining agreement negotiations, grievance tracking, or salary step increases. Unions are alternative to labor agreements and do not have as much system processing behind them.

Related Links

[Defining Labor Agreements](#)

Union Location Page

Use the Union Location page (UNION_TABLE1) to enter general details for a union.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Unions > Unions > Union Location

Image: Union Location page

This example illustrates the Union Location page.

Certified

Select if the union is certified. Certification means that a labor administration board in the country in question formally recognizes the union as the bargaining unit's exclusive representative. Certification typically occurs after the union wins a vote to form a union. A labor administration board's involvement in certifying the union ensures that all the appropriate laws and regulations have been followed in forming the union.

Closed Shop

Select if the union is a closed shop. This usually means that individuals can't work for a company within the represented worker class unless they agree to pay the equivalent dues to the union.

Local

Select if the union is represented by a local bargaining unit. The system makes the Bargaining Unit field available for entry.

Bargaining Unit	Select the bargaining unit associated with this union. This field is only available when you select the Local check box.
(IND) India	
Recognized	Select if the union is a Recognized Union.
Majority Union	Select if the majority of workers are members of the union.
Registered Union	Select if the union is a trade union registered with the government. If this is selected, then you have to enter data in the Registration Number and Registration Date fields.
(BRA) Brazil	
Union Type/Category	Enter a category, such as Trade or Chemical Sector. This information is used to group unions for reporting purposes.
Union Code	Enter the code that identifies the union in Brazil.
Month - Collective Agreement	Enter the base month of the union category. This month is when you review employees and adjust salaries.
Union CNPJ	Enter the union's CNPJ (<i>Cadastro Nacional de Pessoa Jurídica</i>) ID code.

Contract Data Page

Use the Contract Data page (UNION_TABLE2) to enter information on union contract benefit terms.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Unions > Unions > Contract Data

Image: Contract Data page

This example illustrates the Contract Data page.

Union Code 432

Contract Data Find | View All First 1 of 1 Last

Effective Date 01/01/1980 Status Active

Contact Name

Union Steward

Contract Terms

Contract Begin Date 10/10/1980 End Date

USA

Vacation Plan Sick Leave Plan

*Disability Insurance Not Applicable

*Life Insurance Not Applicable

*Tuition Reimbursement Limit None

Canada

Vacation Plan Sick Leave Plan

*Disability Insurance Not Applicable

*Life Insurance Not Applicable

*Tuition Reimbursement Limit None

Contract Terms

Contract Begin Date and **End Date** Enter the dates that the contract begins and ends.

(CAN) (USA)

Vacation Plan Enter the code for the type of vacation plan administered.

Sick Leave Plan Enter the code for the type of sick leave administered.

Disability Insurance Indicate whether the union provides disability insurance for its members.

Life Insurance Indicate whether the union provides life insurance.

Tuition Reimbursement Limit Indicate whether the union provides tuition reimbursement and at what limit.

Union Earnings Distribution Page

Use the Union Earnings Distribution page (UNION_TABLE3) to enter additional contract terms, such as callback hours and allowable earnings codes.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Unions > Unions > Union Earnings Distribution

Image: Union Earnings Distribution page

This example illustrates the Union Earnings Distribution page.

The screenshot shows the 'Union Earnings Distribution' page for Union Code 432. The 'Contract Data' section includes fields for Effective Date (01/01/1980), Status (Active), Contract Begin Date (10/10/1980), and End Date. The 'Contract Terms' section has input fields for Callback Minimum Hours (4.0), Factor (2.0), Standard Hours, Work Day Hours, Band Width Time (From/Through), and Core Time (From/Through). Below this is a section for 'Payroll for North America' which contains a table of 'Allowable Earnings Codes'.

*Company	*Pay Group	Description	*Earnings Code	Description
1 DC	BWH	Bwly hrly	REG	Regular

Contract Terms

Callback Minimum Hours

Enter the minimum number of hours a worker would be paid for if they are called back to a job.

Factor

Enter the rate at which union workers should be paid if they are called back to a job. For example, if the worker should receive the regular rate, enter *1*. If the worker should receive 1.5 times the regular rate, then enter *1.5*.

Payroll for North America

For each company and pay group combination, enter the earnings codes allowable for workers belonging to this union.

Related Links

"Entering Company Information" (PeopleSoft HCM 9.2: Application Fundamentals)

"Setting Up Pay Groups" (PeopleSoft HCM 9.2: Application Fundamentals)

(USF) Setting Up Unions

To set up U.S. Federal Government union and contract information use the Unions USF component (GVT_BU_UNION).

Use the Unions USF to define codes and record data for unions to which agency workers belong. You or others in your agency might need information on union workers for collective bargaining agreement negotiations, grievance tracking, or pay step increases.

This topic discusses how to set up union data in US Federal implementations.

Pages Used to Set Up U.S. Federal Government Union and Contract Information

Page Name	Definition Name	Usage
<u>Union Address Page</u>	GVT_BU_UNION_TBL1	Enter general details and address information for a union.
<u>Union Address Information Page</u>	GVT_BU_UNION_SEC1	Enter the address information for this union.
<u>Contact and Contract Info Page</u>	GVT_BU_UNION_SEC2	Enter contact and contract details for this bargaining unit. The contact information is specific to the contract.
<u>Contact Info Page</u>	GVT_BU_UNION_TBL2	Enter contact information that is general for all contracts with this union.
<u>Partnership Data/Steward Info Page</u>	GVT_BU_UNION_TBL3	Enter partnership and steward data for this bargaining unit.
<u>Union Agreement Page</u>	GVT_BU_UNION_TBL4	Enter additional contract terms for this bargaining unit.
<u>Earnings Codes Page</u>	GVT_BU_UNION_TBL5	Enter allowable earnings codes data for bargaining unit members.

Union Address Page

Use the Union Address page (GVT_BU_UNION_TBL1) to enter general details and address information for a union.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Unions > Unions USF > Union Address

Image: Union Address page

This example illustrates the Union Address page.

Assign union codes to workers on the Job Data - Job Labor page.

See "Job Labor Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce).

Union Scope	Enter the union scope (local, national, worldwide).
Union Affiliate	Enter the union affiliate type.
LMR Hours (labor management relations hours)	Enter the labor management relations training hours required for union members or other personnel, if you want to track this information.
Country	To enter the union's address information, click this link. The system displays the Union Address Information page.
Union Contact / Contract Info	To enter the bargaining unit's contact and contract information, click this link. The Contact and Contract Info page appears.

Union Address Information Page

Use the Union Address Information page (GVT_BU_UNION_SEC1) to enter the address information for this union.

Navigation

Click the Country link on the Union Address page.

Image: Union Address Information page

This example illustrates the Union Address Information page.

Union Address Information

Country United States

Address 200 Constitution Ave N.W.
RoomN4522
MailDrop XDG-722
Washington, DC 20012

Phone:

Edit Address

OK Cancel

Select the appropriate country and enter the address information. If the address is already entered, click the Edit Address link to display the Edit Address Information page.

Contact and Contract Info Page

Use the Contact and Contract Info page (GVT_BU_UNION_SEC2) to enter contact and contract details for this bargaining unit.

The contact information is specific to the contract.

Navigation

Click the Union Contact / Contract Info link on the Union Address page.

Image: Contact and Contract Info page

This example illustrates the Contact and Contract Info page.

Contact and Contract Info

Contact Information

Contact Name

Union Steward

Contract Information

Contract Begin Date

Contract End Date

*Life Insurance

*Disability Insurance

*Tuition Limit

Retirement Pickup Percent

SDI Administration Percent

Vacation Plan

Sick Leave Plan

Callback Minimum Hours

Callback Factor

☐ FICA Pickup

OK Cancel

Contact Information

Enter contact information that is specific for the contract.

Contract Information

Disability Insurance

Specify the amount the disability insurance offered bargaining unit members.

Retirement Pickup Percent

Enter the retirement pickup percent for bargaining unit members' retirement plan under the contract.

Tuition Limit

Indicate the maximum amount of tuition provided each bargaining unit member, if any.

SDI Administration Percent (state disability insurance administration percent)

Enter the percent amount paid to the state disability insurance.

Callback Factor

Enter the rate at which bargaining unit members should be paid if they are called to a job. For example, if the worker should be paid at the regular rate, enter *1* as the factor. Or if the employee should be paid time and a half, enter *1.5*.

Contact Info Page

Use the Contact Info page (GVT_BU_UNION_TBL2) to enter contact information that is general for all contracts with this union.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Unions > Unions USF > Contact Info

Image: Contact Info page

This example illustrates the Contact Info page.

The screenshot shows the 'Contact Info' page for a specific bargaining unit. At the top, there are tabs for 'Union Address', 'Contact Info' (which is active), 'Partnership Data/Steward Info', 'Union Agreement', and 'Earnings Codes'. Below the tabs, the 'Bargaining Unit' is identified as '0055 Natl Assoc of Govt Employees' and the 'Union Code' is '432 American Fed of Govt Employees'. A section for 'Effective Date' shows '01/01/1980' and 'Status' as 'Active'. Below this is a 'Contact Information' section with a search bar and navigation controls. The form contains the following fields: '*Union Contact Number' (0000890543), '*Status' (Active), '*Contact Name' (Joseph Spazk), '*Union Title' (President), 'Primary Phone' (202/872-4800), 'Alternate Phone' (202/872-4801), and 'Fax Number' (empty).

Add contact information that is general for the union bargaining unit.

Partnership Data/Steward Info Page

Use the Partnership Data/Steward Info page (GVT_BU_UNION_TBL3) to enter partnership and steward data for this bargaining unit.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Unions > Unions USF > Partnership Data/Steward Info

Image: Partnership Data/Steward Info page

This example illustrates the Partnership Data/Steward Info page.

The screenshot shows the 'Partnership Data/Steward Info' page. At the top, there are tabs: 'Union Address', 'Contact Info', 'Partnership Data/Steward Info' (active), 'Union Agreement', and 'Earnings Codes'. Below the tabs, the 'Partner' section is visible. It contains the following information: Bargaining Unit 0055 (Natl Assoc of Govt Employees), Union Code 432 (American Fed of Govt Employees), Effective Date 01/01/1980, Status Active, Union Type US Federal Government Union, Date Union Recognized 01/01/1970, Partnership Council (unchecked), Partnership Council Date, Partnership Agreement (unchecked), and Partnership Agreement Date. Below the Partner section is the 'Steward' section, which includes fields for *Union Steward Number, *Status (Active), *Union Steward, *Union Title, Primary Phone, Alt Phone, and Fax. Navigation links like 'Find | View All' and 'First 1 of 1 Last' are present at the top of each section.

Partner

Union Type

Indicate whether this bargaining unit is part of a private, public, or federal government union.

Date Union Recognized

Enter the date the union was recognized by your agency.

Union Agreement Page

Use the Union Agreement page (GVT_BU_UNION_TBL4) to enter additional contract terms for this bargaining unit.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Unions > Unions USF > Union Agreement

Image: Union Agreement page

This example illustrates the Union Agreement page.

The screenshot shows the 'Union Agreement' tab selected. The page displays the following information:

- Bargaining Unit:** 0055, Natl Assoc of Govt Employees
- Union Code:** 432, American Fed of Govt Employees
- Union Effective date:** Find | View All | First 1 of 1 Last
- Effective Date:** 01/01/1980
- Status:** Active
- Comment:** A large text area for entering comments.

Type highlights of the union agreement in the space provided for bargaining unit/union agreement text. Enter more text than is visible in the group box, if needed. Use the inner scroll bar to navigate to text off of the screen.

Earnings Codes Page

Use the Earnings Codes page (GVT_BU_UNION_TBL5) to enter allowable earnings codes data for bargaining unit members.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Unions > Unions USF > Earnings Codes

Image: Earnings Codes page

This example illustrates the Earnings Codes page.

The screenshot shows the 'Earnings Codes' tab selected. The page displays the following information:

- Bargaining Unit:** 0055, Natl Assoc of Govt Employees
- Union Code:** 432, American Fed of Govt Employees
- Union Effective date:** Find | View All | First 1 of 1 Last
- Effective Date:** 01/01/1980
- Status:** Active
- Earnings Code:** Find | View All | First 1 of 1 Last
- Earnings Code Table:**

*Company	*Pay Group	Earn Prog	*Earnings Code
DC	BWH	Biweekly Hourly Paygroup	REG
		GS	Regular

Note: The information on this page is for information only.

Company	Designate the company name.
Pay Group, Earn Prog (pay group, earnings program)	Select the pay group. When you move out of this field, the system displays the associated earnings program.
Earnings Code	Select each earnings code that is valid for this union within each pay group.

Chapter 4

Setting Up Labor Administration Data

Defining Seniority Dates

To define seniority dates, use the Seniority Dates component (HR_SNR_DATE_TBL) and the Tie Breakers component (HR_TIEBREAK_TBL).

This topic provides an overview of seniority dates and discusses how to set up seniority dates and tiebreakers.

Pages Used to Set Up Seniority Dates

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Seniority Dates Page</u>	HR_SNR_DATE_TBL	Set up seniority dates to track a worker's seniority for labor administration purposes. You can base the seniority dates on existing system values or create new dates. Attach the dates you create here to labor agreements.
<u>Tie Breakers Page</u>	HR_TIEBREAK_TBL	Set up different types of ways to break ties between two workers who otherwise have equal seniority.

Understanding Seniority Dates

PeopleSoft calculates and displays a number of seniority dates on the Job Data - Employment Data page (EMPLOYMENT_DTA1). These fields are used throughout PeopleSoft HCM for various features (such as Benefits), but, since seniority rules can vary from labor agreement to labor agreement, they are not used for labor administration processing.

Instead, use the Seniority Dates page (HR_SNR_DATE_TBL) to define the seniority dates required to comply the labor agreements in effect at your organization. Associate the seniority dates with labor agreements on the Labor Agreements component (HR_LABOR_AGRMNT). The system displays the seniority dates associated with a person's labor agreement on the Job Data - Job Labor page (JOB_LABOR).

Examples of seniority dates you may want to create are:

- Seniority date for providing workers with employment rights.
- Seniority date providing workers with the ability to exercise preferences such as bidding on shifts and overtime.

You can create seniority date types using existing system dates so that the system will insert the values from the existing fields into the seniority date you create. You can also create seniority dates to update and maintain manually. Maintain the dates for workers on the Job Data - Job Labor page.

Use seniority dates as sort criteria for the:

- Seniority List report
- Candidate List report
- Reinstatement roster
- Layoff roster
- Recall roster

Tie Breakers

In the event that two workers are tied for seniority, you will need to apply a tie breaker that is in accordance with the workers' labor agreement. Define tie breaker types that are based on information in the system, such as birth date or national identification number, on the Tie Breakers page (HR_TIEBREAK_TBL) and associate them with labor agreements on the Labor Agreement component. Use tie breakers as sort criteria for the:

- Seniority List report
- Candidate List report
- Reinstatement roster
- Layoff roster
- Recall roster

Note: For lottery-style tie breakers, where the unions decide the seniority order, you can manually change people's ranking on the roster by changing their rank number accordingly.

Seniority Dates Page

Use the Seniority Dates page (HR_SNR_DATE_TBL) to set up seniority dates to track a worker's seniority for labor administration purposes.

You can base the seniority dates on existing system values or create new dates. Attach the dates you create here to labor agreements.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Layoffs and Recalls > Seniority Dates > Seniority Dates

Image: Seniority Dates page

This example illustrates the Seniority Dates page.

Label

Enter the label to appear next to this date field on the Job Data - Job Labor page.

Default From Existing Field

Select if this field's value defaults from an existing PeopleSoft system field. When you select this check box, the system makes the Record and Field fields available for entry.

Date From Existing Field

Record and Field

Select the record and field you want to use.

For example, to create a seniority date called Dept Entry that uses the Department Entry Date value from the Work Location page as a seniority date, select the JOB record and the DEPT_ENTRY_DT field. The system will display the Dept Entry seniority date on the Job Labor Workers page and automatically populate it with the date from the Department Entry Date field on the Work Location.

Allow Edits

Select to make the field available for entry on the Job Labor page, enabling you to override the default value.

Tie Breakers Page

Use the Tie Breakers page (HR_TIEBREAK_TBL) to set up different types of ways to break ties between two workers who otherwise have equal seniority.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Layoffs and Recalls > Tie Breakers > Tie Breakers

Image: Tie Breakers page

This example illustrates the Tie Breakers page.

Date From Existing Field

Record (Table) Name and Field Name

Select the record and field value you want to use as a tie breaker. Only select records are available.

Setting Up Layoff and Recall Control Tables

To set up layoff and recall control tables, use the Layoff Exemption Reasons component (HR_LAY_EXEM_TBL), Recall Expiration Rules component (HR_RCL_EXP_TBL), Employee Roster Status component (HR_LBR_EEST_TBL) and Recall Reason component (HR_RCL_RSN_TBL).

This topic provides an overview of recall rights and discusses how to set up layoff and recall control tables.

Pages Used to Set Up Layoff and Recall Control Tables

Page Name	Definition Name	Usage
Recall Expiration Rules Page	HR_RCL_EXP_TBL	Set up rules to govern the expiration of recall rights. Attach recall expiration rules to a labor agreement.
Layoff Exemption Reasons Page	HR_LAY_EXEM_TBL	Create reasons a worker could be exempt from layoff. Attach these reasons to workers on the Job Labor page. The system does not include workers who are exempt from layoffs in the group population when you generate a layoff.
Employee Roster Status Page	HR_LBR_EEST_TBL	Define the statuses you need to manage your roster during a layoff or recall. Assign people roster statuses on the Layoff, Recall or Reinstatement Roster List pages.

Page Name	Definition Name	Usage
Recall Reason Page	HR_RCL_RSN_TBL	Define reasons for allocating workers with recall rights.

Understanding Recall Rights

Workers that have been bumped to a lower level job or workers that were laid off can have rights for vacant positions. Labor agreements specify how long after being bumped or laid off a worker can have rights to reemployment and what circumstances might terminate their recall rights.

For example, workers under labor agreement ABC and who have been with the company for four or more years have first rights on any new vacancies in the organization for twelve months following a layoff while workers who have been with the company for less than four years have recall rights that expire after six months. Recall rights for workers may be terminated in the event that they refuse an offer of reemployment from the company.

Recall Expiration Rules Page

Use the Recall Expiration Rules page (HR_RCL_EXP_TBL) to set up rules to govern the expiration of recall rights.

Attach recall expiration rules to a labor agreement.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Layoffs and Recalls > Recall Expiration Rules > Recall Expiration Rules

Image: Recall Expiration Rules page

This example illustrates the Recall Expiration Rules page.

Recall Expiration Rules

Recall Expiration Rule ID: HXUEXP1

Recall Expiration Rule: Find | View All | First 1 of 1 Last

*Effective Date: 01/01/1900 [31] *Status: Active [+] [-]

*Description: Job Code Entry Seniority date

Select By: Based on Seniority Date

Rule Details Find | View All | First 1 of 1 Last

Seq Nbr: 1

If: Seniority Date ID: HXUJENTRY [magnifying glass] Operand: > 1 Period: Years

Then: Recall Period: = 6 Recall Period: Months

Note: The system determines that a recall right has expired when the defined expiry date is less than current system date.

Recall Expiration Rule

Select By

Select one of the following options:

- *Seniority*

Select if the recall expiration date is calculated using seniority as determined by a seniority date.

Note: If a recall expiration rule is based on a seniority date and this date is blank for a person, then the system will not create automatic recall rights for the worker. You will have to enter rights manually on the Recall Rights page (HR_RCL_RIGHTS).

- *Layoff Date*

Select if the recall expiration date is calculated from the layoff date.

- *No Recall*

Select if there is no recall.

Note: You must set up at least one recall expiration rule with no recall because the Recall Expiration Rule field on the Seniority Rules page (HR_LABOR_AGRDEFN3) is a required field. If a labor agreement has no predetermined rules around recall rights processing then attach a No Recall type rule to the labor agreement. When a layoff is processed for workers in covered by a labor agreement with a No Recall rule, the system will not create automatic recall rights those candidates being laid off. The Recall/ Reinstatement process will also not process recall rights for candidates covered by a labor agreement with a No Recall recall expiration rule.

Rule Details for Seniority Based Recall Expiration Rules

Enter multiple Rule Details rows to create different recall expiry periods for different seniority categories.

Seq Nbr

Enter the sequence in which the system should process this rule detail.

Seniority Date ID

Select the ID of the seniority date you want the rule to use to calculate seniority for the purpose of recall for this rule detail line.

Operand

Select the operation symbol.

Period

Enter a number in the preceding field and then select the period of time it refers to. For example, enter *1* in the preceding field and *Years* in this field to indicate that the period of seniority is one year.

Recall Period

Enter a number in the preceding field and then select the period of time it refers to. For example, enter *6* in the preceding field and *Months* in this field to indicate that recall rights expire after six months for workers with this seniority range.

Rule Details for Layoff Date Based Recall Expiration Rules**Period**

Enter a number in the preceding field and then select the period of time it refers to. For example, enter *6* in the preceding field and *Months* in this field to indicate that recall rights expire six months after layoff.

Layoff Exemption Reasons Page

Use the Layoff Exemption Reasons page (HR_LAY_EXEM_TBL) to create reasons a worker could be exempt from layoff. Attach these reasons to workers on the Job Labor page.

The system does not include workers who are exempt from layoffs in the group population when you generate a layoff.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Layoffs and Recalls > Layoff Exemption Reasons > Layoff Exemption Reasons

Image: Layoff Exemption Reasons page

This example illustrates the Layoff Exemption Reasons page.

The screenshot displays the 'Layoff Exemption Reasons' page. At the top, it shows 'Layoff Exemption Reason K00STW'. Below this is a table with one row titled 'Layoff Exemption Definition'. The table has columns for 'Find | View All', 'First', '1 of 1', and 'Last'. Below the table, there are two main fields: '*Effective Date' with a date picker set to '01/01/1980' and '*Status' with a dropdown menu set to 'Active'. There are also '+' and '-' buttons next to the status dropdown. Below these fields is a '*Description' field with the text 'Shop Steward'.

Employee Roster Status Page

Use the Employee Roster Status page (HR_LBR_EEST_TBL) to define the statuses you need to manage your roster during a layoff or recall.

Assign people roster statuses on the Layoff, Recall or Reinstatement Roster List pages.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Layoffs and Recalls > Employee Roster Status > Employee Roster Status

Image: Employee Roster Status page

This example illustrates the Employee Roster Status page.

Event Type

Select whether the status is for a *Layoff* or *Recall* event. *Recall* events also apply to Reinstatements.

Process Event?

Select so that when you process the layoff, recall, or reinstatement processes the system will process people with this status and insert a new job data record for the event.

For example, create a status called *Layoff Accepted* and select the Process Event? check box for the status. When you assign *Layoff Accepted* to a person on a layoff roster and then process the layoff, the system will insert a new job data record for the person processing their layoff.

Event Complete?

Select if this status indicates the completion of the event on the roster. You should only select this check box for two Employee Roster Statuses: one for an event type of *Layoff* and one for an event type of *Recall*.

When workers are successfully processed using the Layoff (HR_LAY_EXEC) or Recall or Reinstatement processes (HR_REIN_EXEC), the system reads the relevant Event Complete? value from this page and sets all processed workers to this status to prevent them from being reprocessed.

Recall Reason Page

Use the Recall Reason page (HR_RCL_RSN_TBL) to define reasons for allocating workers with recall rights.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Layoffs and Recalls > Recall Reason > Recall Reason

Image: Recall Reason page

This example illustrates the Recall Reason page.

The screenshot shows a web interface titled "Recall Reason". Below the title, there is a breadcrumb or status indicator "Recall Reason REINSTATE". A section titled "Recall Reason History" contains a search bar with "Find | View All" and pagination "First 1 of 1 Last". Below this, there are three input fields: "*Effective Date" with the value "01/01/1900", "Status" with a dropdown menu showing "Active", and "*Description" with the value "Reinstatement".

Setting Up Labor Agreement Control Tables

To set up labor agreement control tables use the Labor Job Classes component (HR_LBR_JOB_CLS_TBL) and Labor Facilities component (HR_LBR_FAC_TBL).

This topic discusses how to set up labor job classes and labor facilities. You must set these up before you can set up labor agreements.

