PeopleSoft Human Capital Management 9.2

PeopleSoft Global Payroll for India

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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.

Locally Installed PeopleSoft Online Help

If you're setting up an on-premises 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. Installable PeopleSoft Online Help is made available with selected PeopleSoft Update Images and with PeopleTools releases for on-premises installations, through the Oracle Software Delivery Cloud.

Your installation documentation includes a chapter with instructions for how to install the online help for your business environment. The documentation zip file may contain a README.txt file with additional installation instructions. See *PeopleSoft 9.2 Application Installation* for your database platform, "Installing PeopleSoft Online Help."

Installable PeopleSoft Online Help now includes PDF versions of each PeopleBook. For more information, see Understanding Locally Installed PeopleSoft Online Help.

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 three main types of common help are:

- Application Fundamentals
- Using PeopleSoft Applications
- Using and Managing the PeopleSoft Online Help

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.

Finally, *Using and Managing the PeopleSoft Online Help* (this guide) introduces you to the setup, features, and usage of the online help system.

Field and Control Definitions

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

Typographical Conventions

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

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

Typographical Convention	Description
⇒	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, Country, 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.

An example of a region-specific heading is: "(Latin America) Setting Up Depreciation"

Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Country Identifiers

Countries are identified by a three-letter country code. The following are examples of country identifiers that may appear in the PeopleSoft Online Help:

- ARG (Argentina)
- AUS (Australia)
- CAN (Canada)
- NLD (The Netherlands)

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following are examples of industry identifiers that 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.

PeopleSoft HCM Related Links

Oracle Help Center

PeopleSoft Online Help Home

PeopleSoft Information Portal

My Oracle Support

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

Application Fundamentals: HCM Abbreviations

PeopleSoft Spotlight Series

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Please include the applications update image or PeopleTools release that you're using.

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Getting Started with Global Payroll for India

Global Payroll for India Overview

Global Payroll for India delivers elements, rules, pages, processes, and reports that work with the PeopleSoft Global Payroll core application to form a complete payroll package for India.

With Global Payroll for India, you can capture establishment information. You can process leave travel and medical allowances. The system enables you to record, report, and process taxes deducted per the Indian Income Tax Act and Profession Tax Act. You can process absences due to privilege leave, sick leave, maternity leave, casual leave, and other reasons. With Global Payroll for India, you can enroll employees in Provident Funds, calculate payee and employer Provident Fund contributions, and ensure that monthly contributions are correctly deposited with the proper Provident Fund Authority. You can ensure that all payees are registered per the Employee State Insurance Act, capture the relevant personal information of payees, and deduct appropriate contributions each month. You can issue loans and advances to payees and then deduct repayment from payees on a monthly basis. You can set up and run the banking process and process paychecks. With Global Payroll for India, you can generate payslips. You can generate reports to meet the requirements for year end recording, reporting, and processing.

Global Payroll for India Business Processes

The following is a list of the Global Payroll for India business processes:

- Absences.
- Provident funds.
- Employee state insurance (ESI).
- Allowances.
- Loans and advances.
- Taxes.
- Banking.
- Payslips.
- Reporting.
- Year end processing.

We discuss these business processes in the business process topics in Global Payroll for India.

Global Payroll for India Integrations

Global Payroll for India integrates with these applications through the core Global Payroll application:

- PeopleSoft HR.
- PeopleSoft Time and Labor.
- PeopleSoft General Ledger.

We discuss integration considerations in the *PeopleSoft Global Payroll*.

Related Topics

- PeopleSoft Global Payroll: Understanding Payee Data
- PeopleSoft Time and Labor: Time and Labor Integrations
- PeopleSoft Global Payroll: Integrating Global Payroll with General Ledger

Global Payroll for India Implementation

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

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, and data models.

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

See the product documentation for *PeopleTools: Setup Manager*

Related Topics

- Application Fundamentals: PeopleSoft HCM Overview

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Understanding Global Payroll for India

Global Payroll for India

Global Payroll for India is a country extension of the core PeopleSoft Global Payroll application. It provides you with the payroll rules, elements, and absence processes that you need to run a payroll in India.

> **Note**
>
> If you want to use the delivered rules for this country, we recommend that you use only employment instances in PeopleSoft HR.

Global Payroll for India Business Processes

Global Payroll for India supports the following business processes:

- Establishments.

  Establishments are used to identify separate units of a company, based on location. Global Payroll for India provides pages on which you capture establishment information. Pages provided record the head of the establishment, nature of business, whether the establishment is registered under the Factories Act or the Shops and Establishments Act, whether the establishment is covered under the Employee State Insurance (ESI) Act, Workmen's Compensation Act, or both, and ESI, provident fund, professional tax, and income tax registration details.

  See Setting Up Establishment Information.

- Allowances.

  Companies might provide payees certain types of allowances. Global Payroll for India enables you to process leave travel and medical allowances.

  For the leave travel allowance program, you can define the program (including who can be covered for reimbursements), capture the leave travel allowance amount (per payee) for the year, track payee claims details and whether the minimum days of leave have been taken, and track payee balances.

  For the medical allowance program, you can define the program (clearly defining the exemption amount that a payee can claim), track payee claims details (while ensuring that the claims in excess of the exemption limit are added to the taxable earnings of the payee), and track payee balances.

  See Processing Medical Allowances.

- Absences.

  PeopleSoft Global Payroll delivers predefined rules for processing absences due to privilege leave, sick leave, maternity leave, casual leave, and other reasons. We designed these rules according to India's statutory requirements. You can easily modify many of these rules to reflect absence policies (leave policies) that are specific to your organization or to labor agreements that might be in force for the employees.

We deliver sample values for many absence take and absence entitlement elements.

PeopleSoft delivers predefined sections and process lists for absence processing. You can use these, modify them, or create your own.

See Absence Setup Tasks.

- Provident funds.

  The provident fund program exists as a method of retirement savings for India's workforce. With Global Payroll for India you can:

  - Define the type of provident fund chosen by the company (statutory provident fund or recognized provident fund).
  - Ensure that all payees are registered with a provident fund and capture the personal information for the payee and his or her beneficiaries.
  - Define the three programs under the provident fund and the calculation methodology for each.
  - Ensure that the deductions for payee contributions are properly calculated and deducted on a monthly basis.
  - Ensure that the employer contribution is properly calculated.
  - Ensure that the monthly contributions are correctly deposited with the proper provident fund authority.

    See Enrolling Payees in a Provident Fund Program.

- ESI.

  ESI is a social security program designed to provide income protection to workers and their dependents when a payee becomes unable to work or when a payee dies. With Global Payroll for India you can ensure that all of the payees are registered per the ESI Act, capture relevant personal information of payees and their dependents, and ensure that the deductions for contributions from payees are deducted from their pay each month.

  See Enrolling Payees in an ESI Program.

- Reports.

  For certain payroll business processes, you need to generate reports to comply with legislative reporting requirements. Such reports are required for processes related to ESI, provident funds, profession tax, income tax, medical allowance, and leave travel allowance. Global Payroll for India provides samples of these for your reporting needs.

  The Payee Reports feature of Global Payroll for India provides you with a flexible reporting solution for payroll information. Setup pages are provided that enable you to change the Global Payroll elements that are used in the delivered sample reports. This feature enables you to change the contents of a report without making a change to the program that prints the report.

  Additionally, Global Payroll provides generic reporting pages to address additional reporting needs. You create a generic report by defining report parameters such as break levels, sorting, and the rows and columns to be printed on the report. After you define the parameters, you can run the report. At the time you run the report, you can define additional parameters on the run control page to further refine the resulting reports.

  See Defining Payee Reports.

  See Global Payroll for India Reports: A to Z.

- Labour Welfare Fund (LWF).

  The Indian Ministry of Labour has introduced the concept of Labour Welfare Fund to extend a measure of social assistance to workers in the unorganized sector. With Global Payroll for India, you can ensure that all payees are registered for LWF deductions.

  The deductions towards LWF are different for each state and are based on the *Active* status of the employee on the last day of the month. Enrolling Payees in LWF: The Specify Tax Details IND page is used to enroll employees under LWF. A new field,**Eligible for LWF,** is introduced to capture employee registration.

- Loans and advances.

  Many companies in India make loans and advances available to employees. Global Payroll for India enables you to issue loans and advances to payees and then process repayment as deductions over a period of time. With Global Payroll for India you can define the different types of loans that the company provides (such as home loans, car loans, and personal loans), define the repayment schedules that the payee requests based on the type of loan, and ensure that repayment from payees is deducted on a monthly basis and that the monthly repayments are adjusted against the loan balance or the advance balance. The payee has the option of early payment of the loan, commonly known as *foreclosure* in India. Payment and balance information is easily provided to payees.

  See Understanding Loans and Advances.

- Taxes.

  Companies must deduct and report on taxes. Global Payroll for India provides functionality to meet legislated tax recording, reporting, and processing requirements for taxes deducted per the Indian Income Tax Act and Profession Tax Act. Refer to the year end processing section later in these topics for more details on reporting.

  See Setting Up Tax Information.

- Banking.

  The banking process uses input from Global Payroll setup, payee, and result tables. The process creates the data required for direct deposit into output tables. This includes the **Employee, Account number, Net Pay,** and other fields. This process must be run after the payroll run. We deliver specifications to a sample financial institution as a guide for you to use for the financial institution.

  A report and a flat file to be sent to the bank are generated from these output tables.

  The preceding process can be run separately for reimbursements such as medical or leave travel allowance. If the earnings for reimbursements are nontaxable, then the gross and net amounts are the same.

  For other types of pay (such as bonuses), you follow the same process as for a regular payroll, which you run separately.

  See Understanding Banking Setup.

- Payslips.

  The Global Payroll for India payslip solution provides you with a series of features including payslip definition pages, run control pages, and a Structured Query Report program.

  The data used in the production of the payslips is generated by the pay calculation process and resides in various result tables. Additional data from PeopleSoft HR and Global Payroll are also used. While some customers have their own pay advice designs, we provide a generic payslip that you can modify to meet your needs.

  See Understanding Payslips for India.

- Year end processing.

One of the tasks that you must undertake in the annual payroll cycle is year end processing. We provide functionality to meet the requirements for year end recording, reporting, and processing. Year end reports are generated in formats for annual reporting required under legislation such as the Factories Act, ESI Act, Provident Fund Act, Profession Tax Act, Minimum Wages Act, and Income Tax Act. You can easily provide year end information to both the regulatory authorities and the payees at the close of the financial year.

See Understanding Year End Processing.

Delivered Elements for India

This section discusses:

- Creation of delivered elements.
- Element ownership and maintenance.

Creation of Delivered Elements

Global Payroll defines each business process for India in terms of delivered elements and rules. Some of these elements and rules are specifically designed to meet legal requirements, while others support common or customary payroll practices.

All of the elements and rules delivered as part of the country extension were created by means of the core application—the same application that you use both to create additional elements or rules and, in many cases, to configure existing elements delivered as part of the Global Payroll system. Because the tools that you need to redefine or create new payroll elements are fully documented in the core application document, we do not reproduce this information here. Instead, we briefly review the relationship between the core application (which contains the tools that you need to define your own elements and rules) and the country extensions (which contain country-specific rules and elements defined by PeopleSoft Global Payroll).

The core application has the following characteristics:

- It consists of a payroll rules engine—a flexible tool that enables you to define the rules and elements of the payroll system and perform payroll and absence calculations.

  Global Payroll does not embed payroll-specific logic or computations in application code. Instead, it specifies all business application logic, such as earnings, deductions, absences, and accumulators, in terms of payroll rules and elements. Global Payroll enables you to enter and maintain payroll rules through a set of pages and offers a comprehensive set of features that enable you to work in your preferred language or currency.
- It provides a payroll processing framework—a flexible way to define and run payroll and absence processing flows, such as calendars, run types, pay periods, and process lists.

Country extensions have the following characteristics:

- They are built by means of the core application.
- They consist of statutory and customary objects (country-specific payroll rules, elements, payroll processes, reports, pages, and self-service applications).

PeopleSoft Global Payroll delivers a query that you can run to view the names of all delivered elements designed for India. Instructions for running the query are provided in the *PeopleSoft Global Payroll .*

Element Ownership and Maintenance

The delivered elements and rules of the Global Payroll country extension can be classified according to whether they are owned and maintained by the customer or by PeopleSoft. Some elements and rules are maintained exclusively by PeopleSoft and cannot be modified, while others can be configured to meet requirements unique to each organization.

Element Ownership in Global Payroll

Five categories of element ownership exist in Global Payroll.

Term	Definition
PS Delivered/Maintained	Elements that Oracle delivers and maintains on an ongoing.
PS Delivered/Not Maintained	Elements that Oracle delivers that you can modify or reconfigure. This category consists primarily of either customary (nonstatutory) rules or statutory elements that you might want to define according to a different interpretation of the rules. Although Oracle might occasionally update elements that are defined as PS Delivered/Not Maintained, you are not required to apply these updates.
Customer Maintained	Elements that your organization creates and maintains. Oracle does not deliver rules defined as Customer Maintained.
PS Delivered/Customer Modified	Elements that were originally PS Delivered/ Maintained elements over which you have decided to take control (this change is irreversible).
PS Delivered/Maintained/ Secure	Delivered elements that you can never modify or control.

Element Ownership in Global Payroll for India

Of the five categories of element ownership, only the following two are used to define Indian elements: PS Delivered/Maintained and PS Delivered/Not Maintained. Although Global Payroll for India delivers some elements as PS Delivered/Maintained, the large majority of elements are designated PS Delivered/Not Maintained. This enables you to modify, update, and reconfigure the delivered elements to meet needs that are specific to your organization.

> **Note**
>
> In general, Global Payroll for India uses the ownership category PS Delivered/Not Maintained except where the modification of an element might interfere with calculations designed to satisfy strict (and generally invariable) legal requirements, such as in the case of taxes. The value of this approach is clearly evident in the setup of delivered accumulators. Because balance accumulators (for example, those storing taxable gross on a year-to-date basis) must be set up to comply with rigid legal requirements for reporting taxes and contributions, Global Payroll for India defines them as PS Delivered/Maintained (meaning that you cannot modify or directly add new elements to them). However, you can add new elements to these accumulators by using the delivered segment accumulators, which serve as the basic entry point into the system and are not maintained by PeopleSoft. Therefore, when you define a new earning or deduction, you can assign the element to a segment accumulator, and the segment accumulator automatically contributes to the correct balance accumulators.

The following table contains an element-by-element description of the Global Payroll for India approach to element ownership and maintenance:

Element Type	Ownership	Exceptions
Earning	PS Delivered/Not Maintained	Tax-related earnings are PS Delivered/Maintained.
Deduction	PS Delivered/Not Maintained	Tax-related deductions are PS Delivered/Maintained.
Variable	PS Delivered/Not Maintained	Tax-related variables are PS Delivered/Maintained.
Bracket	PS Delivered/Not Maintained	Tax-related brackets are PS Delivered/Maintained.
Accumulator	PS Delivered/Not Maintained	Tax-related accumulators are PS Delivered/Maintained.
Element Group	PS Delivered/Not Maintained	Tax-related element groups are PS Delivered/Maintained.
Process List	PS Delivered/Not Maintained	Tax-related process lists are PS Delivered/Maintained.
Section	PS Delivered/Not Maintained	Tax-related sections are PS Delivered/Maintained.
Formula	PS Delivered/Not Maintained	Tax-related formulas are PS Delivered/Maintained.
Array	PS Delivered/Not Maintained	Tax-related arrays are PS Delivered/Maintained.
Writable Array	PS Delivered/Not Maintained	Tax-related writable arrays are PS Delivered/Maintained.
Generation Control	PS Delivered/Not Maintained	Tax-related generation controls are PS Delivered/Maintained.

Related Topics

- PeopleSoft Global Payroll: Defining Element Names

Delivered Elements Naming Conventions

This section discusses:

- Element names.
- Functional area codes.
- Element type codes (PIN_TYPE).

Element Names

One of the keys to understanding how delivered payroll elements function in the system is to understand their names. Understanding the naming convention developed for PeopleSoft-delivered elements can help you determine how an element is used, the element type, and even the functional area it serves. Depending on whether the element is a primary element, a component of a primary element, or a supporting element, one of the following naming conventions applies.

Supporting Elements

For supporting elements, such as variables, formulas, dates, durations, and so on, PeopleSoft Global Payroll uses the following naming conventions: FF TT NAME or FFF TT NAME.

The following list further describes this naming convention:

- FF or FFF: Functional area code.

  See Functional Area Codes.
- TT: Type of supporting element.

  See Element Type Codes (PIN_TYPE).
- NAME: The name provides a further means of identifying the element.

For example, in the provident fund array PF AR ENROLLMENT, PF represents the functional area, AR represents the element type, and ENROLLMENT provides a further means of identifying the element.

> **Note**
>
> This naming convention applies to the following element types: arrays, brackets, counts, dates, durations, formulas, rate codes, variables, historical rules, fictitious calculation rules, proration rules, rounding rules, and generation control conditions.

Primary Elements

Primary elements, such as earnings, deductions, absence take, and absence entitlement elements generally do not contain functional area codes or element type codes in their names. This is because primary elements have names based on Indian terms that identify the function and element type without the use of additional codes. For example, the name of the earning element BASE SALARY clearly identifies this element as an earning, and more specifically, as a base salary element.

Other Elements

Although no fixed naming convention exists for accumulators, sections, and element groups, Global Payroll for India commonly uses the following naming conventions: FF TT NAME and FFF TT NAME.

The following list further describes this naming convention:

- FF or FFF: Functional area code.

  See Functional Area Codes.
- TT: Type of supporting element.

  See Element Type Codes (PIN_TYPE).
- NAME: The name provides a further means of identifying the element.

For example, a section in a process list for India might be named LA AC LOAN PAY, where LA is a functional area code, AC represents the element type, and LOAN PAY provides a means of uniquely identifying the element.

Additional Clues to the Use of Indian Elements

Many Indian elements contain abbreviations that provide clues (beyond those provided by the functional area codes or element type codes) to their use in the system. For example, consider the following variable element: LT VR CLAIM AMTNTAX is the nontaxable claim amount for leave travel allowance. As you become more familiar with the payroll rules that are created for India, these abbreviations help you to further identify and understand the role played by each element.

The following table lists the most common abbreviations that are used in the names of Indian elements:

Abbreviations Used in Global Payroll for India	English
ER	Earning
MIN	Minimum
MAX	Maximum
TX	Taxable
NTX	Nontaxable
PCT	Percent or Percentage
PRD	Period

Component Names (Suffixes)

In Global Payroll for India, suffixes are used to name the components of earning and deduction elements. For example, when you create an earning, deduction, or absence element in Global Payroll, you must define the components that make up the element, such as base, rate, unit, and percentage. The system automatically generates the components and accumulators for the element based on the calculation rule or accumulator periods that are used. The system also names the components and accumulators by appending a suffix to the element's name.

For example, assume that you define the earning element named EARN1 with the following calculation rule:

EARN1 = Rate × Unit

The system automatically creates two additional elements for the components in the calculation rule: a rate element called EARN1_RATE and a unit element called EARN1_UNIT.

The system creates suffixes to name the components of the element (_RATE and _UNIT). In Global Payroll all suffixes fall into one of the following types:

- Separator.
- Earning/deduction component suffixes.
- Earning/deduction accumulator suffixes.
- Deduction arrear component suffixes.
- Absence entitlement component suffixes.
- Absence entitlement accumulator suffixes.

> **Note**
>
> To view all the suffixes that are defined for a country, use the Element Suffixes page in the core Global Payroll application.

Separator

Global Payroll for India delivers a separator defined as: _ (underscore).

Component Suffixes

The following table lists the component suffixes delivered for India:

Component	Suffix
Base	BASE
Percentage	PCT
Rate	RATE
Unit	UNIT

Accumulator Suffixes

The following table lists the accumulator suffixes delivered for India:

Accumulator	Suffix - Calendar Period: Amount	Suffix - Calendar Period: Unit	Suffix - Fiscal Period: Amount	Suffix - Calendar Period: Unit
Calendar Period to Date	CPTDA	CPTDU	FPTDA	FPTDU
Month to Date	CMTDA	CMTDU	FMTDA	FMTDU
Quarter to Date	CQTDA	CQTDU	FQTDA	FQTDU
Year to Date	CYTDA	CYTDU	FYTDA	FYTDU

Deduction Arrears Component Suffixes

The following table lists the deduction arrears component suffixes delivered for India:

Deduction Arrears Component	Suffix
Payback	PBCK
Amount not Taken	ANTKN
Add to Arrears	ATARR
Arrears accumulator	ARR

Absence Entitlements Suffixes

The following table lists the absence entitlement suffixes delivered for India:

Absence Entitlement	Component/Accumulator	Suffix
Separator	not applicable	_ (underscore)
Component	Unit Paid	UNTPD
Component	Unit Adjustment	UNADJ
Accumulator	Balance	BAL
Accumulator	Adjustment	ADJ
Accumulator	Entitlement	ENT
Accumulator	Take	TKE

Related Topics

- PeopleSoft Global Payroll: Defining Suffixes

Functional Area Codes

The following table contains the functional area codes used in the names of Indian elements:

Functional Area	Description
IT	Income Tax
PF	Provident Fund
ALW	Allowance
REM	Reimbursement
BASE	Basic Pay
ER	Other Earnings
DED	Deductions
ARR	Arrears
PT	Profession Tax
LT	Leave Travel Allowance
ESI	Employee State Insurance
MA	Medical
WC	Workmen Compensation
TDS	Tax Deduction Source
OT	Overtime
LN	Loans

Functional Area	Description
ADV	Advances
LWF	Labour Welfare Fund

Element Type Codes (PIN_TYPE)

The following table contains codes for all the element types. Because not all element types are delivered for India, not all of these codes appear in the names of Indian elements:

Element Type	Description
AE	Absence Entitlement
AT	Absence Take
AC	Accumulator
AR	Array
AA	Auto Assigned
BR	Bracket
CT	Count
DT	Date
DD	Deduction
DR	Duration
ER	Earning
EG	Element Group
EM	Error Message
FC	Fictitious Calculation
FM	Formula
GC	Generation Control
HR	Historical Rule
PR	Process
PO	Proration Rule
RC	Rate Code
RR	Rounding Rule
SE	Section
SY	System Element
VR	Variable

Archiving Data for Global Payroll for India

PeopleSoft Global Payroll for India generates a large amount of result data. This data often needs to be maintained for audit or regulatory purposes. To keep the amount of stored data manageable, you should periodically archive it. PeopleSoft PeopleTools delivers an archiving tool called the Data Archive Manager. To help you archive your result data using the Data Archive Manager, PeopleSoft Global Payroll for India delivers a predefined archive object (GPIN_RSLT_ARCHIVE) and an archive template (GPINRSLT). The delivered archive template uses queries that select data by calendar group ID (CAL_RUN_ID field). The calendar group ID can be used to archive single or multiple calendar group data.

The archiving function captures data from the calculation, banking, general ledger, and other post processing tables. The following table lists the result tables that are archived for Global Payroll for India:

Result Record Type	Record Archived
Calculation (Writable Array)	GPIN_LTA_TOT_WA
Calculation (Writable Array)	GPIN_LTA_WA
Calculation (Writable Array)	GPIN_MDA_TOT_WA
Calculation (Writable Array)	GPIN_MDA_WA
Calculation (Writable Array)	GPIN_PSLP_RSLT
Banking	None
General Ledger	None
Other Post Processing	• Payslip Related: GPIN_PSLP_MSGPY. This table stores result payslip message information by cal_run_id. • Payee Reports GPIN_PR_TMP and GPIN_PR_TMP3.

> **Note**
>
> Use extreme caution when making changes to delivered archive objects, queries, or templates. Any modifications can result in the loss of important data.

See PeopleSoft Global Payroll: Archiving Global Payroll Data.

3

Understanding Country Data

Installation Setup for Global Payroll for India

To install Global Payroll for India, you must select the **IND - India** check box on the Global Payroll Country Extensions page. The Products page is discussed in the *PeopleSoft HCM Application Fundamentals* .

Related Topics

- Application Fundamentals: Setting Up Implementation Defaults

Element PIN Ranges

Each country extension that is developed for Global Payroll is assigned a PIN range to which elements can be assigned. The PIN range for Global Payroll for India is 170000–179999. This means that all elements that are defined for Global Payroll for India are assigned a PIN number between 170000 and 179999.

Related Topics

- PeopleSoft Global Payroll: Understanding Elements

Delivered Sample Data

The PeopleSoft system comes with sample data to enable easy navigation in the system during the implementation analysis. Sample data can also serve as the starting point for the design of your own implementation of Global Payroll for India. The following data values provide basic information that enables you to more easily view the delivered sample data.

Most of the delivered sample data for Global Payroll for India begins with the letters KP. Some of the delivered sample data begins with the numeric value of 1929.

The following table describes the delivered sample data:

Sample Data Type	Delivered Value
Regulatory Region	IND
Business Unit	IND01 and KP01
SetID	IND and KPIND (IND is the setID for the regulatory region and KPIND is the setID for other data.)
Company	KP1 and KP2
Global Payroll Pay Group	KP1PG1, KP1PG2, KP2PG1, and KP2PG2
Establishment	KPEST1 through KPEST7

Delivered values *KPEST1* is for the state of Karnataka, *KPEST2* for Delhi, *KPEST3* for the state of Andhra Pradesh, *KPEST4* for the state of Tamil Nadu, *KPEST5* for the state of

Maharashtra, *KPEST6* for the state of West Bengal, and *KPEST7* for the state of Madhya Pradesh.

Retroactive Processing Methods

The default retroactive processing methods for Global Payroll for India are:

Field or Control	Description
Default Retro Method (default retroactive method)	Forwarding.
On Conflict Retro Method (on conflict retroactive method)	Forwarding.

> **Note**
>
> If you use corrective as the retroactive processing method, you must ensure that all periods prior to the start of the current tax year are forwarded to the current year. For example, if during May a payee was paid a backdated increase for the period January to April, you can use corrective retro for the period in the current tax year (April), but you should use forwarding retro for the period in the prior tax year (January to March). Also, some elements that have monthly limits, such as the provident fund element, have accumulators that are defined with corrective retro. This ensures that the calculations are always based on an updated accumulator.

Related Topics

- PeopleSoft Global Payroll: Understanding Retroactive Methods

Categories

Categories are one way to classify elements and they assist in the manageability of elements by relating the element more directly to specific functionality. Global Payroll for India delivers the following categories:

Category	Description
BNS	Bonus
ESI	Employee State Insurance
LTA	Leave Travel Allowance
MED	Medical Allowance
PERQ	Perquisites
PF	Provident Fund
PT	Profession Tax
TDS	Tax Deducted at Source – General
TDSA	Tax Deducted at Source – Previous Employment Declarations
TDSB	Tax Deducted at Source – Exemption Declarations

Category	Description
TDSC	Tax Deducted at Source – Other Income Declarations
TDSD	Tax Deducted at Source – F VIA DD Declarations
TDSE	Tax Deducted at Source – Rebates 88 Declarations

Related Topics

- PeopleSoft Global Payroll: Understanding Categorization of Elements

Dependent Relationships

You must define Mother and Father as eligible dependents on the Personal Relationships - Personal Profile page. If you don't do this, a warning message appears, stating that Mother and Father are not considered legal dependents when you create a dependent on the Dependent Information component.

Related Topics

- PeopleSoft Human Resources Administer Workforce: Tracking Dependent and Beneficiary Data
- PeopleSoft Human Resources Manage Base Benefits: Entering Dependent and Beneficiary Information

Permission Lists, Roles, and Users

The delivered permission lists for Global Payroll for India are:

- HCCPGPIND (component permission list).
- HCPPIND (primary permission list).
- HCDPIND (data permission list).

The delivered roles for Global Payroll for India are:

- GP Administrator IND.
- HR Administrator IND.
- Health & Safety Admin. IND.

The predefined user name for India options in the PeopleSoft system is HCRIND.

Delivered Queries

With Global Payroll for India, some predefined queries are delivered to assist you in viewing pertinent data. Use PSQUERY to run these queries. PSQUERY, a part of PeopleTools functionality, enables you to run queries against data in PeopleSoft databases.

The following table lists predefined queries and data results for each:

Query	Data Results
GPIN ESI NOT REGISTERED	Payees not registered for employee state insurance (ESI).
GPIN LTA MISMATCH	Leave travel allowance that has been paid but is not identified as reimbursed in the database.
GPIN LTA NOT PAID	Leave travel allowance claims that have not been paid.
GPIN LTA WAIVE	Payees who have waived leave travel allowance.
GPIN MDA MISMATCH	Medical allowance that has been paid but is not identified as reimbursed in the database.
GPIN MDA NOT PAID	Medical allowance claims that have not been paid.
GPIN MDA WAIVED	Payees who have waived medical allowance.
GPIN PAYEE REPORT SETUP	Payee report setup data.
GPIN PF NOT REGISTERED	Payees who are not registered in provident fund.
GPIN TDS DISABLED	Payees who are disabled.
GPIN TDS SETUP	Tax deducted at source setup data.
GPIN TDS SR CITIZEN	Senior citizen payees.
GIN YE FORM12BA	Form 12BA perquisites.
GIN YE FORM 3A	Payees with Form 3A data.
GPIN _ PF_NO_BENEF	Provident fund enrollees without beneficiaries.
GPIN_ESI_NO_BENEF	ESI enrollees without beneficiaries.

See the product documentation for *PeopleTools: Query*

Delivered Earnings, Sections, and Process List Elements

This section discusses:

- Delivered earnings.
- Delivered sections.
- Delivered process lists.

Delivered Earnings

Global Payroll for India delivers predefined earning elements. Many of these delivered earnings are documented elsewhere in this book. However, some earnings are not documented elsewhere in this book and are, therefore, defined here.

Global Payroll for India delivers the following predefined earning elements:

Earning	Description
BASE SALARY	Basic Salary
BASE HOURLY	Basic Hourly
DEAR ALLOW	Dearness Allowance

Earning	Description
HRA	House Rent Allowance
RENT	Rent Reimbursement
LUNCH ALLOW	Lunch Allowance
CONVEY ALLOW	Conveyance Allowance
SPEC ALLOW	Special Allowance
SHIFT PCT	Shift Allowance Percentage
SHIFT AMT	Shift Allowance Fixed Amount
SHIFT HRLY	Shift Allowance Hourly
OVERTIME 1.5	Overtime (time and a half)
OVERTIME 2.0	Overtime (double time)
BONUS	Bonus

Note

The PeopleSoft system delivers a query that you can run to view the names of all delivered elements designed for India.

Delivered Sections

Global Payroll for India delivers 11 sections. Use the core application pages to view the element groups and elements that make up each section. Examining the delivered sections clearly illustrates the elements that are processed within each section during each pay run and in what order they are processed. This information is especially useful when you create earning or deduction elements because you will know into what section you should insert the newly created elements for appropriate processing during a payroll run. For example, if you created a new earning element that would not be considered a part of basic earnings, you would include that element in the ER SE OTHER (Other Earnings) section.

Global Payroll for India delivers the following sections:

Section	Description
ER SE BASE	Basic Earning. Contains basic earnings such as base salary and base hourly.
PF SE ALL	Provident Fund. Contains elements necessary to process provident fund deductions.
ESI SE ALL	Employee State Insurance. Contains elements necessary to process ESI deductions.
PT SE ALL	Profession Tax. Contains elements necessary to process the profession tax deduction.
AB SE ALL	Absences. Contains absence take and absence entitlement elements necessary to process absences.
LTA SE ALL	Leave Travel Allowance. Contains elements necessary to process leave travel allowance earnings.

Section	Description
MA SE ALL	Medical Allowance. Contains elements necessary to process medical allowance earnings.
ER SE OTHER	Other Earnings. Contains earning elements necessary to process earnings not considered a part of basic earnings.
ER SE BONUS	Bonus. Contains earning elements for bonus earnings necessary to process nonbasic earnings.
LA SE LN ADV	Loans and Advances. Contains loan and advance deduction elements necessary to process loans and advances.
TDS SE ALL	Income Tax. Contains elements necessary to process income tax.
PSLP SE MSG	Payslip Messages. Contains elements necessary to produce payslip messages.
IND SE INIT	Initialization. Contains common initialization elements.
IN WORK DAYS	Work Days. Contains elements used to calculate work days.
LWF SE ALL	LWF (Labour Welfare Fund). Contains elements used for calculation of LWF.

Related Topics

- PeopleSoft Global Payroll: Understanding Sections

Delivered Process Lists

Global Payroll for India delivers four process lists. Use the core application pages to view the sections, element groups, and elements that make up each process list. Examining the delivered process lists clearly illustrates the elements that are processed during each pay run and in what order they are processed.

Global Payroll for India delivers the following process lists:

Process List	Calculation Type
IN PL ABS	Absence
IN PL PAY	Payroll
IN PL BONUS	Bonus
IN PL PAYBON	Payroll and Bonus

> **Note**
>
> The PeopleSoft system delivers a query that you can run to view the names of all delivered elements designed for India.

4

Setting Up Establishments

Understanding Establishments

This section lists common elements and discusses establishments and how to view delivered elements.

Common Elements and establishments

Field or Control	Description
Establishment ID	This is the ID the system uses to identify the establishment.
Registration Date	Enter the pertinent registration date of the establishment.
Registration Number	Enter the pertinent registration number.
Registration Renewal Date	Establishment registrations are valid for a certain period of time. Enter the pertinent date on which the registration must be renewed.

Establishments

Establishments are used to identify separate units of a company, based on location. Each establishment must be registered under either the Factories Act or the Shops and Establishments Act. The other statutory acts applicable to the establishment are the Employee State Insurance (ESI) Act or the Workmen's Compensation Act, Provident Fund Act, Profession Tax Act, and Income Tax Act.

> **Note**
>
> An establishment is identified by a single establishment ID, but an establishment can be registered under multiple acts, such as the ESI Act, Provident Fund Act, Profession Tax Act, and Income Tax Act. Each act under which the establishment is registered requires a unique, separate registration number. Therefore, a company can have one or more establishments associated with it, but an establishment can be associated only with a single company.

Related Topics

- Enrolling Payees in a Provident Fund Program
  This section provides an overview of provident fund program enrollment and discusses how to enroll payees in a provident fund program.

- Enrolling Payees in an ESI Program
  This section provides an overview of ESI program enrollment and discusses how to enroll payees in an ESI program.
- Setting Up Tax Information
  This section includes a common elements section and provides information on how to set up tax deductions.

Viewing Delivered Elements

The PeopleSoft system delivers a query that you can run to view the names of all delivered elements designed for India. Instructions for running the query are provided in the *PeopleSoft Global Payroll*.

Related Topics

- PeopleSoft Global Payroll: Understanding How to View Delivered Elements

Setting Up Establishment Information

To set up establishment information, use the Establishment Data IND (GPIN_ESTAB_DATA) component.

Pages Used to Set Up Establishment Information

Page Name	Definition Name	Usage
Establishment Registration Page	GPIN_ESTAB	Enter basic establishment identification information as well as Factories Act or Shops and Establishments Act registration information. You add a new establishment by using the Establishment component in PeopleSoft HR.
ESI Registration *Page	GPIN_ESTAB_ESI	Enter ESI registration information.
Provident Fund Registration Page	GPIN_ESTAB_PF	Enter provident fund registration information.
Professional Tax Registration Page	GPIN_ESTAB_PT	Enter professional tax registration information.
Income Tax Registration Page	GPIN_ESTAB_IT	Enter income tax registration information.
LWF Registration Page	GPIN_ESTAB_LWF	Enter LWF registration information.

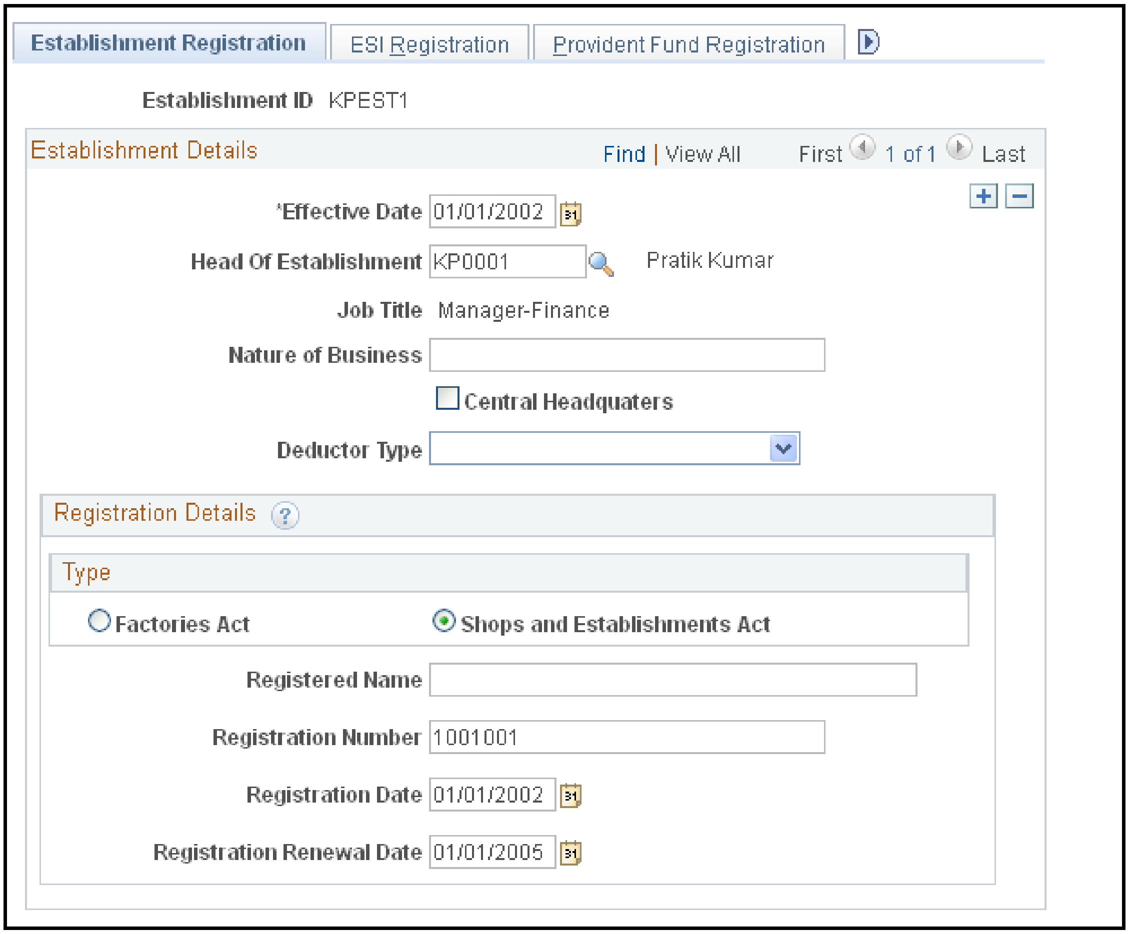
Establishment Registration Page

Use the Establishment Registration page (GPIN_ESTAB) to enter basic establishment identification information as well as Factories Act or Shops and Establishments Act registration information.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Framework**, and then **Organizational**, and then **Establishment Data IND**, and then **Establishment Registration**

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



Field or Control	Description
Head of Establishment	Select the employee who is considered the head of the establishment.
Job Title	The job title appears after you select an employee in the **Head of Establishment** field.
Nature of Business	Enter the nature of the business of the establishment.

Registration Details

Field or Control	Description
Type	Select whether the establishment is registered under the Factories Act or the Shops and Establishments Act.

Field or Control	Description
Registration Number	Enter the establishment's registration number.
Registration Date	Enter the date on which the establishment was registered.
Registration Renewal Date	Enter the date on which the establishment's registration must be renewed.

Note

If a registration number is at the company level, and is applicable to multiple establishments, you must enter the registration number information for each establishment.

Related Topics

- Application Fundamentals: Defining Establishments

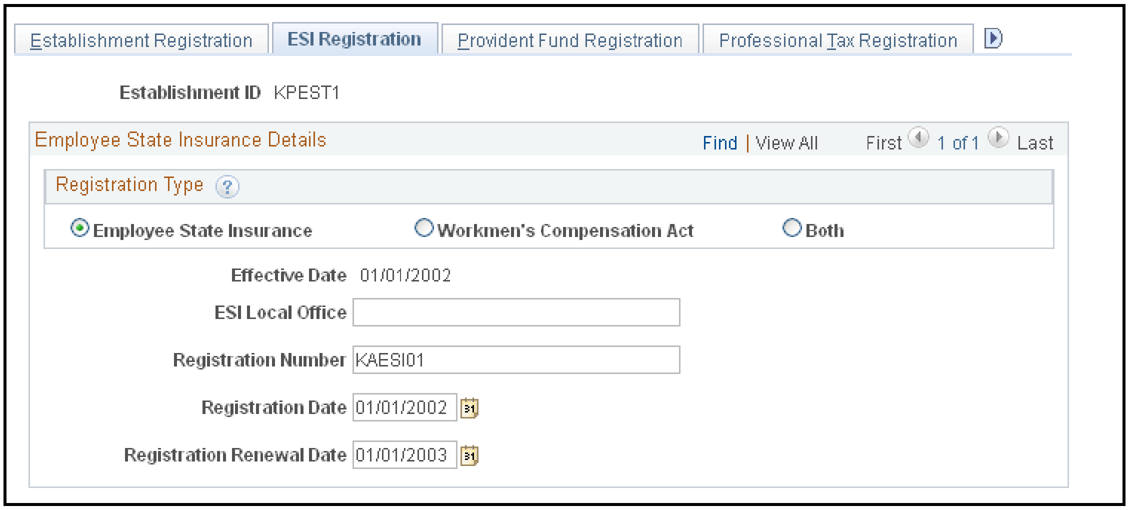
ESI Registration *Page

Use the ESI Registration (employee state insurance registration) page (GPIN_ESTAB_ESI) to enter ESI registration information.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Framework**, and then **Organizational**, and then **Establishment Data IND**, and then **ESI Registration**

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



Field or Control	Description
Registration Type	Select if the registration is related to ESI, Workmen's Compensation Act, or both.

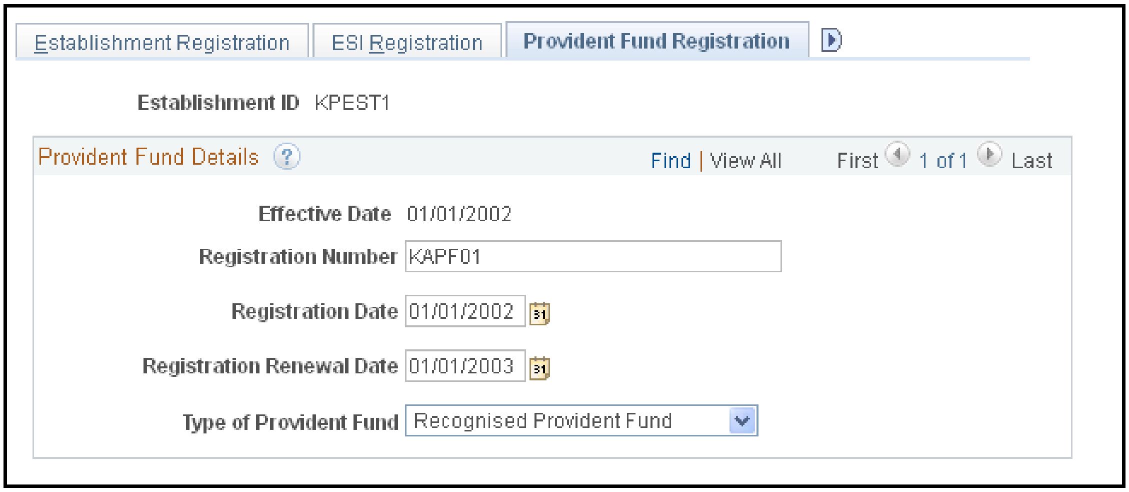
Provident Fund Registration Page

Use the Provident Fund Registration page (GPIN_ESTAB_PF) to enter provident fund registration information.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Framework**, and then **Organizational**, and then **Establishment Data IND**, and then **Provident Fund Registration**

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



Field or Control	Description
Type of Provident Fund	Select *Recognised Provident Fund* or *Statutory Provident Fund* as the provident fund type.

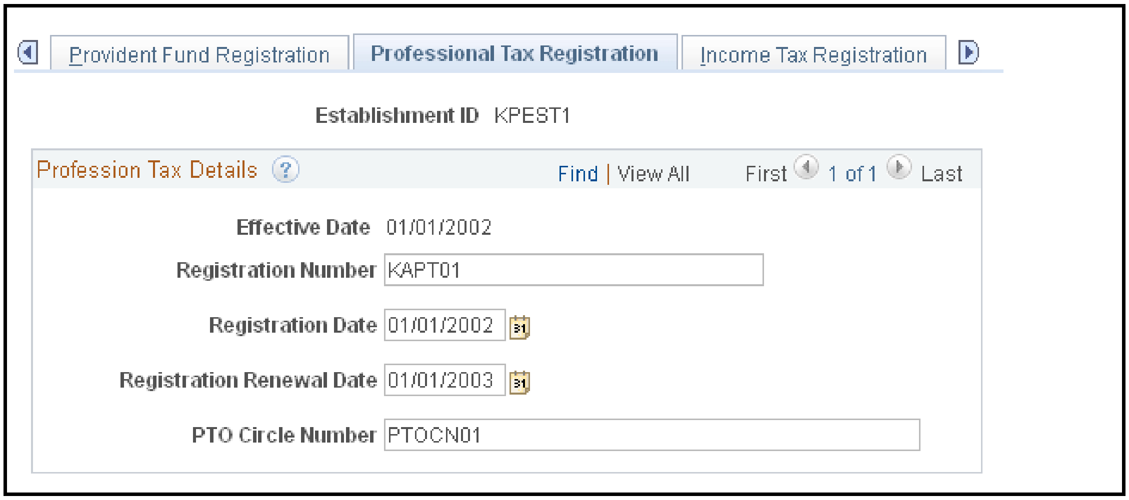
Professional Tax Registration Page

Use the Professional Tax Registration page (GPIN_ESTAB_PT) to enter professional tax registration information.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Framework**, and then **Organizational**, and then **Establishment Data IND**, and then **Professional Tax Registration**

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



Field or Control	Description
PTO Circle Number (profession tax officer circle number)	Enter the PTO circle number.

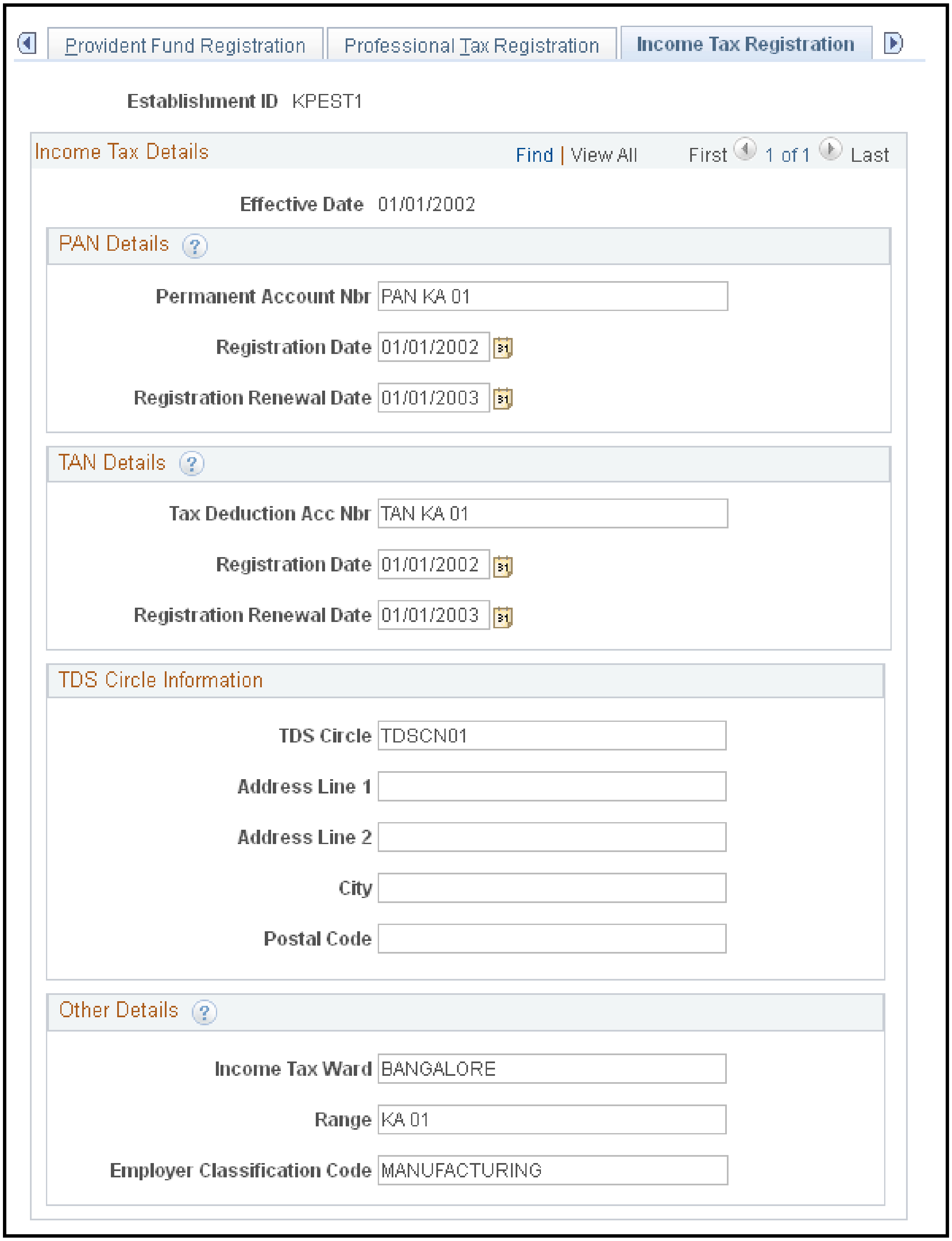
Income Tax Registration Page

Use the Income Tax Registration page (GPIN_ESTAB_IT) to enter income tax registration information.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Framework**, and then **Organizational**, and then **Establishment Data IND**, and then **Income Tax Registration**

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



PAN Details

Field or Control	Description
Permanent Account Nbr (permanent account number)	Enter the company's permanent account number.

TAN Details

Field or Control	Description
Tax Deduction Acc Nbr (tax deduction account number)	Enter the company's tax deduction account number.

Other Details

Field or Control	Description
TDS Circle (tax deduction at source circle)	Enter the circle number applicable to the establishment.
Income Tax Ward	Enter the company's income tax ward.
Range	Enter the range details, if applicable.
Employer Classification Code	Enter the employer classification code.

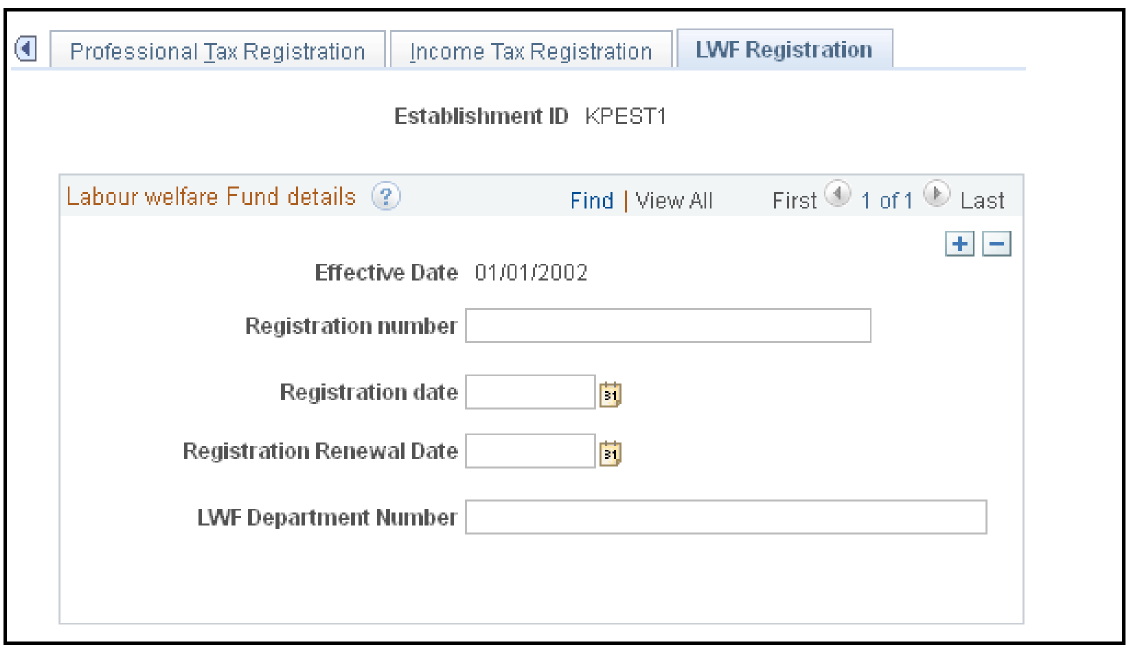
LWF Registration Page

Use the LWF Registration (labour welfare fund registration) page (GPIN_ESTAB_LWF) to enter LWF registration information.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Framework**, and then **Organizational**, and then **Establishment Data IND**, and then **LWF Registration**

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



Labour welfare Fund details

Field or Control	Description
Effective Date	Enter the date from which the registration becomes applicable to the entity.
Registration number	Enter the LWF registration number of the entity.
Registration date	Enter the LWF registration date of the entity.
Registration Renewal date	Enter the renewal date of the LWF registration for the entity.
LWF Department Number	Enter the LWF department number of the entity.