Pages Used to Set Up Labor Agreement Control Tables

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Labor Job Classes Page	HR_LBR_JOB_CLS_TBL	Set up job labor classes to use in labor agreements. Labor classes are required to group and rank job codes to create a bumping hierarchy.
Labor Facilities Page	HR_LBR_FAC_TBL	Set up labor facilities as required to administer the labor agreement. They are used to identify worker sites. Facilities can be used when defining Layoff or Recall events as well as a selection parameter on the Seniority Report. They are not related to the Work Location values.

Labor Job Classes Page

Use the Labor Job Classes page (HR_LBR_JOB_CLS_TBL) to set up job labor classes to use in labor agreements. Labor classes are required to group and rank job codes to create a bumping hierarchy.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Labor Agreement > Labor Job Classes > Labor Job Classes

Image: Labor Job Classes page

This example illustrates the Labor Job Classes page.

The screenshot shows the 'Labor Job Classes' page with the following details:

- Labor Job Class:** HXUHCLK
- Labor Job Class:** HXUHCLK
- Find | View All:** First 1 of 1 Last
- *Effective Date:** 01/01/1900
- *Status:** Active
- *Description:** Clerical Workers
- Short Description:** Clerical W
- Comment:** (Empty text area)

Labor Facilities Page

Use the Labor Facilities page (HR_LBR_FAC_TBL) to set up labor facilities as required to administer the labor agreement. They are used to identify worker sites.

Facilities can be used when defining Layoff or Recall events as well as a selection parameter on the Seniority Report. They are not related to the Work Location values.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Labor Agreement > Labor Facilities > Labor Facilities

Image: Labor Facilities page

This example illustrates the Labor Facilities page.

The screenshot shows the 'Labor Facilities' page with the following details:

- Labor Facility ID:** HXUC-CIVIL
- Labor Facility:** HXUC-CIVIL
- Find | View All:** First 1 of 1 Last
- *Effective Date:** 01/01/1900
- *Status:** Active
- *Description:** Construction Civil Facility
- Short Description:** Facility
- Building Nbr:** (Empty text area)
- Floor Nbr:** (Empty text area)
- Country:** USA (United States)
- Address:** (Empty text area)
- Edit Address:** (Button)

Defining Labor Agreements

To define labor agreements use the Labor Agreement component (HR_LABOR_AGRMNT) and Employee Categorization component (EMPL_CTG_L1). To clone an existing labor agreement use the Clone Labor Agreement component (HR_CLONE_LBR_AGRMT).

This topic discusses how to define labor agreements.

Pages Used to Define Labor Agreements

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Labor Agreement Page</u>	HR_LABOR_AGR_DEFN1	Define general information about labor agreements.
<u>Job Codes Page</u>	HR_LABOR_AGR_DEFN2	If you want the system to validate the job code assigned to a worker Job Data - Job Information page (JOB_DATA_JOBCODE), enter job codes and associated information here.
<u>Seniority Rules Page</u>	HR_LABOR_AGR_DEFN3	If the agreement includes rules regarding seniority, layoffs, and recalls, assign the recall expiration rule, seniority dates and tie breakers.
<u>Facilities Page</u>	HR_LABOR_AGR_DEFN4	If you are using facilities to manage layoff and recall events, assign the labor facilities that are tied to this agreement.
<u>Employee Categorization Page</u>	EMPL_CTG_L1	If you use tiered pay plans, define labor agreement categories and associate them with labor agreements.
<u>Clone Labor Agreement Page</u>	HR_CLONE_LBR_AGRMT	Clone an existing labor agreement.

Labor Agreement Page

Use the Labor Agreement page (HR_LABOR_AGR_DEFN1) to define general information about labor agreements.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Labor Agreement > Labor Agreement > Labor Agreement

Image: Labor Agreement page (1 of 2)

This is the first of two examples illustrating the Labor Agreement page.

The screenshot displays the 'Labor Agreement' page for Set ID USA, Labor Agreement K00001. The page is divided into several sections:

- Header:** Labor Agreement | Job Codes | Seniority Rules | Facilities
- Set ID:** USA
- Labor Agreement:** K00001
- Reg Regions that use this Labor Agreement:** Find | View All | First 1 of 1 Last
- Effective Date:** 01/01/1980
- Status:** Active
- Ratify Date:** 01/01/1980
- Contract Begin Date:** 01/01/1980
- Contract End Date:** 12/31/2010
- *Description:** Professional Agreement 1980
- Bargaining Unit:** KU02 American Professional Union
- Comments:** Agreement made between Professional workers and Management
- Agreement includes:**
 - ☒ Job Codes
 - ☒ Seniority Rules
 - ☒ Facilities
- Short Description:** Prof 1980
- Wage Progression Rules:**
 - Carryover Rules apply when an employee's Job Code changes. Check the values that should be retained with a new Job assignment.
 - ☒ Step ID
 - ☒ Step Entry Date
 - ☒ Wage Progression Hours Worked
- Clone Labor Agreement** (link)

Image: Labor Agreement page (2 of 2)

This is the second of two examples illustrating the Labor Agreement page.

The screenshot displays the 'Labor Agreement' page for Set ID India. The page is divided into several sections:

- Header:** Spain
- Working Hours per Year:** [Field]
- Working Hours per Day:** [Field]
- Vacation Period:** [Field]
- Additional PTO:** [Field]
- Labor Agreement Cd:** [Field]
- Union Participation:** Find | View All | First 1 of 1 Last
 - *Union Code:** [Field]
- Management Representation:** Personalize | Find | View All | First 1 of 1 Last

ID	Name
1	[Field]

Assign labor agreements to workers on the Job Data - Job Labor page (JOB_LABOR).

See "Job Labor Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce).

Click the Reg Regions that use this Labor Agreement to review the regulatory regions that can use this labor agreement. Only workers assigned to one of these regulatory regions can be assigned to this labor agreement. Available regulatory regions are determined by the SetID assigned to the labor agreement.

Effective Date

The system will only make labor agreements that are effective as of the Job Data row effective date available on the Job Labor page.

Ratify Date	Enter the date the labor agreement was ratified. This field is information only.
Contract Begin Date and Contract End Date	Enter the begin and end dates of the labor agreement. The begin date defaults from the Effective Date but can be changed. These fields are for information only.
Bargaining Unit	Select the bargaining unit for this agreement. Note: Bargaining units have a one to one relationship with labor agreements. You cannot assign a bargaining unit to more than one labor agreement. The system will only display those bargaining units that are not already assigned to another labor agreement in the search window.
Clone Labor Agreement	Displays the Clone Labor Agreement page. See Clone Labor Agreement Page .
Agreement Includes	
Job Codes	The system selects this check box when you set up information on the Job Codes page. See Job Codes Page .
Seniority Rules	The system selects this check box when you set up information on the Seniority Rules page. See Seniority Rules Page .
Facilities	The system selects this check box when you set up information on the Facilities page. See Facilities Page .
(CAN) (USA) Wage Progression	
Select if any of the following wage progression carry over options apply to the workers covered by this labor agreement when they change job codes in the Job Data pages:	
Step ID	Select to have the system carry the worker's salary plan step to their newly assigned job code's pay plan. You can override the default value, if required. Deselect this check box if you want to always manually assign the step with a job code change.
Step Entry Date	Select to have the system carry the worker's salary step entry date to their newly assigned job code's step entry date. You can override the default value, if required.

Deselect this check box to have the system insert the effective date of the new Job Data row as the new step entry date.

Wage Progression Hours Worked

Select to have the Update Wage Progression process carry over the worker's time worked towards a wage progression in their new job code.

Deselect this check box to have the system reset workers' accumulated time to zero with the new job assignment.

(ESP) Spain

Working Hours per Year

Enter the annual number of working hours as agreed upon by the labor agreement.

Working Hours per Day

Enter the daily number of working hours as agreed upon by the labor agreement.

Vacation Period

Define the vacation period as agreed upon by the labor agreement. You have the option of defining the vacation period in *Months*, *Natrl Days* (natural days), *Weeks*, or *Work Days*.

Natural days are like calendar days. They include weekends and holidays.

Work days are like regular working days. They do not include weekends and holidays. For example, let's say that an employee's regular work days are Monday through Friday, and the employee is entitled to 23 work days of vacation, as defined in the employee's labor agreement. The employee can take a vacation from July 1 to July 31, using 23 work days. This is calculated as 4 weeks x 5 work days plus 3 more work days.

Additional PTO (additional paid time off)

Enter the amount of additional PTO (*dias moscosos*), if it applies to the labor agreement. Depending on the conditions of the labor agreement, an employee may or may not carry an additional PTO balance from one year to the next. Sometimes, if an employee does not use additional PTO within the current year, the employee will lose those days. Other times, it is possible to carry additional PTO balances to the next year.

SS Labor Agrmnt (social security labor agreement)

Select a social security labor agreement.

(IND) India

Union Code

Select the appropriate Union Code. This is defined in the Unions component.

Management Representation ID

Enter the employee ID of the management representative to the union. This field should not be left empty if a Union Code is entered.

Job Codes Page

Use the Job Codes page (HR_LABOR_AGR_DEFN2) to enter job codes and associated information if you want the system to validate the job code assigned to a worker on Job Data - Job Information page (JOB_DATA_JOBCODE),

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Labor Agreement > Labor Agreement > Job Codes

Image: Job Codes page

This example illustrates the Job Codes page.

The screenshot shows the 'Job Codes' page for Labor Agreement K00001. The 'Job Code Assignment' section shows 'Labor Job Class' K00001 and 'Clerical Workers'. Below this is a table of job codes:

Bumping Sequence	Job Code Set ID	Job Code	Description	Employee Category	Salary Set ID	Salary Plan	Grade
1	SHARE	140035	Analyst-Financial				
2	SHARE	170005	Assistant-Administrative				
3	SHARE	200005	Auditor-General				
4	SHARE	290075	Clerk-Payroll				
5	SHARE	290055	Clerk-I				

The system uses the information you enter on this page to:

- Validate the assigned job code with the assigned labor agreement on the Job Data pages.

Select a Labor Job Class and then choose the job codes that fall under that class for this labor agreement.

Note: If you enter job codes for this labor agreement on this page, you can only assign workers in this labor agreement (assigned on the Job Labor page) to one of those job codes. The system will not let you save the Job Data record if the job code is not valid with the labor agreement.

See "Adding Organizational Instances for Employees, Contingent Workers, and POIs" (PeopleSoft HCM 9.2: Human Resources Administer Workforce).

- Rank job codes in this labor agreement to manage bumping rights in the event of a layoff.

Note: The management of bumping rights is a manual process. Use the Bumping report, which provides the details from the Job Code Assignment page as well as a history of a worker's job information, to help you manage bumping.

See [Bumping Report Page](#).

- Assign employee categories to the job codes in this labor agreement to create wage tiers.
- Assign the salary plan and grade you want to assign to people on the Job Data - Salary Plan page (JOB_DATA_SALPLAN).

The system will use these default values for people with this job code and labor agreement combination instead of the default values from the Location (LOCATION_TABLE) or Job Code components (JOB_CODE_TBL).

See [Understanding Wage Progression](#).

See "Job Data - Salary Plan Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce).

See "Understanding Wage Progression and Administer Compensation" (PeopleSoft HCM 9.2: Human Resources Administer Compensation).

Note: You can take advantage of none, one, or any combination of these features.

Labor Job Class

Select a class of jobs to identify the job codes selected in the Job Codes group box. Use this value to manage layoff bumping hierarchies.

See [Setting Up Labor Agreement Control Tables](#).

Add Multiple Job Codes

Click this button to display the Add by Job Code page. Search for job codes by Job Code Set ID and Job Family and select those job codes you want to add to the Job Codes grid for this Labor Job Class.

Job Codes

Click the Business Units that use these Job Codes to view the business units that use the job codes you've selected in the Job Codes grid. When you create a Job Data record for a worker covered by this labor agreement, ensure that you select the appropriate business unit to enable you to assign them to one of these job codes.

Bumping Sequence

Enter the job code's position in the bumping sequence. The sequence defines a worker's place in the bumping hierarchy.

Bumping is the practice of allowing a worker with more seniority to replace a junior worker in another department or job as long as the senior worker is qualified.

Job Code Set ID and Job Code

Select the Set ID and job code.

Note: You can only add a job code to a labor agreement once for a selected Labor Job Class unless you select an Employee Category as an additional qualifier.

See "Classifying Jobs" (PeopleSoft HCM 9.2: Application Fundamentals).

Employee Category

If you are using tiered wage assignment, select the employee category for this job code.

This enables you to list a job code more than once and to assign different salary plans for different classes of workers.

For example, if pilots hired prior to 1990 are on one pay plan while all those hired later are on another, create two employee categories to distinguish between these two groups on the Employee Categorization page. Enter two rows with the pilot job code, assign one the pre-1990 employee category and the other the post-1990 category and then assign the appropriate salary plan for each row.

See [Employee Categorization Page](#).

Salary Set ID, Salary Plan, and Grade

Select a salary plan (with Set ID) and grade to associate with this job code and labor agreement.

The system will assign this salary plan and grade on the Job Data - Salary Plan page when you assign a worker to this job labor agreement and job code.

See "Job Data - Salary Plan Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce).

See "Understanding Wage Progression and Administer Compensation" (PeopleSoft HCM 9.2: Human Resources Administer Compensation).

Seniority Rules Page

Use the Seniority Rules page (HR_LABOR_AGR_DEFN3) to assign the recall expiration rule, seniority dates and tie breakers if the agreement includes rules regarding seniority, layoffs, and recalls.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Labor Agreement > Labor Agreement > Seniority Rules

Image: Seniority Rules page

This example illustrates the Seniority Rules page.

The screenshot shows the 'Seniority Rules' page for Set ID USA and Labor Agreement K00001. The page includes a 'Recall Expiration Rule ID' field set to K00001 and a 'Status' of Active. Below this, there are two main sections: 'Seniority Dates' and 'Tie Breakers'.

Seniority Dates Table:

ID	Label	Default from Existing Field	User Editable
K00DEP	DEPT ENTRY DATE	☒	☒
K00FAC	FACILITY ENTRY DATE	☒	☒
K00JOB	JOB CODE ENTRY DATE	☒	☒

Tie Breakers Table:

ID	Description
K00001	National ID
K00002	Date of Birth

Recall Expiration Rule ID

Select the recall expiration rule to associate with this labor agreement. The system will determine recall rights of workers assigned to this labor agreement using this rule.

If the labor agreement does not have any predetermined rules about the expiration of recall rights, select a No Recall recall expiration rule. The layoff, reinstatement, and recall processes do not create recall rights for workers in a labor agreement with a No Recall recall expiration rule.

See [Recall Expiration Rules Page](#).

Seniority Dates

Select the seniority dates associated with this labor agreement. When you assign a worker to this labor agreement, the system will display the seniority date fields you select here on the Job Labor page. On the Job Labor page, if the dates default from an existing field, the system will populate them with the value from the existing field. Only the seniority dates that you associate with this labor agreement are available for selection in the layoff and recall rosters, and seniority or candidate list reports for this labor agreement.

See [Seniority Dates Page](#).

Tie Breakers

Select the tie breakers associated with this labor agreement. In cases where more than one worker has the same length of seniority, you can use one of the selected tie breakers to determine priority. The tie

breakers you associate with this labor agreement are the only ones available on layoff or recall roster, or when running a seniority or candidate list report for this labor agreement.

See [Tie Breakers Page](#).

Facilities Page

Use the Facilities page (HR_LABOR_AGR_DEFN4) to assign the labor facilities that are tied to this agreement if you are using facilities to manage layoff and recall events.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Labor Agreement > Labor Agreement > Facilities

Image: Facilities page

This example illustrates the Facilities page.

The screenshot shows the 'Facilities' page for a specific labor agreement. At the top, there are tabs for 'Labor Agreement', 'Job Codes', 'Seniority Rules', and 'Facilities'. Below the tabs, the 'Set ID' is 'USA' and the 'Labor Agreement' is 'K00001'. The page title is 'Labor Agreement'. There are navigation links: 'Find', 'View All', 'First', '1 of 1', and 'Last'. Below this, the 'Effective Date' is '01/01/1980' and the 'Status' is 'Active'. A sub-section titled 'Labor Facility' has links for 'Personalize', 'Find', 'View All', and a calendar icon. It also has 'First', '1 of 4', and 'Last' navigation. A table with two columns, 'Labor Facility ID' and 'Description', is shown. The first row has 'K00001' in the ID column and 'Georgia Training Facility' in the Description column. There are '+' and '-' buttons at the end of the row.

Facilities

Assign facilities to this labor agreement to enable you to categorize workers by facilities, in addition to other methods of grouping, such as by job code, department, and location. Facilities enable you to define groups for layoff and recalls or on the seniority or candidate list reports.

Note: If you enter labor facility IDs for this labor agreement on this page, you can only select from those facilities when you assign a worker to this labor agreement on the Job Labor page.

See [Setting Up Labor Agreement Control Tables](#).

See "Job Labor Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce).

Employee Categorization Page

Use the Employee Categorization page (EMPL_CTG_L1) to define labor agreement categories and associate them with labor agreements if you use tiered pay plans.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Labor Agreement > Employee Categorization > Employee Categorization

Image: Employee Categorization page (1 of 2)

This is the first of two examples illustrating the Employee Categorization page.

Employee Categorization

Set ID USA Labor Agreement K00001 Professional Agreement 1980

Category FT

Find | View All First 1 of 1 Last

*Effective Date 01/01/1980 *Status Active

*Description Full Time Employee Sequence

Short Desc Full Time

Spain

Scheme ID

Social Security Work Group

FORCEM

France

Category 24-83 Social Bilan Category

Number of Columns

Column 1 Description

Column 2 Description

Column 3 Description

Column 4 Description

Column 5 Description

India

Agreement End Date

Comments

Image: Employee Categorization page (2 of 2)

This is the second of two examples illustrating the Employee Categorization page.

Subcategory 1 Find | View All First 1 of 1 Last

*Subcategory Sequence

Description Short Desc

Italy

Reg Region Empl Class

Subcategory 2 Find | View All First 1 of 1 Last

*Subcategory 2 Sequence

Description Short Desc

Labor agreement categories are used on the Labor Agreement - Job Codes page for administering tiered wage assignments for a job code. You must have set up a labor agreement before you can create a labor agreement category. Create and save the labor agreement, create the labor agreement categorizations, and

then return to the Labor Agreement component to update the Job Code page. Employee categories are assigned to workers on the Job Data - Job Labor page.

Note: You do not need to set up labor categories if your organization does not use tiered pay plans.

See "Job Labor Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce).

Category

Enter the category name. Categories can be used to create tiered pay rate on the Labor Agreement - Job Codes page.

Each labor agreement has its own categories, subcategories, and naming conventions. For example, the French Collective Labor Agreement *KFOI* (which is for *Civil Engineering*) classifies employees in three categories: *CAD* (for *Executive*), *ETAM* (for *Manager*), and *OUV* (for *Workman*). In Germany, use categories, such as *Blue Collar Worker* or *White Collar Worker*.

Note: When you set up new employee categories, remember that PeopleSoft Human Resources reserves categories starting with zero for use as system data.

Sequence

Use to number the categories in the order the system should process them.

(ESP) Spain

Scheme ID

Enter the social security scheme ID to tie employee categories with social security.

Note: You must enter a scheme ID before selecting the social security work group.

SS Wrk Group (social security work group)

Every Spanish employee must belong to a work group defined by the Spanish government. Select a group from available options.

FORCEM (*Fundación para la Formación Continua*)

The Spanish government requires employers to report on their employees' FORCEM(*Fundación para la Formación Continua*) categories. Values are:

- *None*
- *Executive*
- *Manager*
- *No Qualifi* (No Qualified Worker)
- *Office Wor* (Office Worker)
- *Qualified* (Qualified Worker)

(FRA) France**Category 24-83**

Select the applicable code to link an employee category to a regulatory 2483 category. The Category 24-83 code is used for the 2483 Training Report.

Social Bilan Category

Select the applicable code to link an employee category to a regulatory Employee Survey category. The code is also used for the 2483 Training Report.

Number of Columns

Specify how the category is organized. When you enter a number of columns, the system dynamically changes the number of description fields that appear on the page when you move out of this field. For example, if you enter 2 in this field, the system adapts the number of description fields accordingly. For example, category *CAD* is organized with three column description criteria: *Number*, *Grade*, and *Step*.

(IND) India**Agreement End Date**

Enter the end date of the labor agreement. Agreement End Date should always be greater than the labor agreement effective date.

Comments

Enter comments about the labor agreement. This might be a description of the labor agreement details.

Subcategory 1**Subcategory and Subcategory 2**

Identify employee subcategories, such as *Technical Trainees* or *Day Laborers*. See the field description for the Category field for instructions on completing these fields.

(DEU) German Public Sector**Employee Category Type**

Indicate these different employee category types. Valid values are:

- *Apprentice* (A)
- *Blue Collar Worker* (B)
- *Civil Servant in Retirement* (V)
- *Civil Servant on Probation* (P)
- *Civil Servant on Recall* (R)
- *Civil Servant on Tenure* (C)
- *Judge on Probation* (J)
- *Judge on Tenure* (U)

- *Judge per Instruction*
- *Other* (default) (O)
- *Public Sector Employee* (S)
- *Trainee* (T)
- *White Collar Worker* (W)

See "Understanding Employee Categories" (PeopleSoft HCM 9.2: Human Resources Manage German Public Sector).

Contract Types

Enter contract types that should be associated with the employee category. This will determine which contract types are available for an employee associated with this employee category.

See "Defining Contract Types for German Public Sector" (PeopleSoft HCM 9.2: Human Resources Manage German Public Sector).

Salary Administration Plan

Enter all salary administration plans that should be associated with the employee category. This enables the system to validate the salary administration plan by employee category.

Remuneration Regulations

Define the remuneration regulations for the salary plan you entered for this employee category. Remuneration regulations are maintained on the Remuneration Regulation page.

Remuneration regulation age limits for retirement and hiring, as well as probation and pre-service period limits, are mapped to service class groups.

Job Group/Service Class Info

Click this link associated with the remuneration regulation to access the Job Group/Service Class Information page to view or update mappings for this remuneration regulation. In order to access the page, you must first save the employee category.

See "Job Group/Service Class Information Page" (PeopleSoft HCM 9.2: Human Resources Manage German Public Sector).

Clone Labor Agreement Page

Use the Clone Labor Agreement page (HR_CLONE_LBR_AGRMT) to clone an existing labor agreement.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Labor Agreement > Clone Labor Agreement

Image: Clone Labor Agreement page

This example illustrates the Clone Labor Agreement page.

Clone Labor Agreement		
Set ID	USA	United States Table Sets
Labor Agreement	K00001	Professional Agreement 1980
Effective Date	01/01/1980	
Bargaining Unit	KU02	American Professional Union
New Set ID.	USA	United States Table Sets
New Labor Agreement		
Effective Date		
Bargaining Unit		

After selecting the labor agreement you want to clone, enter a name and an effective date for this new labor agreement. The effective date must be greater than or equal to the labor agreement that is being cloned. You cannot clone labor agreements across different set IDs.

After you click the Save button, the Labor Agreement page displays. The system automatically populates the pages of the Labor Agreement component with the data of the originating labor agreement. This includes wage progression rules, job codes, salary plans, labor job classes, seniority dates, tie breakers, labor facilities, employee categories, and country specific data. You can verify or modify the labor agreement data.

Setting Up Labor Administration Disciplinary, Grievance, and Resolution Classifications

To set up labor administration disciplinary, grievance, and resolution classifications use the Disciplinary Steps or Disciplinary Steps USF component (DISCIP_STEP_TABLE), Disciplinary Type or Disciplinary Type USF component (DISCIP_TYPE_TABLE), Disciplinary Events USF component (GVT_DIS_EVENTS_TBL), Grievance Type Table component (GRIEV_TYPE_TABLE), Grievance Step Table component (GRIEV_STEP_TABLE), and Resolution Type component (RESLTN_TYPE_TBL). Use the DISCIP_STEP_TABLE component interface to load data into the tables for the Disciplinary Steps component and the GRIEV_STEP_TABLE component interface to load data into the tables for the Grievance Step Table component.

This topic discusses how to set up disciplinary, grievance, and resolution classifications.

Pages Used to Set Up Labor Administration Disciplinary, Grievance, and Resolution Classifications

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Disciplinary Steps Page	DISCIP_STEP_TABLE	Enter steps to be taken in the disciplinary process.
(USF) Disciplinary Step Table Page	GVT_DISCIP_STEP	Enter steps to be taken in the disciplinary process.
Disciplinary Type Page and Disciplinary Type USF Page	DISCIP_TYPE_TABLE	Set up types of actions that may require managers to impose disciplinary actions on workers.
(USF) Disciplinary Offenses Table - Disciplinary Penalty Matrix 1 Page	GVT_DISCIP_OFFENSES	(USF) Set up the first penalty matrix indicating the offense levels for the discipline type.
(USF) Disciplinary Offenses Table - Disciplinary Penalty Matrix 2 Page	GVT_RECMND_ACTIONS	(USF) Set up the second penalty matrix indicating the recommended disciplinary step for each offense levels.
Disciplinary Events USF Page	GVT_DIS_EVENTS_TBL	Set up disciplinary events that can be assigned to a worker in the event of disciplinary action.
Grievance Type Table Page	GRIEV_TYPE_TABLE	Set up the different types of grievances that workers, applicants, or unions might file.
Grievance Step Table Page	GRIEV_STEP_TABLE	Set up steps that can be taken to resolve grievances.
Resolution Types Page	RESLTN_TYPE_TABLE	Set up resolutions to track disciplinary or grievance outcomes.

Disciplinary Steps Page

Use the Disciplinary Steps page (DISCIP_STEP_TABLE) to enter steps to be taken in the disciplinary process.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Disciplinary Steps > Disciplinary Steps

Image: Disciplinary Steps page

This example illustrates the Disciplinary Steps page.

The screenshot shows the 'Disciplinary Steps' page with a sub-header 'Disciplinary Step ADM'. Below it is a table titled 'Disciplinary Actions'. The table has columns for 'Effective Date', 'Status', 'Description', and 'Short Description'. There is one row with the following data: Effective Date: 01/01/1900, Status: Active, Description: Admonishment, Short Description: Admonish. The table includes navigation controls like 'Personalize', 'Find', 'View All', and 'First 1 of 1 Last'.

	*Effective Date	*Status	*Description	Short Description
1	01/01/1900	Active	Admonishment	Admonish

(USF) Disciplinary Step Table Page

Use the Disciplinary Step Table page (GVT_DISCIP_STEP) to enter steps to be taken in the disciplinary process.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Disciplinary Steps USF > Disciplinary Step Table

Image: Disciplinary Step Table page

This example illustrates the Disciplinary Step Table page.

The screenshot shows the 'Disciplinary Step Table' page with a sub-header 'Disciplinary Step ADM'. Below it is a form titled 'Disciplinary Actions'. The form includes fields for 'Effective Date' (01/01/1900), 'Status' (Active), 'Description' (Admonishment), 'Short Description' (Admonish), and 'Days To Complete'. There is also a checkbox for 'Action Reportable to Union' which is currently unchecked. The form includes navigation controls like 'Find', 'View All', and 'First 1 of 1 Last'.

Action Reportable to Union

Select if the action disciplinary action should be reported to the union.

Days to Complete

Enter the number of days it takes the person to complete the disciplinary action.

Disciplinary Type Page and Disciplinary Type USF Page

Use the Disciplinary Type page or the Disciplinary Type USF page (DISCIP_TYPE_TABLE) to set up types of actions that may require managers to impose disciplinary actions on workers.

Navigation

- Set Up HCM > Product Related > Workforce Administration > Labor Administration > Disciplinary Type > Disciplinary Type
- Set Up HCM > Product Related > Workforce Administration > Labor Administration > Disciplinary Type USF > Disciplinary Type USF

Image: Disciplinary Type page

This example illustrates the Disciplinary Type page.

Disciplinary Type Information			
*Effective Date	*Status	*Description	Short Description
1 01/01/1980	Active	Fighting	Fighting

(USF) Disciplinary Offenses Table - Disciplinary Penalty Matrix 1 Page

Use the Disciplinary Offenses Table - Disciplinary Penalty Matrix 1 page (GVT_DISCIP_OFFENSES) to set up the first penalty matrix indicating the offense levels for the discipline type.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Disciplinary Type USF > Disciplinary Penalty Matrix 1

Enter a row for each Disciplinary Offense Level.

(USF) Disciplinary Offenses Table - Disciplinary Penalty Matrix 2 Page

Use the Disciplinary Offenses Table - Disciplinary Penalty Matrix 2 page (GVT_RECMND_ACTIONS) to set up the second penalty matrix indicating the recommended disciplinary step for each offense levels.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Disciplinary Type USF > Disciplinary Penalty Matrix 2

Recommended Actions

Enter the recommended actions. The system automatically displays the Usual Days To Complete, as defined on the Disciplinary Events USF page.

This display helps managers approximate how long it will take to complete this action so they can plan how to fit each course of action into their workloads. Your labor administration specialists can establish these as experience dictates. However, government and agency policies or union agreements may affect these recommendations.

Disciplinary Events USF Page

Use the Disciplinary Events USF page (GVT_DIS_EVENTS_TBL) to set up disciplinary events that can be assigned to a worker in the event of disciplinary action.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Disciplinary Events USF > Disciplinary Events USF

Image: Disciplinary Events USF page

This example illustrates the Disciplinary Events USF page.

The screenshot shows the 'Disciplinary Events USF' page. At the top, it says 'Disciplinary Action Event ECF'. Below this is a section titled 'Event Detail'. On the right side of this section, there are links for 'Find | View All' and pagination controls showing 'First 1 of 1 Last'. The form contains the following fields:

- *Effective Date: 01/01/1980 (with a calendar icon)
- *Status: Active (dropdown menu)
- *Description: Employee Counseling - Formal
- Short Description: Formal
- *Days To Complete: 7

Grievance Type Table Page

Use the Grievance Type Table page (GRIEV_TYPE_TABLE) to set up the different types of grievances that workers, applicants, or unions might file.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Grievance Type Table

Image: Grievance Type Table page

This example illustrates the Grievance Type Table page.

The screenshot shows the 'Grievance Type Table' page. At the top, it says 'Grievance Type FUG'. Below this is a section titled 'Grievance Information'. On the right side of this section, there are links for 'Find | View All' and pagination controls showing 'First 1 of 1 Last'. The form contains the following fields:

- *Effective Date: 01/01/1980 (with a calendar icon)
- *Status: Active (dropdown menu)
- *Description: Union Grievance Procedure
- Short Description: Union Grv

Grievance Step Table Page

Use the Grievance Step Table page (GRIEV_STEP_TABLE) to set up steps that can be taken to resolve grievances.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Grievance Step Table

Image: Grievance Step Table page

This example illustrates the Grievance Step Table page.

Resolution Types Page

Use the Resolution Types page (RESLTN_TYPE_TABLE) to set up resolutions to track disciplinary or grievance outcomes.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Resolution Types

Image: Resolution Types page

This example illustrates the Resolution Types page.

Chapter 5

Setting Up Works Councils

Setting Up Works Councils

To set up works councils, use the Works Council component (WC_COUNCIL_TBL_GBL), the Works Council Decision component (WC_DECISION_TBL_GBL), the Works Council Decision Group component (WC_DECISIONGRP_TBL_GBL), the Job Change by Reg Region component (WC_ACTN_REASON_TBL_GBL), and the Workflow Parameters component (WC_USER_NOTIFY_GBL).

This topic provides an overview of the works councils business process and discusses how to set up works councils.

Pages Used to Set Up Works Councils

Page Name	Definition Name	Usage
<u>Works Council Page</u>	WC_COUNCIL_TBL	Specify the works councils to which your workers may belong.
<u>Works Council Decision Page</u>	WC_DECISION_TBL	Maintain works council decisions.
<u>Works Council Decision Group Page</u>	WC_DECISIONGRP_TBL	Define works council decision groups.
<u>Job Change by Reg Region Page (job change by regulatory region page)</u>	WC_ACTN_REASON_TBL	Define Job Change actions and reasons per regulatory region. This is the main setup page for configuring works council transactions for job changes that require works council approval.
<u>Workflow Parameters Page</u>	WC_USER_NOTIFY	Define Job Change request workflow parameters.

Understanding the Works Councils Business Process

If your organization does business in countries where workers can belong to works councils, define the works councils that your workers can join.

The works councils for your company are internal committees elected by the non-management workers to represent their interests. If your organization does business in countries where workers can belong to works councils, every work location in your company may have a local works council. The company as a whole may have a central works council. The works council's duties may include:

- Watching the implementation of collective bargaining agreements.
- Promoting integration of minorities, young, older, and handicapped workers.

- Monitoring fair compensation and working hours.
- Providing codetermination concerning layoffs, short-time work, and other labor issues.

Works Council Page

Use the Works Council page (WC_COUNCIL_TBL) to specify the works councils to which your workers may belong.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Works Council > Works Council

Image: Works Council page

This example illustrates the Works Council page.

The screenshot displays the 'Works Council' configuration page. At the top, it shows 'Set ID DEU01' and 'Works Council ID GDWC00912'. The main section is titled 'Works Council Information' and includes a search bar with 'Find | View All' and pagination 'First 1 of 1 Last'. The form contains the following fields:

- *Effective Date: 01/01/1980
- *Status as of Effective Date: Active
- Description: Works Council Munich
- Short Description: WC Munich
- Posting: 30 (Days between Internal and External Posting)
- Default Approval After: 2 Week(s)

Below the form is a 'Spokesperson' table with one entry:

Spokesperson
GD110000010 Sabine Azubinefive

Works Council ID

The ID you entered to access this page. This is the ID you'll define.

Posting

Enter the number of days between internal and external posting.

Default Approval After

The Default Approval After date will automatically approve works council relevant job change requests if the works council doesn't react by the date specified. Any worker Job Change approval requests that have not been approved or denied after the specified date will automatically set to *Approved by Works Council* via an automatic update process and will trigger all workflow associated with Works Council approval.

Spokesperson

Select the ID for the person (or persons) to whom you want to route works council approvals. Any job change request that has been configured for works council approval in the Job Change by Reg Region page can be assigned. The spokesperson (s) will receive any works council hire approval requests for

job requisitions that have a works council ID. Enter as many spokesperson IDs as needed.

Linking Works Councils to the Company Location Table

The Company Location page (COMPANY_TABLE1) is used to assign the works council ID to a company location to route works council relevant job change requests to the appropriate works council spokesperson. During approval processing for job actions which require works council approval, the system first checks which works council ID is relevant for the worker's company and location and then check the Works Council Table to see which spokesperson(s) should be notified.

Related Links

"Setting Up Company Locations" (PeopleSoft HCM 9.2: Application Fundamentals)

Works Council Decision Page

Use the Works Council Decision page (WC_DECISION_TBL) to maintain works council decisions.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Works Council Decision > Works Council Decision

Image: Works Council Decision page

This example illustrates the Works Council Decision page.

Works Council Decision Group Page

Use the Works Council Decision Group page (WC_DECISIONGRP_TBL) to define works council decision groups.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Works Council Decision Group > Works Council Decision Group

Image: Works Council Decision Group page

This example illustrates the Works Council Decision Group page.

Works Council Decision Group

Works Council Decision Group KDH

Decision Group Information Find | View All First 1 of 1 Last

*Effective Date 01/01/1900

*Status Active

Description Hiring Decisions

Short Descr Hiring Decisions

Decision Information Personalize | Find | View All | First 1-3 of 3 Last

	*Decision ID	Description	Notify HR Administrator	Reasons Required		
1	KDA	Agree	☒	☐	+	-
2	KDN	Negotiate	☒	☒	+	-
3	KDR	Reject	☒	☒	+	-

Job Change by Reg Region Page

Use the Job Change by Reg Region (job change by regulatory region) page (WC_ACTN_REASON_TBL) to define Job Change actions and reasons per regulatory region.

This is the main setup page for configuring works council transactions for job changes that require works council approval.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Job Change by Reg Region > Job Change by Reg Region

Image: Job Change by Reg Region page

This example illustrates the Job Change by Reg Region page.

Job Change by Reg Region

Regulatory Region

DEU

Germany

Action

HIR

Hire

Reason Code

NPS

New Position

Job Change by Reg Region

Find | View All

First

1 of 1

Last

*Effective Date

01/01/1980

*Status

Active

☐ Originated by New Manager?

Checklist Code

DEUHIR

Hire

Mandatory Search Criteria

☐ Employee ID

☐ First Name

☐ Last Name

☐ Department

☐ Personnel Status

☐ Birth date

Process Participants

Find | View All

First

1 of 3

Last

*Process Participant

HR Administrator

Data

Personalize | Find

First

1-7 of 7

Last

*Relevant Information

Show Current Info

Show New Info

1. Organization Information	☒	☒	+ -
2. Job Information	☒	☒	+ -
3. Salary Plan	☒	☒	+ -
4. Payroll	☒	☒	+ -
7. HR Decision			+ -
8. Request WC Approval			+ -
10. Process Job Change			+ -

The Job Change by Reg Region page identifies which combination or regulatory region, action, and action reason may be selected from the Request Job Change - Works Council page. All of the setup information required for a Works Council relevant job change request may be defined here, including which page areas are relevant for which roles, whether a given role may also view current information, and so on. Define which job changes require works council approval before they take place, by regulatory region, action, and action reason.

Note: If you are processing a worker transfer request, you can define whether the current or new manager requests the job change.

- Originated by New Manager?

Select this check box to indicate that transfer job change requests will be initiated by the worker's new manager.
- Checklist Code

Select a Checklist Code. The Checklist Code refers to a checklist that consists of all to-do items maintained for a single worker or applicant with the specified status and date. You can associate the checklist with a job change here. During the business process the HR person can generate the relevant checklist from the job change request page.

Mandatory Search Criteria

Employee ID, First Name, Last Name, Department, Personnel Status and Birthdate Select each associated check box for the search criterion that you want to appear on the Job Change Request search page.

Process Participants

Process Participant Select a Process Participant from the drop down list. Select *Current Manager*, *HR Administrator*, *New Manager*, or *Works Council*.

Relevant Information For each process participant selected, define the relevant information that participant will be able to view in the job change process.

Show Current Info and Show New Info For each Relevant Information selected, choose whether the process participant will be able to view only the current information, only the new information or both current and new information.

Workflow Parameters Page

Use the Workflow Parameters page (WC_USER_NOTIFY) to define Job Change request workflow parameters.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Workflow Parameters > Workflow Parameters

Image: Workflow Parameters page

This example illustrates the Workflow Parameters page.

The screenshot shows the 'Workflow Parameters' page for 'Job Change Request Status'. At the top, there is a 'Find | View All' link and a pagination indicator 'First 1 of 11 Last'. Below this is a 'Status' dropdown menu set to 'Requested by Manager'. The page is divided into two main sections: 'Subject' and 'Explain'. Both sections contain 'Message Set' (1000) and 'Message Nbr' (1037) fields. The 'Subject' section displays the text 'Employee %1 Requested.' and the 'Explain' section displays 'A Job Change Request has been requested for an employee.'

(DEU) Setting Up German Works Councils Business Processes

To set up German works councils business process, use the Tariff Area component (TARIFF_AREA_GBL) and Speaker Committee DEU component (SPK_COMM_GER_GBL).

This topic discusses how to set up German works council business processes.

Pages Used to Define German Labor Administration Codes

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Tariff Area Page</u>	TARIFF_AREA_GER	Enter tariff areas for later use on the Job Labor - Germany page (JOB_LABOR). In PeopleSoft Human Resources, the tariff areas for the metal tariff are included as system data.
<u>Speaker Committee DEU Page</u>	SPK_COMM_GER	Define the speaker committee for your work locations.

Related Links

"Entering Basic Job Opening Data" (PeopleSoft HCM 9.2: Talent Acquisition Manager)

Understanding German Works Council Business Processes

In addition to the core functionality setup tables, if you're administering a German workforce, you can use several German setup tables to define codes for labor administration matters that affect your company, such as tariff areas and speaker committees.

Rules defining worker labor administration for your German workforce are negotiated between the trade unions and the employers' associations. Additional rules are defined between the workers and their employers through two groups of elected representatives. The works councils represent non-management workers. The speaker committee represents management workers. Although the works councils and speaker committees are groups of people elected to represent the interests of workers, they aren't union representation.

Use the codes and information that you set up in these tables to track information about decisions made by the works councils at your operating locations.

Understanding Tariff Areas

A tariff is a contract between the workers' unions and the employers' association, defining labor agreements on issues such as standard working hours, income, and vacation. This contract is valid for all of Germany for the business or industrial sector the company is working in (such as banking or metal). Tariffs are already in the system.

Additional labor agreement terms, such as salary plans or workforce reviews, can also be applied based upon the tariff area. Region or location (such as Bavaria or Berlin) often define the tariff area.

Understanding Speaker Committees

The speaker committee (*sprecherausschuss*) represents the interest of the management personnel in your company before the ownership or executive management. The speaker committee mainly consults; however, it also helps determine individual employment contracts, hiring, and dismissals. The committee also helps monitor employment fairness, equity, and nondiscrimination in terms of nationality, race, religion, sex, and age.

Tariff Area Page

Use the Tariff Area page (TARIFF_AREA_GER) to enter tariff areas for later use on the Job Labor - Germany page (JOB_LABOR).

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Tariff Area > Tariff Area Ger

Image: Tariff Area page

This example illustrates the Tariff Area page.

Tariff Area

Tariff Metal Processing Tariff Area M01

Tariff Information Find | View All First 1 of 1 Last

*Effective Date 01/01/1900

*Status Active

Description Metall Schleswig-Holstein

Short Description Met SCH-H

In PeopleSoft Human Resources, the tariff areas for the metal tariff are included as system data.

Speaker Committee DEU Page

Use the Speaker Committee DEU page (SPK_COMM_GER) to describe the speaker committee for your work locations.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Speaker Committee DEU > Speaker Committee DEU

Image: Speaker Committee DEU page

This example illustrates the Speaker Committee DEU page.

Speaker Committee DEU

Spokesmen Committee ID GD0000001

Committee Information Find | View All First 1 of 1 Last

*Effective Date 01/01/1980

*Status Active

*Description Region North

Short Description Reg North

Managing Layoffs and Recalls

Common Elements for Managing Layoffs and Recalls

Effective Date

You can enter any number of effective-dated rows into a roster, but only one row per calendar day. When you insert a new row, the system makes the previous rows unavailable for entry.

You can create future-dated rosters and insert future-dated rows into a roster. You can generate and maintain future-dated rosters, but you cannot process them for layoff, reinstatement, or recalls.

Mass Update to be used

Select to use mass update to update workers' Job Data records with their layoff or recall status instead of the Run Layoff Process or Run Recall Process processes. When you select the Mass Update to be used check box the system makes the Run Layoff Process or Run Recall Process buttons unavailable.

Use the Process Recall Rights process to update candidates' Recall Rights records.

See [Processing Layoffs and Recalls Using PeopleSoft Mass Update](#).

Group ID

Select the ID of the group containing the candidates used for this roster. The system displays the Labor Agreement associated with the group ID.

The system displays the groups you created in the Labor Group Definition component (HR_LBR_GRP_DEFN) and groups created in the Group Build - Group Definition component (GB_GRP_DEFN_TABLE). You can only select groups with a valid labor agreement.

Note: You must select a Group ID to create a layoff roster. To create a recall roster, you can select a Group ID or a Layoff Roster ID.

See [Defining Groups of Workers to Layoff or Recall](#).

See "Setting Up Group Definitions" (PeopleSoft HCM 9.2: Application Fundamentals).

Labor Agreement

Collective labor agreement managing the labor administration between a group of workers and the organization.

Seniority Dates or Seniority Date ID Select the seniority dates the system should use to sort the candidates in the roster. Only those seniority dates assigned to the specified Labor Agreement are available for selection.

The sequence number of each seniority date entered specifies the sequence the system should use to sort the candidates in the roster. You cannot select a seniority date more than once.

Tie Breakers or Tie Breaker ID Select the tie breakers the system should use to rank the candidates in the roster in the event that people share seniority dates and indicate if the system should apply the tie breaker in ascending or descending order. Only those tie breakers assigned to the specified Labor Agreement are available for selection.

The sequence number of each tie breaker entered specifies the order in which the system should implement them. You cannot select a tie breaker more than once.

For example, if you select a tie breaker based on the national identification number and select the Descending Order? check box, the system identifies those people with a higher national identification number as having more seniority in the event that there is a tie for seniority.

Generate Roster

When you've defined the extraction criteria for the roster, save the page. The system will make the Generate List button available. Click to generate a roster list. The system will set the roster status to *In Progress* and move you to the next page in the component.

When you generate a:

- Layoff roster, the system selects all workers defined by the selected group ID, removes those who are exempt from layoff (as indicated on the Job Labor page), and sorts them by the seniority dates and tie breakers you selected.
- Recall roster, the system selects the workers defined by the selected group ID or who were laid off on the selected layoff roster, removes those whose recall rights have expired, and sorts them by the seniority dates and tie breakers you selected.
- Reinstatement roster, the system selects the workers who were laid off on the selected layoff roster, removes those whose recall rights have expired, and sorts them by the seniority dates and tie breakers you selected.

Refresh Roster

Click to update the roster. The system will insert a new, effective-dated row and generate a new roster list for that row. The system will include candidates that you had manually added to the previous roster. The system retains the previous roster but makes it display-only.

Note: If you have processed anyone on the roster, you cannot refresh it. This is enables you to maintain history and data integrity.

Regenerate Roster List

If you make some changes to the roster setup, for example change a seniority date or Group ID, click to generate a new roster list. The system completely overwrites the previous roster with the regenerated one.

Note: If you have processed anyone on the roster, you cannot regenerate it. This is enables you to maintain history and data integrity.

Roster Status

Insert a new row and update the roster status as needed. When you create a roster, the system assigns the status to *Open*. When you generate the roster, the system sets the status to *In Progress*. When you select a roster of *Closed*, the system makes the roster component unavailable for entry. Use the other statuses to manage the roster process.

Default Rehire Date

Enter the default hire date. The system will populate the roster Rehire Date field with this value.

Nbr in Group to Consider (number in group to consider)

Enter the number of candidates in the group you are considering for layoff or recall. The system will populate the list with this number of candidates, taking from the top of the list as determined by the seniority date(s).

For example, if there are a total of thirty people in the group and you want to consider ten of them for layoff, the system will populate the roster with the ten most junior people, as determined by the selected seniority date, from that group of thirty.

View Roster

Click after you've selected how many candidates you want to consider and the system will populate the roster list.

Total in Group

Displays the total number of people defined by the selected group ID, including candidates that you have added manually.

Apply To

Choose whether to apply a status to all candidates, just those displayed on the page, or on an individual basis (select those candidates for the selected status using the Select check box in the grid).

Status

Select a status to apply to multiple candidates in the roster.

Apply

Click to apply the status you selected in the Status field to the candidates.



This icon indicates that a candidate was added to the roster manually. The only candidates you can remove from a roster are those that are added manually.

Tie

Selected if the system had to use a tie breaker to determine the candidate's ranking because more than one person shared seniority.



Click to add comments to a candidate. You can add multiple, effective-dated comments.

The system creates a note for those candidates who were affected by a tie breaker, indicating that a tie breaker was used and what it determined the candidate's ranking to be.

See "Configuring and Working with the HR Notepad" (PeopleSoft HCM 9.2: Application Fundamentals).

Rank

The system lists the candidates by seniority and tie breaker. To modify the list order, enter a new ranking number.

Note: Candidates you've added to the roster manually have a permanent rank of zero (0).

Select

Click to select individuals people to apply roster status to as a group. For example, to apply the roster status of Layoff Accepted to the four candidates who have accepted to date, select the candidates, select the *Individual* Apply To value, select the status in the Status field, and click Apply.

Status

Select the candidates roster status.

See [Employee Roster Status Page](#).

Defining Groups of Workers to Layoff or Recall

To define groups of workers to layoff or recall, use the Labor Group Definition component (HR_LBR_GRP_DEFN).

This topic discusses how to define groups and group members, and how to define group security.

Note: You can also access the Labor Group Definition component from a link on the Layoff Roster Setup page or Recall Roster Setup page.

Note: You can also create groups using the Group Build - Group Definition component but the groups must include a single, valid labor agreement as a part of the definition for them to be valid selections on the Layoff Roster component (HR_LAYOFF_ROSTER) and the Recall Roster component (HR_RECALL_ROSTER). Groups are not used with the Reinstatement Roster component (HR_REINST_ROSTER).