5

Understanding Absence Rules

Absence Elements

This section discusses:

- Absence rules.
- Delivered absence elements.
- Process lists and sections.
- Viewing delivered elements.

Related Topics

- PeopleSoft Global Payroll: Absence Management Features
- PeopleSoft Global Payroll: Defining Absence Entitlement Elements
- PeopleSoft Global Payroll: Entering Processing Instructions
- PeopleSoft Global Payroll: Defining Earning Elements
- PeopleSoft Global Payroll: Defining Deduction Elements

Absence Rules

PeopleSoft Global Payroll delivers predefined rules for processing absences due to vacation, illness, maternity, and other reasons. Oracle designed these rules according to India's statutory requirements. You can easily modify many of these rules to reflect absence policies that are specific to your organization or to labor agreements that might be in force for the payees.

This section supplements the absence documentation provided in the *PeopleSoft Global Payroll ,* which we recommend that you read before reading these topics on India-specific absence processing.

If you want more information about the specific rules composition for any of the elements listed in this section, use the Global Payroll core pages to get this information. For example, if you want to see the calculation logic of an absence entitlement element, use the Calculation page **(Set Up HCM**, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Elements**, and then **Absence Elements**, and then **Absence Entitlements**, and then **Calculation).**

> **Note**
>
> You can see the relationship between elements by using the View Element Relationships utility **(Set Up HCM**, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Elements**, and then **View Element Relationships).**

Reversals and Corrections

Global Payroll for France does not support reversal or correction processing.

> **Warning**
>
> Submitting reversals can have undesirable consequences for contribution declarations. PeopleSoft recommends the use of the delivered retroactive processing rules for France rather than reversal processing.

Related Topics

- PeopleSoft Global Payroll: Correcting or Reversing Finalized Results
- #unique_77

Process Lists and Sections

The AB PRIV LV, AB CASUAL LV, AB SICK LV, AB MTRNTY LV, PRIV LV, CASUAL LV, SICK LV, and MATERNITY LV absence elements are members of the AB SE ALL process section.

The AB SE ALL section is included in the IN PL ABS process list.

Viewing Delivered Elements

Oracle delivers a query that you can run to view the names of all delivered elements designed for India. Instructions for running the query are provided in the *PeopleSoft Global Payroll*.

Absence Setup Tasks

Before you can enter and process absences for India, you must complete various setup tasks. To prepare Global Payroll for India for absence processing:

1. Define work schedules and assign a schedule to each payee.
2. Define holiday schedules.
3. Modify the delivered absence take and absence entitlement elements, and create new absence elements, as needed.

   A list of the absence take and absence entitlement elements that we deliver with Global Payroll for India are listed here. We deliver sample values for many of these elements. Most likely, you'll want to replace at least some of these values with data that is specific to your organization.

   The entitlements for a company are listed through a delivered Global Payroll bracket (AB BR ENTITLE). For each defined company, you need to enter data for the privilege leave (AB VR PL ADULT and AB VR PL CHILD), sick leave (AB VR SL), and casual leave (AB VR CL) categories. The entitlements that you enter are in days per year.

   See PeopleSoft Global Payroll: Defining Bracket Elements.
4. Assign absence elements to payees and process lists.

As with all primary elements, you must assign absence entitlement and take elements to payees and include the elements in the process lists that you use when you run the absence processes. (This step is not necessary for per-absence entitlement elements.)

The PeopleSoft system delivers predefined sections and process lists for absence processing. Use these, modify them, or create your own.

6

Enrolling Payees in Provident Funds

Understanding Provident Funds

Payees who are employed by a company must join a recognized provident fund. The employers category determines which provident fund the employees should join. For instance, all government employees will be covered under Government Provident Fund (GPF). Private sector employees are generally covered under the recognized provident fund. Organizations have a choice to be covered under the Regional Provident Fund Commissioner (RPFC) or have their own setup, formed under a trust, which will report to the RPFC periodically. Generally large employers have their own trusts, and the onus of managing the contributions rests on the employer itself, guided by a board of trustees. Note that the PeopleSoft software does not provide for the compliances of a trust; it provides only for employers covered under the RPFC.

Provident funds work by deducting a fixed percentage from the salary of the employee. The employer also matches the contribution, which is remitted to the account of the employee maintained by the RPFC. Contributions from the employee and the employer are remitted every month by a certain date. Upon an employee's retirement, death, or permanent disability, the accumulated contribution along with interest is paid to the employee or his or her legal heirs.

Note

Employees' provident fund contributions are paid fully into the PF account, while the employer's contribution is split into Contribution towards Pension (PF ER PEN) and Contribution towards Provident Fund (PF ER).

With Global Payroll for India you can:

- Define the type of provident fund chosen by the company (statutory provident fund or recognized provident fund).
- Ensure that all payees are registered with a provident fund and capture the personal information for the payee and their beneficiaries.
- Define the three programs under the provident fund and the calculation methodology for each (Employees Provident Fund Scheme, Employees Pension Scheme, and Employees Deposit-Linked Insurance Scheme).
- Ensure that the deductions for payee contributions are properly calculated and deducted on a monthly basis.
- Ensure that the employer contribution is properly calculated.
- Ensure that the monthly contributions are correctly deposited with the proper provident fund authority.

> **Note**
>
> The PeopleSoft system delivers several queries that enable you to retrieve provident fund information.

Related Topics

- Delivered Queries
  With Global Payroll for India, some predefined queries are delivered to assist you in viewing pertinent data. Use PSQUERY to run these queries. PSQUERY, a part of PeopleTools functionality, enables you to run queries against data in PeopleSoft databases.

Understanding Provident Fund Reports

As part of the provident fund process, you need to generate and submit certain reports such as:

- A remittance statement report that includes details on provident fund contributions that were deducted for the contribution period.
- A new provident fund registration report that identifies new payees who must be registered with a provident fund.
- A terminated employees report that identifies payees who have terminated employment.

Related Topics

- Defining Payee Reports
  To define payee reports, use the Payee Report Fields IND (GPIN_PR_FLD_TABLE), Payee Report Break Levels IND (GPIN_PR_BRK_LVLS), Payee Report Setup IND (GPIN_PR_SETUP), and Payee Report Element Map IND (GPIN_PR_EMAP) components.

Understanding Provident Fund Deductions

This section discusses:

- Delivered provident fund deductions.
- Viewing delivered elements.

Delivered Provident Fund Deductions

Global Payroll for India delivers the following elements to process provident funds:

Deduction	Description
PF	Use to calculate the employee's provident fund contribution.
PF VOL	Use to calculate the employee's voluntary provident fund contribution.
PF ER	Use to calculate the employer's provident fund contribution.

Deduction	Description
PF ER PEN	Use to calculate the applicable percentage of the Employer contribution.
PF ER ADMIN	Use to calculate the employer's provident fund administration charge.
PF ER EDLI	Use to calculate the employer's EDLIS contribution.
PF ER EDLIA	Use to calculate the employer's EDLIS administration charge.

Related Topics

- PeopleSoft Global Payroll: Defining Deduction Elements

Viewing Delivered Elements

PeopleSoft delivers a query that you can run to view the names of all delivered elements designed for India. Instructions for running the query are provided in *PeopleSoft Global Payroll .*

Enrolling Payees in a Provident Fund Program

This section provides an overview of provident fund program enrollment and discusses how to enroll payees in a provident fund program.

Page Used to Enroll Payees in a Provident Fund Program

Page Name	Definition Name	Usage
Define PF Enrollment IND Page	GPIN_PF_ENROLL	Enroll a payee in a provident fund program.

Understanding Provident Fund Program Enrollment

To enroll a payee in a provident fund program:

1. Make sure the provident fund registration information for the establishment is entered on the Provident Fund Registration page.

   See Provident Fund Registration Page.
2. Enroll the payee by using the PF Enrollment (provident fund enrollment) page.

   See Define PF Enrollment IND Page.

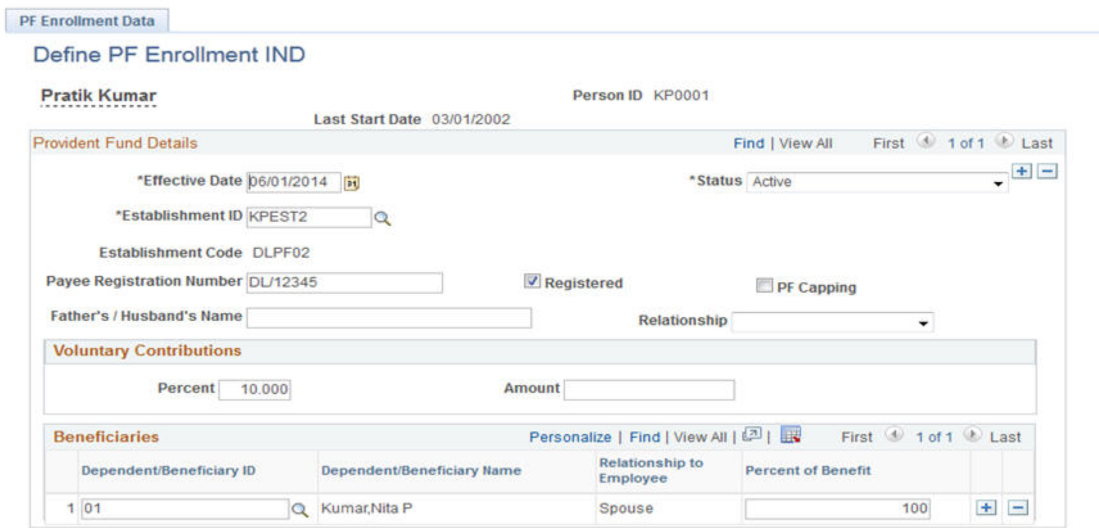
Define PF Enrollment IND Page

Use the Define PF Enrollment IND (define provident fund enrollment IND) page (GPIN_PF_ENROLL) to enroll a payee in a provident fund program.

Navigation:

Global Payroll & Absence Mgmt, and then **Payee Data**, and then **Pension Information**, and then **Define PF Enrollment IND**, and then **Define PF Enrollment IND**

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



Provident Fund Details

Field or Control	Description
Effective Date	The effective date must be on or after the payee hire or rehire date. If the effective date is before the hire date for the payee, the system issues an error message.
Payee Registration Number	Enter the payee's provident fund registration number. This number will generally be available a month after the employee is hired.
Registered	Select if you have a provident fund registration number for the payee.

Voluntary Contributions

Field or Control	Description
Percent	If the payee elects to contribute an additional percentage beyond that legally mandated, enter the percentage.
Amount	If the payee elects to contribute an additional amount beyond that legally mandated, enter the amount.

Note

The voluntary contribution for the payee can be either a percentage or an amount. You cannot enter both.

Beneficiaries

Field or Control	Description
Dependent/Beneficiary ID	Select the dependent or beneficiary to whom the benefit should flow. Any number of payees can be entered, but the total of the Percent of Benefit must equal 100%.
Percent of Benefit	Enter the percentage of funds to be distributed to the dependent beneficiary should the payee die. The percentages that you enter must total 100.

> **Note**
>
> To terminate a payee from a provident fund program, add a row and change the status to *Inactive.*

> **Note**
>
> Additional Provident Fund reports, which are required to be submitted to the statutory bodies, are provided for year end processing.

See Define Form 3A Data IND Page.

7

Enrolling Payees in Employee State Insurance

Understanding ESI

ESI is a Social Security plan that is designed to provide subsidized or free medical assistance to employees and their dependents during the course of their employment, or if an employee becomes unable to work due to specific circumstances. With Global Payroll for India, you can register payees under an ESI program and process the appropriate deductions during the normal payroll cycle.

With Global Payroll for India you can:

- Ensure that all of the payees are registered per the ESI Act and capture beneficiary information.
- Ensure that the deductions for contributions from payees are deducted from their pay each month.

> **Note**
>
> Enrolling payees in ESI is a manual process. The human resources department should ensure that the appropriate payees are enrolled in the ESI program.

> **Note**
>
> The PeopleSoft system delivers several queries that enable you to retrieve ESI information.

Related Topics

- Delivered Queries
  With Global Payroll for India, some predefined queries are delivered to assist you in viewing pertinent data. Use PSQUERY to run these queries. PSQUERY, a part of PeopleTools functionality, enables you to run queries against data in PeopleSoft databases.

Rounding Rules

Earnings and deductions provided by Global Payroll France have their *results* rounded using the rounding rule GP ROUND NEAR 2DEC. For the component elements (unit, base, rate, percent) of the earnings and deductions, the rounding rules applied are the pay group default rounding rules.

Understanding Delivered ESI Deductions

This section discusses:

- Delivered ESI deductions.
- Process lists and sections.
- Viewing delivered elements.

Delivered ESI Deductions

PeopleSoft delivers the following deductions to process ESI:

Name/ Description	Unit	Rate	Base	%	Amount
ESI Employee State Insurance (gc)	NA	NA	ESI GROSS WAGES	ESI VR PYE PCT	NA
ESI ER Employee State Insurance Employer Contribution (gc)	NA	NA	ESI GROSS WAGES	ESI VR ER PCT	NA

In this table, the first column combines the name and description of the delivered deductions. A (gc) in the row indicates that the deduction has an associated generation control element. A (po) indicates a post-processing formula, and (pr) indicates a preprocessing formula. The other four columns indicate the deductions calculation rule (Amount, Base × %, and so on).

These deductions may need to be modified to meet particular business requirements:

- ESI

  The ESI deduction has a calculation rule of base multiplied by percentage and is used to calculate the employee's contribution to ESI; the base is the accumulator ESI GROSS WAGES and the percentage is determined by the numeric variable ESI VR PYE PCT. The generation control element ESI GC ENROLL determines when the system processes this deduction. The deduction is made during the contribution period. If any employee crosses the limit (od Rs.7,500/-) during the contribution period, he continues to pay for the whole period.
- ESI ER

  The ESI ER deduction has a calculation rule of base multiplied by percentage and is used to calculate the employer's contribution to ESI; the base is the accumulator ESI GROSS WAGES and the percentage is determined by the numeric variable ESI VR ER PCT. The generation control element ESI GC ENROLL determines when the system processes this deduction.

Process Lists and Sections

The ESI and ESI ER deductions are members of the ESI SE ALL process section.

The ESI SE ALL section is included in the IN PL PAY and IN PL PAY BON process lists.

Viewing Delivered Elements

PeopleSoft delivers a query that you can run to view the names of all delivered elements designed for India. Instructions for running the query are provided in *PeopleSoft Global Payroll*.

Enrolling Payees in an ESI Program

This section provides an overview of ESI program enrollment and discusses how to enroll payees in an ESI program.

Page Used to Enroll Payees in an ESI Program

Page Name	Definition Name	Usage
Define ESI Data IND Page	GPIN_ESI_ENROLL	Enroll a payee in an ESI program.

Understanding ESI Program Enrollment

To enroll a payee in an ESI program:

1. Make sure that the ESI registration information is entered on the ESI Registration page.

   See ESI Registration *Page.
2. Enroll the payee by using the Define ESI Data IND(employee state insurance enrollment) page.

   See Define ESI Data IND Page.

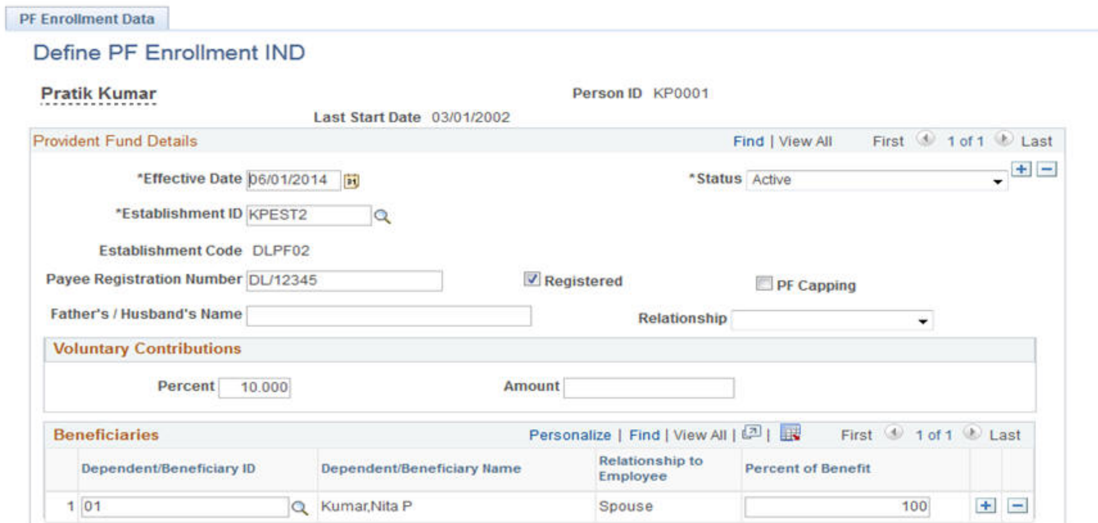
Define ESI Data IND Page

Use the Define ESI Data IND (define employee state insurance data IND) page (GPIN_ESI_ENROLL) to enroll a payee in an ESI program.

Navigation:

Global Payroll & Absence Mgmt, and then **Payee Data**, and then **Social Security/ Insurance**, and then **Define ESI Data IND**, and then **Define ESI Data IND**

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



Field or Control	Description
Effective Date	The ESI effective date must be on or after the payee hire or rehire date. If the ESI effective date is before the hire date for the payee, the system issues an error message.
Registration Number	Enter the payee's ESI registration number when it is assigned by the authorities.
Name of Hospital/Dispensary	Enter the name of the medical facility providing the payee's ESI medical care.
Registered	This field is automatically populated when you run the NEW ESI ENROLLMENT report. When this field is selected, it indicates that an application for ESI registration has been submitted for the payee.

Beneficiaries

Field or Control	Description
Dependent/Beneficiary ID	Select the ID for the appropriate dependent or beneficiary. When you select an ID, the name and relationship appear.

> **Note**
>
> To terminate a payee from ESI, add a row and change the status to *Inactive.*

8

Processing Allowances

Understanding Allowances

Certain types of allowances are exempted from taxes, such as Leave Travel Allowance, Medical Allowance, Hill Area Council Allowance, and Border Area allowances. However, the most common are Leave Travel Allowances and Medical Allowances. Global Payroll for India enables you to set up leave allowances and medical allowances with the payee's option of special claims processing or claim reimbursement.

These allowances are paid based on a defined frequency: monthly, quarterly, half yearly, or annually. This is a company policy and no statutory obligations exist as to the periodicity of the payment. Rules governing the taxation of these allowances are guided by the Finance Act. Employees can be paid these allowances by producing bills (medical/travel bills) and have the allowance exempted from tax. If the employee does not want to use this facility, then the allowance is paid off as a monthly allowance, with the full amount being taxable.

Companies might provide payees certain types of allowances. Global Payroll for India enables you to set up leave travel allowances and medical allowances with the payee's option of special claims processing or waiving of the claim reimbursement and receiving a flat taxable amount for the fiscal period.

> **Note**
>
> Global Payroll for India also delivers earning elements for other allowances including dearness allowance, house rent allowance, lunch allowance, conveyance allowance, shift allowance, and special allowance.

Global Payroll for India delivers the following allowances:

Term	Definition
Leave Travel Allowance	If the company provides leave travel allowance, you can pay a payee this allowance amount as part of his or her salary. If a payee is provided a leave travel allowance, he or she can waive having claims reimbursed or opt for nontaxable reimbursement of valid claims up to the Income Tax Act published limit each fiscal year. The payee submits the appropriate travel claim information, along with any required supporting documentation for the travel, and the claim is then processed during the normal payroll processing cycle. Leave travel allowance can be paid out monthly, quarterly, semiannually, or annually.

Term	Definition
Medical Allowance	If the company provides medical allowance, you can pay a payee this allowance amount as part of his or her salary. If a payee is provided a medical allowance, he or she can waive having claims reimbursed or opt for nontaxable reimbursement of valid claims up to the Income Tax Act published limit each fiscal year. The payee submits the appropriate medical claim information, along with any required supporting documentation for the medical claim, and the claim is then processed during the normal payroll processing cycle. Medical allowance can be paid out monthly, quarterly, semiannually, or annually.

With Global Payroll for India, you can:

- Define the leave travel allowance program, including who can be covered for reimbursements.
- Capture the leave travel allowance amount, per payee, for the fiscal year.
- Track claim details for payees' leave travel allowance and whether the minimum days of leave have been taken.
- Track the balance of leave travel allowance that is available for each payee.
- Define the medical allowance program, clearly defining the exemption amount that a payee can claim.
- Track medical allowance claim details of payees while ensuring that the claims in excess of the exemption limit are added to the taxable earnings of the payee.
- Track the medical allowance balance amount that is available to each payee.

> **Note**
>
> The PeopleSoft system delivers several queries that enable you to retrieve allowance information.

Understanding Allowance Earnings

This section discusses:

- Delivered allowance earnings.
- Viewing delivered elements.

Delivered Allowance Earnings

Global Payroll for India delivers the following earnings to process allowances:

Earning	Description
LTA NON TAX	Use to calculate the nontaxable earning portion of the employee's leave travel allowance.
LTA TAX	Use to calculate the taxable earning portion of the employee's leave travel allowance.
LTA PAYOUT (Leave Travel Allowance Payout)	Use to calculate the employee's leave travel allowance payout.
LTA WAIVE (Leave Travel Allowance Waive)	Use to calculate the employee's waived leave travel allowance.
MA NON TAX	Use to calculate the nontaxable earning portion of the employee's medical allowance.
MA TAX	Use to calculate the taxable earning portion of the employee's medical allowance.
MA PAYOUT	Use to calculate the employee's medical allowance payout.
MA WAIVE	Use to calculate the employee's waived medical allowance.

Viewing Delivered Elements

PeopleSoft Global Payroll delivers a query that you can run to view the names of all delivered elements designed for India. Instructions for running the query are provided in *PeopleSoft Global Payroll*.

Processing Leave Travel Allowances

This section provides an overview of leave travel allowances.

Pages Used to Process Leave Travel Allowances

Page Name	Definition Name	Usage
Define LTA Enrollment IND Page	GPIN_LTA_ENROLL	Enroll a payee for leave travel allowance.
Define LTA Enrollment IND Page	GPIN_LTA_CLAIMS	Enter details for a payee's leave travel allowance claim.

Understanding Leave Travel Allowances

To process leave travel allowance for a payee:

1. Define the payout frequency of leave travel allowance reimbursement as a variable.

   You can define how often the company reimburses leave travel allowance. You can decide to reimburse payee claims monthly, quarterly, semiannually, or annually. To define the reimbursement frequency, you define a variable at the pay entity level with an override option at the pay group and payee levels.

   The variable that you define for payout frequency is LT VR PAY CLAIMS. The delivered default is 0 (False) and you can change this at any level, if desired. The other option is 1

(True). If it is 1 (True), then the claims are processed in the payroll. If it is 0 (False), then the claims are not processed.

2. Enroll the payee for leave travel allowance.

   See [Define LTA Enrollment IND Page](#).

3. If applicable, enter claim information for leave travel allowance .

   See [Define LTA Enrollment IND Page](#).

Define LTA Enrollment IND Page

Use the Define LTA Enrollment IND (define leave travel allowance enrollment) page (GPIN_LTA_ENROLL) to enroll a payee for leave travel allowance.

Navigation:

Global Payroll & Absence Mgmt, and then **Payee Data**, and then **Define LTA Enrollment IND**, and then **Define LTA Enrollment IND**

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

Enrollment Information

Field or Control	Description
Coverage Election	Select **Elect** if the payee wants to submit claims for leave travel allowance during the year. Select**Waive** if the payee wants to waive the ability to submit claims for leave travel allowance during the year. If you select**Waive,** the allowance is still paid, but is fully taxable to the extent of the limit amount

Field or Control	Description
Allowance Amount	Enter the allowance amount that the payee is entitled to for the year.

Dependent Information

Field or Control	Description
Dependent/Beneficiary ID	Select the identification number for the payee's dependents who are eligible for reimbursement of claims. The corresponding name and relationship appears.

> **Note**
>
> To terminate a payee from leave travel allowance, add a row and change the status to *Inactive.*

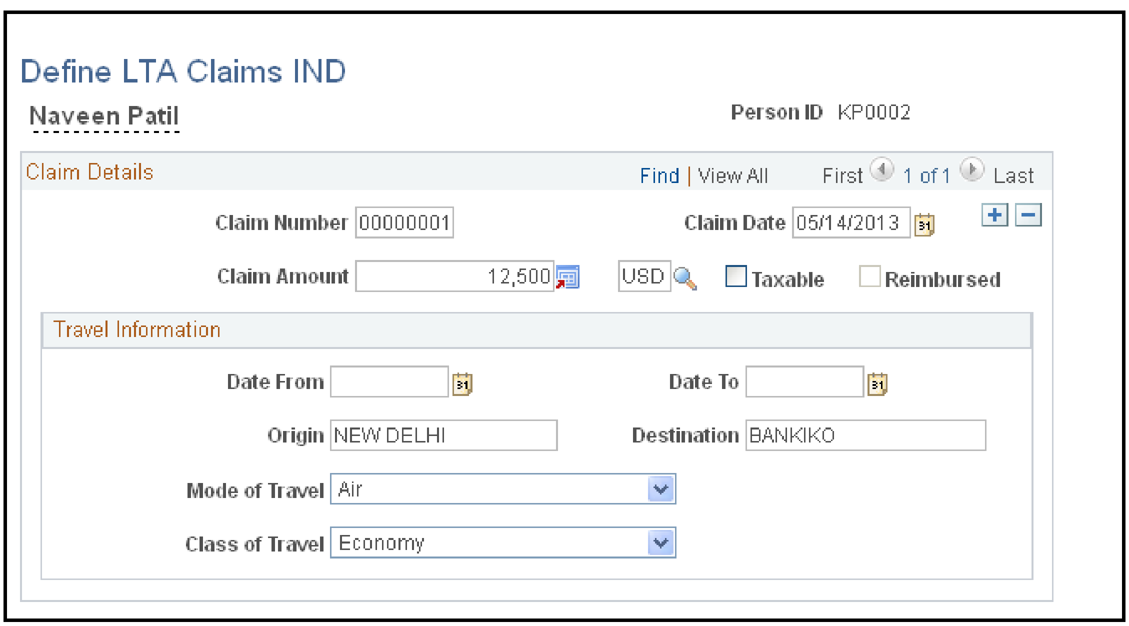
Define LTA Enrollment IND Page

Use the Define LTA Claims IND (define leave travel allowance claims) page (GPIN_LTA_CLAIMS) to enter details for a payee's leave travel allowance claim.