Pages Used to Define Groups

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Labor Group Definition Page</u>	HR_LBR_GRP_DEFN	Use the group definition page to define the parameters of the labor management group.
<u>Labor Group Members Page</u>	HR_LBR_GRP_MEMBERS	Review group members.
<u>Labor Group Security Page</u>	HR_LBR_GRP_SCTY	Grant or remove security access to the group.

Related Links

"Setting Up Group Definitions" (PeopleSoft HCM 9.2: Application Fundamentals)

Labor Group Definition Page

Use the Labor Group Definition page (HR_LBR_GRP_DEFN) to use the group definition page to define the parameters of the labor management group.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Layoffs and Recalls > Labor Group Definition > Labor Group Definition

Image: Labor Group Definition page

This example illustrates the Labor Group Definition page.

Labor Group Definition

Labor Group Members

Labor Group Security

Group ID K00001

*Description Labor Agreement K00001

*Short Desc

*As Of Date 08/01/2004

*Bargaining Unit KU02 American Professional Union

Labor Facility ID

Event Type

☒ Layoff
 ☐ Recall

Labor Agreement

Agreement	Description	Contract Begin Date	Contract End Date
K00001	Professional Agreement 1980	01/01/1980	12/31/2010

Job Codes

Personalize | Find | View All |

First 1-8 of 15 Last

Job Code	Description	Include
140035	Analyst-Financial	☒
170005	Assistant-Administrative	☒
170045	Assistant-Nursing	☒
200005	Auditor-General	☒
290075	Clerk-Payroll	☒
660005	Nurse-Head	☒
660010	Nurse-Licensed Practical	☒
660015	Nurse-Registered	☒

Save

Save and Populate Group

Event Type

Select the type of event in which this group will be used:

- Select *Layoff* to include only workers with an HR status of *Active* in your group definition.
- Select *Recall* to include workers with an HR status of either *Active* or *Inactive*. This enables you to include workers who have been laid off (HR status of *Active*) or terminated (HR status of *Inactive*) in your recall group.

As of Date	Only bargaining units, labor agreements, labor facilities, and job codes active as of this date are available on this page.
Bargaining Unit	Select the bargaining unit that you are using to define this group. The system will display the labor agreement, and its contract dates, associated with this unit in the Labor Agreement grid. Note: You must select a bargaining unit associated with a labor agreement since the layoff, recall, and reinstatement processes use the information you set up on the labor agreement. See Setting Up Bargaining Units.
Labor Facility ID	Select the ID of the labor facility you are using to define this group. Leave this field blank to include people in all the facilities. The system will populate the options with the labor facilities assigned to the labor agreements associated with the selected bargaining unit. See Setting Up Labor Agreement Control Tables.
Job Code and Include	The system displays the job codes associated with the labor agreements. Select the Include check box next to those job codes you want to include in this group definition. See Job Codes Page.
Save	Click to save the group definition without populating the Labor Group Members page.
Save and Populate Group	Click to save the group definition and populate the group members page with the people assigned to the labor agreements, labor facilities, and job codes selected on this page.
See Defining Labor Agreements .	

Labor Group Members Page

Use the Labor Group Members page (HR_LBR_GRP_MEMBERS) to review group members.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Layoffs and Recalls > Labor Group Definition > Labor Group Members

Image: Labor Group Members page

This example illustrates the Labor Group Members page.

Labor Group DefinitionLabor Group MembersLabor Group Security

Group ID K00001

Description Labor Agreement K00001

As Of Date 08/01/2004

DataPersonalizeFindView AllFirst1-23 of 23Last

Empl ID	Empl Record	Name
K0HU10	0	Allison Smith
K0HU10	1	Allison Smith
K0HU11	0	Thomas Holmes
K0HU12	0	Patricia Happs
K0HU13	0	Joseph Barnes
K0HU14	0	Hector Walpoe
K0HU15	0	Penelope Gustaf
K0HU16	0	Roberta Wong
K0HU17	0	Mas Ravi
KU0010	0	Antonio Santos
KU0021	0	Salish Bir
KU0039	0	Shawn Quilligan
KU0042	0	Danny Johnson
KU0044	0	Daryl Reese
KU0045	0	Jorge Enriquez

The Labor Group Members page lists the people who meet the criteria you defined on the Labor Group Definition page.

Labor Group Security Page

Use the Labor Group Security page (HR_LBR_GRP_SCTY) to grant or remove security access to the group.

Navigation

Set Up HCM > Product Related > Workforce Administration > Labor Administration > Layoffs and Recalls > Labor Group Definition > Labor Group Security

Image: Labor Group Security page

This example illustrates the Labor Group Security page.

Group ID K00001
Description Labor Agreement K00001
As Of Date 08/01/2004

Authorized Users Personalize | Find | First 1-2 of 2 Last

Remove	Name
☐	Betty Locherty
☐	Betty Locherty

Add another authorized user

Save

Only people who have security access to this group can create layoff, recall, or reinstatement rosters for this group. The system automatically adds the name of the user who creates the group.

The group security access you grant on this page overrides the data permission security associated with a user's Row Security Permission List. For example, a user who does not have row security access to Department 604CAN but that is added to this list for a group that contains people in Department 604CAN will be able to view the data of those people in the layoff, recall, and reinstatement rosters.

Remove	Select to remove the user's security access to this group when you save the component.
Add another authorized user	Click to access the Labor Group Security - Add User page and grant another user security access to this group.

Managing Layoffs

To manage layoffs, use the Layoff Roster component (HR_LAYOFF_ROSTER) and the Process Layoff component (HR_RUNCTL_LAY).

This topic discusses how to set up and manage a layoff roster and run the layoff process.

Pages Used to Manage Layoffs

Page Name	Definition Name	Usage
Layoff Roster Setup Page	HR_LAYOFF_SETUP	Define the layoff roster parameters.
Layoff Roster List Page	HR_LAYOFF_CAND_LST	Manage the layoff roster.
Layoff Process Run Control Page	HR_RUNCTL_LAY	Process layoffs.

Layoff Roster Setup Page

Use the Layoff Roster Setup page (HR_LAYOFF_SETUP) to define the layoff roster parameters.

Navigation

Workforce Administration > Labor Administration > Layoffs and Recalls > Layoff Roster > Layoff Roster Setup

Image: Layoff Roster Setup page

This example illustrates the Layoff Roster Setup page.

The screenshot displays the 'Layoff Roster Setup' page. At the top, there are tabs for 'Layoff Roster Setup' and 'Layoff Roster List'. Below the tabs, the 'Roster ID' is 'K00001' and the 'Roster Status' is '010 - Open'. The 'Extraction Criteria' section includes fields for '*Effective Date' (08/01/2004), '*Description' (Layoff - Labor Agreement K00001), and 'Group ID' (K00001). There is also a '*Roster Type' dropdown set to 'Permanent' and a checked box for 'Mass Update to be used?'. Below these are buttons for 'Regenerate Roster List' and 'Refresh Roster'. The 'Sort Criteria' section contains two tables: 'Seniority Dates' with two rows (FACILITY ENTRY DATE and DEPT ENTRY DATE) and 'Tie Breakers' with one row (PERSON BIRTHDATE).

You can enter any number of effective-dated rows into a roster, but only one row per calendar day. When you insert a new row, the system makes the previous rows unavailable for entry.

You can create future-dated rosters and insert future-dated rows into a roster. You can generate and maintain future-dated rosters, but you cannot process the layoff.

Roster Type

Select if the layoff is one of the following:

- *Temporary*

The system makes workers laid off in a temporary layoff available for reinstatement and recall.

- *Permanent*

The system makes workers laid off in a permanent layoff available for recall only.

Mass Update to be used?

Select to use Mass Update to update worker Job Data records with the layoff or recall status instead of using the Layoff process

Labor Group Definition

Click this link to add a new group definition using the Labor Group Definition page.

Layoff Roster List Page

Use the Layoff Roster List page (HR_LAYOFF_CAND_LST) to manage the layoff roster.

Navigation

Workforce Administration > Labor Administration > Layoffs and Recalls > Layoff Roster > Layoff Roster List

Image: Layoff Roster List page

This example illustrates the Layoff Roster List page.

The screenshot displays the 'Layoff Roster List' page. At the top, there are tabs for 'Layoff Roster Setup' and 'Layoff Roster List'. The 'Layoff Roster List' tab is active. Below the tabs, the page shows the 'Layoff Roster Information' section. This section includes a 'Roster ID' field with the value 'K00001', a 'Roster Status' dropdown menu set to '020 - In Progress', an 'Effective Date' field with the value '02/26/2013', a 'Date First Notified' field with the value '02/28/2013', and a 'Planned Termination Date' field with the value '02/28/2013'. There are also fields for 'Total in Group' and 'Nbr in Group to Consider', with a 'View Roster' button. Below this is a section for 'Apply Employee Roster Status' with an 'Apply To' dropdown menu, a 'Status' field, and an 'Apply' button. The main section is 'Layoff Roster List', which contains a table with columns: 'Select', 'Empl ID', 'Name', 'Empl Record', 'Get Employee Details', 'Tie', 'Notes', 'Rank', 'Status', and 'Term Date'. The first row of the table shows a candidate with 'Empl ID', 'Name', 'Empl Record' (0), 'Rank' (0), and 'Status'. Below the table, it says 'Candidates to be Processed 0' and there is a 'Process Layoff' button.

Note: The system will not include as candidates those workers who are identified as being exempt from layoff on the Job Labor page.

Planned Termination Date

Select a termination date. The system will enter this date in the Term Date column of the Layoff Roster list, but you can

override it if necessary to terminate candidates on different days. The system will process the layoffs as of this date.

The system uses this date as the termination date when you layoff a candidate so you must select a date if there are any candidates in your roster to be laid off.

Date First Notified

Select the date the workers were or will be notified of the layoff for informational purposes.

Expected Reinstatement Date

If you've selected a roster type of *Temporary*, the system displays this field. Enter the date you expect to reinstate the workers.

Process Layoff

Click to run the Layoff process. The system will move you to the Layoff Process search component.

You can process candidates in batches. The layoff process processes those candidates who have a status with the Process Event? check box selected as part of its definition. After the layoff process processes candidates with a process event status, the system resets the candidates' status to one with the Event Complete? check box selected as part of its definition. The layoff process will not reprocess candidates with an event complete status.

To process another group of candidates, set the status of a new group of candidates to a process event status and run the layoff process again.

This button is not available when you use Mass Update to update workers Job Data records.

Candidates to be processed:

Displays the number of candidates the Layoff Process will process.

Note: The Layoff Process will process those candidates with a status that has the Process Event? check box selected.

See [Employee Roster Status Page](#).

Note: You cannot remove candidates who were included in the roster because they were a part of the selected group.

Adding Candidates Manually

You can manually add candidates to the roster (for example, workers who were bumped from their position). To add a candidate manually, add a row and select an EmplID and employee record number. Click the Man Emp (Manual Employee) button to retrieve the person's job details. When the person's details have been retrieved the button becomes display only. The system assigns all manually-added candidates the permanent rank of zero.

The system updates the Nbr in Group to Consider and Total in Group values to reflect the additional candidates.

Note: You can remove candidates who were manually added to the roster.

Layoff Process Run Control Page

Use the Layoff Process Run Control page (HR_RUNCTL_LAY) to process layoffs.

Navigation

Workforce Administration > Labor Administration > Layoffs and Recalls > Layoff Roster > Layoff Roster List

Click the Process Layoff button on the Layoff Roster List page.

Image: Layoff Process Run Control page

This example illustrates the Layoff Process Run Control page.

The layoff process:

- Inserts a new row in the Job Data pages with the effective date of the layoff.

The system copies all of the data from the previous Job Data row to the new row and includes the Action and Action Reason values you select here. If the system is unable to enter a job row for an employee due to an error on their job record a message will be entered for that employee number in the log.

- Inserts a new row into the Recall Rights page with the effective date of the layoff.

The system enters the value of *Layoff* in the Reason field.

The system calculates the Expiration Date using the recall expiration rule attached to the labor agreement being processed.

The system will not insert a record into the Recall Rights page:

- If you select the Auto Reinstatement check box on the Layoff Process Run Control page.
- If the candidate does not have a value for the seniority date used by the recall expiration rule to calculate recall rights.
- If the Recall Expiration rule attached to the Labor Agreement is a No Recall rule.

See [Understanding Recall Rights](#).

See [Managing Recall Rights](#).

- Updates the status of the processed candidates in the layoff roster with an event complete status.

See [Employee Roster Status Page](#).

Note: If the system encounters any errors when processing a candidate's layoff, the system will skip the person and enter a note into the process logged. The Layoff process includes the candidate on post processing reports, but their job data information is blank.

Roster ID	Displays the ID of the roster from which the process was launched.
Action and Action Reason	Select the action the layoff process is executing and the reason for the action. The system will insert these values into the Job Data row it creates for the people it is processing for lay off.

Auto Reinstatement

The auto reinstatement fields are available for temporary layoffs only.

Auto Reinstatement	Select if all of the people being laid off are to be reinstated at the same time. If you use the Auto Reinstatement field, the system will not insert a record into the Recall Rights page for the candidates being laid off.
---------------------------	---

Note: When you select an action, ensure that this action corresponds to the layoff Action. For example, if you process the layoff with the action of LOF (layoff), you can only reinstatement the candidates using the REC (recall) action. Candidates laid off with the action TER (termination) can only be reinstated with the action of REH (rehire).

See [Recall Rights Page](#).

Action and Action Reason	Select the action and the action reason for the reinstatement
Reinstatement Date	The system populates this with the expected reinstatement date from the layoff roster when you select the Auto Reinstatement check box, but you can edit it if necessary.

Layoff Reports

The Layoff Process produces two reports:

- Layoff Roster Post Processing (HRLAY006).

This report displays a list of those workers laid off.

The Layoff Roster Post Processing report lists candidates that were not processed for layoff successfully without job data. Review this report to identify candidates that were not processed by looking for those without job data on this report.

- Recall Rights Post Processing (HRLAY007).

This report lists those workers who have received recall rights.

Note: The system does not generate this report if you select the Auto Reinstatement check box.

Managing Recall Rights

To manage recall rights, use the Process Recall Rights component (HR_RUNCTL_RGT) and the Recall Rights component (HR_RCL_RIGHTS).

This topic discusses how to process and maintain recall rights.

Note: Recall rights are the rights a laid off worker has to accept a lower level job (bumping) or to be recalled back to work when a position becomes available. Each labor agreement has a recall expiration rule that calculates how long a worker has recall rights following a layoff and under what circumstances those rights would expire.

Pages Used to Manage Recall Rights

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Process Recall Rights Page</u>	HR_RUNCTL_RGT	Use to update the Recall Rights component with information from the Job Data records of those candidates who have a process event status on the roster and who were processed using PeopleSoft Mass Update.
<u>Recall Rights Page</u>	HR_RCL_RIGHTS	View and maintain a worker's reemployment rights.

Process Recall Rights Page

Use the Process Recall Rights page (HR_RUNCTL_RGT) to update the Recall Rights component with information from the Job Data records of those candidates who have a process event status on the roster and who were processed using PeopleSoft Mass Update.

Navigation

Workforce Administration > Labor Administration > Layoffs and Recalls > Process Recall Rights > Process Recall Rights

Image: Process Recall Rights page

This example illustrates the Process Recall Rights page.

Note: Use this process only when using PeopleSoft Mass Update to update candidates' job information. The layoff, recall, and reinstatement processes create recall rights automatically.

Roster ID

Select the ID of the layoff or recall roster whose candidates' recall rights you want to update. The system will create a record in the Recall Rights component for those candidates who have a process event status on the roster. When an employee's recall rights have been processed for a particular Roster ID they cannot be processed a second time for the same Roster ID.

Reason

Select the reason for the new recall rights record. The system will insert this value in the Reason field on the Recall Rights page.

Recall Rights Page

Use the Recall Rights page (HR_RCL_RIGHTS) to view and maintain a worker's reemployment rights.

Navigation

Workforce Administration > Labor Administration > Layoffs and Recalls > Recall Rights

Image: Recall Rights page

This example illustrates the Recall Rights page.

Recall Rights

Employee ID K0HU10 Empl Record 0 Name Allison Smith

Recall Rights Find | View All First 1 of 1 Last

*Effective Date 02/26/2013 Sequence 0

Recall Expiration Date

Reason

Roster ID

You can manually enter and maintain recall rights for a person but the system will create and populate a row on this page for each person being processed when you run the:

- Process Layoff process.
- Process Recall or Process Reinst (Reinstatement) processes.

Note: The system will create rows for those who accept a recall. Employees who reject recalls may lose their Recall Rights depending on the recall rights expiration rule assigned to their labor agreement. If a person rejects a recall, update the Recall Rights manually.

- Process Recall Rights process.

This table shows the values that the system enters depending on which process you run:

Process	Effective Date	Recall Expiration Date:	Reason	Roster ID:
Run Layoff Process	The date the layoff takes effect, as entered in the Termination Date field on the Layoff Process component.	The system populates this date using the recall expiration rule associated with the person's labor agreement.	LAYOFF	The system populates this field with the ID of the layoff roster that prompted the layoff action.
Recall or Reinstatement processes	The date the recall or reinstatement takes effect as entered in the Rehire Date column on the Recall Roster List or Reinstatement Roster List pages.	The system populates this date using the recall expiration rule associated with the person's labor agreement.	RECALL	The system populates this field with the ID of the recall or reinstatement roster that prompted the recall or reinstatement action.

Process	Effective Date	Recall Expiration Date:	Reason	Roster ID:
Process Recall Rights On the Process Recall Rights page, you can select a: - Layoff roster. - Recall roster.	- The system uses layoff roster termination date. - The system uses recall roster rehire date.	- The system populates this date using the recall expiration rule associated with the person's labor agreement. - The system populates this field with the rehire date from the recall roster.	<i>LAYOFF</i> <i>RECALL</i>	The system populates this field with the ID of the roster that was selected on the Process Recall Rights page.

Recall Expiration Date

Enter the date the person's recall rights expire.

The system does not include candidates whose recall rights have expired when creating recall or reinstatement rosters.

Reason

Select the reason the person obtained the recall right.

See [Setting Up Layoff and Recall Control Tables](#).

Roster ID

The system populates this with the layoff or recall roster ID.

Managing Recalls and Reinstatements

To manage recalls and reinstatements, use the Recall Roster component (HR_RECALL_ROSTER), the Reinstatement Roster component (HR_REINST_ROSTER), and the Recall/Reinstatement Process component (HR_RUNCTL_REINSTAT).

This topic provides an overview of reinstatements and recalls and discusses how to set up, manage, and process both recall rosters and reinstatement rosters.

Pages Used to Manage Recalls and Reinstatements

Page Name	Definition Name	Usage
Recall Roster Setup Page	HR_RECALL_SETUP	Define the recall roster parameters.
Recall Roster List Page	HR_RECALL_CAND_LST	Manage the recall roster.
Reinstatement Roster Setup Page	HR_REINST_SETUP	Define the reinstatement roster parameters.
Reinstatement Roster List Page	HR_REINST_CAND_LST	Manage the reinstatement roster.
Process Recall/Reinstatement Page	HR_RUNCTL_REINSTAT	Use the HR_REIN_EXEC process to recall or reinstatement workers.

Understanding Reinstatements and Recalls

You have two methods of rehiring employees laid off using the Layoff process. The Reinstatement process is intended to enable you to rehire laid off workers quickly while the Recall process gives you some more flexibility in who you rehire and how, but takes a bit more time. This table lists some of the key differences between the two processes:

Recalls	Reinstatements
Populate the roster with rehire candidates from a group or from a layoff roster.	Populate the roster with reinstatement candidates from a layoff roster only.
Candidates are sorted by seniority and tie breakers.	Candidates are sorted by EmplID number
You can use PeopleSoft Mass Update, instead of the recall process, to update the system with the candidates' recall information.	You can only update the system with the Reinstatement process.
Processes permanent and temporary layoff rosters.	Processes temporary layoff rosters only

Recall Roster Setup Page

Use the Recall Roster Setup page (HR_RECALL_SETUP) to define the recall roster parameters.

Navigation

Workforce Administration > Labor Administration > Layoffs and Recalls > Recall Roster > Recall Roster Setup

Image: Recall Roster Setup page

This example illustrates the Recall Roster Setup page.

The screenshot displays the 'Recall Roster Setup' page. At the top, there are tabs for 'Recall Roster Setup' and 'Recall Roster List'. Below the tabs, the 'Roster ID' is 'K00002' and the 'Roster Status' is '010 - Open'. The 'Extraction Criteria' section includes fields for '*Effective Date' (08/01/2004), '*Description' (Recall - Labor Agreement K00001), 'Group ID' (K00001), 'Labor Agreement' (K00001), 'Professional Agreement' (1980), 'Default Rehire Date' (03/01/2005), and 'Layoff Roster ID'. A checkbox for 'Mass Update to be used?' is checked. The 'Sort Criteria' section shows 'Seniority Dates' with a table listing sequences and dates. The 'Tie Breakers' section shows a table with sequence, tie breaker ID, record, field name, and descending order. At the bottom, there are buttons for 'Generate Roster' and 'Refresh Roster'.

The system only includes candidates whose recall rights are still valid or those candidates who have a No Recall recall rights rule attached to their labor agreement in the recall roster.

Group ID

To populate the recall roster with members in a group, select a group ID.

If you select a group ID, confirm that it includes candidates with the HR status you want for this roster (either *Active* or *Active* and *Inactive*).

Layoff Roster ID

To populate the recall roster with workers laid off from a roster, select the ID of the layoff roster. When generating the roster, the system first checks that the layoff for those candidates was successful and excluded those candidates that weren't successfully laid off.

Recall Roster List Page

Use the Recall Roster List page (HR_RECALL_CAND_LST) to manage the recall roster.

Navigation

Workforce Administration > Labor Administration > Layoffs and Recalls > Recall Roster > Recall Roster List

Image: Recall Roster List page

This example illustrates the Recall Roster List page.

Recall Roster Setup | Recall Roster List

Roster ID: K00002 | Roster Status: 020 - In Progress

Recall Roster Information

Effective Date: 08/01/2004 | Default Rehire Date: 03/01/2005

Total in Group: 1

Nbr in Group to Consider: 1 | View Roster

Apply Employee Roster Status

Apply To: All | Status: K00RECA | Apply

Recall Roster List

Select	Empl ID	Name	Empl Record	Man Empl	Tie	Notes	Rank	Status	Rehire Date
☐	K0LA01	Ted Alfort	0				0	K00RECA	03/01/2005

Process Recall | Candidates to be Processed: 1

The system will populate the Recall/Reinstatement Roster in one of two different ways:

- If the labor agreement has a no recall expiration rule, the system populates the roster with candidates that were previously laid off.
- If the labor agreement has recall expiration rule that gives workers recall rights, the system populates the roster with candidates who have been previously laid off and who have valid recall rights.

Those workers whose recall rights have expired (as determined by the recall rights expiration rule attached to their labor agreement) are not eligible for recall.

You can process candidates in batches. The recall process processes those candidates who have a status with the Process Event? check box selected as part of its definition. After the recall process processes candidates with a process event status, the system resets the candidates' status to one with the Event Complete? check box selected as part of its definition. The recall process will not reprocess candidates with an event complete status.

To process another group of candidates, set the status of a new group of candidates to a process event status and run the recall process again.

Click Process Recall to access the Recall/Reinstatement Process page and process the candidates for recall.

Adding Candidates Manually

You can manually add candidates to the roster (for example, only six former workers still have recall rights but you need to recall eight). To add a candidate manually, add a row and select an EmplID and employee record number. Click the Man Emp (Manual Employee) button to retrieve the person's job details. Once the worker's details have been retrieved, the button becomes display only. The system assigns all manually-added candidates the permanent rank of zero.

The system updates the Nbr in Group to Consider and Total in Group values to reflect the additional candidates.

Note: You can remove candidates who were manually added to the roster.

Reinstatement Roster Setup Page

Use the Reinstatement Roster Setup page (HR_REINST_SETUP) to define the reinstatement roster parameters.

Navigation

Workforce Administration > Labor Administration > Layoffs and Recalls > Reinstatement Roster > Reinstatement Roster Setup

Image: Reinstatement Roster Setup page

This example illustrates the Reinstatement Roster Setup page.

Layoff Roster ID

Select the ID of the temporary layoff roster that you are reinstating.

People laid off using a permanent layoff roster need to be recalled using the Recall Roster component and process.

Default Employee Roster Status

Select the default roster status of the recall candidates. The system will populate the roster Status field with this value and you can modify it as necessary.

Reinstatement Roster List Page

Use the Reinstatement Roster List page (HR_REINST_CAND_LST) to manage the reinstatement roster.

Navigation

Workforce Administration > Labor Administration > Layoffs and Recalls > Reinstatement Roster > Reinstatement Roster List

Image: Reinstatement Roster List page

This example illustrates the Reinstatement Roster List page.

Reinstatement Roster Setup | **Reinstatement Roster List**

Roster ID KC00001C Roster Status 010 - Open

Reinstatement Roster Information Find First 1 of 1 Last

Effective Date 08/25/2009

Default Rehire Date 10/05/2009

Total in Group

Nbr in Group to Consider View Roster

Future Job rows exist with a different Pay System. Personalize Find View All First 1 of 1 Last

Empl ID	Name	Empl Record	Job Code	Labor Facility	Dept ID	Location	Std Hrs/Wk	Notes	Rehire Date	Status
			0							

Run Reinstatement Candidates to be Processed 0

You can process candidates in batches. The reinstatement process processes those candidates who have a status with the Process Event? check box selected as part of its definition. After the reinstatement process processes candidates with a process event status, the system resets the candidates' status to one with the Event Complete? check box selected as part of its definition. The reinstatement process will not reprocess candidates with an event complete status.

To process another group of candidates, set the status of a new group of candidates to a process event status and run the reinstatement process again.

Process Recall/Reinstatement Page

Use the Process Recall/Reinstatement page (HR_RUNCTL_REINSTAT) to use the HR_REIN_EXEC process to recall or reinstatement workers.

Navigation

- Workforce Administration > Labor Administration > Layoffs and Recalls > Recall Roster > Recall Candidate List

Click the Recall Process button.

- Workforce Administration > Labor Administration > Layoffs and Recalls > Reinstatement Roster > Reinstatement Roster List

Click the Run Reinstatement button on the Reinstatement Roster List page.

Image: Process Recall/Reinstatement page

This example illustrates the Process Recall/Reinstatement page.

Running the Recall/Reinstatement Process for a Recall Roster

When you run the recall/reinstatement process (HR_REIN_EXEC) for a recall roster, the process:

- Inserts a new row in the Job Data pages with the effective date equaling the rehire date entered on the recall roster.

The system copies all of the data from the previous Job Data row to the new row and includes the Action and Action Reason values you select here.

See "Adding Organizational Instances for Employees, Contingent Workers, and POIs" (PeopleSoft HCM 9.2: Human Resources Administer Workforce).

- Inserts a new row into the Recall Rights page expiring their recall rights, with the effective date equaling the rehire date entered on the recall roster.

The system enters the value of *Recall* in the Reason field.

The system enters the recall roster's rehire date as the Expiration Date.

See [Recall Rights Page](#).

- Updates the status of the processed candidates in the recall roster with an event complete status.

See [Employee Roster Status Page](#).

Running the Recall/Reinstatement Process for a Reinstatement Roster

When you run the recall/reinstatement process (HR_REIN_EXEC) for a reinstatement roster, the process:

- Inserts a new row in the Job Data pages with the effective date equaling the rehire date entered on the reinstatement roster.

The system copies all of the data from the previous Job Data row to the new row and includes the Action and Action Reason values you select here.

See "Adding Organizational Instances for Employees, Contingent Workers, and POIs" (PeopleSoft HCM 9.2: Human Resources Administer Workforce).

- Inserts a new row into the Recall Rights page expiring their recall rights, with the effective date equaling the rehire date entered on the reinstatement roster.

The system enters the value of *Recall* in the Reason field.

The system enters the reinstatement roster's rehire date as the Expiration Date.

See [Recall Rights Page](#).

- Updates the status of the processed candidates in the reinstatement roster with an event complete status.

See [Employee Roster Status Page](#).

Recall/Reinstatement Report

The recall and reinstatement process creates the Recall/Reinstatement Roster Post Processing report (HRLAY008) after it completes the recall process. This report lists those workers rehired. It also creates the Recall Rights Post Processing report (HRLAY007) which list the recall rights created for the rehired workers.

These reports list candidates that were not processed successfully without job data. Review the reports to identify candidates that were not processed by looking for those without job data on this report.

Processing Layoffs and Recalls Using PeopleSoft Mass Update

To process a layoff or a recall using PeopleSoft Mass Update:

1. Select the Use Mass Update? check box on the Layoff Roster Setup or Recall Roster Setup page.
2. Set the status of the candidates you want to process to a process event status on the Layoff Roster List or Recall Candidate List page.

See [Employee Roster Status Page](#).

3. In the Query Manager component (QUERY_MANAGER), define a query that selects the roster and the candidates to be processed for layoff or recall.

Note: We have included two sample queries, HR_UNION_LAYOFF and HR_UNION_RECALL, that you can modify to meet your needs.

See *PeopleTools: PeopleSoft Query PeopleBook*

4. Create a group in the Group Build - Group Definition component.

See "Setting Up Group Definitions" (PeopleSoft HCM 9.2: Application Fundamentals).

5. Attach the query to the group.

Note: We have included two sample groups, K0LAYOFF and K0RECALL, that you can use if you use the sample queries.

6. Set up a Mass Update ID on the Define Mass Update component (MU_SETUP). Enter the following information:
 - In the Population Selection Criteria grid on the Common Changes (MU_SETUP_CHANGES) page, select *Group Build* in the Select By field and the name of the group you are processing in the Group field.
 - Select the job data that you want to update for the candidates that you are processing for layoff or recall.

For example, in addition to selecting to update the Action and Action Reason fields with the value of *Recall*, you may also want to update the Standard Hours field with a value of 30.

See "Setting Up Mass Update Definitions" (PeopleSoft HCM 9.2: Application Fundamentals).

7. Prepare the Mass Update ID on the Create Mass Updates page.
8. Preview the Mass Update ID on the Report Mass Updates or Manage Mass Updates pages.
9. Process the Mass Update ID on the Execute Mass Updates (RUNCTL_MU_EXECUTE) page.

See "Understanding Mass Update Processing" (PeopleSoft HCM 9.2: Application Fundamentals).

Running Layoff and Recall Reports

To run layoff and recall reports, use the Seniority Report component (HR_RUNCTL_LAY003), Layoff Roster Report component (HR_RUNCTL_LAY001), Bumping Report component (HR_RUNCTL_LAY002), Candidate List Report component (HR_RUNCTL_LAY004), and the Recall Roster Report component (HR_RUNCTL_LAY005).

This topic discusses how to run layoff and recall reports.

Pages Used to Run Layoff and Recall Reports

Page Name	Definition Name	Usage
<u>Layoff Roster Report Page</u>	HR_RUNCTL_LAY001	Use to run a report on the setup and roster list information of a layoff roster (HRLAY001).
<u>Bumping Report Page</u>	HR_RUNCTL_LAY002	Use to run the Bumping report (HRLAY002). This report displays worker job data history and bumping sequence as set up on the labor agreement.

Page Name	Definition Name	Usage
<u>Seniority Report Page</u>	HR_RUNCTL_LAY003	Use to run the Seniority report (HRLAY003). The report lists workers, their seniority dates, and the values for those dates.
<u>Candidate List Report Page</u>	HR_RUNCTL_LAY004	Use to run the Candidate List Report (HRLAY004). This report lists the workers with recall rights that have not expired.
<u>Recall Roster Report page</u>	HR_RUNCTL_LAY005	Use to run a report (HRLAY005) on the setup and roster list information of a recall roster.

Layoff Roster Report Page

Use the Layoff Roster Report page (HR_RUNCTL_LAY001) to use to run a report on the setup and roster list information of a layoff roster (HRLAY001).

Navigation

Workforce Administration > Labor Administration > Reports > Layoff Roster Report

Image: Layoff Roster Report page

This example illustrates the Layoff Roster Report page.

Select the Roster ID you want to report on. To further categorize, select one or more employee roster status in the order in which you want the report to list the people with those statuses.

Bumping Report Page

Use the Bumping Report page (HR_RUNCTL_LAY002) to use to run the Bumping report (HRLAY002).

This report displays worker job data history and bumping sequence as set up on the labor agreement.

Navigation

Workforce Administration > Labor Administration > Reports > Bumping Report

Image: Bumping Report page

This example illustrates the Bumping Report page.

Bumping Report

Run Control ID PS Report Manager Process Monitor **Run**

Language English ▼

Selection Criteria

Roster ID 🔍

Empl ID 🔍

Set ID 🔍

Labor Agreement 🔍

Department 🔍

Location Code 🔍

Labor Facility ID 🔍

Job Code 🔍

Select the roster ID you want to report on. To further limit your search, select values in the other fields. The system will only return the information for those workers that meet the criteria you specify.

Seniority Report Page

Use the Seniority Report page (HR_RUNCTL_LAY003) to use to run the Seniority report (HRLAY003).

The report lists workers, their seniority dates, and the values for those dates.

Navigation

Workforce Administration > Labor Administration > Reports > Seniority Report

Image: Seniority Report page

This example illustrates the Seniority Report page.

Seniority Report

Run Control ID PS Report Manager Process Monitor **Run**

Language English

Selection Criteria

As of Date 02/26/2013 Department Set ID

*Set ID Department

*Labor Agreement Location Set ID

*Seniority Date ID Location

Labor Facility ID Job Code Set ID

Job Family Job Code

Tie Breakers Personalize | Find | View All | First 1 of 1 Last

Sequence	*Tie Breaker ID	Record	Field Name	Descending Order?
1				☐

Select values in the fields to limit your search. The system will return only the seniority information for those workers that meet the criteria you specify.

Candidate List Report Page

Use the Candidate List Report page (HR_RUNCTL_LAY004) to run the Candidate List Report (HRLAY004).

This report lists the workers with recall rights that have not expired.

Navigation

Workforce Administration > Labor Administration > Reports > Candidate List Report

Image: Candidate List Report page

This example illustrates the Candidate List Report page.

Candidate List Report

Run Control ID PS Report Manager Process Monitor **Run**

Language English

Selection Criteria

As of Date 03/19/2014 Department Set ID Department

*Set ID Location Set ID Location Code

*Labor Agreement Job Code Set ID Job Code

*Seniority Date ID Labor Facility ID

Job Family

Tie Breakers Personalize | Find | View All | First 1 of 1 Last

Sequence	*Tie Breaker ID	Record	Field Name	Descending Order?
1				

Select values in the fields to limit your search. The system will return only the candidates who meet the criteria you specify.

Recall Roster Report page

Use the Recall Roster Report page (HR_RUNCTL_LAY005) to run a report (HRLAY005) on the setup and roster list information of a recall roster.

Navigation

Workforce Administration > Labor Administration > Report > Recall Roster Report

Image: Recall Roster Report page

This example illustrates the Recall Roster Report page.

Recall Roster Report

Run Control ID PS Report Manager Process Monitor **Run**

Language English

Roster Information

*Roster ID

Employee Roster Status Selection (optional) Personalize | Find | 1 of 1

Sequence	Employee Roster Status
1	

Specify the roster ID for the report. Optionally, specify employee roster statuses to include.

Chapter 7

Managing Wage Progression

Understanding Wage Progression

When you assign a worker to a labor agreement and bargaining unit on the Job Data - Job Labor page (JOB_LABOR) and a salary plan with wage progression rules on the Job Data - Salary Plan page (JOB_DATA_SALPLAN), you can manage their wage plan's step progression using the wage progression processes.

Wage progression is the step-by-step advancement of a worker's compensation rate from a beginning rate to one of full parity. The progression is based on a wage progression rule associated with the worker's salary plan. The rule includes step progression requirements and a rate calculation formula.

The Update Wage Progression processes gather the data required to make a decision about the worker's eligibility to advance and stores that information in the Review Wage Progression component (HR_WP_MAINT_ACTVTY). Once all of the necessary data is accumulated, the system can flag qualified workers for advancement. The system inserts a new Job Data row for the qualified workers with their new step and related wage rate. The system processes the new compensation rate in the next payroll.

If, during the calculation of a worker's new rate, they reach or exceed the maximum rate for the salary grade, the system considers them at parity for their job wage rate. In these circumstances, the system increments the worker to the next highest step for the grade and no longer includes them in the wage progression processes.

See "Understanding Wage Progression and Administer Compensation" (PeopleSoft HCM 9.2: Human Resources Administer Compensation).

Wage Progression Business Process

To insure timely reflection of the increased pay rate in a worker's paycheck, evaluate workers on wage progression for step increases prior to each payroll.

To manage wage progression:

1. Set up wage progression run IDs on the Wage Progression Run ID page (HR_WP_ID_DEFN).

Wage progression run IDs determine the population of workers considered for processing. The run ID is the key value in progression processes.

See Understanding Wage Progression Run IDs.

2. To process wage progression rules based on time worked, you must import time data into the wage progression staging table.

Use the Extract Payroll Data process (HR_EXTRT_NAP) to extract the last pay period's confirmed time data from Payroll for North America. Write additional processes to extract data from other time

sources. The Update Wage Progression - Update Activity with Time Data process retrieves the time data from this table.

See [Understanding the Extract Payroll Data Process](#).

3. Run the Update Wage Progression processes from the Update Wage Progression page (RUN_UPD_WP_ACTVTY).

To be included in wage progression processing, a worker must have the following:

- A labor agreement.
- A bargaining unit.
- The Stop Wage Progression check box on the Job Data - Job Labor and Review Wage Progression page is not checked.

See [Understanding the Update Wage Progression Process](#).

4. Use the Approve Employees to Advance page (HR_WP_ADVANCE) to approve workers for wage progression if approval is required by the salary plan's wage progression rule.

See [Approving and Processing Wage Advancements](#).

Note: To set up a salary plan requiring advancement approval, select the Advancement Approval Required check box on the Salary Plan Table - Define Wage Progression Rule page (SALARY_PLAN_TABLE2).

The system will automatically approve workers for advancement if their job and time data meets the advancement criteria and if their plan's wage progression does not require approval for advancement.

See "Understanding Wage Progression and Administer Compensation" (PeopleSoft HCM 9.2: Human Resources Administer Compensation).

5. Process workers approved for advancement using the Advance Employees to next Step process (HR_WP_ADV) from the Process Wage Progression page (RUN_UPD_WP_ADVC).

See [Process Wage Progression Page](#).

At any point in the process, you can review or modify a worker's wage progression activity details on the Review Wage Progression page (HR_WP_MAINT_HIST).

See [Review Wage Progression Page](#).

Setting Up Wage Progression Run IDs

To set up wage progression run IDs use the Wage Progression Run ID component (HR_WP_ID_DEFN).

This topic provides an overview of wage progression run IDs and describes how to set up wage progression run IDs.

Page Used to Set Up Wage Progression Run IDs

Page Name	Definition Name	Usage
Wage Progression Run ID Page	HR_WP_ID_DEFN	Define groups of workers to manage throughout the wage progression process.

Understanding Wage Progression Run IDs

Wage progression run IDs enable you to create discrete populations of workers and manage their wage progression consistently throughout the process. The run ID is a key on the process run control pages and the Approve Employees to Advance page.

Determine the best way to define your population (for example, by salary plan), and then use that method for all your wage progression run IDs.

Note: Be sure to configure run ID populations in such a way that you will be including a worker's Job Data record in only one population.

Wage Progression Run ID Page

Use the Wage Progression Run ID page (HR_WP_ID_DEFN) to define groups of workers to manage throughout the wage progression process.

Navigation

Workforce Administration > Labor Administration > Wage Progression > Wage Progression Run ID > Wage Progression Run ID

Image: Wage Progression Run ID page

This example illustrates the Wage Progression Run ID page.

Wage Progression Run ID

Wage Progression Run ID KUWP2

*Description By Salary Plan KUH2

Population Basis

☐ Labor Agreement ☒ Salary Plan ☐ Group ID

Wage Progression by Salary Plan

Personalize | Find | Salary Admin Plans 1 of 1 Last

	Set ID	Salary Administration Plan	Step Increment Type	
1	SHARI	KUH2	Hours Worked	Administrative Workers

+ -

Wage Progression Population Basis

Choose the method by which to determine the population for the wage progression run ID:

- Labor Agreement

- Salary Plan
- Group ID

Wage Progression by Bargaining Unit

When you select Labor Agreement as your run ID population basis, enter one or more labor agreements in the grid and the workers associated with the selected labor agreements will make up the run ID population.

Wage Progression by Salary Plan

When you select Salary Plan as your run ID population basis, enter one or more salary plans in the grid and the workers associated with the selected plans will make up the run ID population.

Wage Progression by Group ID

When you select Group ID as your run ID population basis, enter one group ID and the workers associated with the selected group ID will make up the run ID population.

See "Setting Up Group Definitions" (PeopleSoft HCM 9.2: Application Fundamentals).

Extracting Information from PeopleSoft Payroll for North America

To obtain time-worked information from PeopleSoft Payroll for North America, use the Extract Payroll Data component (HR_WP_NA_PY_EXTRCT).

This topic provides an overview of the Extract Payroll Data process and discusses how to extract information from Payroll for North America.

Page Used to Extract Time Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Extract Payroll Data Page</u>	HR_WP_NA_PY_EXTRCT	Run the Extract Payroll Data process. Select the company whose payroll data you want to extract.

Understanding the Extract Payroll Data Process

If you are using Payroll for North America to process your workers' payroll and if you have workers in a salary plan with wage progression rules that use special accumulators for hours worked or leave hour limits, use the Extract NA Payroll Data process (HR_EXTRT_NAP) to extract time data of your workers.

Run the process once per pay cycle. The Extract NA Payroll Data process:

- For the selected company, extracts all the previous payroll's confirmed time data specified in the wage progression rule's accumulator ID and places it in an HR staging tables HR_PAY_STG and HR_PAY_STG_ERNS.

- Sets the HR_WP_PROCESS_FLG on the PAY_CHECK record to indicate that the time data has been processed and to prevent the system from gathering the same data multiple times.

The Update Wage Progression - Payroll Update process retrieves the time data from the staging table and updates the Review Wage Progression page with the information to enable you to manage wage progression and process workers for advancement. After you run the Update Wage Progression process you can review the detailed time data using the Review Time Details page.

See [Review Time Details Page](#).

See [Understanding the Extract Payroll Data Process](#).

See [Understanding the Update Wage Progression Process](#).

See [PeopleSoft Payroll for North America](#).

Extracting Off-Cycle Runs

The Extract Payroll Data process will not extract off-cycle payrolls for a Pay Run ID until an on-cycle payroll has been run first for the same Pay Run ID.

If the year-ending month is opened up for an off-cycle payroll after the next period on-cycle payroll has already been run, make sure to accommodate the payroll time entries in wage progression while the off-cycle payroll is open. The extraction process will not recognize the additional entries for the Pay Run ID once the off-cycle payroll has been closed again.

Extract Payroll Data Page

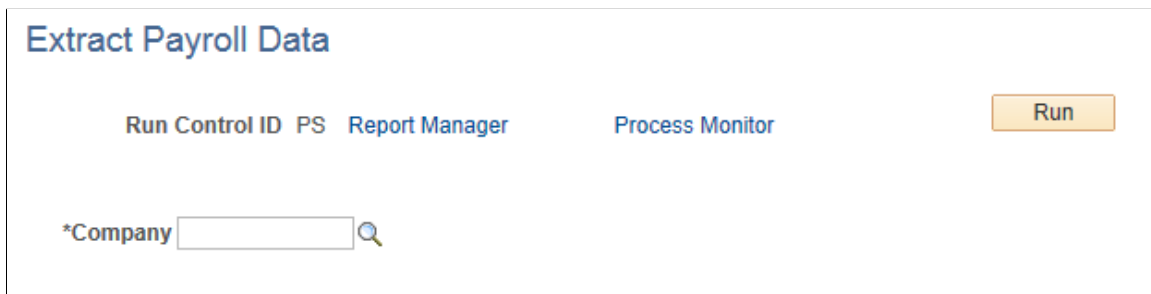
Use the Extract Payroll Data page (HR_WP_NA_PY_EXTRCT) to run the Extract Payroll Data process.

Navigation

Workforce Administration > Labor Administration > Wage Progression > Extract Payroll Data > Extract Payroll Data

Image: Extract Payroll Data page

This example illustrates the Extract Payroll Data page.



Extract Payroll Data

Run Control ID PS Report Manager Process Monitor

Run

*Company 

Select the company whose payroll data you want to extract.

Maintaining Worker Wage Progression Information

To maintain worker wage progression information use the Update Wage Progression component (RUN_UPD_WP_ACTVTY) and Review Wage Progression component (HR_WP_MAINT_ACTVTY).

This topic provides an overview of the Update Wage Progression process and discusses how to maintain worker wage progression information.

Pages Used to Maintain Worker Wage Progression Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Update Wage Progression Page</u>	RUN_UPD_WP_ACTVTY	To update a worker's wage progression activity record, run the following wage progression processes in sequence: 1. Update Activity with Job Data process. 2. Update Activity with Time Data process. 3. Qualify Employees process.
<u>Review Wage Progression Page</u>	HR_WP_MAINT_HIST	Review a worker's wage progression activity rows and add new rows to make manual adjustments to the activity record.
<u>Review Time Details Page</u>	HR_WP_EARN_INQUIRY	Review earning period details per pay period about a worker's leave and worked hours.
<u>Exception Messages Page</u>	HR_WP_MSG_SEC	Review system messages about why a worker was excepted from advancement. Acknowledge exception to resume wage advancement eligibility.
<u>Wage Progression Exception Rpt Page</u>	RUN_WP002	Run the exceptions report (WP002). It lists all employees within a Wage Progression Run ID group that have unacknowledged exceptions and indicates the exception type.

Understanding the Update Wage Progression Process

The Update Wage Progression process is made up of three processes that gather the job and payroll time information related to wage progression for workers included in the Wage Progression Run ID, and determine when a worker is qualified to advance based on their wage progression rule. Each process updates the Review Wage Progression page.

The three processes are:

1. The Update Activity with Job Data process (HR_WP_UPD_JC).

Run to update workers' wage progression records with relevant updates from their job data records.

2. The Update Activity with Time Data process (HR_WP_UPD_PY0).

Run to update workers' wage progression records with time worked information extracted from the payroll system.

3. The Qualify Employees process (HR_WP_UPD_QL).

Run to evaluate and qualify if workers are ready for advancement.

Note: You must run these processes in sequence.

Update Activity with Job Data Process

If a worker is assigned to a bargaining unit, labor agreement, and salary plan that includes a wage progression rule, the Update Activity with Job Data process:

- Detects changes to the following fields on the current Job Data record:
 - Bargaining unit.
 - Labor agreement.
 - SETID_JOBCODE, if the change is the result of a change in the worker's business unit.
 - JOBCODE, if the new value is manually entered.
 - SETID_SALARY, if the change is the result of a change in the worker's business unit.
 - SAL_ADMIN_PLAN, if the new value is manually entered or changed as a result of a system rule.
 - GRADE, if the new value is manually entered or changed as a result of a system rule.
 - STEP, if the new value is manually entered.
 - STEP_ENTRY_DT , if the value is updated
 - WPP_STOP_FLAG, if the new value is manually entered.

Note: The system processes the Job Data record that is current on the process' As of Date.

- When a Job Code change occurs, checks and applies the carryover rules selected for the worker's labor agreement on the Labor Agreement page (HR_LABOR_AGR_DEFN1).

See [Labor Agreement Page](#).

- Inserts a new row into the Review Wage Progression page with the updated information.

The system identifies this row by populating the Type field with the value of *Job Change*.

- Updates the Last Process Dates date and time stamps.

Note: After the process initially records a selected Stop Wage Progression check box for a worker, it will no longer gather job data for workers who have the Stop Wage Progression check box selected on the Job Labor page or Review Wage Progression - Activity tab.

Update Activity with Time Data Process

Run this process when the wage progression rule is based on hours worked or when an elapsed-time wage progression rule has leave limits in effect. The process processes all staged time data, processed by the Extract Time Data process, for workers active in wage progression. The staging tables (HR_PAY_STG and HR_PAY_STG_ERNS) must first be populated with data extracted from Payroll for North America or another external subsystem.

If the process detects previously extracted and staged time data, it:

- Inserts a new row into the Review Wage Progression page with the updated information.

The system identifies this row by populating the Type field with the value of *Payroll Update*.

- Inserts a new row into the Review Time Detail page.

See [Review Time Details Page](#).

- Deletes the row from the staging table after processing.