Navigation:

Global Payroll & Absence Mgmt, and then **Payee Data**, and then **Define LTA Claims IND**, and then **Define LTA Claims IND**

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



Claim Details

Field or Control	Description
Claim Number	Enter the claim number.
Claim Date	Enter the date on which the payee made the claim.
Claim Amount	Enter the amount of the claim.
Taxable	Select if the claim amount is taxable.
Reimbursed	Selected when payroll is run for the month and the claim is fully reimbursed.

Travel Information

Field or Control	Description
Date From and**Date To**	Enter the date on which the travel began and the date on which it ended.
Origin	Enter the location where the employee's travel originated.
Destination	Enter the employee's travel destination.
Mode of Travel	Enter the mode of travel. This is for information only. Ensuring that the mode of travel adheres to applicable rules is a manual process.
Class of Travel	Enter the class of travel. This is for information only. Ensuring that the class of travel adheres to applicable rules is a manual process.

Note

You can use the delivered GPIN_LTA_REIMBURSED query to verify reimbursed claims.

Processing Medical Allowances

This section provides an overview of medical allowances.

Pages Used to Process Medical Allowances

Page Name	Definition Name	Usage
#unique_108	GPIN_MDA_ENROLL	Enroll a payee for medical allowance.
Define MDA Claims IND Page	GPIN_MDA_CLAIMS	Enter medical allowance claim information.

Understanding Medical Allowances

To process medical allowance for a payee:

1. Define medical allowance variables.

   You must define two variables. One variable defines how often you want to reimburse a payee's medical allowance claims. You can define this variable as monthly, quarterly, semiannually, or annually. A second variable defines the exempt amount, which is the amount specified for medical reimbursement that is exempt from tax.

   The variable that you define for reimbursement frequency is MA VR PAY CLAIMS. The delivered default is 1 (True) and you can change this at any level, if desired. The other option is 0 (False). If it is 1 (True), then the claims are processed in the payroll. If it is 0 (False), then the claims are not processed. The exempt from tax limit variable is MA VR LIMIT NTAX. If the limit changes, you can modify this variable to reflect the new limit.
2. Enroll the payee for medical allowance.

   See #unique_108.
3. If applicable, enter medical allowance claim information.

   See Define MDA Claims IND Page.

Pages Used to View or Update Data for Illness and Maternity Certificates

Page Name	Definition Name	Usage
#unique_112	GPFR_ILLNESS_1	View or update the basic administrative information that will appear on certificates for illness, maternity, and paternity.
#unique_113	GPFR_ILLNESS_2	View or update information about the absences due to maternity or illness. This page does not apply to long-term illness.
#unique_114	GPFR_ILLNESS_3	View or update the reference salaries. The page displays the employee's gross pay for the last three months before the leave date. This page does not apply to long-term illness.
#unique_115	GPFR_ILLNESS_4	Enter the information that the social security agency needs to pay the social security allowance to your organization, rather than directly to the payee.
#unique_116	GPFR_ILLNESS_5	Enter the total insurance contributions and number of worked hours for a payee with a long-term illness. Use this page for long-term illnesses only.

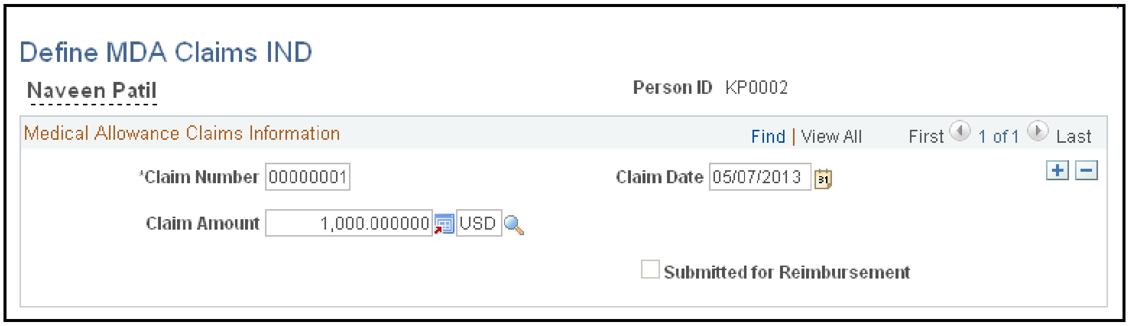
Define MDA Claims IND Page

Use the Define MDA Claims IND (define medical allowance claims) page (GPIN_MDA_CLAIMS) to enter medical allowance claim information.

Navigation:

Global Payroll & Absence Mgmt, and then **Payee Data**, and then **Define MDA Claims IND**, and then **Define MDA Claims IND**

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



Field or Control	Description
Claim Number	Enter the claim number.
Claim Date	Enter the date on which the payee made the claim.
Claim Amount	Enter the amount of the claim.
Submitted for Reimbursement	A writable array selects this check box automatically after you select the claim for processing.

Note

You can use the delivered GPIN_MA_CLAIMS_REIMBURSE query to verify reimbursed claims.

9 Managing Loans and Advances

Understanding Loans and Advances

Many companies in India grant payees loans that are then deducted over a specified period of time from the payee's pay, at a specified interest rate or as an interest-free loan. Additionally, some companies advance a payee a specified amount against future pay and the advance is then deducted from his or her pay over a period of time. Global Payroll for India enables you to manage such loans and advances.

> **Note**
>
> Global Payroll for India supports the basic calculation of loan with balances; calculation with compound interest and reducing balances is not supported.

To set up and manage a loan or advance, you:

1. Assign the deduction to the payee.
2. Enter details of the loan or advance by using variables.
3. Manage loan or advance payment deductions as part of the normal payroll processing calculations.

Understanding Loan and Advance Deductions

This section discusses:

- Delivered loan and advance deductions.
- Viewing delivered elements.

Delivered Loan and Advance Deductions

Global Payroll for India delivers the following deductions to process loans and advances:

- LOAN

  Use the LOAN deduction to calculate and deduct loan repayment amounts from an employee's pay.
- ADVANCE

  Use the ADVANCE deduction to calculate and deduct advance repayment amounts from an employee's pay.

Viewing Delivered Elements

PeopleSoft Global Payroll delivers a query that you can run to view the names of all delivered elements designed for India. Instructions for running the query are provided in *PeopleSoft Global Payroll* .

Entering Loan and Advance Information

This section discusses how to process a recurring loan and related activities.

Pages Used to Enter Loan and Advance Information

Page Name	Definition Name	Usage
Element Assignment by Payee Page	GP_ED_PYE	Assign specific earning and deduction elements to a payee or disable earning and deduction elements for payees.
Increasing the Loan or Advance Balance	GP_PEA_SOVR_SEC	Override the value of a variable associated with a particular earning or deduction for a payee (also called a payee/element override). Supporting element overrides are provided to change loan date and reference number.
Supporting Elements Page	GP_PAYEE_SOVR	Override the value of a bracket, date, duration, formula, or variable element that's associated with a payee.
One Time (Positive Input) Page	GP_PI_MNL_ENRDED	Enter positive input for a single payee. (You select the pay group, calendar, and emplID to access this page.)

Related Topics

- PeopleSoft Global Payroll: Element Assignment By Payee Page
- PeopleSoft Global Payroll: Supporting Elements Page

Element Assignment by Payee Page

To enter information for a recurring loan:

1. Access the Element Assignment by Payee page **(Global Payroll & Absence Mgmt**, and then **Payee Data**, and then **Assign Earnings and Deductions**, and then **Element Assignment by Payee**, and then **Element Assignment by Payee)** so that you can assign the loan deduction to the payee.
2. Click **Add New Assignment.**
3. Select the entry type of *Deduction.*
4. Select the element name of *LOAN.*

5. In the **Begin Date** field, enter the date on which the loan begins.
6. Click **OK.** This accesses the Element Detail page.
7. Enter *INR* in the**Currency Code** field.
8. In the **Supporting Element Overrides** group box, enter the element name of *LA VR LN REF* in the**Variable Name** field.
9. Enter the loan reference number in the **Character Value** field.
10. Insert a row.
11. Enter the element name of *LA VR LN DATE* in the**Variable Name** field and enter the begin date for this loan in the**Date Value** field.
12. Insert a row.
13. Select the element name of *LA VR LN INSTALL* in the**Variable Name** field and enter the amount of the loan to be deducted each payroll run in the**Numeric Value** field.
14. Insert a row.
15. Select the element type of *Variable.*
16. Select the element name of *LA VR LN TOTAL* and enter the total value of the loan in the**Numeric Value** field.
17. Click **OK.**

Entering a Recurring Advance

To enter information for a recurring advance:

1. Access the Element Assignment by Payee page **(Global Payroll & Absence Mgmt**, and then **Payee Data**, and then **Assign Earnings and Deductions**, and then **Element Assignment by Payee**, and then **Element Assignment by Payee)** so that you can assign the loan deduction to the payee.
2. Click **Add New Assignment.**
3. Select the entry type of *Deduction.*
4. Select the element name of *LOAN.*
5. In the **Begin Date** field, enter the date on which the loan begins.
6. Click **OK.** This accesses the Element Detail page.
7. Enter *INR* in the**Currency** field.
8. In the **Supporting Element Overrides** group box, enter the element name of *LA VR ADV REF* in the**Variable Name** field.
9. Enter the advance reference number in the **Character Value** field.
10. Insert a row.
11. Enter the element name of *LA VR ADV TYPE* in the**Variable Name** field and enter the type of advance in the**Character Value** field.
12. Insert a row.
13. Enter the element name of *LA VR ADV DATE* in the**Variable Name** field and enter the begin date for this advance in the**Date Value** field.
14. Insert a row.

15. Select the element name of *LA VR ADV INSTALL* in the**Variable Name** field and enter the amount of the advance to be deducted each payroll run in the**Numeric Value** field.
16. Insert a row.
17. Select the element type of *Variable.*
18. Select the element name of *LA VR ADV TOTAL* and enter the total value of the advance in the**Numeric Value** field.
19. Click **OK.**

One Time (Positive Input) Page

Use the One Time (Positive Input) page (GP_PI_MNL_ENRDED) to enter positive input for a single payee.

(You select the pay group, calendar, and emplID to access this page.)

Navigation:

Global Payroll & Absence Mgmt, and then **Payee Data**, and then **Assign Earnings and Deductions**, and then **One Time (Positive Input)**, and then **One Time (Positive Input)**

Increasing the Loan or Advance Balance

When you need to increase a loan or advance balance, access the Element Assignment by Payee page (**Global Payroll & Absence Mgmt**, and then **Payee Data**, and then **Assign Earnings and Deductions**, and then **Element Assignment by Payee**, and then **Element Assignment by Payee** and click the**Element Override**) link. This accesses the Supporting Element Overrides page.

For loans, select the variable name *LA VR LOAN ADJ* and enter the monetary value by which you want to increase the loan or advance balance.

10

Withholding Taxes

Understanding Tax Computation Process Flow

This section discusses:

- Income tax process flow.
- Profession tax computation flow.

> **Note**
>
> To examine the specifics of the calculations, use the core PeopleSoft Global Payroll application to examine the tax-related elements and rules.

Income Tax Process Flow

To calculate payee income tax to be withheld, the system:

1. Calculates taxable earnings.

   Taxable earnings are the sum of all earnings that a payee has received for the tax period, including previous employment earnings, basic salary from current employment, house rent allowance, and perquisites.
2. Totals previous and current employer exemptions.

   Previous and current employer exemptions for the payee are totaled. These exemptions can be items such as house rent allowance, conveyance, or leave travel allowance.
3. Calculates gross salary.

   Gross salary is calculated as taxable earnings minus exemptions.
4. Calculates the standard deduction, based on the previously calculated gross salary. Profession tax is taken into consideration during this step.

   > **Note**
   >
   > Standard deduction is limited to Gross Salary. Gross Salary cannot be a negative value.

   Standard Deduction is a flat deduction available for Income from Salary. It is available on the cumulative salary earned in a year. In the 2024 Budget, the Standard Deduction for taxpayers choosing the new regime (Section 115BAC) has been increased from Rs 50,000 to Rs 75,000 per annum. However, the Standard Deduction for the old regime remains unchanged at Rs 50,000 per annum. Profession Tax contribution is also considered to arrive at Salary Income. Union Budget 2024 brought about differential rates of Standard

Deductions for those choosing the Old Regime and those opting for the New Regime. Necessary changes to Brackets have been made to ensure Tax calculations are taken care of .

5. Calculates salary income.

   Salary income is Taxable Earnings – Exemptions = Gross Salary – Standard Deduction = Salary Income.

6. Calculate other income. I

   Income from other sources is income derived by the employee from sources such as business income and income from capital gains, Loss and Profits from House Property. Differential tax treatments are given to such incomes under the New and Old Regimes respectively, depending on what the employee chooses. Any changes, will be notified by position statement issued by PeopleSoft oracle to all its existing customers. The employee may choose to declare this income to the employer. Such income or loss is added or reduced from taxable income while taxes for the year are determined.

7. Calculate gross total income.

   Gross total income is calculated by considering the total of all heads of incomes before allowing any deductions under chapter VIA.

8. Total chapter VIA deductions.

   Chapter VIA Deductions

   These deductions are predominantly available only for old tax regime. Employees choosing new tax regime are not eligible to claim deductions under Chapter VIA.

   However, under the new tax regime, we have an exception where contributions to National Pension Scheme (NPS) is permitted even under the new regime.

   NPS serves as a long-term savings and retirement planning initiative, offering various contribution methods. Employees can make voluntary contributions under Section 80CCD (1) and can also utilize Section 80CCD (1B) for additional contributions. Note that these sections are applicable to the new regime also. The tax implications vary according to the Act, and our system adheres to these regulations. There are no amendments to sec 80 CCD(1) and 80CCD(1B) for the FY 2024-25. Another section - Section 80CCD (2) addresses employer contributions to employees' NPS accounts. In the 2024 budget, applicable from the AY 2024-25 , Section 80CCD(2) permitted private sector employers also to contribute upto 14% (from the earlier 10%) akin to government sector employers. Please note that these changes specifically impact only employees opting for taxation under Section 115BAC (new regime). For the old tax regime, the employer contribution remains unchanged at 10%.

   All chapter VIA deductions (such as medical insurance or self-education) that the payee claims are calculated. Each deduction has a statutory limit defined in variables. Please note that there are differential tax treatments for claiming deductions under Chapter VIA. As of the FY 2024-25 - all Chapter VIA deductions (with a few exceptions) are eligible only for employees opting for the old regime subject to individual limits as prescribed in the Income Tax Act from time to time. Any legislative changes will be modified and notified by way of position statements that will be updated from time to time. Customers are encouraged to continuously watch the document from time to time. Blogs are also published on changes to these.

9. Calculate total taxable income (net income).

   Total taxable income (net income) is calculated as gross total income minus chapter VIA deductions. The tax liability of the assessee is determined based on this result. The rates of taxes applicable, and the rebates that are given, are all based on this amount. The applicability of the surcharge also depends on this result.

10. If employee has not furnished the Permanent Account Number (PAN), the deductor will deduct the tax which is higher of the following rates, namely:
    a. At the rate specified in the relevant Provisions of this Act; or
    b. At the rate or rates in force; or
    c. At the rate of twenty percent.

    whichever is higher
11. Calculate tax liability.

    The total taxable income (net income) is used to determine the applicable income tax rate. The income tax rates are stored in a bracket. Income tax rates effective 2021, had differential rates for those opting for old regime and those opting for the new regime.
12. Apply rebates.

    Rebates are reductions from the tax liability of an employee. After the introduction of Section 115 BAC, Rebates are allowed for employees based on certain criteria which may be announced year on year when the budget presentations are made.

    The amount or percentage of rebate is usually determined by the annual finance bill proposed every year.

    Marginal Relief u/s 87A for New Tax Regime u/s 115BAC(1A)

    For the assessment year 2026-27 (Financial Year April 2025 to March 2026) onwards, Rebate under section 87A has been enhanced. The limit of total income for rebate calculations on which the income-tax is payable under sub-section (1A) of section 115BAC, from Rs. 7,00,000/- to Rs. 12,00,000/- hence, raising the limit of Rebate under Section 87A from Rs. 25,000/- to Rs. 60,000/-.

    There are no changes to 87A rebates for those Assessee paying taxes under the Old tax regime. It remains to be Rs 12500 for a total Income of upto Rs.500000/-

    For the assessment year 2025-26 (Financial Year April 2024 to March 2025)

    From Assessment Year 2024-25, a maximum rebate of Rs. 25,000 is allowed under section 87A, if the total income of an individual, who is opting for the new tax scheme under Section 115BAC(1A), is up to Rs. 7,00,000. Further, if the total income of the resident individual (opting section 115BAC(1A)) exceeds Rs. 7,00,000 and the tax payable on such income exceeds the difference between the total income and Rs. 7,00,000, the employee is entitled to a rebate with marginal relief to the extent of the difference between the tax payable on such total income and the amount by which it exceeds Rs. 7,00,000.

    Under the old tax regime, the rebate is retained at 12500/- for income upto Rs 5,00,000

    Section 87A of the Income Tax Act, 1961 allows an income tax rebate on the tax payable by the employee making the employee’s tax rebate makes one's income tax liability zero. Marginal relief was available for Incomes between 6-7 lakhs. But certain transactions are taxed at a specific rate and are hence not allowed for section 87A tax rebate. if the total income of the resident individual (opting section 115BAC(1A)) exceeds Rs. 7,00,000 and the tax payable on such income exceeds the difference between the total income and Rs. 7,00,000, the employee is entitled to a rebate with marginal relief to the extent of the difference between the tax payable on such total income and the amount by which it exceeds Rs. 7,00,000.
13. Calculate balance tax.

    Net tax payable is calculated as the result of the tax liability minus the rebates.
14. Calculate surcharge.

Surcharge is an additional levy on the net taxes of an employee. When the net tax payable is determined, the surcharge is calculated. The amount calculated is added to the taxable income and considered for tax deduction. This is the last step in the tax computation process. The amount calculated is prorated and deducted on a monthly basis.

Marginal Benefit/Relief for surcharge

The Income-tax Act, 1961 provides marginal relief to individuals whose taxable income exceeds the threshold limit after which a surcharge becomes payable, but whose net income is less than the surcharge.

> **Note**
>
> The marginal relief is calculated based on the surcharges and marginal benefits provided by the Government.

15. Calculate net tax liability.

    The final tax liability is the result of the net tax payable plus the surcharge.

16. Determine monthly tax deduction.

    To determine the month's tax deduction for the payee, the balance tax of the employee is determined after reducing the tax deducted so far from the employee's tax liability for the year, and the balance determined. This is divided by the number of months left in the year and tax for the month determined. This is the amount that will reflect as TDS (tax deducted at source) month on month.

Profession Tax Computation Flow

The frequency with which you must deduct profession tax varies among states. The deduction frequencies for each state (monthly, quarterly, semiannually, or annually) are stored in variables, one variable for each state.

Rates and slabs that are applicable to each state are stored in brackets, one bracket for each state.

Each employee is linked to an establishment and the establishment is linked to a state. The rates that are applicable to each state are stored in a bracket.

Profession tax differs from state to state, and the deduction occurs based on the specified frequency. The amount deducted for profession taxes is considered for the calculation of the standard deduction as discussed in step 4 of the Income Tax process flow.

> **Note**
>
> Make sure that a payee's profession tax establishment is set up using the Establishment component (ESTABLISHMENT_DATA) in PeopleSoft HR because this information is vital to the proper calculation of a payee's profession tax deduction. This is the only source where an employee is linked to an establishment and an establishment to the state, therefore determining the correct deduction.

Related Topics

- [Setting Up Establishment Information](#)
  To set up establishment information, use the Establishment Data IND (GPIN_ESTAB_DATA) component.

Rates And Elements Page

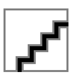
Use the Rates And Elements page (GPFR_RATE_PANELS) to view the variables containing the rates for the different types of contributions, such as ARRCO or AGIRC.

The data on the Rates and Elements page is delivered by PeopleSoft but is not maintained by PeopleSoft.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Addl Rates**, and then **Ceilings**, and then **Values**, and then **Rates/Elements/Limits FRA**, and then **Rates And Elements**

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



Field or Control	Description
Component Name	Displays the name of the component that contains the variables.

Elements

Field or Control	Description
Entry Type	Select the entry type: *Accumulatr* (accumulator), *Deduction, Section,* and *Variable.*
Element Name	Displays the names of the variables containing the rates for the different types of contributions, such as ARRCO or AGIRC. Variable names are coded according to the contribution type. For example, *ARC VR TX T1 NC S* is the variable that contains the value of the ARRCO contribution rate for a payee on earning base T1.

Delivered Tax Earnings

While the elements in this section are defined as earnings, they are actually used to store specific information. "Previous" in the following table refers to previous employment, such as "Previous Employment Salary." The elements in this section do not function as typical earning elements.

Global Payroll for India delivers the following elements to process payee taxes:

Earning	Description
PREV SAL	Previous salary.
PREV PT	Previous profession tax.
PREV TDS	Previous tax deducted at source.
PREV HRA	Previous house rent allowance.
PREV LIC	Previous life insurance deduction.
PREV SAL HRA	Previous salary for house rent allowance.
PREV MED EXM	Previous medical exemption.
PREV LTA EXM	Previous leave travel allowance exemption.
PREV PF	Previous provident fund.
PREV EDU EXM	Previous child education exemption.
PREV HOS EXM	Previous child hostel exemption.
PREV HRA EXM	Previous house rent allowance exemption.
PREV CON EXM	Previous conveyance exemption.
RTO BASE SAL	Captures the salary changes due to retroactive processing of on the basic salary. This excludes the DA. This retroactive processing value is forwarded from the segment accumulator SEG AC BASE SAL.
RTO HRA EXM	Captures the changes due to retroactive processing on the on monthly HRA exemption (HRA EXMPT). This retroactive processing value is forwarded from the segment accumulator HRA AC EXM SEG.
CHILD EDU ALW	Child education allowance.
CHILD HOSTEL	Child hostel allowance.
CONVEY EXM	Conveyance exemption.
PEN FND 80CC	Pension fund 80CCC.
MED INS 80D	Medical insurance premium 80D.
MED HND 80DD	Medical treatment (handicapped dependents) 80DD.
MED AIL80DDB	Medical treatment (special ailments) 80DDB.
EDU LOAN 80E	Education loan 80E.
DONAT 100PCT	Donations - 100 percent 80G.
DONAT 50PCT	Donations - 50 percent 80G.
RENT 80GG	Rent paid 80GG.
DONAT 80GGA	Donations - scientific research 80GGA.
INT SEC 80L	Interest on securities 80L.
PERM DIS 80U	Permanent physical disability.
LIC PREM	Life insurance corporation premium.
DEFRD ANNTY	Deferred annuity.
PPF	Public provident fund.
PO CUML DEPOSITS	Post office cumulative term deposits.
NSC DEPOSITS	National Savings Certificate deposits.

Earning	Description
NSS DEPOSITS	National Savings Scheme deposits.
INT NSC	Interest on National Savings Certificate reinvested.
PRIN LOAN RE	Principal loan repayment.
MUTUAL FND	Mutual funds.
NHB SCHEME	National Housing Board scheme.
TX REBAT 88B	Tax rebate Section 88B.
TX REBAT 88C	Tax rebate Section 88C.
TX REBAT 89	Tax rebate Section 89.
INFRA BONDS	Infrastructure bonds.
LIC ANNUITY	Life insurance corporation annuity.
ULIP	Unit-linked insurance plan.
PERQ CAR	Car perquisite.
PERQ HOUSE	House perquisite.
TDS STD DED	Standard deduction.
HRA EXM	House rent allowance exemption.

Delivered Tax Deductions

Global Payroll for India delivers the following tax deductions:

Deduction	Description
TDS	Tax deduction at source.
PT	Profession tax.

> **Note**
>
> PeopleSoft Global Payroll delivers a query that you can run to view the names of all delivered elements that are designed for India.

Setting Up Tax Information

This section includes a common elements section and provides information on how to set up tax deductions.

Common Elements Used in this Section

Field or Control	Description
Sequence number	Enter a sequence number to indicate the sequence of elements for the page.
Entry Type	Select the element's entry type.

Field or Control	Description
Element Name	Select the element name. Only those elements with the entry type that you select in the Entry Type column appear as choices. The corresponding description appears when you select the element name.
Declaration Category	Select the respective item such as Section 80C deductions under Chapter VI A, Section 80CCC, or Other income to list the entry type and element name under the correct category on the Tax Savings Declarations IND self service page.
Tax Regime	Select an appropriate tax regime applicable for Earnings or Deductions. Possible values are: • Old Regime: Earnings or Deductions are applicable for old tax regime. • New Regime: Earnings or Deductions are applicable for new tax regime. • Both: Earnings or Deductions are applicable for both old and new tax regimes. The default value for the Tax Regime is “New Regime” (effective 1st April 2023). This setup is used to enable the earnings/deductions for Employee Self Service “Tax Savings Declarations IND”.
List in Self Service	Payroll administrators have the option to list items or investments to display on the Tax Savings Declarations IND self service page. They also have the option to add or delete items when there is an introduction of a new deduction type or an amendment to the existing deduction provisions.
Self Service Label	Enter a description of the element. The description will be displayed on the Tax Savings Declarations IND self service page.

Pages Used to Set Up Tax Information

Page Name	Definition Name	Usage
Tax Setup – Deductions Page	GPIN_TDS_DEDN	Set up information for deductions Under Chapter VI A. In addition you can enable self service functionality using this page.
Tax Setup – Exemptions Page	GPIN_TDS_EXEM	Set up tax exemptions.
Tax Setup – Other Income Page	GPIN_TDS_OTH	Set up other income information. In addition you can enable self service functionality using this page.
Tax Setup – Perquisites Page	GPIN_TDS_PERQ	Set up information for perquisites.

Page Name	Definition Name	Usage
Tax Setup – Previous Employment Page	GPIN_TDS_PREV	Set up previous employment data. In addition you can enable self service functionality using this page.

> **Note**
>
> The PAN number need to be updated in the employees Personal Information Page. If the mandatory filed of PAN information is not updated in the provided field, it triggers the tax calculation at a higher rate as mentioned in the Act.