Updates the Last Process Dates date and time stamps.

Note: The process will not gather time data for workers who have the Stop Wage Progression check box selected on the Job Labor page or Review Wage Progression - Activity tab but it will delete the row in the staging table so that the time will not be processed once you deselect the Stop Wage Progression check box for the worker.

Note: You do not need to enter an As of Date to run this process as all rows in the staging tables will be processed. The system will create a separate Review Wage Progression entry for each pay period.

See [Extracting Information from PeopleSoft Payroll for North America](#).

Qualify Employees Process

The Qualify Employees process determines if a worker is ready for step advancement. The process should be the last update run prior to Process Wage Progression which will perform the actual wage advancement.

The process qualifies workers under an elapsed-time wage progression rule by looking at the adjusted step entry date in the most recent job change or manual row in the Review Wage Progression page comparing it to the as of date entered on the run control page.

The process qualifies workers under hours-worked rules by looking at the first payroll update row in the Review Wage Progression page with hours that qualify. Whenever there is a manual row with the same date as a job change or payroll update row, the process gives the manual row's data precedence. The process:

- Calculates and populates the Estimated Advancement Date value.

This calculation is based on the wage progression rule's advancement parameters, the worker's adjusted step entry date, as of date, hours worked, on the Review Wage Progression page and, for hours worked rules, the standard hours on the Job Data - Job Information page.

- The process will set the worker's wage progression status depending on the type of wage progression rule:
 - For hours-worked wage progression rules, the process determines if the worker has accumulated enough hours since the step's original entry date.

If the Accumulated Hours Worked is greater than the step's Required Hours and the wage progression rule does not indicate that approval is required, the system sets the worker's status to *Approved*; or if Approval is required, *Qualified-Approval Required* or *Almost Qualified*, if the wage progression approval rule allows for an hours within tolerance.

- For elapsed-time rules, the process determines if the calendar time between the worker's adjusted step entry date and the process As of Date exceeds the time required in the salary step.

If the time has been met and the wage progression rule does not indicate that approval is required, the system sets the worker's status to *Approved*. If the rule does require approval, the system sets the status to *Qualified - Approval Required*. If the wage progression approval rule allows for an hours within tolerance, the system may set the status to *Almost Qualified*.

In all other circumstances, the process sets the status to *Not Qualified*.

- Updates the qualifying row on the Review Wage Progression page with the Status field accordingly.

Updates the Last Process Dates date and time stamps.

Process Exceptions

All Update Wage Progression processes identify circumstances that fall outside the basic wage progression definition and flags the workers' Review Wage Progression records with an exception condition. The system will not process for advancement workers with a row in an exception state but all other wage progression processes will continue.

During any of the Update Wage Progression processes, the system will mark a worker for exception when it encounters an exception condition. The system inserts a red alert icon (!) on the worker's Review Wage Progression page. Additionally, you can generate a list of workers with exceptions using the Wage Progression Exception report. The table below lists the various exceptions, what triggered the exception, and the action you might take before acknowledging the exception.

Exception Condition	What it Means	Action Required
Job Data Correction	A user has made a correction to a Job Data row, effecting job data that impacts wage progression.	Review the worker's Job Data record and make modifications to the job data record or the worker's wage progression record, if necessary.
Manual Step Advance	A user has manually changed a worker's grade step level on the Job Data - Salary Plan page.	Review the change for accuracy.

Exception Condition	What it Means	Action Required
Exceeded Leave Hours	The worker's leave hours have exceeded the leave limit prior to meeting the elapsed time required for step advancement.	Review the worker's wage progression record and modify the Orig Step Entry Date value if appropriate.
Exceeded Time Limit	The worker has worked the required number of hours in the required calendar period.	Review the worker's wage progression record and modify the Orig Step Entry Date or Hours Worked value if appropriate.
Approved but Stop Wage Progression	A user has selected one of the Stop Wage Progression check boxes of a worker who was approved for advancement.	Review the worker's Job Data record and wage progression record and make modifications to the job data record or the worker's wage progression record, if necessary.
Released Stop Wage Progression	A user has cleared one of the Stop Wage Progression check boxes.	Review the worker's Job Data record and wage progression record and make modifications to the job data record or the worker's wage progression record, if necessary.
Two Earnings Periods	The Update Activity with Time Data process includes time from two or more earnings periods.	Review the worker's Job Data record and wage progression record and make modifications to the job data record or the worker's wage progression record, if necessary.
Special Accumulator ID Changed	A user has changed the wage progression rule's accumulator ID on the Salary Plan Table – Define Wage Progression Rule page.	Review the worker's wage progression record and modify if appropriate.
New Time < Old Time	The Update Activity with Time Data process has caused the worker's new Hours Worked total to be less than the previous Hours Worked value.	Review the worker's wage progression record and modify if appropriate.

Update Wage Progression Page

Use the Update Wage Progression page (RUN_UPD_WP_ACTVTY) to update a worker's wage progression activity record. Run the following wage progression processes in sequence:

1. Update Activity with Job Data process.
2. Update Activity with Time Data process.
3. Qualify Employees process.

Navigation

Workforce Administration > Labor Administration > Wage Progression > Update Wage Progression > Update Wage Progression

Image: Update Wage Progression page

This example illustrates the Update Wage Progression page.

Last Process Dates	
Last Process to Run	Qualification
Job Changes Process Date	02/26/13 9:52PM
Payroll Update Process Date	02/26/13 9:52PM
Qualification Process Date	02/26/13 9:53PM
Approve for Advancement Date	
Advancement Process Date	

You must run the three update process one at a time, in this order:

1. Update Activity with Job Data process (HR_WP_UPD_JC)
2. Update Activity with Time Data process (HR_WP_UPD_PY0)
3. Qualify Employees process (HR_WP_UPD_QL)

Wage Progression Run ID

Select the run ID representing the information group on which you want to collect activity data.

As of Date

Select the date as of which you want to incorporate changes to the Job Data pages or qualify an Elapsed Rule based worker for advancement.

Last Process Dates

There are five wage progression programs. This group box lists the last time each of the processes were run and which process was run most recently.

Review Wage Progression Page

Use the Review Wage Progression page (HR_WP_MAINT_HIST) to review a worker's wage progression activity rows and add new rows to make manual adjustments to the activity record.

Navigation

Workforce Administration > Labor Administration > Wage Progression > Review Wage Progression > Review Wage Progression

Image: Review Wage Progression (1 of 7)

This is the first of seven examples illustrating the Review Wage Progression page.

Review Wage Progression									
Julie Berry		Employee		Empl ID K0HU19		Empl Record		0	
Activity Details									
Personalize Find View All Print Export First 1 of 1 Last									
Activity	Elapsed Time	Reported Time	Exception	Job	Wage Plan	Labor Agreement			
Notes	Activity Date	Type	Progression Type	Status	Approved By	Stop WP	Estimated Advance	Date Posted	
	01/01/2003	Job Change	Reported Time Based	Not Qualified			02/03/2003	02/26/2013	
Insert Manual Row									

Image: Review Wage Progression (2 of 7)

This is the second of seven examples illustrating the Review Wage Progression page.

Review Wage Progression									
Julie Berry		Employee		Empl ID K0HU19		Empl Record		0	
Activity Details									
Personalize Find View All Print Export First 1 of 1 Last									
Activity	Elapsed Time	Reported Time	Exception	Job	Wage Plan	Labor Agreement			
Notes	Activity Date	Type	Progression Type	Status	Orig Step Entry Date	Adj Step Entry Date	Leave Limit	Leave Hours	Time Detail
	01/01/2003	Job Change	Reported Time Based	Not Qualified	01/01/2003	01/01/2003			
Insert Manual Row									

Image: Review Wage Progression (3 of 7)

This is the third of seven examples illustrating the Review Wage Progression page.

Review Wage Progression									
Julie Berry		Employee		Empl ID K0HU19		Empl Record		0	
Activity Details									
Personalize Find View All Print Export First 1 of 1 Last									
Activity	Elapsed Time	Reported Time	Exception	Job	Wage Plan	Labor Agreement			
Notes	Activity Date	Type	Progression Type	Status	Required Hours	Hours Worked	Adj Hours	Time Detail	
	01/01/2003	Job Change	Reported Time Based	Not Qualified	160.000				
Insert Manual Row									

Image: Review Wage Progression (4 of 7)

This is the fourth of seven examples illustrating the Review Wage Progression page.

Review Wage Progression

Julie Berry Employee Empl ID K0HU19 Empl Record 0

Activity Details
Personalize Find View All First 1 of 1 Last

Activity Elapsed Time Reported Time Exception Job Wage Plan Labor Agreement

Notes	Activity Date	Type	Progression Type	Status	Date Posted
	01/01/2003	Job Change	Reported Time Based	Not Qualified	02/26/2013

Insert Manual Row

Image: Review Wage Progression (5 of 7)

This is the fifth of seven examples illustrating the Review Wage Progression page.

Review Wage Progression

Julie Berry Employee Empl ID K0HU19 Empl Record 0

Activity Details
Personalize Find View All First 1 of 1 Last

Activity Elapsed Time Reported Time Exception Job Wage Plan Labor Agreement

Notes	Activity Date	Type	Progression Type	Status	Job Code	Description
	01/01/2003	Job Change	Reported Time Based	Not Qualified	810005	Server-Food

Insert Manual Row

Image: Review Wage Progression (6 of 7)

This is the sixth of seven examples illustrating the Review Wage Progression page.

Review Wage Progression

Julie Berry Employee Empl ID K0HU19 Empl Record 0

Activity Details
Personalize Find View All First 1 of 1 Last

Activity Elapsed Time Reported Time Exception Job Wage Plan Labor Agreement

Notes	Activity Date	Type	Progression Type	Status	Salary/Wage Plan	Salary Grade	Step
	01/01/2003	Job Change	Reported Time Based	Not Qualified	KUH2	3	2

Insert Manual Row

Image: Review Wage Progression (7 of 7)

This is the seventh of seven examples illustrating the Review Wage Progression page.

Review Wage Progression								
Julie Berry			Employee	Empl ID K0HU19		Empl Record 0		
Activity Details					Personalize Find View All  	First 1 of 1 Last		
Activity	Elapsed Time	Reported Time	Exception	Job	Wage Plan	Labor Agreement		
Notes	Activity Date	Type	Progression Type	Status	Labor Agreement	Description	Bargaining Unit	
	01/01/2003	Job Change	Reported Time Based	Not Qualified	K00002	Consulting Agreement 1980	KU01	
Insert Manual Row								

Static Columns

These columns appear on each tab.

!

For workers with unacknowledged exceptions, the system marks the rows with a red alert icon.

See [Exception Messages Page](#).

Notes

Click to access the Notepad feature to enter or review notes about a row of wage progression activity. You should add a note of explanation for all manual adjustments.

Activity Date

The date the wage progression activity took place. The activity date for rows with a type of:

- *Job Change* equals to the effective date of the Job Data record.
- *Payroll Update* equals to the pay period end date.
- *Manual* defaults to the system date, but can be overridden. The date must be greater than or equal to the last activity date.

Type

The system populates this field with one of the following values to indicate what type of update has been made to the worker's wage progression history:

- *Job Change*

The Job Data subprocess from the Update Wage Progression process page processed changes on the Job Data pages that impacted wage progression.

- *Payroll Update*

The worker is assigned to a wage progression rule that requires time data and the Time Data subprocess from the Update Wage Progression process page has processed the time data.

- *Wage Advancement*

The Process Wage Progression process has advanced this worker to a new step ID.

- *Manual*

You manually updated the worker's wage progression activity on this page.

Note: You should include a note explaining the manual updates you make.

Progression Type

Displays the progression rule's increment type, either *Elapsed Time Based* or *Reported Time Based*.

Status

The Qualification subprocess from the Update Wage Progression process page or an individual manual row entry may trigger a status change if the data supports it. When there is a manual row on the same date as another type of row, the system gives the manual row precedence. The system will evaluate this row for proper status and adjust the other rows accordingly. The system updates the Status field with the following values:

- *Not Qualified:* Not ready for advancement. This status is applied when a worker first enters a step.
- *Almost Qualified:* This status is only applied to workers with salary plan whose wage progression rules require approval and have a time within tolerance.
- *Qualified - Approval Required:* Worker has met advancement criteria but the wage progression rule requires manual approval. Approve workers for advancement on the Approve Employees to Advance page.

See [Approve Employees to Advance Page](#).

- *Approved:* Worker has met advancement criteria and has been approved automatically (wage progression rule does not require manual approval).
- *Not Approved:* The worker previously had the status of *Qualified - Approval Required* or *Almost Qualified* but you did not manually approve them prior to running the Process Wage Progression process. The system will reset the worker's status to *Qualified - Approval Required* or *Almost Qualified* the next time you run the Qualify Employees process from the Update Wage Progression page.
- *Advanced:* Assigned to the last row with the old salary step to indicate that the worker has advanced to a new step.

- *Completed Wage Progression*: Assigned to workers who have reached the top step of the plan's wage progression rule.

Activity

Approved By

- If the system automatically approved the worker for advancement, the system sets the value to *System*.
- If the worker requires manual approval, for advancement, the system sets the value to *Manual* once you approve them on the Approve Employees to Advance page.

Stop WP (stop wage progression)

Select this check box here or on the Job Labor page to suspend a worker's participation in the wage progression process. When you select this check box here the system inserts a new Job Data row and selects the Stop Wage Progression check box on the Job Data - Job Labor page.

When you select the Stop Wage Progression on the Job Labor page, the system updates the wage progression activity when you next run the Update Activity with Job Data process.

When you select the check box, the system:

- Makes the salary plan and grade fields available for entry on the Job Data - Salary Plan page.
- No longer includes the worker in the Update Wage Progression processes (except for the first Update Activity with Job Data process that updates this field with the value from the Job Labor page, if that's where you first selected the check box).

The system also selects this check box when a worker completes the wage progression.

Estimated Advance

Displays the system-calculated estimated date the worker will be eligible to advance based on the wage progression rule of their salary plan.

For rules based on hours worked, the system bases this calculation on the standard hours on the worker's Job Data record. The date will always be the first day of the next pay period after the worker qualifies.

This is only an estimate since various other factors could impact the actual advancement date.

See [Understanding the Update Wage Progression Process](#).

Date Posted

Displays the system date the row was generated or created.

Elapsed Time

These fields are applicable for elapsed time-based wage progression rules only.

Orig Step Entry Date (original step entry date)	Displays the date the worker <i>originally</i> entered their current salary step. The system draws this value from the Step Entry Date field on the Job Data - Salary Plan page.
Adj Step Entry Date (adjusted step entry date)	Manually adjust the step entry date here to maintain wage progression accuracy.
Leave Limit	(Optional) Displays the maximum number of leave hours a worker can accumulate while in the step, as defined in the salary plan's progression rule.
Leave Hours	(Optional) Displays the leave hours the worker has accumulated since the original step entry date. The Update Activity with Time Data process updates this value.
Time Detail	(Optional) Click to view the Review Time Details page. See Review Time Details Page .

Reported Time

These fields are applicable for hours-based wage progression rules only.

Required Hours	Displays the number of hours the worker needs to accumulate to advance to the next grade step defined in the salary plan's progression rule.
Hours Worked	Displays the qualifying hours the worker has worked since the original step entry date. The Update Activity with Time Data process updates this value and also adds in any adjusted hours from a previous manual row.
Adj Hours (adjusted hours)	Manually enter hours here to establish a new total for hours worked. Adjust the hours as necessary to maintain wage progression accuracy. The next Update Wage Progression with Time Data will incorporate manual adjustments. The system uses this adjusted value to qualify if the worker is ready to progress to the next step by comparing it to the Required Hours.
Time Detail	(Optional) Click to view the Review Time Details page. See Review Time Details Page .

Exception

Exception Detail	These columns only appear if there is a row with an exception. Click to view the details about the worker's exception from advancement.
-------------------------	---

See [Exception Messages Page](#).

Acknowledge Exception

Select to indicate that you acknowledge the exception message and return the worker to advancement eligibility.

Job

Job Code and Description

Displays the job code and a description of the worker's job.

Wage Plan

Salary/Wage Plan, Salary Grade and Step

Displays the wage progression salary plan, grade, and step currently held by the worker.

Labor Agreement

Labor Agreement . Description , and Bargaining Unit

Displays the worker's labor agreement and bargaining unit.

Review Time Details Page

Use the Review Time Details page (HR_WP_EARN_INQUIRY) to review earning period details per pay period about a worker's leave and worked hours.

Navigation

- Workforce Administration > Labor Administration > Wage Progression > Review Wage Progression > Review Wage Progression

Click the Time Detail button on the Review Wage Progression - Elapsed Time tab (leave hours) and Review Wage Progression - Reported Time tab (hours worked) on the Review Wage Progression page.

- Workforce Administration > Labor Administration > Wage Progression > Review Time Details > Review Time Details

Image: Review Time Details page.

This example illustrates the Review Time Details page.

The screenshot shows a web application window titled "Wage Prgr Earnings Inquiry". Inside, the "Review Time Details" section is active. It displays the employee's name "Julie Berry" and "Employee" status. To the right, it shows "Empl ID K0HU19" and "Empl Record 0". Below this, there is a "Time Detail" table with columns: "Pay Period End Date", "Earnings Begin Date", "Earnings End Date", "Hours", "Earnings Code", "Payroll Seq", and "Earnings Seq". The table is currently empty. Above the table, there are navigation links: "Personalize", "Find", "View All", and "First 1 of 1 Last". A "Cancel" button is located at the bottom left of the window.

Note: The data populated on this page depends on the source of the data and process by which you populate this page. The Extract Payroll Data process populates the page with Payroll for North America pay period and earning period time data for the special accumulator identified in the worker's wage progression rule.

Exception Messages Page

Use the Exception Messages page (HR_WP_MSG_SEC) to review system messages about why a worker was excepted from advancement and to acknowledge the exception to resume wage advancement eligibility.

Navigation

Workforce Administration > Labor Administration > Wage Progression > Review Wage Progression > Review Wage Progression

Click the Exception Detail button on the Review Wage Progression - Exception tab of the Review Wage Progression page.

When a worker's wage progression conditions warrant manual review and a possible manual adjustment, the Update Wage Progression process will flag their Review Wage Progression record. When a worker is excepted, you cannot advance the person until you have acknowledged the exception by selecting the Acknowledge Exception check box on the Review Wage Progression - Exception tab. However, the system will continue to update the worker's Review Wage Progression record when you run the Update Activity with Job Data and the Update Activity with Time Data processes.

When you select the Acknowledge Exception check box and save the Review Wage Progression page, the system updates the Acknowledged By and Acknowledged On fields with your user ID and the date and time you acknowledged the exception. Click the Notepad button to enter comments. You should add a note of explanation for all exception acknowledgements.

Wage Progression Exception Rpt Page

Use the Wage Progression Exception Rpt page (RUN_WP002) to run the exceptions report (WP002).

This report lists all employees within a Wage Progression Run ID group that have unacknowledged exceptions and indicates the exception type.

Navigation

Workforce Administration > Labor Administration > Wage Progression > Wage Progression Exception Rpt > Wage Progression Exception Rpt

Image: Wage Progression Exception Rpt page

This example illustrates the Wage Progression Exception Rpt page.

Approving and Processing Wage Advancements

To approve and process wage advancements, use the Approve Employees to Advance component (HR_WP_ADVANCE) and the Process Wage Progression component (RUN_UPD_WP_ADVANCE).

This topic provides an overview of the Advance Employees to the Next Step process and discusses how to approve and process wage advancements.

Pages Used to Approve and Processing Wage Advancements

Page Name	Definition Name	Usage
Approve Employees to Advance Page	HR_WP_ADVANCE	If the worker's wage progression rule requires approval, approve workers for wage progression from the online list displayed by a Wage Progression Run ID.

Page Name	Definition Name	Usage
<u>Process Wage Progression Page</u>	RUN_UPD_WP_ADV	• Run a preview report of all advancement candidates in a Wage Progression Run ID. • Process advancements, inserting new steps and wage rates, for all qualified candidates in a Wage Progression Run ID.

Understanding the Process Wage Progression Process

The Process Wage Progression process (HR_WP_ADV) advances employees to their next wage step, inserting a new Job Data row for each worker being processed.

If workers have a status of *Approved* on the Review Wage Progression page or you have manually approved them for advancement on the Approve Employees to Advance page, the process:

- Updates the Job Data - Salary Plan page with the new step information and executes a Default Pay Components action to enter the new pay rates on the Compensation page (JOB_DATA3). Only rate codes with a Source of Sal Step will be updated. The process will not modify rate codes with a source of Manual.
- Updates the qualifying row on the Review Wage Progression page for the completed salary step, setting the status to *Advanced*.
- Inserts a new row into the Review Wage Progression page for the new salary step and sets the status to *Not Qualified*.

Note: If the worker has a status of *Completed Wage Progression* on the Review Wage Progression page, indicating that they have already reached the top of the wage progression, the process selects the Stop Wage Progression check box on the Job Data - Job Labor page.

You can also launch a preview report, Employees Due Advancement (WP001.SQR), from the Process Wage Progression page to create a list of all of the workers that the Process Wage Progression process will advance. The system will not include workers who have already been processed for advancement.

Approve Employees to Advance Page

Use the Approve Employees to Advance page (HR_WP_ADVANCE) to if the worker's wage progression rule requires approval, approve workers for wage progression from the online list displayed by a Wage Progression Run ID.

Navigation

Workforce Administration > Labor Administration > Wage Progression > Approve Employees to Advance > Approve Employees to Advance

Image: Approve Employees to Advance page: Activity tab

This example illustrates the Approve Employees to Advance page: Activity tab.

Approve Employees to Advance

Wage Progression Run ID KUWP2
By Salary Plan KUH2

Last Process Dates

Last Process to Run Qualification

Job Changes Process Date 02/26/13 9:52PM
Payroll Update Process Date 02/26/13 9:52PM
Qualification Process Date 02/26/13 9:53PM

Approve for Advancement Date
Advancement Process Date

Use Select All to approve all employees on the list. Select Save when review and selection are complete. Employees remain on the list until Process Wage Progression is run to advance employee's Step and compensation rate.

Employees Pending Advancement

Personalize | Find | View All |
First 1 of 1 Last

Activity | Job | Wage Plan

Select	Activity Date	Name	Status	Estimated Advance	Activity Detail
☐					

Select All
Deselect All

Image: Approve Employees to Advance page: Job tab

This example illustrates the Approve Employees to Advance page: Job tab.

Employees Pending Advancement

Personalize | Find | View All |
First 1 of 1 Last

Activity | Job | Wage Plan

Select	Activity Date	Name	Empl ID	Empl Record	Job Code	Description
☐				0		

Select All
Deselect All

Image: Approve Employees to Advance page: Wage Plan tab

This example illustrates the Approve Employees to Advance page: Wage Plan tab.

Employees Pending Advancement

Personalize | Find | View All |
First 1 of 1 Last

Activity | Job | Wage Plan

Select	Activity Date	Name	Salary Plan	Grade	Step
☐					

Select All
Deselect All

To approve a worker for wage progression, select the Select check box.

The system only displays those workers who have a status of *Qualified - Approval Required* or *Almost Qualified* on the Review Wage Progression page. Click the Activity Detail button to review a worker's wage progression information on the Review Wage Progression page.

If a worker has an unacknowledged exception, the system marks their row with a red alert icon (!) and makes the Select check box next to their name unavailable. Click the Exception Detail button to review the Exception Messages page.

Workers remain on the Employees Pending Advancement list until you process the wage advancement using the Process Wage Progression process. If you do not approve a worker on this list prior to running the Process Wage Progression process, the system changes their status on the Review Wage Progression page to *Not Approved*. You need to run the Update Wage Progression - Qualify Employees process to reset their status to *Qualified - Approval Required* or *Almost Qualified* and make them appear on this page for approval again.

Process Wage Progression Page

Use the Process Wage Progression page (RUN_UPD_WP_ADV) to:

- Run a preview report of all advancement candidates in a Wage Progression Run ID.
- Process advancements, inserting new steps and wage rates, for all qualified candidates in a Wage Progression Run ID.

Navigation

Workforce Administration > Labor Administration > Wage Progression > Process Wage Progression > Process Wage Progression

Image: Process Wage Progression page

This example illustrates the Process Wage Progression page.

The screenshot displays the 'Process Wage Progression' page. At the top, there are tabs for 'Run Control ID', 'PS', 'Report Manager', and 'Process Monitor', with a 'Run' button on the right. Below the tabs is a section titled 'Report Request Parameters' containing a text field for '*Wage Progression Run ID' with the value 'KUWP2' and a search icon, and a checkbox for 'Update Future Rows'. Below this is a section titled 'Last Process Dates' with a dropdown arrow. It contains a table with the following data:

Last Process to Run	Qualification
Job Changes Process Date	02/26/13 9:52PM
Payroll Update Process Date	02/26/13 9:52PM
Qualification Process Date	02/26/13 9:53PM
Approve for Advancement Date	
Advancement Process Date	

Wage Progression Run ID

Select the wage progression run ID representing the population of workers you want to process for advancement.

Update Future Rows

Select whether to update future-dated Job Data rows.

If a worker has future-dated Job Data rows (rows whose effective dates are greater than the date the of the Job Data row the Advance Employees to next Step process will insert), the system will update the step and compensation data in the future Job Data rows in addition to adding the new current row. The process will only update future-dated Job Data rows with salary plan, grade, and step values identical to the new row.

Last Process Dates

This collapsible group box contains a log of the five wage progression programs. It indicates the last time each of the processes were run and which of the processes was run most recently.

Chapter 8

Tracking Disciplinary Actions and Grievances

Tracking Disciplinary Actions

This topic discusses how to track disciplinary actions.

Pages Used to Track Disciplinary Actions

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Disciplinary Action Page</u>	DISCIPLINARY_ACTN	Describe the incident that led to a disciplinary action against a worker.
<u>Action Taken Page</u>	ACTION_TAKEN	Document details of disciplinary actions taken against a worker.
<u>Disciplinary Resolution Page</u>	DISCIP_ACTN_RESLTN	Record the final resolution of an incident that required disciplinary action.

Disciplinary Action Page

Use the Disciplinary Action page (DISCIPLINARY_ACTN) to describe the incident that led to a disciplinary action against a worker.

Navigation

Workforce Administration > Labor Administration > Record Disciplinary Actions > Disciplinary Action

Image: Disciplinary Action page

This example illustrates the Disciplinary Action page.

The screenshot shows the 'Disciplinary Action' page for worker Shannon Bacci (Person ID: EIS09). The page has three tabs: 'Disciplinary Action' (selected), 'Action Taken', and 'Disciplinary Resolution'. Below the tabs, it shows 'Shannon Bacci' and 'Person ID EIS09'. A 'Total Incident 1' counter is displayed. The main form area is titled 'Disciplinary Action' and includes a search bar with 'Find | View All' and pagination 'First 1 of 1 Last'. The form fields are:

- *Type: LAL (with a magnifying glass icon) and 'Absent Without Leave' (with a plus/minus icon).
- *Reported Date: 02/26/2013 (with a calendar icon).
- *Description: A large text area.
- Supervisor ID: EIS06 (with a magnifying glass icon) and 'Diane Chambers'.
- *Purge Date: 08/26/2013 (with a calendar icon).

 Below this is a section titled 'Disciplinary Letter Information' with a search bar and pagination. It contains:

- *Letter Code: DAF (with a magnifying glass icon) and 'Filing'.
- Date Letter Printed: 02/26/2013 (with a calendar icon) and a plus/minus icon.

Total Incident

Each time you enter a new disciplinary offense for this worker, the system calculates and displays the total number of incidents.

Type

Select a disciplinary action type.

Reported Date

Select the date the disciplinary action is reported.

Supervisor ID

Select the worker's supervisor ID if the default supervisor ID selected from the worker's Work Location page isn't accurate.

Purge Date

The system automatically inserts a purge date of six months from the Reported Date.

Note: This field is informational only and the system does not purge data automatically based upon this date. You may use this field to write an SQR to purge old disciplinary incidents, but the system will not do this automatically.

Letter Code

Select the type of letter you want to issue the worker.

Date Letter Printed

The system generates this date when you run the standard letter process.

Related Links

"Understanding PeopleSoft HCM Form Letters" (PeopleSoft HCM 9.2: Application Fundamentals)

Action Taken Page

Use the Action Taken page (ACTION_TAKEN) to document details of disciplinary actions taken against a worker.

Navigation

Workforce Administration > Labor Administration > Record Disciplinary Actions > Action Taken

Image: Action Taken page

This example illustrates the Action Taken page.

The screenshot displays the 'Action Taken' page for a disciplinary incident. At the top, there are tabs for 'Disciplinary Action', 'Action Taken' (selected), and 'Disciplinary Resolution'. Below the tabs, the worker's name 'Shannon Bacci' and 'Person ID EIS09' are shown. A 'Total Incident 1' indicator is present. The 'Disciplinary Information' section includes a table with columns for 'Disciplinary Type' (LAL - Absent Without Leave) and 'Reported Date' (02/26/2013). Below this, the 'Action Taken' section shows a table with columns for '*Disciplinary Step' (ADM - Admonishment), 'Step Resolution' (002 - Performance Rating Warranted), and '*Action Date' (02/26/2013). There are also fields for 'Discussed With' and a 'Comment' box.

Action Taken

Enter as many rows as necessary to resolve the disciplinary issue.

Disciplinary Step

Select a disciplinary step for the disciplinary type.

Step Resolution and Action Date

Select the resolution type that occurred for this step and the date when the disciplinary step took place.

Discussed With

Enter the name of the person with whom you discussed the step.

Disciplinary Resolution Page

Use the Disciplinary Resolution page (DISCIP_ACTN_RESLTN) to record the final resolution of an incident that required disciplinary action.

Navigation

Workforce Administration > Labor Administration > Record Disciplinary Actions > Disciplinary Resolution

Image: Disciplinary Resolution page

This example illustrates the Disciplinary Resolution page.

The screenshot shows the 'Disciplinary Resolution' page for Shannon Bacci (Person ID: EIS09). The page has three tabs: 'Disciplinary Action', 'Action Taken', and 'Disciplinary Resolution' (which is active). Below the tabs, it shows 'Shannon Bacci' and 'Total Incident 1'. The main content area is titled 'Disciplinary Resolution' and includes a search bar with 'Find | View All' and pagination 'First 1 of 1 Last'. The form contains the following fields:

- Reported Date:** 02/26/2013
- Disciplinary Type:** LAL (Absent Without Leave)
- Final Resolution:** 002 (Performance Rating Warranted)
- Resolution Comments:** A large text area for entering comments.

Final Resolution

Select the resolution type that indicates how the incident was finally resolved.

(USF) Tracking Disciplinary Actions

This topic provides an overview of the U.S. federal disciplinary tracking system and discusses how to track disciplinary actions.

Pages Used to Track Disciplinary Actions

Page Name	Definition Name	Usage
(USF) Disciplinary Offenses Page	GVT_DISCIPLIN_ACT1	Describe the incident that led to a disciplinary action against a worker.
Disciplinary Actions Page	GVT_DISCIPLIN_ACT2	Record what actions took place in response to the offense. First enter data on the Disciplinary Offenses page.

Page Name	Definition Name	Usage
Disciplinary Action Events Page	GVT_DISP_ACTN_EVNT	Enter an event that discusses the steps of the disciplinary action that have taken place thus far. First enter data on the Disciplinary Offenses and Disciplinary Actions pages.

Related Links

[\(USF\) Setting Up Unions](#)

(USF) Disciplinary Offenses Page

Use the Disciplinary Offenses page (GVT_DISCIPLIN_ACT1) to describe the incident that led to a disciplinary action against a worker.

Navigation

Workforce Administration > Labor Administration > Record Disciplinary Actions USF > Disciplinary Offenses

Image: Disciplinary Offenses page

This example illustrates the Disciplinary Offenses page.

The screenshot shows the 'Disciplinary Offenses' page for user Sharon Keyes (Person ID LE0002). The page has three tabs: 'Disciplinary Offenses', 'Disciplinary Actions', and 'Disciplinary Action Events'. Below the tabs, it shows 'Total Incident 1'. The main form area is titled 'Disciplinary Offenses' and includes fields for:

- *Reported Date: 02/26/2013
- *Purge Date: 08/26/2013
- *Offense Type: LMS (Misrepresentation)
- Offense Nbr: 1 (1st Offense)
- Supervisor ID: LEPOI01 (Shiela Hoffman)
- *Description: (Empty text area)

 Navigation links include 'Find', 'View All', 'First', '1 of 1', and 'Last'. At the bottom, there is a 'Recommended Actions' section showing 'Days To Complete' as 0.

Note: Most of the fields on this page are shared by the Disciplinary Action page.

See [Disciplinary Action Page](#).

Offense Type and **Offense Nbr**
(offense number)

Select an offense type and number.

Once you have selected an offense type and number, the system automatically displays a list of all disciplinary actions recommended for this particular offense. The system also displays the recommended number of Days To Complete each action. These recommendations were created on the Disciplinary Penalties Matrix 1 page (GVT_DISCIP_OFFENSES) and Disciplinary Penalties Matrix 2 page (GVT_RCMND_ACTIONS).

See [\(USF\) Disciplinary Offenses Table - Disciplinary Penalty Matrix 1 Page](#).

See [\(USF\) Disciplinary Offenses Table - Disciplinary Penalty Matrix 2 Page](#).

Related Links

[Setting Up Labor Administration Disciplinary, Grievance, and Resolution Classifications](#)

Disciplinary Actions Page

Use the Disciplinary Actions page (GVT_DISCIPLIN_ACT2) to record what actions took place in response to the offense.

First enter data on the Disciplinary Offenses page.

Navigation

Workforce Administration > Labor Administration > Record Disciplinary Actions USF > Disciplinary Actions

Image: Disciplinary Actions page

This example illustrates the Disciplinary Actions page.

Disciplinary Offenses | **Disciplinary Actions** | Disciplinary Action Events

Sharon Keyes Person ID LE0002
Total Incident 1

Disciplinary Actions Find | View All First 1 of 1 Last

Reported Date 02/26/2013 Offense LMS Misrepresentation Offense Nbr 1

Action Taken Find | View All First 1 of 1 Last

*Action Type REP Reprimand

*Date Initiated 02/26/2013 Step Length (Days) 1 Reported to Union 02/26/2013

Discussed With

Comment

Action Type	Select a discipline step to record the action taken to resolve the problem. See Setting Up Labor Administration Disciplinary, Grievance, and Resolution Classifications .
Date Initiated	Defaults to today's date. Change unless the action taken was initiated today.
Step Length (Days)	If the action has a limited time frame, enter the duration, in days.
Reported To Union	If your agency identified this type of action as reportable to the union(s), enter the date it was reported to the union(s).

Disciplinary Action Events Page

Use the Disciplinary Action Events page (GVT_DISP_ACTN_EVNT) to enter an event that discusses the steps of the disciplinary action that have taken place thus far.

First enter data on the Disciplinary Offenses and Disciplinary Actions pages.

Navigation

Workforce Administration > Labor Administration > Record Disciplinary Actions USF > Disciplinary Action Events

Image: Disciplinary Action Events page

This example illustrates the Disciplinary Action Events page.

The screenshot displays the 'Disciplinary Action Events' page for Sharon Keyes (Person ID LE0002). The page has a breadcrumb trail: Disciplinary Offenses > Disciplinary Actions > Disciplinary Action Events. Below the header, it shows 'Total Incident 1'. The main content area is divided into several sections:

- Disciplinary Actions:** Includes fields for Reported Date (02/26/2013), Offense (LMS Misrepresentation), and Offense Nbr (1). Navigation links like 'Find', 'View All', 'First', '1 of 1', and 'Last' are present.
- Disciplinary Action Steps:** Shows a table with one step: REP Reprimand. It also has navigation links.
- Disciplinary Action Events:** This is the primary form for adding events. It includes:
 - *Event Nbr: 0
 - *Event: IPA (Initiate Personnel Action)
 - *Initiated: 02/26/2013
 - *Days To Complete: 15
 - *Follow-Up Date: 03/13/2013
 - Name: (empty field)
 - Resolution Date: (empty field)
 - Comment: (empty text area)

Event Nbr (event number) These disciplinary action events are stored and presented in numerical order based on the event number you assign. PeopleSoft recommends that you assign event numbers

chronologically to give yourself a picture of the events as they happened. For events initiated on the same day, the event number can play a critical role when trying to avoid or settle litigation.

Event	Select an event that discusses what took place at this point.
Initiated	The date the event was initiated defaults to today's date. Change the date unless it was actually initiated today.
Days To Complete	(Optional) Estimate a number of days to complete this event if you want or let it default from the Disciplinary Events table.
Name	Include the name (if any) of the person who initiated this event or was primarily responsible for resolving it.

Tracking Grievances

This topic discusses how to track grievances.

Pages Used to Track Grievances

Page Name	Definition Name	Usage
<u>Grievance Page</u>	GRIEVANCES1	Add a new grievance into the system. You can create grievances for workers, applicants, unions, or another group or person.
<u>Grievance Steps Page</u>	GRIEVANCES2	Record the steps taken to resolve the grievances. A grievance may require a number of steps before it is resolved.
<u>Grievance Resolution Page</u>	GRIEVANCE_RESLTN	Document the final resolution of a grievance.

Grievance Page

Use the Grievance page (GRIEVANCES1) to add a new grievance into the system.

You can create grievances for workers, applicants, unions, or another group or person.

Navigation

Workforce Administration > Labor Administration > Record Grievances > Grievance

Image: Grievance page

This example illustrates the Grievance page.

Assigning Grievance IDs

When you open the Grievances component, the system prompts you for a grievance ID. Use the grievance ID to track a grievance through the entire resolution process. There are two ways to assign grievance IDs:

- Automatically

If you use automatic ID assignment, the system adds IDs sequentially as you add new grievances.

If you let the system assign the number automatically, it first appears as *0000000000*. The actual number assigned to the grievance appears after you save the information you enter in the Record Grievances component (GRIEVANCES).

- Manually:

Enter grievance IDs yourself, using whatever system you choose for your organization. If you choose manual entry, you don't need to assign IDs sequentially.

Note: To avoid maintaining two different sets of grievance IDs, PeopleSoft recommends that you choose only one way of assigning them. *Either* always assign IDs manually *or* always let the system assign them—not both.

Filed By

Employee/Applicant

If you are adding a grievance filed by a worker or applicant, click this button and enter the person or applicant ID in the adjacent field.

Union

Select if you are entering a grievance filed by a union on behalf of union members and enter a union code in the adjacent field.

Other

Select if you are entering a grievance that doesn't fall into either of the previous categories. In the adjacent field, enter free-form text up to 40 characters to describe who filed the grievance.

Security**Business Unit and Department**

If you enter a business unit and department here, then only those users with security access to that department can access the grievance record when you save the information for this grievance. For example, if you select Department *10200* for Grievance ID *0000000001*, then when you save the page only users with security access to Department *10200* can access this record.

Note: If you don't enter a value in the Department field, then you won't set department level security for this record and the system defaults to no department security for grievance records.

Note: These system does not default a worker's business unit and department into these fields.

See "Understanding PeopleSoft Security" (PeopleSoft HCM 9.2: Application Fundamentals).

Grievance Details**Type**

(Required) Select a grievance type.

See [Setting Up Labor Administration Disciplinary, Grievance, and Resolution Classifications](#).

Contract Ref (contract reference)

Enter the contract reference for this grievance, if applicable.

Status and Status Date

Select the status of the grievance — *Settled*, *Pending*, or *Appealed* — and the date that status was reached.

Grievance Steps Page

Use the Grievance Steps page (GRIEVANCES2) to record the steps taken to resolve the grievances.

A grievance may require a number of steps before it is resolved.

Navigation

Workforce Administration > Labor Administration > Record Grievances > Grievance Steps

Image: Grievance Steps page

This example illustrates the Grievance Steps page.

Grievance ID 0000000001
 Grievance Date 05/12/2001 Grievance Type Unfair Lbr Status Pending

Data Find | View All First 1 of 1 Last

*Grievance Step 002 Manager/Emp. Rel. Discussion

*Action Date 05/12/2001

Resolution Date

Discussed With

Letter Code

Letter Dt

Step Resolution

Comment Talked about my feelings

Note: Grievances are sorted in descending order—you'll see the most recent one first.

Grievance Step and Action Date

Select the grievance step and the date it was taken.

Note: You can enter multiple grievance steps as you process this grievance.

See [Setting Up Labor Administration Disciplinary, Grievance, and Resolution Classifications](#).

Resolution Date

When the step is resolved, update this page by entering a resolution date, if applicable.

Discussed With

Enter the name of the person with whom you discussed the step.

Letter Code

If you want to send a standard letter about the grievance, select the appropriate letter code.

Letter Date

Enter the date when the letter was sent.

Step Resolution

Select the action you took to resolve this step.

See [Setting Up Labor Administration Disciplinary, Grievance, and Resolution Classifications](#).

Comment

You can enter comments longer than the three lines shown.

Related Links

"Understanding PeopleSoft HCM Form Letters" (PeopleSoft HCM 9.2: Application Fundamentals)

Grievance Resolution Page

Use the Grievance Resolution page (GRIEVANCE_RESLTN) to document the final resolution of a grievance.

Navigation

Workforce Administration > Labor Administration > Record Grievances > Grievance Resolution

Image: Grievance Resolution page

This example illustrates the Grievance Resolution page.

Final Resolution

Select the resolution type that indicates how the incident was finally resolved.

See [Setting Up Labor Administration Disciplinary, Grievance, and Resolution Classifications](#).

Resolution Comments

Enter any comments you have about the final resolution.

(USF) Entering Union Negotiability Appeals

This topic discusses how to track union negotiability appeals.

Page Used to Enter Union Negotiability Appeals

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Record Negotiability Appeal USF Page	GVT_NEGBLTY_ITEMS	Track union negotiability appeal items and the steps taken to resolve them.

Record Negotiability Appeal USF Page

Use the Record Negotiability Appeal USF page (GVT_NEGBLTY_ITEMS) to track union negotiability appeal items and the steps taken to resolve them.

Navigation

Workforce Administration > Labor Administration > Record Negotiability Appeal USF > Record Negotiability Appeal USF

Image: Record Negotiability Appeal USF page

This example illustrates the Record Negotiability Appeal USF page.

Record Negotiability AppealUSF

Bargaining Unit 0055 Natl Assoc of Govt Employees
 Union Code 432 American Fed of Govt Employees
 Item Appealed OVTM

Negotiability Appeals Items Find | View All First 1 of 1 Last

*Effective Date 01/01/1980 *Status Active
 *Description Overtime *Item Status Pending - Agency

Negotiability Appeals Tracking Find | View All First 1-2 of 2 Last

*Appeal Step	*Description	Long Description	Date
01	Discuss with Union	Need additional discussion	01/01/1992
02	Resolve Issue	Union agreed that this was not negotiable.	01/01/1996

Item Status

Indicate the status of the appeal of this item. If the resolution affects the status of the item being appealed, update the Item Status field at the same time.

Appeal Step

Use only for sequencing the events or steps. Enter steps in the order in which they happened, if known.

Description and Long Description

When that step is resolved, describe the resolution.

Date

Enter the date on which the step was or will be resolved.

Requesting Works Councils Approval

Understanding the Works Councils Approval Business Process

This topic discusses how to set up the Works Council business process.

To set up and run the Works Council business process:

1. Set up codes and values on the Job Change by Reg Region page (WC_ACTN_REASON_TBL).
2. Human Resources Administrator or Manager requests a Job Change for an worker.

If a manager submits the request, the HR Administrator is notified and reviews the request. If the HR Administrator approves the request, the Works Council is notified.

For job change requests such as transfers that involve a change in reporting managers, the new manager enters the job change request and the current manager approves or denies the job change request.

3. Works Council reviews and approves or denies the worker job change request.

The processing for the works council review and approval is automated. The works council member reviews the job change request, uses the Job Change Request pages (WC_JOB_CHG_REQ) to look at the information about the worker and the action, and enters a response (or decision). Once a decision is entered, the human resources administrator is notified with an email and worklist.

4. Review the works council's decisions.

The human resources administrator uses the Review All Job Change Request page (WC_JCR_STATUS2_INQ) to review the works council's decision and chooses to accept or override the works council's decision. If the human resources administrator overrides the works council decision, the works council is notified with an email and worklist.

5. Load changes to job data.

Changes can be loaded manually or automatically.

Important! Managers can only enter job change requests using the self service pages as delivered with PeopleSoft eProfile. The request as part of Manage Labor Administration must be entered by the HR Administrator.

The following tables discuss the delivered processes by role and business process.

Hire Process

<i>Business Process</i>	<i>Requested by</i>	<i>Approved by</i>
Human Resources	HR Administrator	Works Council
eProfile	Manager	Works Council

Termination Process

<i>Business Process</i>	<i>Requested by</i>	<i>Approved by</i>
Human Resources	HR Administrator	Works Council
eProfile	Manager	Works Council

Transfer Process

<i>Business Process</i>	<i>Requested by</i>	<i>Approved by</i>
Human Resources	HR Administrator	Works Council
eProfile	New Manager	Manager, Works Council

Related Links

"Adding a Person" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)

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

"Understanding the Management of Direct Reports" (PeopleSoft HCM 9.2: eProfile Manager Desktop)

Prerequisites

Works councils members should use the Job Change Request pages to record works councils decisions about personnel actions affecting workers. HR managers should use them to request changes. Before using these pages, however, you must define job changes and reasons by regulatory region on the Job Change by Reg Region page.

All job change requests can be represented by a single process flow, with the exception of an Employee Transfer. Employee Transfers are an exception because they involve both a new requesting manager and the current manager who must approve the transfer. Once the current manager approves the transfer, the Employee Transfer business process is identical to the standard Request Job Change - Works Councils process.

Related Links

"Understanding Regulatory Regions" (PeopleSoft HCM 9.2: Application Fundamentals)

Entering a Job Change Request

This topic provides an overview of job change request processing and discusses how to enter a job change request.

Pages Used to Enter Job Change Requests

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Job Change Request - Select Employee Page</u>	WC_JCR_SEARCH	Enter the required data and initiate the job change request. The Job Change Request - Select Employee page requires different data entry depending on the type of request—either hire, transfer, or termination.
<u>Job Change Request Page</u>	WC_JOB_CHG_REQ	Enter or review details for a job change request. Some Reason Codes require additional mandatory search criteria as defined on the Job Change by Reg Region page.
<u>Decision Details Page</u>	WC_JCR_USER_SEC	Enter comments or view general information and related comments for this job change request.
<u>Review My Job Change Request Page</u>	WC_JCR_STATUS2_INQ	The Review My Job Change Request page shows job change requests that the user is or has been involved with.
<u>Review Job Change Request Page</u>	WC_JCR_STATUS_INQ	Search for job change requests to review the status. This page is available to all roles in the job change approval process though only to the specific users involved in each particular job change request.
<u>Job Change Request Approval Page</u>	WC_JCR_APPR_INQ	Mass-approve job change requests.
<u>WC Automatic Approval Page</u>	RUNCNTL_HR_WC_APPR	Run the WC Automatic Approval Application Engine process (HR_WC_APPR2) to initiate automatic approval of Work Council notifications.

Understanding the Job Change Request Process

The Job Change Request pages enable you to easily notify the works councils of a worker job change before the change takes place so the change may be approved.

The Works Councils Notification process requires the following dynamic roles to be defined before generating a job change request. These dynamic roles will be used to route all workflows and email notifications:

Works Councils Member

Define the Works Council Member on the Works Council page as you define the works council. The Works Council ID is associated with the company on the Company Location page (COMPANY_TABLE1). When you select a worker, the system uses the associated company data contact the works council for that worker.

The Works Councils ID will be used to route job change requests for a worker to the appropriate works councils spokesperson. If no works councils spokesperson is found for the worker, or if the works councils has no associated spokesperson, the HR Administrator will receive an error message when the Works Councils Notification process is triggered from the Request Job Change page.

HR Administrator

The HR Administrator who works on the job change request owns the request until the job change is complete. The system determines this according to department security setup—anyone with the role of HR administrator who has access the worker's department is notified with change request—the first HR administrator who takes action in the page is responsible for following the process from that point on.

Note: In the case of a worker transfer or any job change resulting in a department change, the HR Administrator of the worker's *new* department will be notified rather than the HR Administrator of the worker's current department. If no HR Administrator is found for the worker, you will receive an error message when the Works Councils Notification process is triggered from the Request Job Change page.