Understanding Tax Information Setup and Maintenance

To enter tax-related data as part of the setup and ongoing data maintenance:

1. Enter the income and profession tax-related information pertaining to the establishment.

   See Setting Up Establishment Information.

2. Define the setup for payee tax declarations and previous employment.

   You define the setup for each page in the Specify Tax Details IND component (GPIN_TDS_GEN).

   See Tax Setup – Deductions Page.

3. Enter the declarations of a payee's general and house rent allowance tax information.

   See Tax Setup – Exemptions Page.

   See Tax Setup – Other Income Page.

4. Enter the payee's rebate, previous employment, deduction, exemption, other sources, and perquisites tax information.

   See Tax Setup – Perquisites Page.

> **Note**
>
> Oracle provides tax element updates when amendments are made to the legislated rules governing income tax by the Central Finance Bill. However, for changes in slabs or rates, you must change the existing values to the amended rates or slabs.

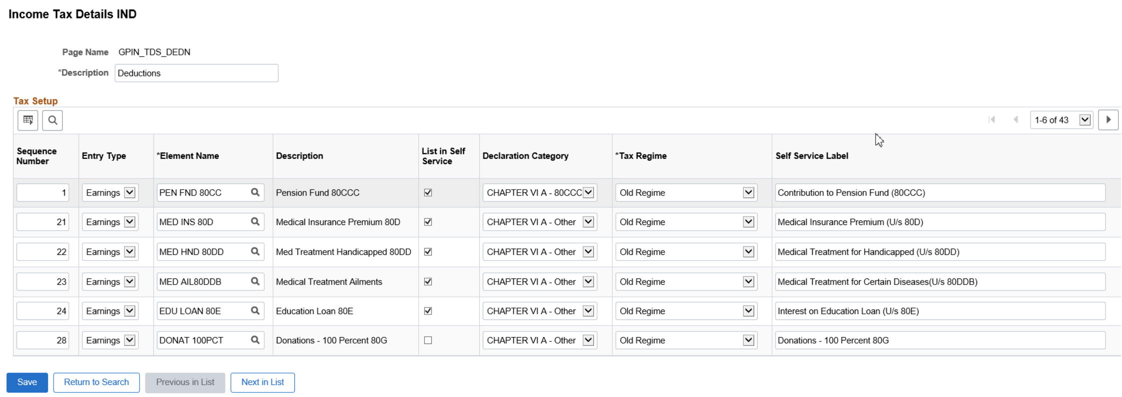
Tax Setup – Deductions Page

Use the Tax Setup – Deductions page (GPIN_TDS_DEDN) to set up information for deductions Under Chapter VI A.

Navigation:

Setup HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Taxes**, and then **Income Tax Details IND**, and then **Deductions**

This example illustrates the fields and controls on the Tax Setup – Deductions page. You can find definitions for the fields and controls later on this page.



> **Note**
>
> See field descriptions under the Common Elements heading at the beginning of this section.

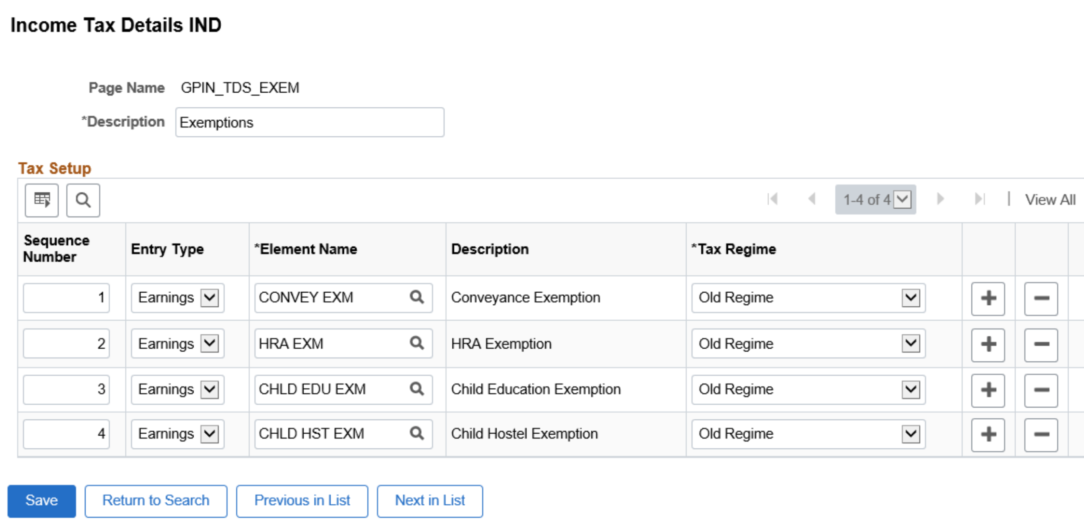
Tax Setup – Exemptions Page

Use the Tax Setup – Exemptions page (GPIN_TDS_EXEM) to set up tax exemptions.

Navigation:

Setup HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Taxes**, and then **Income Tax Details IND**, and then **Exemptions**

This example illustrates the fields and controls on the Tax Setup – Exemptions page. You can find definitions for the fields and controls later on this page.



> **Note**
>
> See field descriptions under the Common Elements heading at the beginning of this section.

Tax Setup – Other Income Page

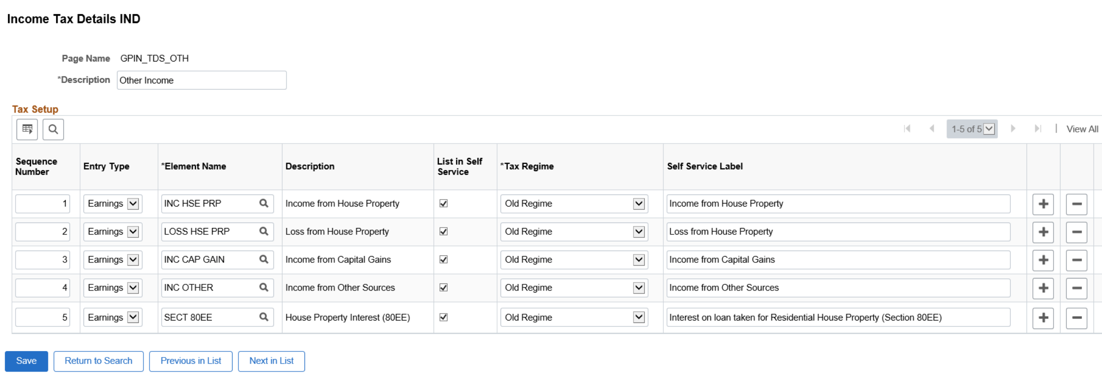
Use the Tax Setup – Other Income page (GPIN_TDS_OTH) to set up other income information.

In addition you can enable self service functionality using this page.

Navigation:

Setup HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Taxes**, and then **Income Tax Details IND**, and then **Other Income**

This example illustrates the fields and controls on the Tax Setup – Other Income page. You can find definitions for the fields and controls later on this page.



> **Note**
>
> See field descriptions under the Common Elements heading at the beginning of this section.

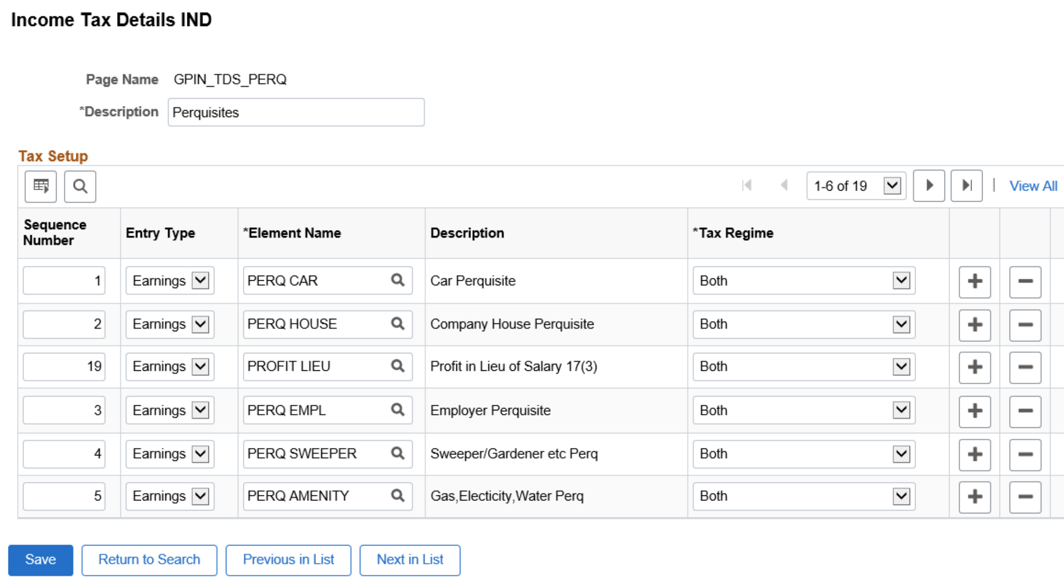
Tax Setup – Perquisites Page

Use the Tax Setup – Perquisites page (GPIN_TDS_PERQ) to set up information for perquisites.

Navigation:

Setup HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Taxes**, and then **Income Tax Details IND**, and then **Perquisites**

This example illustrates the fields and controls on the Tax Setup – Perquisites page. You can find definitions for the fields and controls later on this page.



Income Tax Details IND

Page Name GPIN_TDS_PERQ

*Description Perquisites

Tax Setup

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Sequence Number	Entry Type	*Element Name	Description	*Tax Regime
1	Earnings	PERQ CAR	Car Perquisite	Both
2	Earnings	PERQ HOUSE	Company House Perquisite	Both
19	Earnings	PROFIT LIEU	Profit in Lieu of Salary 17(3)	Both
3	Earnings	PERQ EMPL	Employer Perquisite	Both
4	Earnings	PERQ SWEEPER	Sweeper/Gardener etc Perq	Both
5	Earnings	PERQ AMENITY	Gas,Electicity,Water Perq	Both

Save | Return to Search | Previous in List | Next in List

> **Note**
>
> See field descriptions under the Common Elements heading at the beginning of this section.

Tax Setup – Previous Employment Page

Use the Tax Setup – Previous Employment page (GPIN_TDS_PREV) to set up previous employment data.

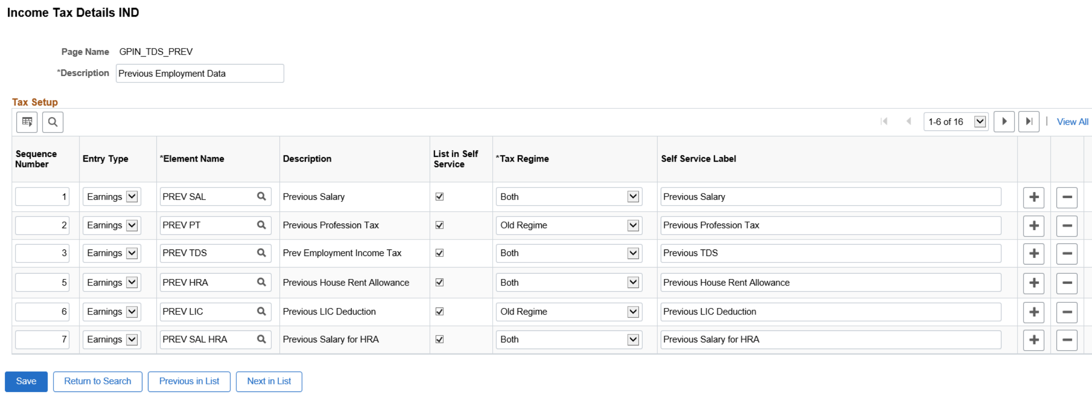
> **Note**
>
> The Payroll administrator is responsible for entries made and approvals in this page. It is important to note that Approval amount by the payroll administrator is permitted to be different from what is declared by the employee in his Self Service page. If the amount is different from what is submitted for approval (by the payroll administrator), a warning message has been enabled indicating the user about a variance. The Administrator may use his discretion in updating or saving this page. The approval by Payroll administrator has direct impact on the payroll calculations.

In addition you can enable self service functionality using this page.

Navigation:

Setup HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Taxes**, and then **Income Tax Details IND**, and then **Previous Employment**

This example illustrates the fields and controls on the Tax Setup – Previous Employment Data page. You can find definitions for the fields and controls later on this page.



> **Note**
>
> See field descriptions under the Common Elements heading at the beginning of this section.

Maintaining Tax Rates

Section 115BAC was Introduced in the Union Budget 2020 and effective from the financial year 2020-21, the New Regime offers a simplified tax structure with lower tax rates. While the Old Tax regime adhere to the conventional exemptions and deductions under various sections, which is now not permissible in the New tax regime. The New Tax regime and the Old Tax regime have differential tax calculations and the Tax incidences and would vary depending on what the employee chooses. In Peoplesoft, different rules are there for the New Regime and the Old regime and Taxes are calculated accordingly. Supporting elements incl Formulas are modified to cater to the tax treatment depending on what tax savings options the employee chooses. TDS VR TAX RGM defines the Regime chosen by the employee.

Tax Slabs for AY 2024-25 (FY 2025-26) year’s tax budgetary changes can be accessed through position statement Id <statement id no:>.

Maintaining Tax Declarations

This section provides information on how to enter the payee related information.

Pages Used to Maintain Tax Information

Page Name	Definition Name	Usage
General Information Page	GPIN_TDS_GEN	Enter the declaration of the payee's general tax information.
HRA Details Page	GPIN_TDS_HRA	Enter the declaration of the payee's house rent allowance information.
Deduction Page	GPIN_TDS_DEDN	Enter the payee's deductions under chapter VI A.

Page Name	Definition Name	Usage
Other Income Page	GPIN_TDS_OTH	Enter the payee's other source of income.
Exemption Page	GPIN_TDS_EXEM	Enter the payee's tax exemption information.
Entering Perquisites Information	GPIN_TDS_PERQ	Enter the payee's perquisites details.
Previous Income Page	GPIN_TDS_PREV	Enter the payee's previous employment income information.

Entering Payee Related Information

This section provides information on how to enter the payee related information.

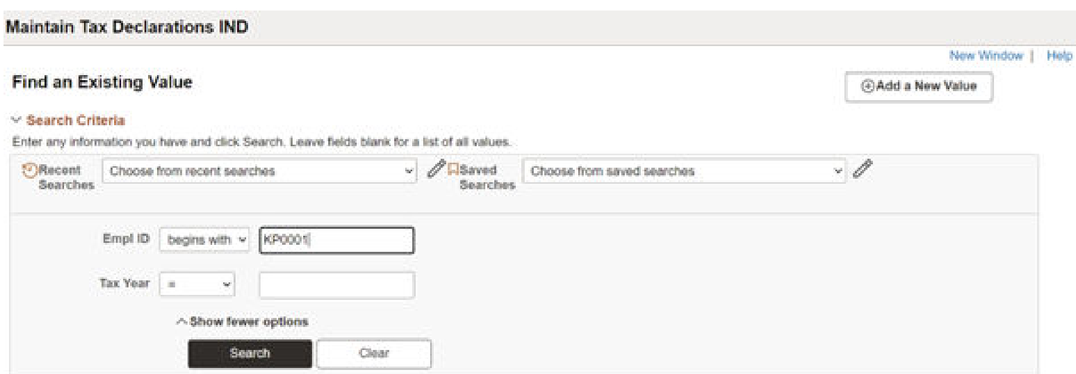
To enter the payee related information, perform the following:

1. Access Maintain Tax Declaration IND page.

   Navigation:

   Global Payroll & Absence Mgmt, and then **Payee Data**, and then **Taxes**, and then **Maintain Tax Declaration IND**

   This example illustrates the fields and controls on the Maintain Tax Data IND page.

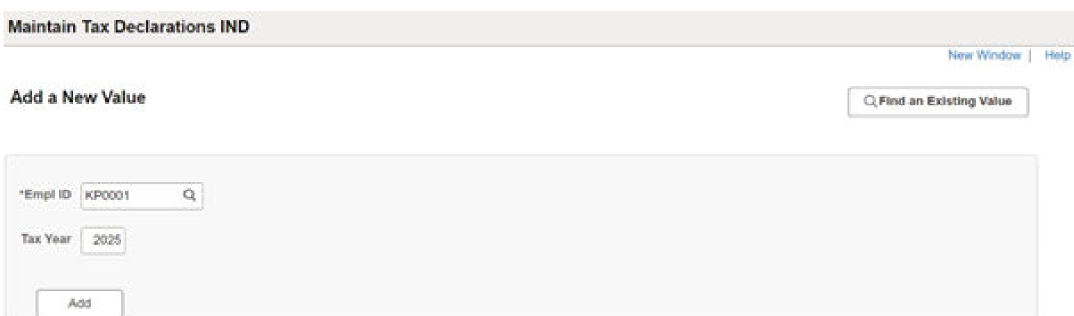
   

2. Select the required tax year from the Tax Year field.

> **Note**
>
> A Financial Year (F.Y) refers to the period during which income is generated, reported, and recorded. The Assessment Year (A.Y) is the subsequent year in which the reported earnings are evaluated by the relevant authorities. Thus, the relationship can be expressed as F.Y +1 = A.Y. For instance, if the Financial Year is 2024-2025, the corresponding Assessment Year would be 2025-2026.ssment of the earnings declared by the Authorities are done. Effectively, F.Y +1 = A.Y. For example: If F.Y is 2024- 2025, then assessment year is 2025-26.
>
> In the specified tax year, it is necessary to designate the beginning of the assessment year as your tax year. Consequently, for any income you intend to calculate from April 2024 to March 2025 (FY 2024-25), you should select 2025 as the tax year. Similarly, for incomes pertaining to FY 2025-26, the tax year would be 2026, and this pattern continues accordingly.
>
> With the Introduction of Income Tax Rules 2026 > The Term 'Assessment Year' and 'Previous Year' has been replaced with "Tax Year". The tax year will be the same year in which income is earned, reported, and assessed. This alignment is expected to make tax filing simpler and easier to understand, especially for individual taxpayers. Relevance changes have been effected in the Application. Note that PeopleSoft has always been using the term "Tax Year". Though the Income Tax department does not enforce using specific term > The Term tax Year is introduced to bring higher clarity.

If no tax year values are available, click the Add button to enter the new tax year value.

Maintain Tax Declaration IND page



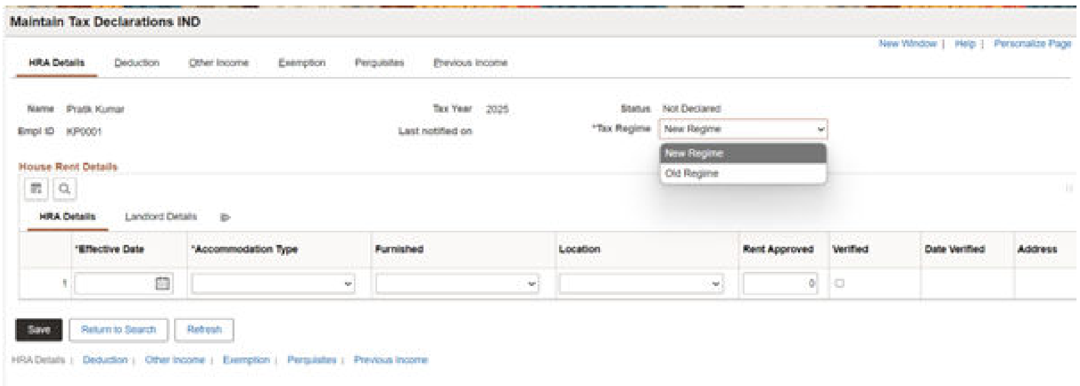
Mapping the correct tax year is important for calculations specifically after the new regime and old regime tax calculations have differential tax treatments.

3. Select the required tax regime.

   Selecting the appropriate tax regime is crucial following the implementation of Section 115BAC. The chosen regime will influence tax calculations significantly. Various elements such as exemptions, standard deductions, Chapter VIA deductions, and rebates are treated differently depending on the selected regime.

> **Note**
>
> The default regime is new regime as per notifications by the CBDT effective FY 2023-24. However, if the employee chooses the old regime, it needs to be updated by the payroll administrator.

Maintain Tax Declaration IND page



Following the Budget announcement in 2023, effective from the 2023-24 fiscal year, Peoplesoft has implemented necessary modifications through Elements, including Formulas, Brackets, and Variables, to identify the applicable tax regime. Relevant search keys have been incorporated to facilitate this identification. For instance, the TDS VR TAX REGIME variable has been established to ascertain the tax regime, which is determined solely from the information on the tax declaration maintenance page for the respective year. Consequently, the interplay between the tax year and the tax regime ensures accurate tax calculations.

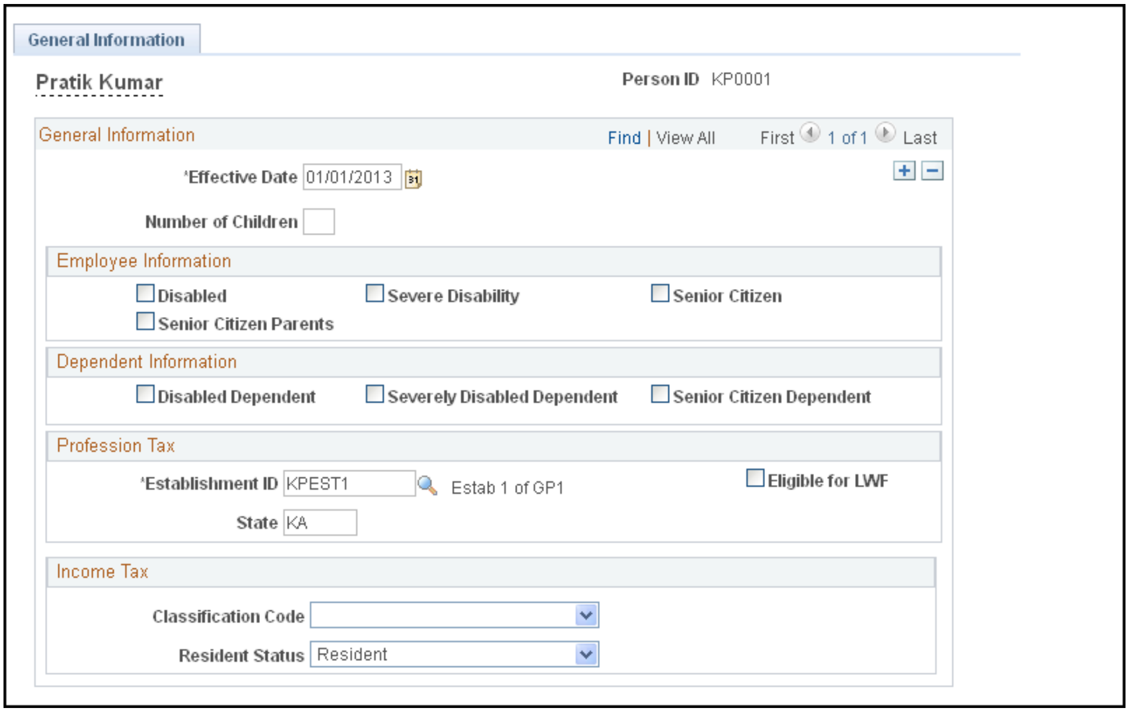
General Information Page

Use the General Information page (GPIN_TDS_GEN) to enter the declaration of the payee's general tax information.

Navigation:

Global Payroll & Absence Mgmt, and then **Payee Data**, and then **Taxes**, and then **Specify Tax Details**, and then **General Information**

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



Field or Control	Description
Number of Children	Enter the number of children for the payee. Child Education Allowance and Child Hostel Allowance have undergone significant changes under the Income Tax Rules 2026. Therefore, it is important to accurately specify the number of children on the “Specify Tax Declaration” page, as this directly impacts the calculation of the eligible exemption.

Employee Information

Field or Control	Description
Disabled	Select if the payee is disabled. In some states (for example, Lakshadweep and Madhya Pradesh), profession tax exemption applies to payees who are disabled. To apply an exemption to the profession tax calculation, select this check box. The Generation Control Formula (GC FM) looks for employees with disabilities and calculates exemption if the particular state has the rule of exemption.
Severe Disability	Select if the payee has a severe disability. In some states, profession tax exemption applies to payees who are severely disabled. To apply an exemption to the profession tax calculation, select this check box. The GC FM looks for employees with severe disabilities and calculates exemption if the particular state has the rule of exemption.

Field or Control	Description
Senior Citizen	Select if the payee is a senior citizen. In some states, profession tax exemption applies to payees who are senior citizens. To apply an exemption to the profession tax calculation, select this check box. The GC FM looks for senior citizen employees and calculates exemption if the particular state has the rule of exemption.
Senior Citizen Parents	Select if the payee's parents are senior citizens.

Dependent Information

Field or Control	Description
Disabled Dependent	Select if the payee has a disabled dependent.
Severely Disabled Dependent	Select if the payee has a severely disabled dependent.
Senior Citizen Dependent	Select if the payee has a dependent that is also a senior citizen.

Profession Tax

Field or Control	Description
Establishment ID	Select the establishment ID that is related to the profession tax for the payee.
Eligible for LWF(eligible for Labour Welfare Fund)	Select to indicate that the payee is eligible for LWF deductions. This deduction can occur monthly, semiannually or annually depending on policies of each individual state. The deduction amount also varies from one state to another.
State	Enter the abbreviation of the state in which the payee resides.

Income Tax

Field or Control	Description
Classification Code	Select the proper classification code for the payee.
Resident Status	Select Non-Resident or Resident.

> **Note**
>
> Professional Tax (PT) is a tax on employment, which is paid to state governments based on the employee's region, their income slab, and other criteria. The employee's disability and senior citizen status provides certain exemptions to the employee from PT. To calculate the exemptions correctly, the system looks at the check boxes on the Tax Detail pages. Additionally, the system uses the Generation Control Formula (GC FM) to retrieve these statuses and pass the information or values to the PT Exemption formula.