Manager

Manager self service security setup is used to route Works Councils related workflows to the correct manager. If no Manager is found for the worker, you will receive an error message when the Works Councils Notification process is triggered from the Request Job Change - Works Councils page.

Employee

Workers will be automatically notified via email once a job change request is complete.

Security

A transaction requiring Works Councils approval may be initiated by the new manager, the current manager, or the HR Administrator. If the current manager initiates the job change request, they can then select the direct reports. If the new manager makes the request, they may select all workers. You must know the exact mandatory search criteria, which you configured on the Job Change by Reg Region page, to find the right worker.

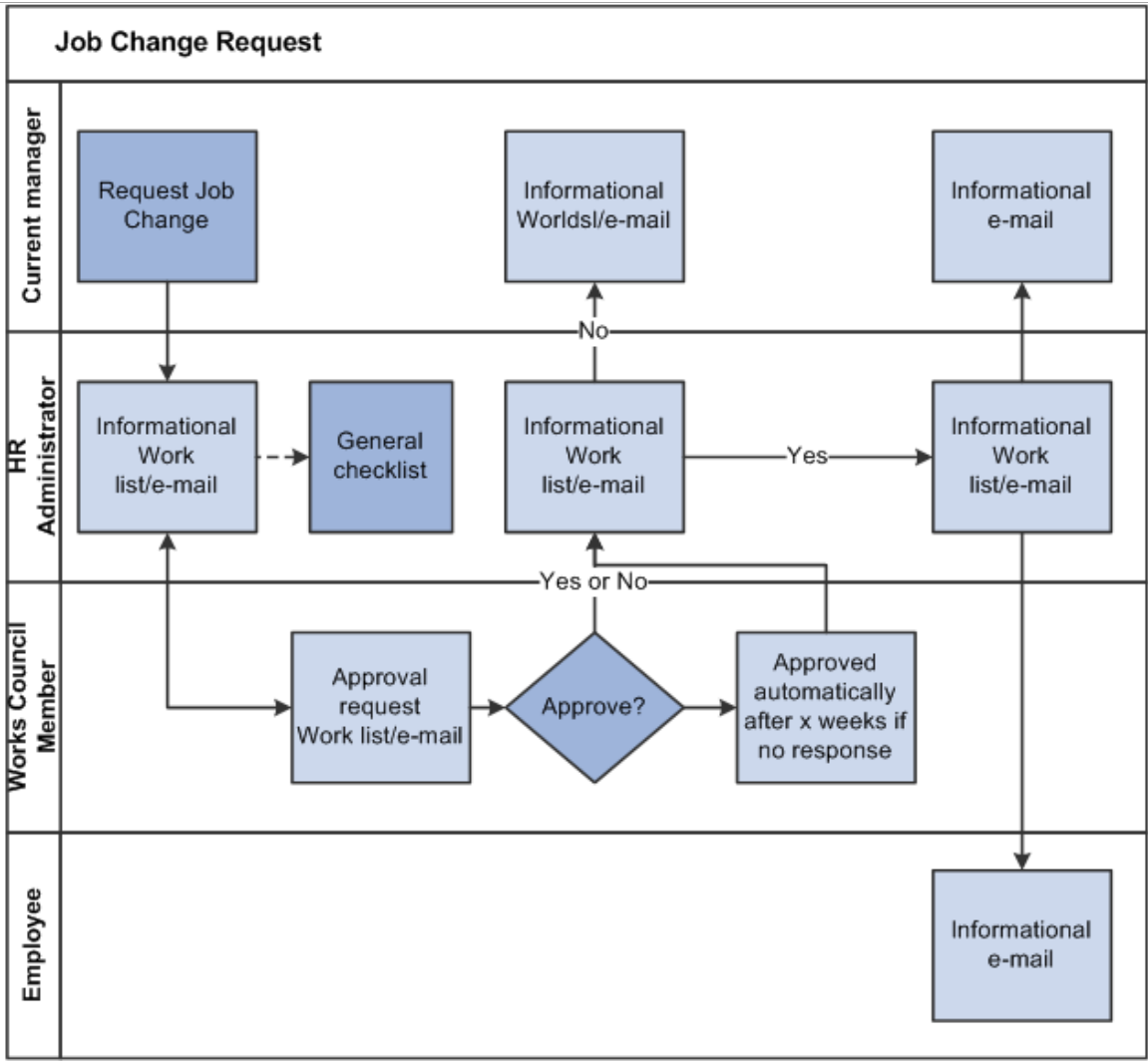
If the HR Administrator initiates the request, they may select all workers in the departments for which they are responsible as defined in the standard department security.

Note: In the case of a transfer, the new HR representative can select from all workers based on specific criteria.

This diagram illustrates the approval process for a job change request:

Image: Employee Job Change approval process

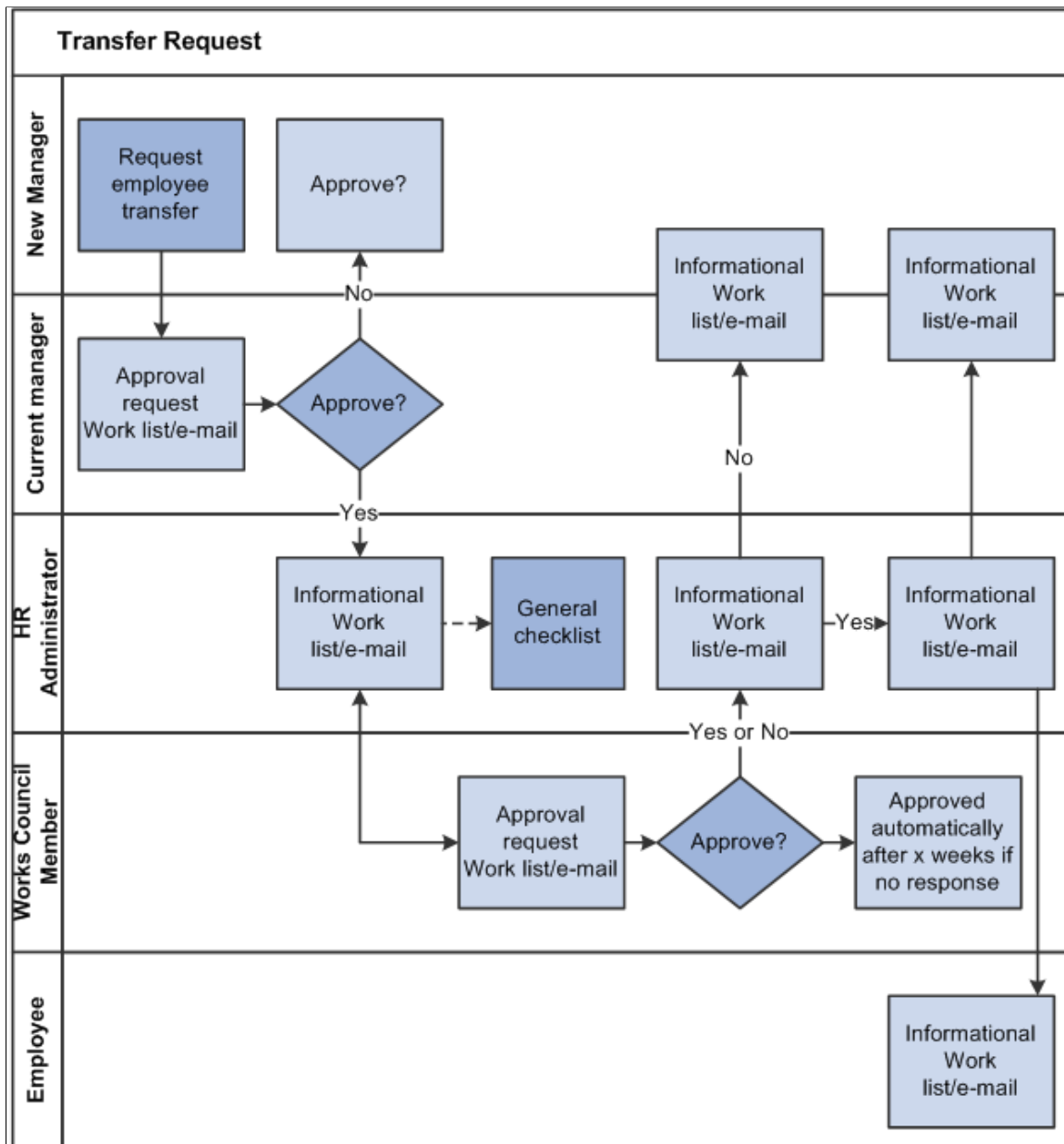
In this diagram of the employee job change approval process, the current manager requests a job change. The system sends an informational email to the HR administrator and an approval request to the works council member. Works council approval occurs automatically after x weeks if there is no response. When the request is processed, the system sends informational email to the current manager and the HR administrator. If the request is approved, the system also sends informational email to the employee.



This diagram illustrates the approval process for a transfer request:

Image: Employee Transfer approval process

In this diagram of the employee transfer approval process, the new manager requests the transfer. The system sends the first approval request to the current manager. If the current manager approves the request, the system sends an informational email to the HR administrator and an approval request to the works council member. Works council approval occurs automatically after x weeks if there is no response. When the request is processed, the system sends informational email to the new manager, the current manager, and the HR administrator. If the request is approved, the system also sends informational email to the employee.



Related Links

"Setting Up Company Locations" (PeopleSoft HCM 9.2: Application Fundamentals)

"Delivered Workflows for Administer Workforce" (PeopleSoft HCM 9.2: Application Fundamentals)

"Understanding PeopleSoft Security" (PeopleSoft HCM 9.2: Application Fundamentals)

Job Change Request - Select Employee Page

Use the Job Change Request - Select Employee page (WC_JCR_SEARCH) to enter the required data and initiate the job change request.

Navigation

- Workforce Administration > Job Information > Request Job Change > Select Employee
- Manager Self Service > Job and Personal Information > Request Job Change > Select Employee
- Manager Home Page > Job and Personal Information > Request Job Change > Select Employee

Image: Job Change Request - Select Employee page

This example illustrates the Job Change Request - Select Employee page as it appears before you select an action:

Job Change Request

Select Employee

Enter the Job Change Request Details and select an employee to initiate the Job Change Request by selecting the employee name, selecting Search for Employee, or selecting the chart icon to find an indirect report.

Job Change Details

Regulatory Region

Action

Reason Code

Direct Reports For Betty Locherty

Personalize | Find | First 1-3 of 3 Last

Name	ID	Job Title	Department	Birthdate
Adland Chu	KU0065	SrPyrI Clk	FIN	10/18/1970
Diane Palmer	K0MTX005	Admin Asst	FIN	07/18/1981
Susan Hoinck	KU0119	SrFinAnlst	FIN	07/06/1963

Search for an employee

The Job Change Request - Select Employee page requires different data entry depending on the type of request—either hire, transfer, or termination.

Hire Action

Begin the Works Council hiring approval process by selecting the *Hire* action on the Job Change Request - Select Employee page.

Image: Job Change Request - Select Employee page: Hire Action

This example illustrates the Job Change Request - Select Employee page as it appears after you select *Hire* in the Action field.

Job Change Request

Select Employee

To hire an employee, enter First Name, Last Name, City and select the GO button.

Job Change Details

Regulatory Region

Germany

Action

Hire

Reason Code

New Position

Hire

First Name

Frederick

Last Name

Schneider

City

Frankfurt

»»

All fields in the Hire group box are mandatory.



Click the Go icon to access the Job Change Request page to initiate the job change request process.

Termination Action

Begin the Works Council termination approval process by selecting the *Termination* action on the Job Change Request - Select Employee page.

Image: Job Change Request - Select Employee page: Termination Action

This example illustrates the Job Change Request - Select Employee page as it appears after you select *Termination* in the Action field.

Job Change Request
Select Employee

Enter the Job Change Request Details and select an employee to initiate the Job Change Request by selecting the employee name, selecting Search for Employee, or selecting the chart icon to find an indirect report.

Job Change Details

Regulatory Region Germany
Action Termination
Reason Code Misconduct

Direct Reports For Betty Locherty
Personalize Find
First 1-3 of 3 Last

Name	ID	Job Title	Department	Birthdate
Adland Chu	KU0065	SrPyrl Clk	FIN	10/18/1970
Diane Palmer	KOMTX005	Admin Asst	FIN	07/18/1981
Susan Hoinck	KU0119	SrFinAnlst	FIN	07/06/1963

Search for an employee

Complete the fields in the Job Change Details group box, then click the Search For An Employee button to view a list of workers who meet your criteria. You can then select a worker from the list to continue with the termination process.

HR Administrators see only workers to which they have row level access as defined in the department security tree.

Managers see only their direct reports as defined in the self-service setup.

Transfer Action

Begin the Works Council transfer approval process by selecting the *Transfer* action on the Job Change Request - Select Employee page.

Note: A worker's new manager enters the transfer request. The worker's current manager and the works council must approve the request.

Image: Job Change Request - Select Employee page: Transfer Action

This example illustrates the Job Change Request - Select Employee page as it appears after you select *Transfer* in the Action field.

Job Change Request

Select Employee

To Transfer an employee, enter all mandatory search criteria and select the SEARCH button.

Job Change Details

Regulatory Region

Germany

Action

Transfer

Reason Code

Employee Request

Mandatory Search Criteria

Empl ID

GD110000004

First Name

Andreas

Last Name

Groninger

Business Unit

DEU01

Department

21601

Birthdate

07/01/1965

Search

Complete the fields in the Job Change Details group box and the Mandatory Search Criteria group box, then click the Search For An Employee button to view a list of workers who meet your criteria. You can then select a worker from the list to continue with the transfer process.

Note: Mandatory search criteria fields are defined on the Job Change by Reg Region page, so the fields that appear in the Mandatory Search Criteria group box depend on your configuration. As these are mandatory search criteria, every field in this group box is a required field.

Job Change Request Page

Use the Job Change Request page (WC_JOB_CHG_REQ) to enter or review details for a job change request.

Navigation

- Click the Go button for a hire request on the Job Change Request - Select Employee page.
- Click an employee name in the search results for a termination or transfer request on the Job Change Request - Select Employee page.
- Workforce Administration > Job Information > Review All Job Change Request > Job Change Request

The following examples show the Job Change Request page for a manager submitting a hire request.

Image: Job Change Request page for the Hire action (1 of 2)

This example illustrates the Job Change Request page for the Hire action (1 of 2).

Job Change Request	
Mueller,Karl	
Empl ID NEW	Empl Record 0
Job Change Details	
Regulatory Region DEU	Germany
Action HIR	Hire
Reason Code NPS	New Position
*Effective Date 02/26/2013	☐ No Handicapped App Recommended
Job Change Request Status	
Status	Status Date/Time
Current Information	
Organization Information	
Position Number 00000001	CM
Company KD1	CC-Germany
Business Unit DEU01	DEU BU
Department 10200	HQ
Location KD912	MUC
Job Information	
Job Code 350000	Cntry Mgr
Standard Hours 40.00	
Work Period W	Weekly

Image: Job Change Request page for the Hire action (2 of 2)

This example illustrates the Job Change Request page for the Hire action (2 of 2).

Salary Plan

Plan Metal Plan
Grade G1
Step

Payroll

Payroll System
Pay Group German M

Process Participants

Personalize | Find | First 1-2 of 2 Last

Participants	Actions	Participant	Name	Employee ID	JCR Originator?	Comments
1	HR Administrator	Betty Locherty	KU0007	☒	Comments	
2	Works Council	Friedrich Bauer	KD0004	☐	Comments	

Request WC Approval

[Return to Select Employees](#)

The following examples show the Job Change Request page for manager submitting a termination request.

Image: Job Change Request page for the Termination action (1 of 2)

This example illustrates the Job Change Request page for the Termination action (1 of 2).

Job Change Request

Andreas Groninger

Empl ID GD110000004
First Start Date 01/01/2001
Date of Birth 01/01/1945

Empl Record 0
Nationality German

Job Change Details

Regulatory Region DEU Germany
Action TER Termination
Reason Code CON Misconduct
*Effective Date

Job Change Request Status

Status	Status Date/Time
Current Information	
New Information	

Organization Information

Position Number
Reg Region DEU Germany
Company GD1 GP GER1
Business Unit DEU01 DEU BU
Department 21601 Sal/Serv
Location Code GD913 HH

Image: Job Change Request page for the Termination action (2 of 2)

This example illustrates the Job Change Request page, Termination (2 of 2).

Job Information

Job Code 790000

Sales Mgr

Standard Hours 18.00

Work Period W

Weekly

Salary Plan

Plan KD01

Metal Plan

Salary Grade G2

Group 2

Step 1

View Compensation Details

Process Participants

Personalize | Find |  

First 1-3 of 3 Last

Participants

Actions 

	Participant	Name	Employee ID	JCR Originator?	Comments
1	HR Administrator	Betty Locherty	KU0007	☒	Comments
2	Works Council	Sabine Azubinefive	GD110000010	☐	Comments
3	Employee	Andreas Groninger	GD110000004	☐	Comments

Request WC Approval

Submit

Generate Checklist

Save for Later

[Return to Select Employees](#)

Note: When entering termination requests, this page is display only. The Comments link remains active to access the Decision Details page to add comments to this request.

The following examples show the Job Change Request page for the new manager entering a transfer request.

Image: Job Change Request page for the Transfer action (1 of 2)

This example illustrates the Job Change Request page for the Transfer action (1 of 2).

Job Change Request			
Andreas Groninger		Empl ID	GD110000004
		Empl Record	0
First Start Date		01/01/2001	Nationality
Date of Birth		01/01/1945	German
Job Change Details			
Regulatory Region	DEU	Germany	
Action	XFR	Transfer	
Reason Code	CIT	Completion of Int Cpany Trans	
*Effective Date	02/26/2013		☐ No Handicapped App Recommended
Job Change Request Status			
Status		Status Date/Time	
Current Information		New Information	
Organization Information			
Position Number		Position Number	
Reg Region	DEU	Germany	
Company	GD1	GP GER1	Company
Business Unit	DEU01	DEU BU	Business Unit
Department	21601	Sal/Serv	Department
Location Code	GD913	HH	Location

Image: Job Change Request page for the Transfer action (2 of 2)

This example illustrates the Job Change Request page for the Transfer action (2 of 2).

Job Information

Job Code 790000 Sales Mgr

Job Code

Standard Hours 18.00

Standard Hours

Work Period W Weekly

Work Period Weekly

Salary Plan

Plan KD01 Metal Plan

Plan

Salary Grade G2 Group 2

Grade

Step 1

Step

View Compensation Details

Process Participants

Personalize | Find | First 1-3 of 3 Last

Participants

Actions

Participant	Name	Employee ID	JCR Originator?	Comments
1 HR Administrator	Betty Locherty	KU0007	☒	Comments
2 Works Council	Sabine Azubinefive	GD110000010	☐	Comments
3 Employee	Andreas Groninger	GD110000004	☐	Comments

Request WC Approval

Submit

Generate Checklist

Save for Later

[Return to Select Employees](#)

Current Info (current information)

This column displays the current information for this worker.

Current information will not be displayed if the role is a new manager performing a job change request of a transfer.

Additional new manager transactions can also be configured on the Job Change by Reg Region page.

New Info (new information)

Use the fields in this column to enter new job details for this job change request.

Job Change Details

No Handicapped App Recommended (no handicapped applicants recommended)

The HR Administrator is the only role that may select No Handicapped App Recommended before submitting, approving or denying a request . Some works councils want to ensure that the Labor Bureau had no qualified handicapped applicants to recommend prior to hiring other external candidates.

Job Change Request Status

After submitting a job change request, this group box displays the status as the request proceeds through the workflow.

Organization Information

If you select a position number, the organization, job and salary plan data will default from the position data. You can edit the defaulted information. If you do not select a position number, complete the fields in the group box.

Job Information

Complete the fields in this group box if the information does not default from the position data. Defaulted information can be edited here.

Salary Plan

Complete the fields for salary plan, grade, and step data.

View Compensation Details

Click to access the current compensation details of an existing worker. This link is not visible for job change requests with Action *Hire*.

Process Participants

This group box displays everyone involved with requesting or approving job change requests. On the Job Change by Reg Region page you define who is involved with a request and what information they can view.

JCR Originator?

The selected check box indicates which process participant initiated this job change request.

Comments

Access the Decision Details page to provide additional information about this request.

Request Job Change

Once the request has been submitted, this group becomes Request WC Approval.

The buttons that appear in this group box will depend on which action has been selected or where the job change request stands in the approval process.

Submit

Click to submit a new job change request after completing all of the fields on the page.

Generate Checklist

Click to generate a checklist for this job change request.

Save for Later

Click to save this job change request to complete later. To access this after saving it, use the Review All Job Change Requests page.

Approve and Deny

Click approve or deny a job change request routed to you.

Related Links

"Work Location Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)

"Job Information Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)

"Job Data - Salary Plan Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)

Decision Details Page

Use the Decision Details page (WC_JCR_USER_SEC) to enter comments or view general information and related comments for this job change request.

Navigation

Click the Comments link in the Process Participants group box on the Job Change Request page.

Image: Decision Details page

This example illustrates the Decision Details page.

The screenshot shows a web browser window titled "Decision Details". Inside the window, the following information is displayed:

- Process Participant** HR Administrator
- Name** Betty Locherty
- Employee ID** KU0007
- Action**
- Action Date**

Below this information is a large text area labeled "Comment". At the bottom of the window, there are two buttons: "OK" and "Cancel".

Review My Job Change Request Page

Use the Review My Job Change Request page (WC_JCR_STATUS2_INQ) to view job change requests that you are or have been involved with.

Navigation

Workforce Administration > Job Information > Review My Job Change Request

Image: Review My Job Change Request page

This example illustrates the Review My Job Change Request page.

Review My Job Change Request

Regulatory Region: DEU Germany
 Action: HIR Hire
 Reason Code: NPS New Position
 Job Change Request Status: Works Cnd Approval Requested

Job Change Request Status: Works Cnd Approval Requested

Personalize | Find | First 1 of 1 Last

Name	EmplID	Record	Eff Date	Status	Status Date/Time
1 Mueller, Karl	0068	0	02/26/2013	Works Cnd Approval Requested	02/26/2013 10:29PM

Status and Actions

The Status tab displays the current status of the request. The Action tab displays the Action and Reason for this request.

Click the worker name to view the Job Change Request page. The Job Change Request page displays the job change request details and current status of the request in the Job Change Request Status group box. The Job Change Request page also contains links to view the status history and comments from the process participants.

Review Job Change Request Page

Use the Review Job Change Request page (WC_JCR_STATUS_INQ) to search for job change requests to review the status. This page is available to all roles in the job change approval process though only to the specific users involved in each particular job change request.

Navigation

Manager Self Service > Job and Personal Information > Review Job Change Request > Review Job Change Request

Note: This page displays the same information as the Review My Job Change Request page.

Job Change Request Approval Page

Use the Job Change Request Approval page (WC_JCR_APPR_INQ) to mass-approve job change requests.

Navigation

Workforce Administration > Labor Administration > Job Change Request Approval

Image: Job Change Request Approval page

This example illustrates the Job Change Request Approval page.

Job Change Request Approval

To view the Job Change Request that need approval, enter the Job Change Request Details and select the button Search.

Search fields

Regulatory Region

Action

Reason Code

Search Results Personalize | Find | 1-2 of 2

Status

Row Selected	Name	Empl ID	Record	Eff Date	Status	Status Date/Time
1 ☐	Andreas Groninger	GD110000004		0 02/26/2013	Works Cncl Approval Requested	02/26/2013 10:36PM
2 ☐	Mueller,Karl	0068		0 02/26/2013	Works Cncl Approval Requested	02/26/2013 10:29PM

Reason

Search for all job change requests and approve all selected requests at once.

When you select a job change request to approve, the system accesses the Job Change Request page for this job change request.

The following table discusses approval access by role.

Role	Approval Access
Manager	Enters job change requests. For job change requests such as transfers that involve a change in reporting manager, the new manager enters the transfer request and the current manager approves or denies the transfer request.
HR Administrator	Approves or deny job change requests either before or after Works Council review and decision.
Works Council	Approves or denies a job change request.

WC Automatic Approval Page

Use the WC Automatic Approval page (RUNCNTL_HR_WC_APPR) to run the WC Automatic Approval Application Engine process (HR_WC_APPR2) to initiate automatic approval of Work Council notifications.

Navigation

Workforce Administration > Labor Administration > WC Automatic Approval

Image: WC Automatic Approval page

This example illustrates the WC Automatic Approval page.