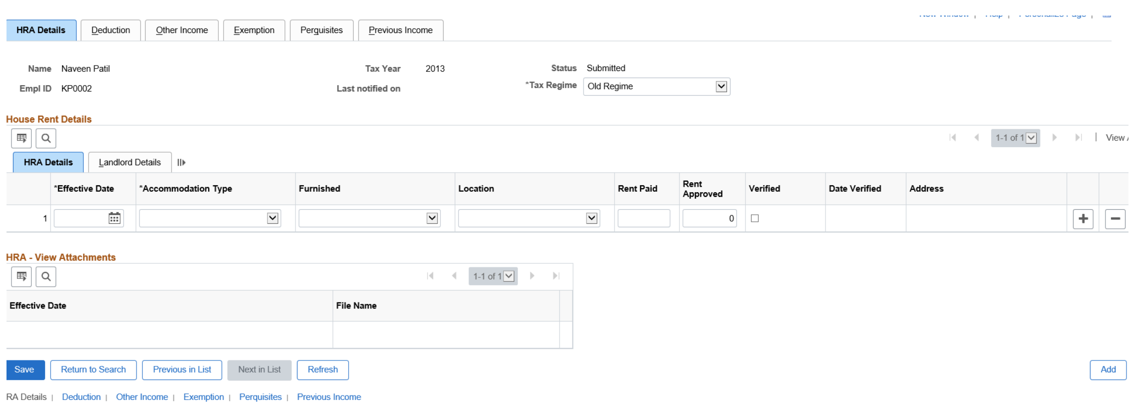
HRA Details Page

Use the HRA Details page (GPIN_TDS_HRA) to enter the declaration of the payee's house rent allowance information.

Navigation:

Global Payroll & Absence Mgmt, and then **Payee Data**, and then **Taxes**, and then **Maintain Tax Declarations IND**, and then **HRA Details**

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



The HRA (House Rent Allowance) calculation accommodates the monthly HRA exemption.

Field or Control	Description
Tax Regime	Tax regime associated with earnings/ deductions. Payroll Administrator can reset or change the Tax Regime once the payee has submitted through Self Service “Tax Savings Declaration IND” page. **Note:** Payroll Administrator can reset or change the tax regime only when the Status is “Submitted”. If no tax declaration is submitted by the user, the TDS amount is calculated as zero. In this scenario, Administrator should provide the required value for tax regime through support element overrides TAX VR TAX REGIME at payee level.
Accommodation Type	Select what type of accommodation the employee currently uses: House Rent, Company Lease, or None. Select None if the payee is not eligible for HRA/CLA or if the payee resides in his own house. **Note:** The drop-down list values displayed for Accommodation Type are not based on the selected Tax Regime.
Furnished	Select the company lease accommodation type: Furnished, Un-Furnished, or Not Applicable. This is used for calculation of perquisites. This column is to be updated only if the Accommodation type is Company Lease. The type decides the extent of taxation of perquisite.
Location	Select the applicable location category for income tax purposes. This value is used by the system to determine applicable tax exemption limits. Valid values are: • Metropolitan: Select if the employee resides in one of the following cities: Ahmedabad, Bangalore, Calcutta, Chennai, Delhi, Hyderabad, Mumbai, Pune. • Nometropolitan: Select if the employee resides in any city other than the listed metropolitan cities. Employees are responsible for selecting the appropriate value in the Location field on the Maintain Tax Declaration page as Metro or Non-Metro, based on their place of residence. The system automatically calculates tax exemptions based on the selected location category and applicable rules. Payroll Administrators are responsible for educating employees on the correct selection and its impact on tax calculations.
Rent Approved	Enter the amount of rent that is paid by the employee using the code INR.
Verified	Select if the approved rent has been verified.

Field or Control	Description
Date Verified	Displays the date the rent was verified.

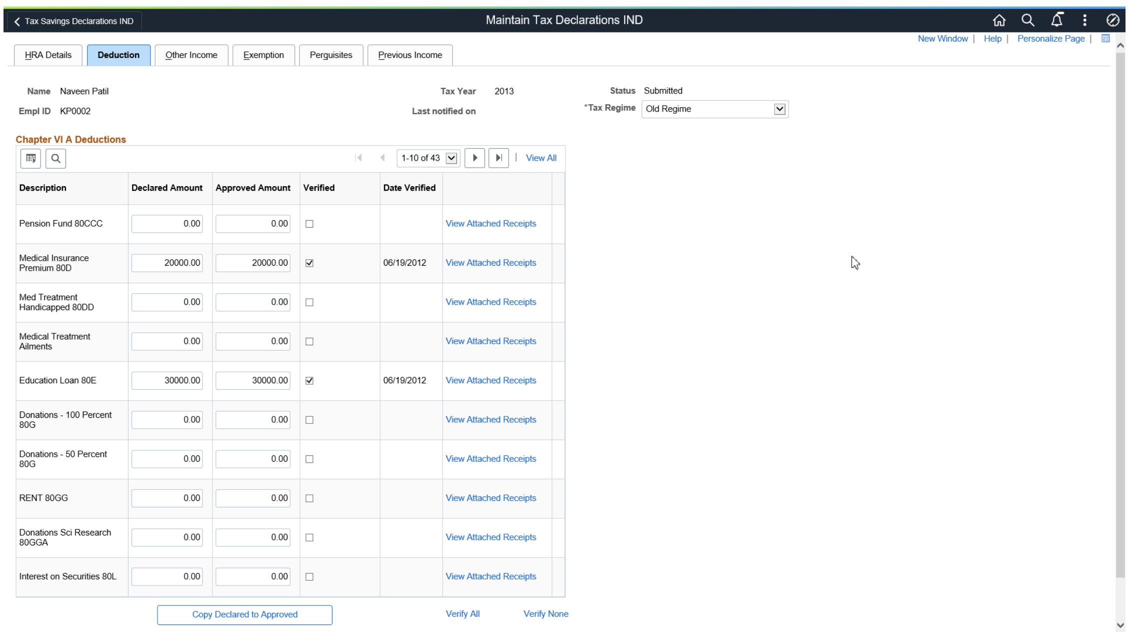
Deduction Page

Use the Deduction page (GPIN_TDS_DEDN) to enter the payee's deductions under chapter VI A.

Navigation:

Global Payroll & Absence Mgmt, and then **Payee Data**, and then **Taxes**, and then **Maintain Tax Declarations IND**, and then **Deduction**

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



Field or Control	Description
Description	Displays the type of deduction.
Declared Amount	Enter the amount declared by the payee for the deduction type.
Approved Amount	Enter the amount that the payee can claim for the deduction from their gross total income. The payroll administrator enters the approved amount once the declared investment passes the verification process.
Verified	If the declared investment has completed the verification process, the payroll administrator selects this check box and the approved value is considered the final declaration for income tax computation.

Field or Control	Description
Date Verified	Displays the date the amount was verified.
Copy Declared to Approved	After completing the verification process, a payroll administrator can click this button to copy all the declared investments to the approved column all at once instead of entering data manually.
Verify All	Click to verify all amounts. The system selects the Verified check box for all fields that have entries in the Declared Amount fields.
Verify None	Click to remove all the check marks in the Verified fields.

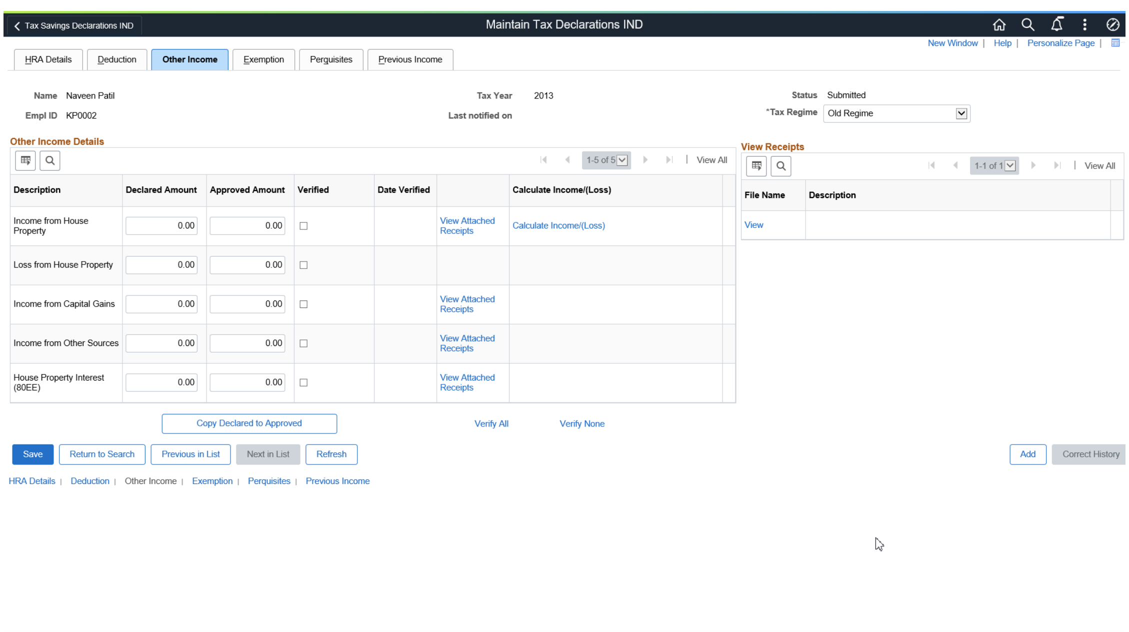
Other Income Page

Use the Other Income page (GPIN_TDS_OTH) to enter the payee's other source of income.

Navigation:

Global Payroll & Absence Mgmt, and then **Payee Data**, and then **Taxes**, and then **Maintain Tax Declarations IND**, and then **Other Income**

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



> **Note**
>
> Significant legislative modifications have been included in this section. For further details, please consult the UPD supplementary document. For example, starting in April 2023, employees opting for the New Regime will not be able to claim losses from self-occupied house properties. Consequently, the corresponding fields have been disabled to prevent any confusion for the employee (user). The application manages the calculation rules accordingly.

> **Note**
>
> See field descriptions in the previous section: Entering Deduction Information.

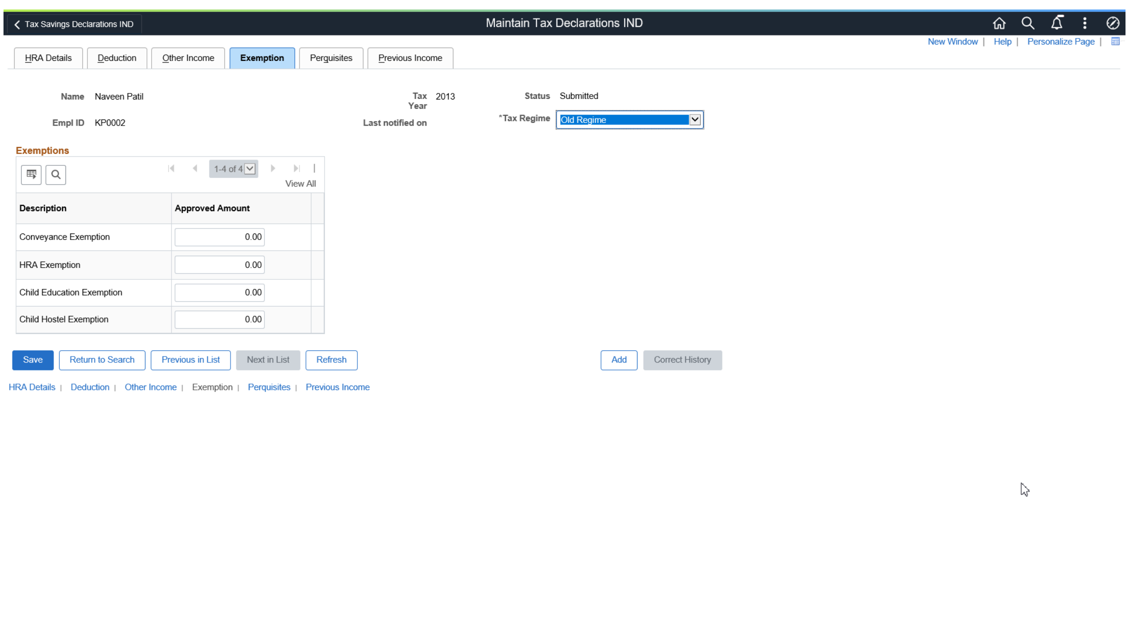
Exemption Page

Use the Exemption page (GPIN_TDS_EXEM) to enter the payee's tax exemption information.

Navigation:

Global Payroll & Absence Mgmt, and then **Payee Data**, and then **Taxes**, and then **Maintain Tax Declarations IND**, and then **Exemption**

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



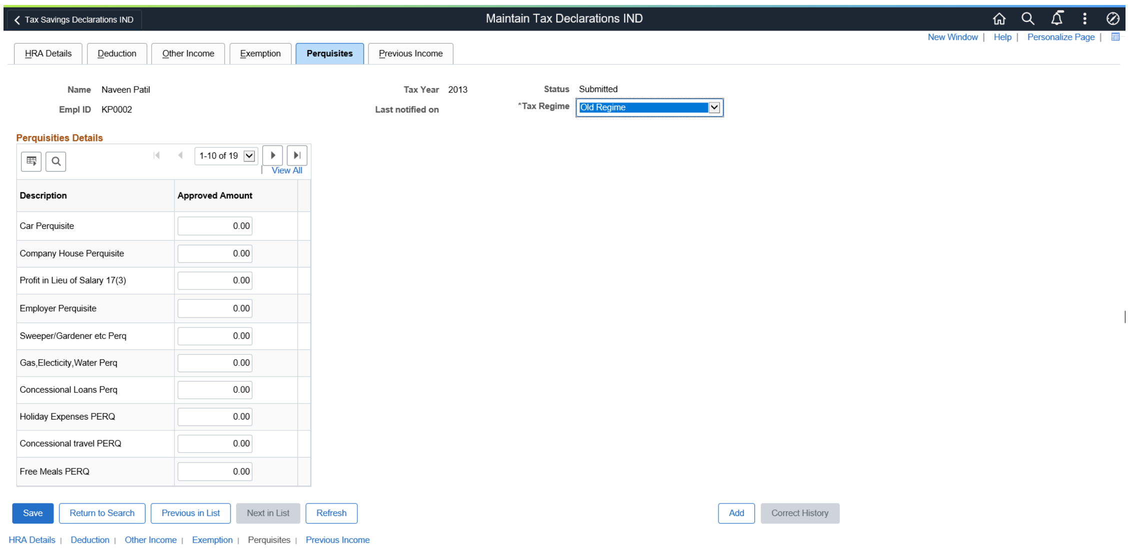
This page is accessible to the Payroll Administrator only. It may be noted that the Payroll Administrator has the rights to override the values given by the employee or calculated by the system. PA is expected to exercise due diligence before making changes to a system calculated value or employee declared value.

> **Note**
>
> See field descriptions in the Entering Deduction Information section.

Entering Perquisites Information

Access the Perquisites page (Global Payroll & Absence Mgmt, Payee Data, Taxes, Maintain Tax Declarations IND, Perquisites).

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



> **Note**
>
> See field descriptions in the Entering Deduction Information section.

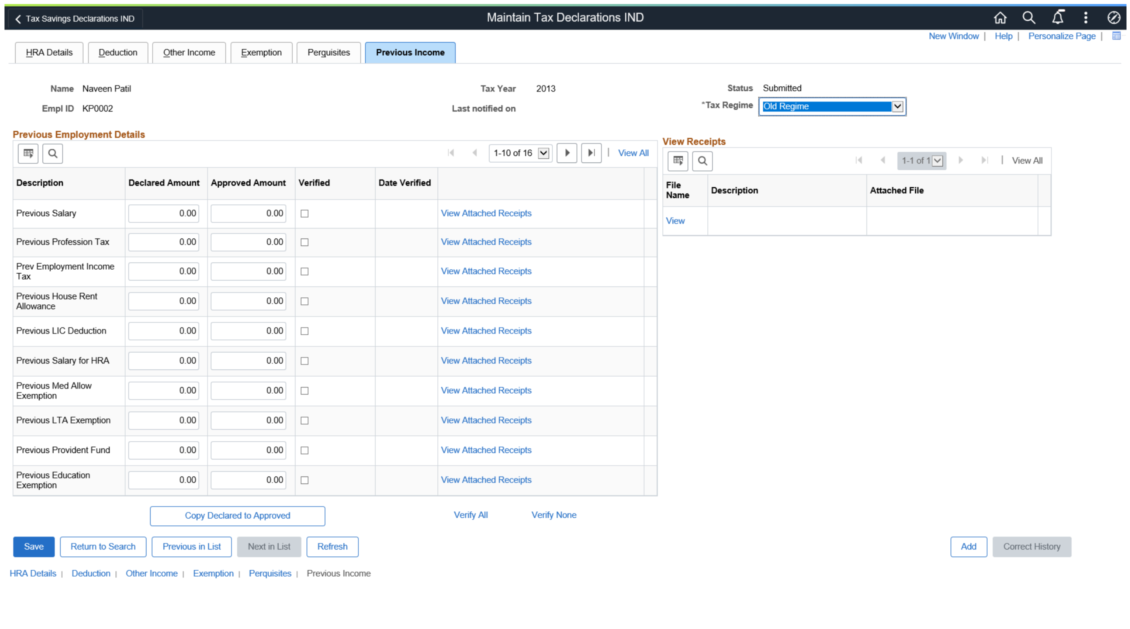
Previous Income Page

Use the Previous Income page (GPIN_TDS_PREV) to enter the payee's previous employment income information.

Navigation:

Global Payroll & Absence Mgmt, and then **Payee Data**, and then **Taxes**, and then **Maintain Tax Declarations IND**, and then **Previous Income**

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



> **Note**
>
> See field descriptions in the Entering Deduction Information section.

Enabling Self Service Functionality for Tax Declarations

Global Payroll for India calculates taxes for employees based on the applicable tax rules. As stated in the Indian Income Tax Act, employees are expected to declare their investments, which allows employers to accurately calculate taxes.

This section provides an overview on self service setup and maintenance for tax deductions.

Pages Used to Enable Self Service Functionality for Tax Declarations

Page Name	Definition Name	Usage
Administering SSD Periods Page	GPIN_SSTD_ADMIN	Enable self service functionality for declaring tax saving investments.
Tax Savings Declarations Page	GPIN_SS_TD_SEC	Enter or verify an employee’s investment declarations, which allows employers to accurately calculate taxes.
#unique_153	INDGPIN_SS_DTCV	Migrate data from the older data structure to the newer data structure in the middle or the start of the financial year.
12BAA Declarations IND Page	GPIN_SS_TD_12BAA	

Understanding Self Service Setup and Maintenance for Tax Deductions

You have the option to use self service functionality or continue to use the existing Maintain Tax Declaration (MTD) functionality. If you decide to use self service functionality, the Payroll Administrator must use the Administer SSD Periods page to define the Self Service Tax Savings Declarations template.

Payroll administrators can use self service for the pay entity as a whole or for specified pay groups or payees.

The system enables payroll administrators to notify employees when the open period starts during which employees are allowed to declare tax saving investments through the Self Service Tax Declarations page and when the system is closed to new entries (freeze date).

The system then posts the selected tax declarations. Declared investments pass through the defined validation and verification process. The declarations are then considered for income tax computation during the respective pay period.

The payroll administrator then:

- Runs the pay process.
- Reviews pay results.
- Generates payslips and Income Tax Computation Statements (ITCS).

Employees access the self service page to verify their payslips and ITCS to ensure that their declarations and tax calculations were processed correctly. Depending on your internal policies, if the payroll administrator or employee finds discrepancies in the declarations that were processed, the data is corrected and processed accordingly in the same pay period or in a succeeding pay period.

In addition, employees have to provide a self-attested declaration to assure that the proofs and information submitted are true and fair. To facilitate this we have provided an option in the self-service page to generate a report called Tax Saving Investment Declaration Form. The report is generated using Oracle's XML Publisher.

Administering SSD Periods Page

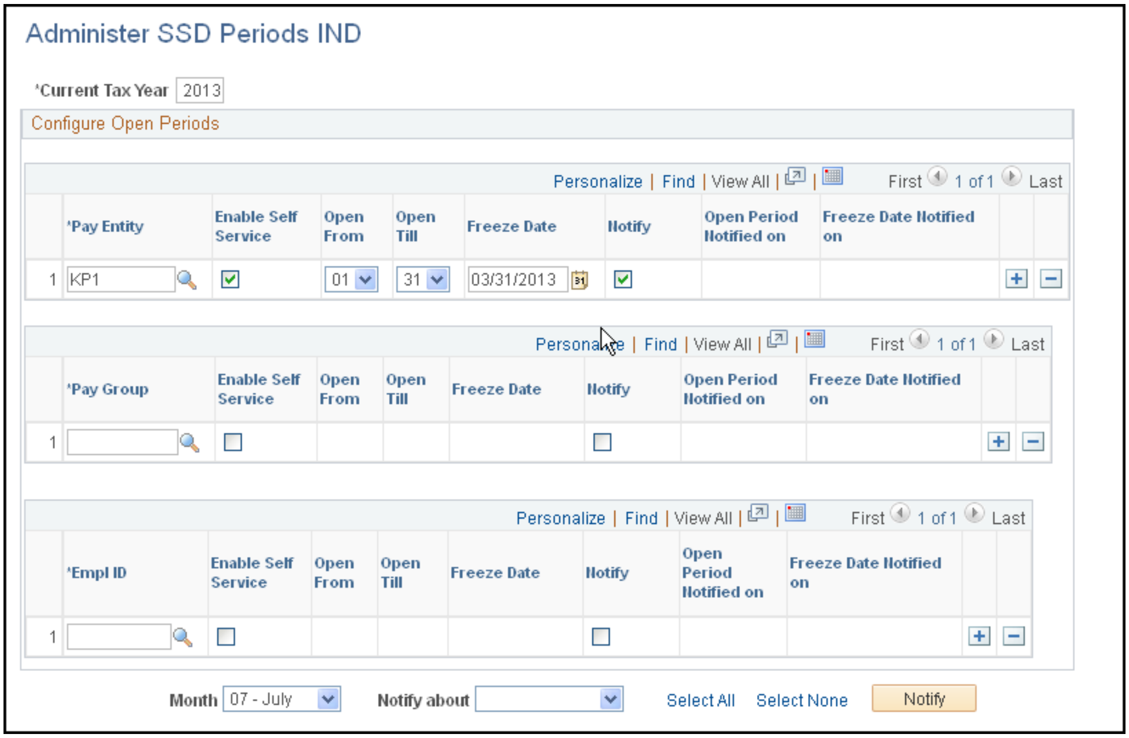
Use the Administer SSD Periods page (GPIN_SSTD_ADMIN) to enable self service functionality for declaring tax saving investments.

Employee has the option to declare TDS and TCS details deducted and collected from sources other than Salary to his/her Employer resulting in possible adjustment of TDS from Salary. For details on declaring TDS and TCS details, see 12BAA Declarations IND Page.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Taxes**, and then **Administer SSD Periods IND**

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



Field or Control	Description
Current Tax Year	Enter the current tax year for which you want to enable self service tax declarations.
Pay Entity	Select the pay entity for which you want to enable self service tax declarations.
Enable Self Service	Select this check box for the pay entity, pay group, and employees for whom you want to enable self service tax declarations functionality.
Open From and **Open Till**	Enter the first and last day of the month from which you want to enable self service tax declarations functionality for the pay entity, pay group, or employees. **Note:** To span the open period across two consecutive months, enter a higher number in the **Open From** field. For example, if you want the open period to start on October 25th and end on November 5th, enter October in the**Month** field, 25 in the**Open From** field and 5 in the**Open Till** field.
Freeze Date	Enter the final date that you will allow employees to enter self service tax declaration information through self-service. The freeze date is the year end cut off date in which employees can edit information. After this date, access is ceased and employees will have read-only access to the self service Tax Savings Declarations page.

Field or Control	Description
Notify	Select this check box if you want to notify by email the payees associated with pay entity, pay group, or employee ID regarding the open period or freeze date.
Open Period Notified on	This field displays the date on which the pay entity, pay group, or employee was notified about the open period.
Freeze Date Notified on	This field displays the date on which the pay entity, pay group, or employee was notified about the freeze date.
Pay Group	Select the pay group for which you want to enable self service tax declarations.
Empl ID (employee ID)	Select the employee ID for which you want to enable self service tax declarations.
Month	Select the month for which you want to enable self service functionality.
Notify about	Select either *Freeze Date* or *Open Period.*

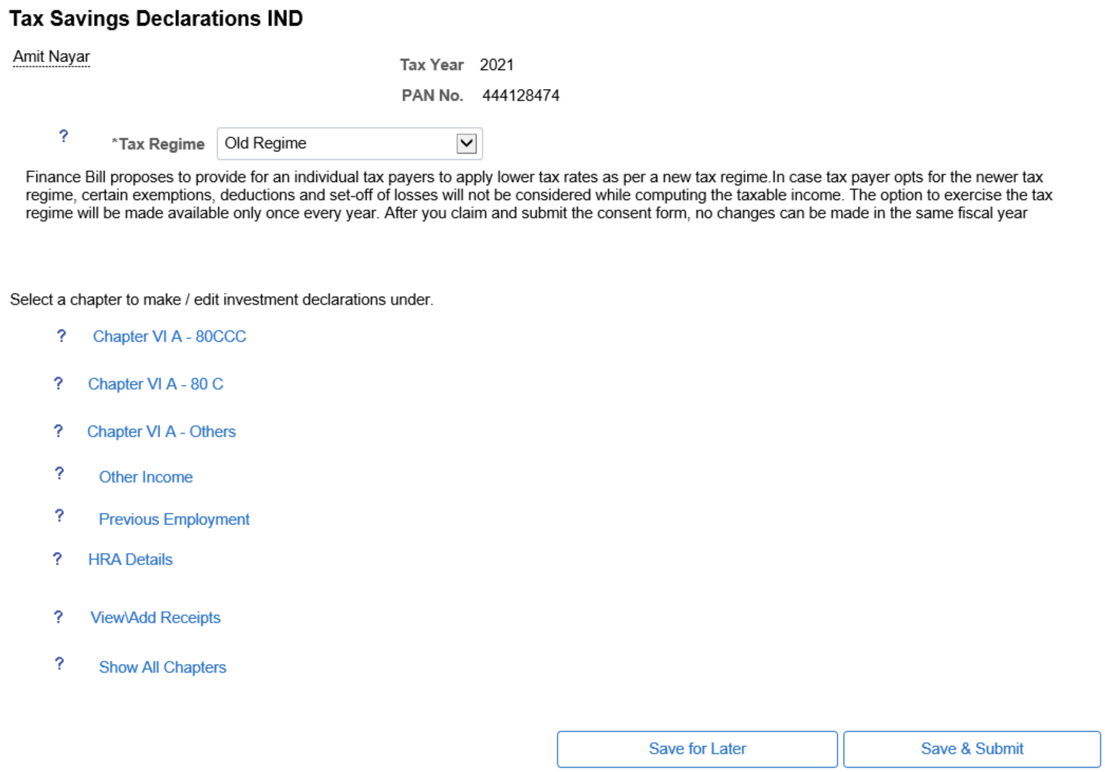
Tax Savings Declarations Page

Use the Tax Savings Declarations IND page(GPIN_SS_TD_SEC) to enter or verify an employee's investment declarations, which allows employers to accurately calculate taxes.

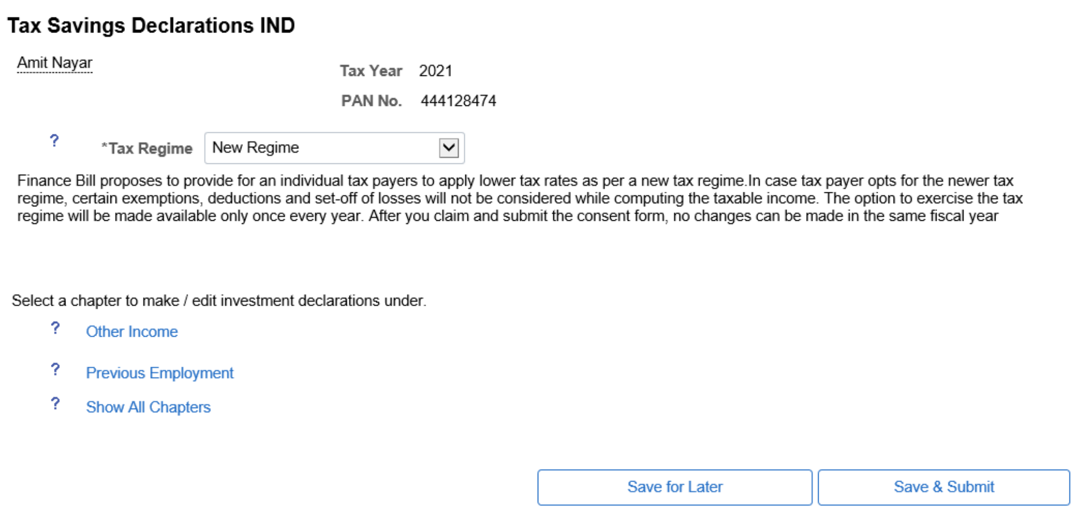
Navigation:

Self Service, and then **Payroll and Compensation**, and then **Tax Savings Declarations IND**, and then **Tax Savings Declarations IND**

This example illustrates the fields and controls on the Tax Savings Declarations IND page for Old Regime. You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Tax Savings Declarations IND page for New Regime. You can find definitions for the fields and controls later on this page.



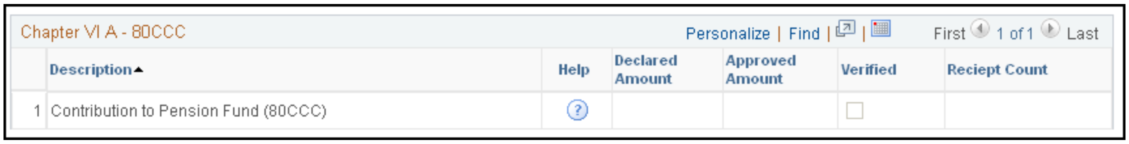
When an employee accesses the Tax Savings Declarations IND page, all the above topics are in collapse mode. Click the topic heading to display the group box associated with the heading or click Show All topics.

Field or Control	Description
Tax Regime	Select the required tax regime, based on which tax will be calculated. The investment declarations under each chapter is displayed based on the selected tax regime. The list of investment declarations displayed for new and old tax regimes are illustrated in the above figures. **Note:** To enable the respective earnings and deductions for the Tax Regime, administrator needs to make the necessary setup, if it needs to be available through Self Service.
Save for Later	Click this button to save the information that you enter on this page. This option enables an employee to save data on the page at any given time during the open period and to edit saved data for completion at a later date. Data saved on the page is not considered for income tax computation unless the employee submits the same information during the respective pay period.
Save & Submit	Click this button to post declaring tax saving investment data and other required information. The employee has to submit Tax Saving Investment Declaration form for income tax computation. Once an employee submits the information, they will not have write access to modify the data submitted unless it is enabled by the payroll administrator. After the freeze date, employees will not have write access to modify data. The data submitted is considered final for the tax year. Taxes are computed accordingly.
Generate Report	Once the declaration is submitted by the employee, the system enables a button at the bottom of the page to generate the Tax Saving Investment Declaration form. Clicking the button generates the Tax Saving Investment Declaration form, and opens it in a new page or tab. The report is generated using Oracle's XML Publisher. If a declaration is not yet approved then only declared amounts are shown, approved amounts are left blank in the output. In addition, employees have to give a self-attested declaration to indemnify the true and fair view of the proofs and information submitted. To facilitate this we have provided an option in the self-service page to generate a report named Tax Saving Investment Declaration Form. The report is generated using Oracle's XML Publisher.

Chapter VI A - 80CCC

Click the Chapter VI A - 80CCC topic heading to display the following group box:

This example illustrates the fields and controls on the Chapter VI A – 80CCC group box. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Help	Click to display text which provides an awareness or educates an employee about the tax saving investments, eligibility criteria, and minimum and maximum amounts for deductions that are available for income tax provisions.
Saved Amount	This is an editable field where an employee declares the amount of their investment.
Approved Amount	This is an amount which an employee can claim as a deduction from his or her gross total income. This is a non-editable field and data comes from the Maintain Declaration page post payroll administrator's verification process.
Verified	Using the in Maintain Tax Declaration pages, a payroll administrator declares the approved amount as verified. If the declared investment has completed the verification process, then this check box will have a tick and be considered as the final declaration for income tax computation.
Upload	Click this link to upload scanned copies of investments receipts. This functionality: • Mitigates the time consuming process when a payroll administrator has to wait until the employee receives hard copy of bills and receipts. • Makes the verification process faster and simpler. However, the employer has to comply with the regulation for collecting and preserving the documents pertaining to the investments declared by the employees. **Note:** Only JPG and PDF files are supported.

Chapter VI A - 80C

Click the Chapter VI A - 80C topic heading to display the following group box:

This example illustrates the fields and controls on the Chapter VI A - 80C group box. You can find definitions for the fields and controls later on this page.

Chapter VI A - 80 C   Personalize | Find | First 1-16 of 16 Last

	Description	Help	Declared Amount	Approved Amount	Verified	Reciept Count
1	Life Insurance Premium 20% Policy (Jeevan Anand, ETC)	?			☐	
2	Public Provident Fund (PPF)	?			☐	
3	Notified Post Office Savings Scheme	?			☐	
4	National Savings Certificate (NSC)	?			☐	
5	National Savings Scheme, 1992 (NSS)	?			☐	
6	Interest Accrued on National Savings Certificate (NSC)	?			☐	
7	Housing Loan - Repayment of Principal Amount, Registration Fees, Stamp Duty	?			☐	
8	Mutual Funds / Equity Linked Savings Scheme (ELSS)	?			☐	
9	NHB Deposit Scheme	?			☐	
10	Infrastructure Bonds	?			☐	
11	Unit Linked Insurance Plan	?			☐	
12	Education - Tuition Fee	?			☐	
13	Fixed Deposit Scheme (Block Period of 5 Yrs)	?			☐	
14	Senior Citizen Savings scheme	?			☐	
15	Life Insurance Sum Assured 10% Policy	?			☐	

Note

See the field descriptions in previous section.

Chapter VI A - Others

Click the Chapter VI A - Others topic heading to display the following group box:

This example illustrates the fields and controls on the Chapter VI A - Others group box. You can find definitions for the fields and controls later on this page.

Chapter VI A - Others   Personalize | Find | First 1-10 of 10 Last

	Description	Help	Declared Amount	Approved Amount	Verified	Reciept Count
1	Medical Insurance Premium (U/s 80D)	?			☐	
2	Medical Treatment for Handicapped (U/s 80DD)	?			☐	
3	Medical Treatment for Certain Diseases(U/s 80DDB)	?			☐	
4	Interest on Education Loan (U/s 80E)	?			☐	
5	Deduction in respect of rent paid U/s 80GG (original Rent Receipt)	?			☐	
6	Permanent Physical Disability (U/s 80U)	?			☐	
7	Medical Insurance Parents 80D	?			☐	
8	Medical Preventive Health Checkup (U/s 80D)	?			☐	
9	Deduction for Interest Income (U/s 80TTA)	?			☐	
10	Equity Savings Scheme (80CCG)	?			☐	

> **Note**
>
> See the field descriptions in the Chapter VI A - 80CCC section.

Other Income

Click the Other Income topic heading to display the following group box:

This example illustrates the fields and controls on the Other Income group box. You can find definitions for the fields and controls later on this page.

Other Income — Personalize | Find | First 1-4 of 4 Last

	Description	Help	Saved Amount	Declared Amount	Approved Amount	Verified	Reciept Count
1	Income from House Property	?				☐	
2	Loss from House Property	?				☐	
3	Income from Capital Gains	?				☐	
4	Income from Other Sources	?				☐	

See the field descriptions in the Chapter VI A - 80CCC section.

Previous Employment Income

Click the Previous employment topic heading to display the following group box:

This example illustrates the fields and controls on the Previous employment group box. You can find definitions for the fields and controls later on this page.

Previous employment — Personalize | Find | First 1-13 of 13 Last

	Description	Help	Declared Amount	Approved Amount	Verified	Reciept Count
1	Previous Salary	?			☐	
2	Previous Profession Tax	?			☐	
3	Previous TDS	?			☐	
4	Previous House Rent Allowance	?			☐	
5	Previous LIC Deduction	?			☐	
6	Previous Salary for HRA	?			☐	
7	Previous Med Allow Exemption	?			☐	
8	Previous LTA Exemption	?			☐	
9	Previous Provident Fund	?			☐	
10	Previous Education Exemption	?			☐	
11	Previous HRA Exemption	?			☐	
12	Previous Conveyance Exemption	?			☐	
13	Previous Child Hostel Exempt	?			☐	

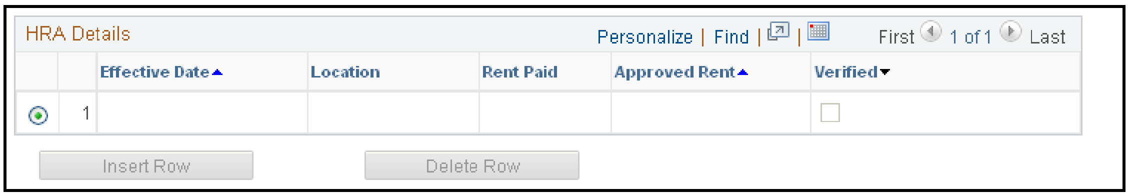
The Previous employment group box is displayed only when an employee is hired during the middle of the tax year, otherwise the group box will not be listed on the Tax Savings Declarations IND page.

> **Note**
>
> See the field descriptions in the Chapter VI A - 80CCC section.

HRA Details

Click the HRA Details topic heading to display the following group box:

This example illustrates the fields and controls on the HRA Details group box. You can find definitions for the fields and controls later on this page.

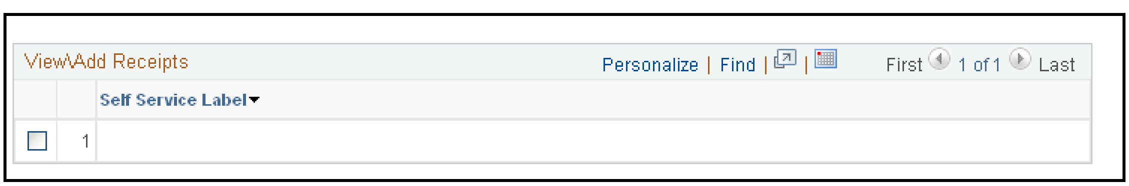


Field or Control	Description
Effective Date	The effective date on which employee started paying rent.
Location	The metro or non-metro place where the employee resides.
Approved Rent	The amount of rent that an employee can actually claim.
Verified	See the field descriptions in the Chapter VI A - 80CCC section for an explanation.
Insert Row and**Delete Row**	In cases where the employee has multiple rents to declare or changes in rent paid data, they can use these buttons to add or delete rows.
Rent Paid	Actual rent paid by the employee.

View/Add Receipts

Click the View/Add Receipts topic heading to display the following group box:

This example illustrates the fields and controls on the View/Add Receipts group box. You can find definitions for the fields and controls later on this page.



Employees have the option to upload the receipts against their declarations in the respective group boxes. In addition, this group box provides employees with the option to upload or delete the uploaded files at once, if employees chooses to do so.

There is a prompt button in the tab. Clicking the button accesses a page listing all the investment declaration items. The Add Attachment and Delete Attachment buttons enable employees to add or delete the uploaded receipts.

PeopleSoft HCM Related Links

Oracle Help Center

PeopleSoft Online Help Home

PeopleSoft Information Portal

My Oracle Support

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

Application Fundamentals: HCM Abbreviations

PeopleSoft Spotlight Series

12BAA Declarations IND Page

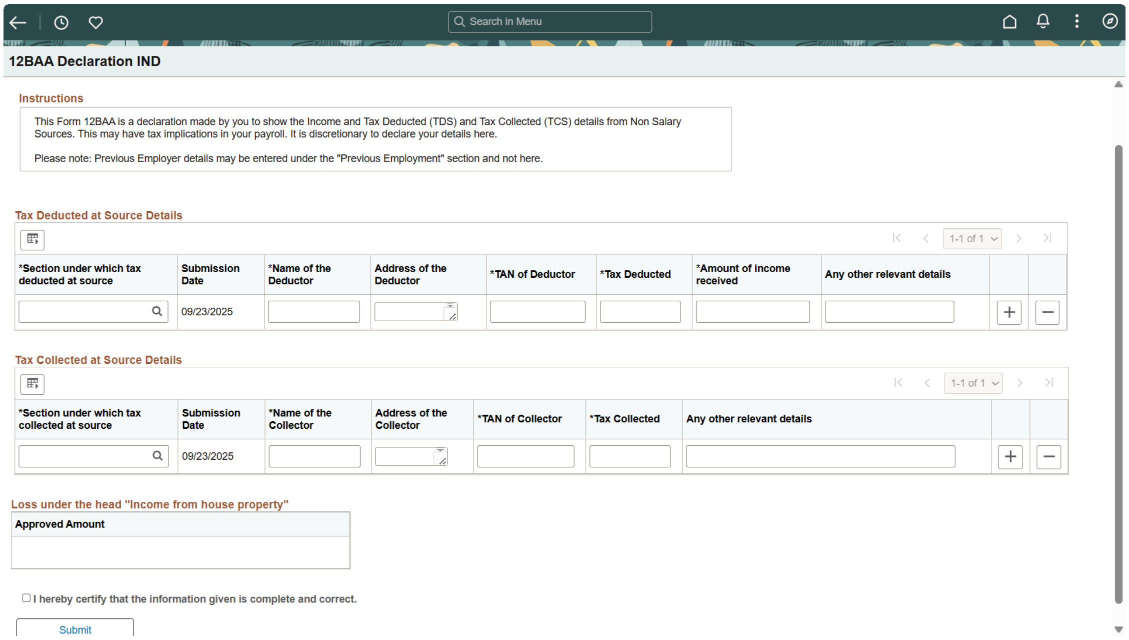
Use the 12BAA Declarations IND page (GPIN_SS_TD_12BAA) to declare your other sources of Incomes (other than Salary) along with the details of Tax Collected at Source (TCS) and Tax deducted at Source (TDS) from transactions during the financial year. The form requires verification and self-certification by the employee.

This declaration is made with an aim to consider and help calculate & arrive at the most optimal Tax calculations. This is expected to net off any excess deductions and adjust the taxes payable by the Employee during the Financial Year. The idea is to simplify the process at source from salary by the employer.

Navigation:

Self Service, and then **Payroll and Compensation**, and then **Tax Savings Declarations IND**, and then **12BAA Declarations IND**

This example illustrates the 12BAA Declarations IND page.



Tax Deducted at Source Details

You can provide information on tax deducted at source, such as the section under which tax was deducted, deductor details, and amounts.

Field or Control	Description
Section under which tax deducted at source	Select the required section under which TDS is done. Employers are allowed to add or delete sections in response to legislative changes. The procedures for updating are detailed in the section.
Submission Date	This Is defined to be System date. It is updated by the system.
Name of the Deductor	Enter the name of deductor.
Address of the Deductor	Enter the address of deductor.
TAN of Deductor	Enter the deductor TAN.
Tax Deducted	Enter the tax amount deducted at source.
Amount of Income Received	Enter the amount of income received.
Any other relevant details	Enter any additional remarks for the tax deducted at source.

Tax Collected at Source Details

Section under which tax collected at source, TAN of collector, Amount of tax collected and other relevant information.

Field or Control	Description
Section under which tax collected at source	Select the required section under which TDS is done. Employers are allowed to add or delete sections in response to legislative changes. PeopleSoft will not be keeping the sections list updated.The procedures for updating are detailed in the section.
Submission Date	This Is defined to be system date. It is updated by the system.
Name of the Collector	Enter the name of collector.
Address of the collector	Enter the address of collector.
TAN of collector	Enter the TAN of collector.
Tax Collected	Enter the tax amount collected at source.
Any other relevant details	Enter any additional remarks for the tax collected at source.

Loss under the head "Income from house property"

The amount calculated as 'Loss from House Property' by the Global payroll system (Self Service > Payroll & Compensation > Tax savings declarations IND > Other Income > Income from House Property) will be displayed here. The amount computed under this category will be shown in this section. No calculation logic is provided in this context. This will only be reflected here if there is a value present in LSE HSE PRP.

You can verify and self declare the 12BAA declaration.

Payroll and Tax Implications

Payroll Elements such as INC 12BAA, TDS 12BAA, TCS 12BAA has been created to cater to the Tax adjustments. These elements will sum up all the Incomes and deductions declared at various points of time by the employee and consider for Taxation. We are aware that Taxation is annualised and is self-adjusting. In cases where Net Tax Liability is lesser than the TDS deducted (tax Liability lower than tax deducted), The said deduction will go unadjusted and will reflect as a payroll element as TDS VR 12BAA Unused and TCS VR 12BAA Unused

> **Note**
>
> In case of any unadjusted taxes, the payroll administrator can opt to inform the employee of such unadjusted amounts so that the employee can claim a refund while filing his returns. Employers, in India are not authorised to refund taxes excess deducted either by himself or through 12BAA sources.

Related Topics

- PeopleSoft Global Payroll: Viewing Results by Calendar Group

Implementing Professional Tax Framework

Global Payroll for India PeopleSoft supports on implementing the Professional Tax framework by setting up the legislative deduction according to the State Government slabs, while processing payroll.

Pages Used to Implement Professional Tax Framework

Page Name	Definition Name	Usage
Brackets Pages	GP_BRACKET3	Define the brackets for professional tax calculations. The brackets are: • PT BR DD FREQUENCY • PT BR STATE RATES
Variables — Definition page	GP_VARIABLE	Helps to trigger the professional tax calculation using the new professional tax setup.
Professional Tax Details IND — Definition Page	GPIN_PT_SETUP	Define the key elements to calculate the professional tax for each state.
Translate Values Page	PSXLATMAINT	to maintain translate values.
Professional Tax Details IND — Slabs Page	GPIN_PT_SETP_SLABS	Define the salary range for calculating professional tax along with any other additional tax.
#unique_164	GPIN_TDS_GEN	Update the employee specific tax details. The PT VR ENABLE N PT variable is enabled to view the updated page.
Professional Tax Report IND Page	GPIN_PR_RC	To generate the professional tax report

Brackets Pages

Use Brackets Pages to define the brackets for professional tax calculations. There are two brackets:

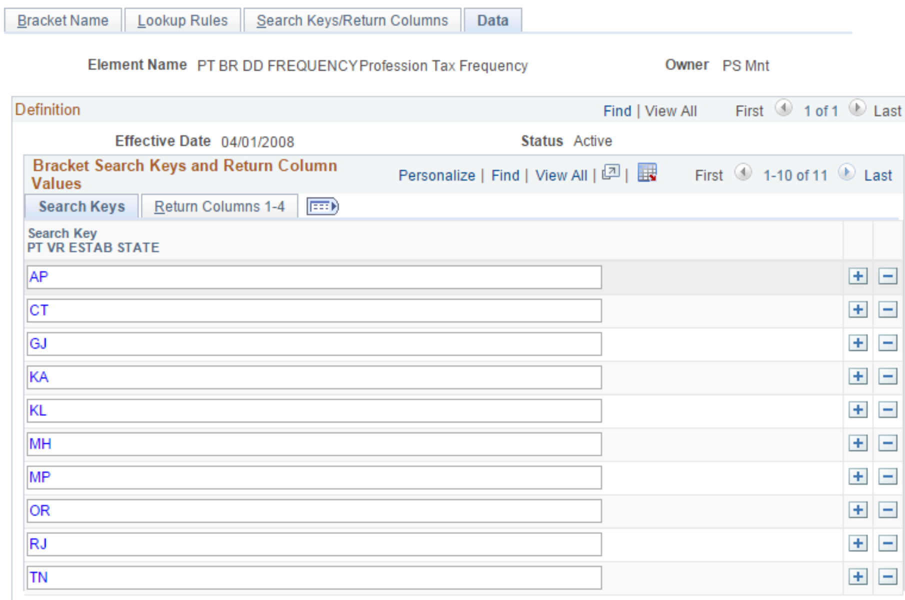
- **PT BR DD FREQUENCY**
- **PT BR STATE RATES**

The PT BR DD FREQUENCY bracket stores the deduction frequency data for each state codes.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Elements**, and then **Supporting Elements**, and then **Brackets**, and then **Data.**

This examples illustrate the fields and controls of the Search Keys tab in Brackets — Data page.



The fields represent the nine states which are supported by the system.

Field or Control	Description
AP	Andhra Pradesh
CT	Chandigarh
GJ	Gujarat
KA	Karnataka
KL	Kerala
MH	Maharashtra
MP	Madhya Pradesh
OR	Odisha
RJ	Rajasthan
TL	Tamil Nadu

The PT BR STATE RATES stores the professional tax rates against the income slab for each state.

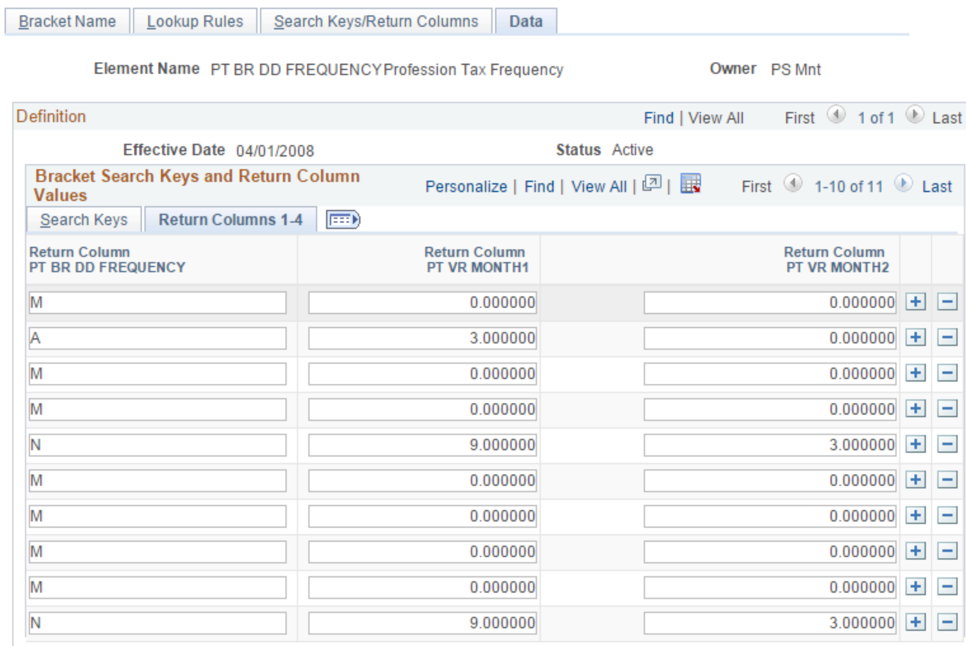
Note

The bracket PT BR DD Frequency supports Annual and Monthly PT (Professional Tax) deduction. For states Tamilnadu and Kerala, where the PT needs to deducted in semi annual basis, use separate formula PT FM SA D along with PT FM SA GC to calculate the month of PT deductions.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Elements**, and then **Supporting Elements**, and then **Brackets**, and then **Data.**

This example illustrates the fields and controls of the Return Columns tab in Brackets — Data page



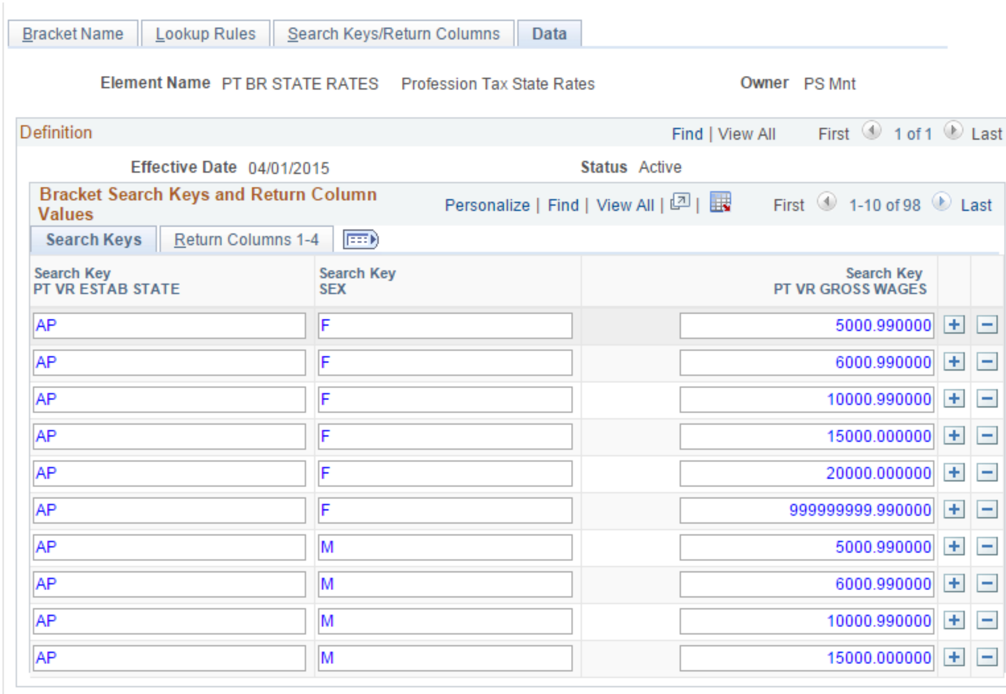
Field or Control	Description
Return ColumnPT BR DD FREQUENCY	Represents the first alphabet of the state codes.
Return ColumnPT BR MONTH1	Enter the variable that represents the first month in which the professional tax is getting deducted.
Return ColumnPT BR MONTH2	Enter the variable that represents the second month in which the professional tax is getting deducted. For example, if **PT BR MONTH1** is **9** and **PT BR MONTH2** is **3**, then the first tax deduction happens in the September and the second deduction happens in March.

The PT BR STATE RATES stores the professional tax rates against the income slab (lower limit and upper limit) for each state.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Elements**, and then **Supporting Elements**, and then **Brackets**, and then **Data.**

This example illustrates the fields and controls of the Return Columns tab in Bracket — Data (PT BR STATE RATES) page



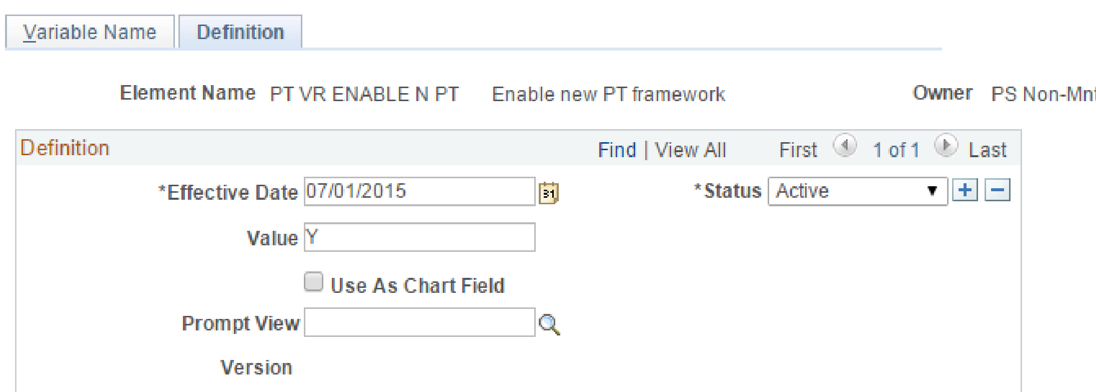
Variables — Definition page

Use Variables — Definition page (GP_VARIABLE) to trigger the professional tax calculation using the new professional tax setup.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Elements**, and then **Supporting Elements**, and then **Variables**, and then **Definition**.

This example illustrates the fields and controls of the Variables — Definition page.



Field or Control	Description
Effective Date	Enter the date from which the variable defined be effective.

> **Note**
>
> The professional tax calculations can be done even in the mid of the year. The switching will not be having any impact on the accumulators since the same accumulator is going to be maintained and the system will calculate the PT irrespective of the switch.

Professional Tax Details IND — Definition Page

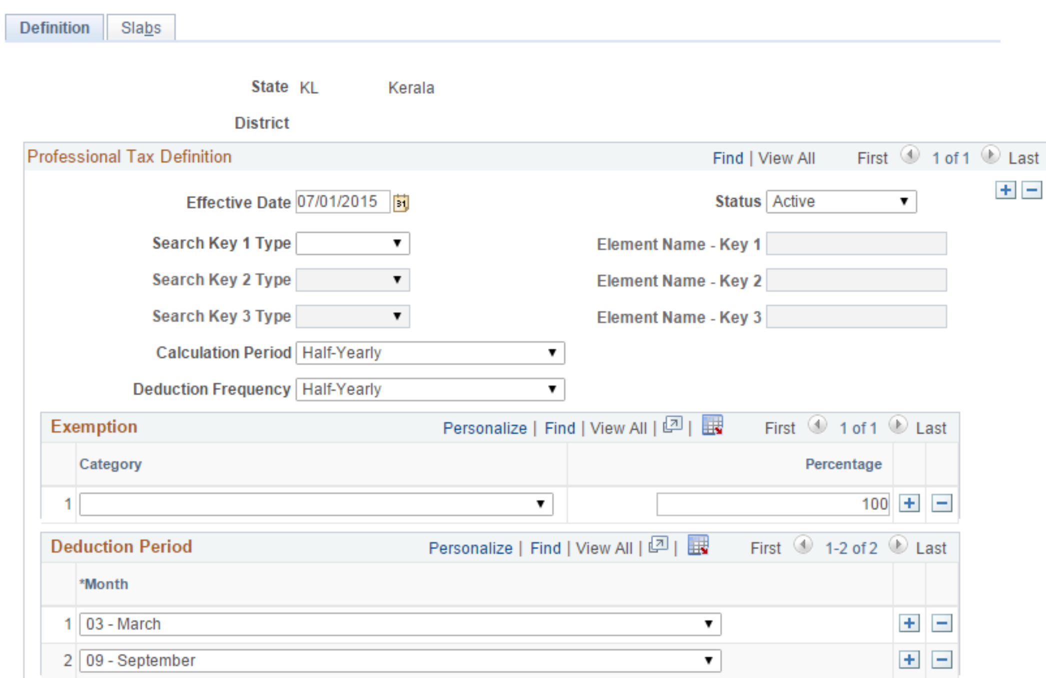
Use Professional Tax Details IND — Definition Page (GPIN_PT_SETUP) to create the key elements to calculate the professional tax .

The Global Payroll for India supports professional tax for nine states. There are certain details required to calculate professional tax such as deduction frequency, income range and exemption category for those nine states.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Taxes**, and then **Professional Tax Details IND**, and then **Definition**.

This example illustrates the fields and controls of the Professional Tax Details IND — Definition Page



Field or Control	Description
Effective Date	Specify date from which the tax details becomes effective. When there is a change in the tax slabs or any new exemption, add a new effective dated row.

Field or Control	Description
Search Key	Refers to different type of employees, classification within employee group which is in turn used in defining the professional tax slabs for each type of employees. For example, in Maharashtra professional tax rates for male and female employees are different. Use the search key to configure such classifications.
Element Name	Corresponds to the respective Search key defined. For each category (combination of **Search key** and **Element Name**), you can define different gross wages or tax rates as applicable.
Calculation Period	Define the frequency of employee's income based on which the professional tax is calculated. This varies between states and cane be Monthly, Quarterly, Half-yearly and Yearly
Deduction Frequency	Define the frequency with which the system deducts the professional tax from employee's salary. Varies between states and can be Monthly, Quarterly, Half-yearly and Yearly.
Category	Configure the exemption category and percentage of exemption in the new set-up page.

> **Note**
>
> Profession Tax rates/updates are not maintained by Peoplesoft. A red paper is made available for any changes that Profession Tax may need.

> **Note**
>
> **Deduction Period** is applicable when the deduction frequency is not **Monthly**. When the deduction frequency is half-yearly the deduction period grid enables to select the months in which the professional tax deduction has to be done from the employee. The number of rows in the grid must match with the deduction frequency selected except for monthly selection.

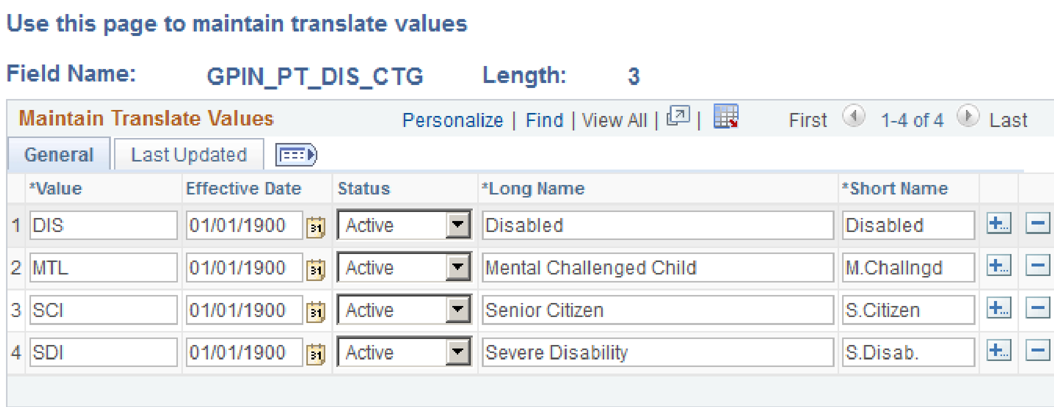
Translate Values Page

Navigation:

Use Translate Values Page (PSXLATMAINT) to add a new value under the exemption category and to maintain the translate values.

PeopleTools, and then **Utilities**, and then **Administration**, and then **Translate Values**.

This example illustrates the fields and controls of the Translate Values Page.



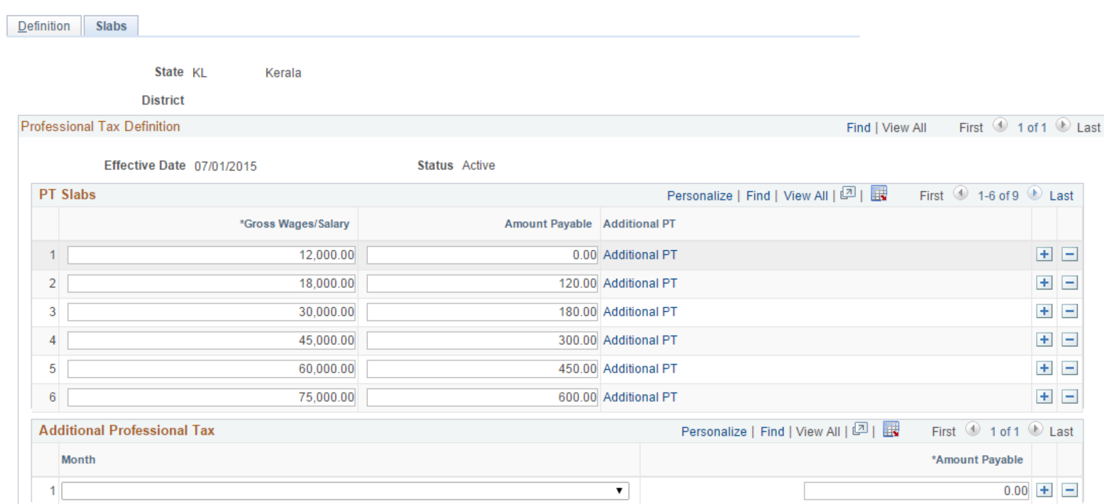
Professional Tax Details IND — Slabs Page

Navigation:

Use Professional Tax Details IND — Definition Page (GPIN_PT_SETP_SLABS) to define the salary range for calculating professional tax along with any other additional tax.

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Taxes**, and then **Professional Tax Details IND**, and then **Slabs**.

This example illustrates the fields and controls of the Professional Tax Details IND — Slabs Page.



PT Slabs defines the state specific professional tax.

Field or Control	Description
Gross wages/ Salary	Defines upper limit of Income slab for the respective search keys. The amount is in sync with the calculation period in definition tab. If Income frequency is yearly, gross salary must be an annual income.
Amount Payable	Amount of Professional tax to be deducted for the corresponding income range.
Additional PT	Corresponds to any additional professional tax to be deducted for the respective gross salary range.

Note

The **Additional Professional Tax** grid is different from the **Additional PT** link under **PT Slabs** grid. Some states have additional deduction of professional tax in any specific month, then you can select the month on which the **Additional PT** has to be deducted and the applicable amount. This deduction happens only for such category of employee in that specific month irrespective of income ranges.

ASSEDIC Rates FRA Page

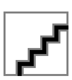
Use the ASSEDIC Rates FRA page (GPFR_ASS_RATES) to set up rates for ASSEDIC contributions.

PeopleSoft delivers these rates, but you can maintain them when the government issues updates.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Addl Rates**, and then **Ceilings**, and then **Values**, and then **ASSEDIC Rates FRA**, and then **ASSEDIC Rates FRA**

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



Unemployment Insurance Contrib (unemployment insurance contributions)

The fields in this region display the **Payee** and **Employer** contribution percentages for the portion of gross salary below the A ceiling and **Payee** and **Employer** contribution percentages for the portion of gross salary below the B ceiling but above the A ceiling.

> **Note**
>
> The field names in this region are dynamically displayed based on the values entered on the Ceilings page. These values change each year

Salary Guarantee Association

The field in this region displays the **Employer** contribution percentage for FNGS.

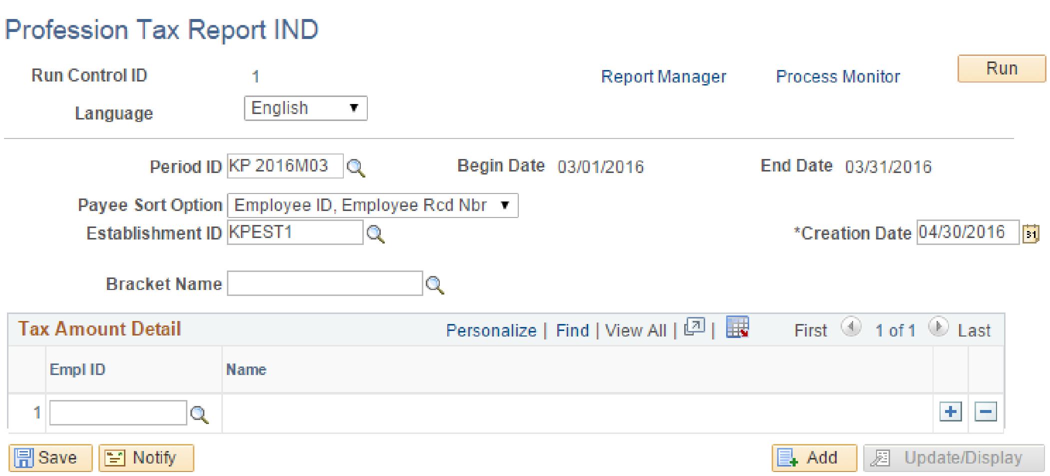
> **Note**
>
> There is only an employer contribution percentage for FNGS, not for payees. This rate is based on the B ceiling, which is displayed dynamically. If the gross salary is over this limit, the contribution is still based on the B ceiling.

Professional Tax Report IND Page

Use Professional Tax Report IND page (GPIN_PR_RC) to generate reports for professional tax..

Global Payroll & Absence Mgmt, and then **Taxes**, and then **Professional Tax Report IND**.

This example illustrates the fields and controls of the Professional Tax Report IND page.



11

Working with Banking

Understanding the Banking Process for India

The following list briefly summarizes the direct deposit banking procedure that you use for net payments to payees in India:

1. Set up bank accounts and schedule disbursements.
2. Run payroll.
3. Run the Global Payroll Banking Process Application Engine process (GP_PMT_PREP).
4. Run the Banking for India Structured Query Report (SQR) process (GPINBK01), which automatically generates the EFT file and SQR.

Subsequent sections provide more details about these steps.

Understanding Banking Setup

To set up banking, you must use core PeopleSoft Global Payroll pages. The setup involves:

- Setting up basic bank information using the Bank Table page.
- Setting up bank branch information using the Branch Table page.
- Setting up source bank account information using the Source Bank Accounts page.
- Linking the source bank ID to a pay entity using the Source Bank Link page.
- Entering bank account information for payees using the Bank Account Information page.

See PeopleSoft Global Payroll: Understanding Banking.

Generating EFT Files and Reports

This section provides an overview of EFT file and report generation and discusses how to prepare the EFT flat file.

Page Used to Generate EFT Files and Reports

Page Name	Definition Name	Usage
Run Payment Prep Process IND Page	GPIN_PAYMENT	Prepare the EFT flat file.

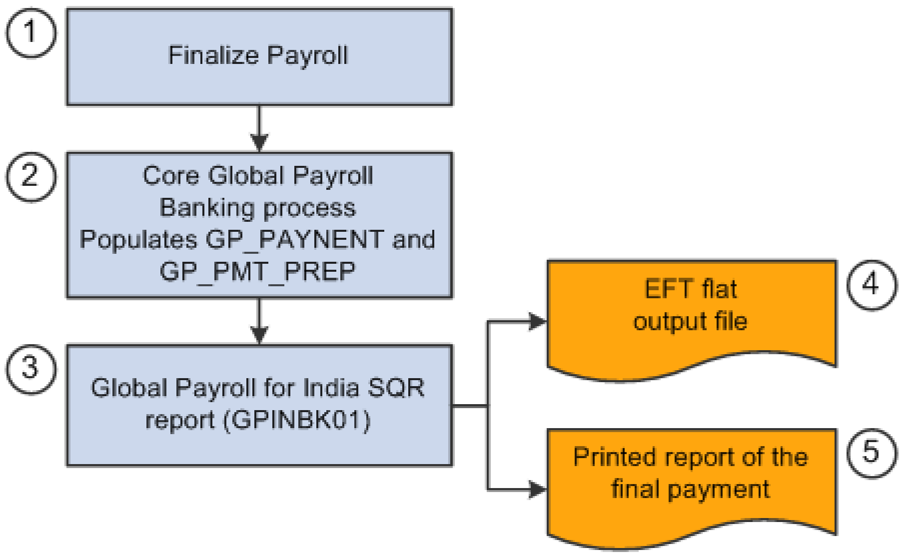
Understanding EFT File and Report Generation

The EFT process prepares the EFT flat file that you transmit to the appropriate bank and launches the SQR program that prints the banking report.

> **Note**
>
> The EFT flat file and SQR banking report are delivered with a configuration to satisfy the banking needs for customers using the Industrial Credit and Investment Corporation of India (ICICI) financial institution. If the company uses a financial institution other than ICICI, you must modify the delivered process to meet the company's needs. You can use the delivered ICICI configuration as a guide when developing the EFT and reporting process.

Process Flow

This diagram illustrates the payroll EFT and report generation process flow for India:



Process Explanation

The following steps correspond to the numbers in the preceding diagram:

1. Process and finalize payroll in the Global Payroll core application.
2. Run the Global Payroll Banking Process.

   This process populates the GP_PAYMENT output record.

   > **Note**
   >
   > Select the **Finalize** check box on the Payment Preparation page when you run the Global Payroll Banking Process. If you do not, no data will be available for the next step.

3. Run the Banking for India process.

   This process selects all rows in GP_PAYMENT that have a status of finalized for the specified calendar group ID, run type name, and source bank ID.

   The process populates the following records, which form the header, transaction, and trailer of both the EFT file and the printed report:

- GPIN_BANK_RNCTL: This record stores the run control information such as calendar run ID, operator ID, and run control ID.
- GP_PAYMENT: This record stores information about the payment details for each payee.
- PYE_BANKACCT: This record contains payee bank account information for use with direct deposit, and so on.
- PERSON_NAME: This record stores details about the name of each payee.
- SRC_BANK: This record contains information about the source bank.
- BANK_EC_TBL: Main bank table containing bank name and address.
- BANK_BRANCH_TBL: Bank branch ID and address information.
- GP_NET_DIST: Net distribution top (EMPLID, EMPL_RCD) level.
- GP_NET_DIST_DTL: Net distribution effective date and account level.

You can run this process as many times as you want. The Banking for India process consolidates the data from the records into one EFT file that you send to the source bank. The naming convention is SRC_BANK_ID.DAT. The SQR program prints the banking report in the standard character set using data from the same records as the EFT file. The number of records is equal to the number of source banks.

Related Topics

- PeopleSoft Global Payroll: Understanding Banking

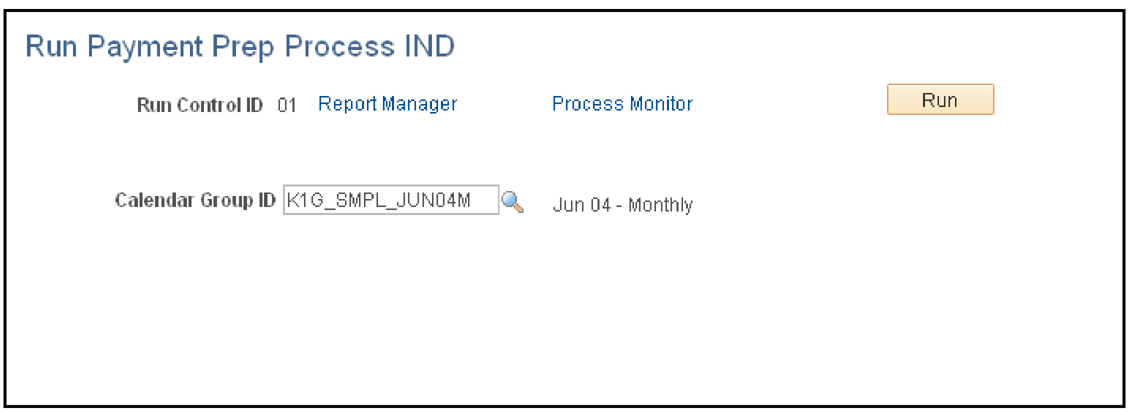
Run Payment Prep Process IND Page

Use the Run Payment Prep Process IND Page (GPIN_PAYMENT) to prepare the EFT flat file.

Navigation:

Global Payroll & Absence Mgmt, and then **Payment Processing**, and then **Run Payment Prep Process IND**, and then **Run Payment Prep Process IND**

This example illustrates the fields and controls on the Run Payment Prep Process IND. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Calendar Group ID	Select the calendar group ID that is associated with the pay run for which you want to process banking.

Click the **Run** button to run the GPINBK01 process request. PeopleSoft Process Scheduler runs the Banking for India process at user-defined intervals.

Related Topics

- PeopleSoft Global Payroll: Running the Banking Process

12

Working with Payslips

Understanding Payslips for India

The Payslip feature enables you to create and control payslips so that they display the data that you want and in the format that you want. You can override templates at lower levels, so you do not have to create multiple templates to cover every payslip scenario that you might encounter.

Regulations require that days worked be printed on payslips to ensure compliance with the Factories Act and Employee State Insurance (ESI). An additional tab for defining this information is available when you create payslip templates.

The PeopleSoft system delivers a query that you can run to view the names of all delivered elements designed for India.

Creating Payslip Templates and Payslip Messages

To create payslip templates and payslip messages, use the Templates IND (GPIN_PSLP_SETUP) and Messages IND (GPIN_PSLP_MSG) components.

This section provides an overview of payslip templates.

Pages Used to Create Payslip Templates and Messages

Page Name	Definition Name	Usage
Payslip Setup Page	GPIN_PSLP	Set up delivery and print exclusion options, column headings (labels), and column contents (rows of accumulators).
Earnings and Deductions Page	GPIN_PSLP1	Create sections of earnings and deductions, select from three description options, and set the element components that the payslip is to display.
Absence Details Page	GPIN_PSLP2	Select the absence elements that the system uses to extract an absence balance to display on the payslip.
Working Days Setup Page	GPIN_WORKDAYS	Set the element components for the number of scheduled working days and the number of actual days worked that the payslip displays.

Page Name	Definition Name	Usage
Messages IND Page	GPIN_PSLP_EXT	Create messages to appear on payslips. You can control which payslips show the message.

Understanding Payslip Templates

When creating payslip templates, you can:

- Set the accumulator column labels.
- Select the accumulators to go under the column labels.
- Create unlimited rows of accumulators for each column and set the printing sequence.
- Create unlimited sections for earnings and deductions.
- Use standard or custom element descriptions.
- Set delivery options.
- Exclude departments or locations from printing at the setup level but override those exclusions at run time.

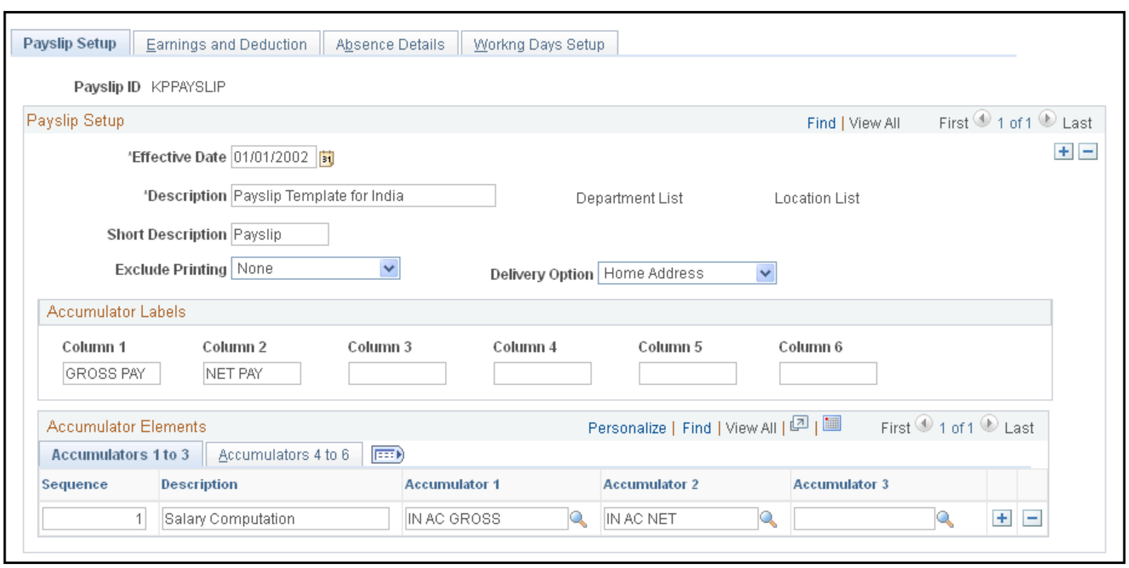
Payslip Setup Page

Use the Payslip Setup page (GPIN_PSLP) to set up delivery and print exclusion options, column headings (labels), and column contents (rows of accumulators).

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Payslips**, and then **Templates IND**, and then **Payslip Setup**

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



Field or Control	Description
Payslip ID	You can attach a single template, by its ID, to multiple pay groups. You can attach multiple templates to a pay group. Each template is used in conjunction with a particular run type.
Exclude Printing	Select either *Department* or*Location* to exclude departments or locations from the payslip print run. The corresponding link becomes active, so you can select from the department or location lists. You can override the exclusion on the Process Payslip page before you run the print program. **Note:** If you choose to enter a particular pay entity as the print option on the Process Payslip page and you have excluded a location that falls under that pay entity, it is not printed.
Delivery Option	Select an address type to receive printed payslips. You can select *Department* or*Location* to mail the payslip to an internal address, or you can select *Home Address* or *Mail Address* to send it to an external address as recorded on the payee's personal data record. You can override the selection made here on the Payslip Payee Override page, which is effective-dated; therefore, you can override the delivery option for a period of time if necessary. See Overriding Payslip Delivery Options.
Column 1 to**Column 6**	Enter the labels that you want to appear across the page on the printed payslip as the column headings for the accumulators. These column labels appear in the payslip region under the region heading Pay Summary.

Accumulators 1 to 3

Field or Control	Description
Sequence	Enter a sequence number to set the order in which the accumulators appear. They appear in ascending order with the lowest number first.
Description	Enter a description of each accumulator row.
Accumulator 1, Accumulator 2, and**Accumulator 3**	Select the accumulators that you want displayed for the corresponding column. For example, suppose you enter a description for sequences 1 and 2 as *Current* and *YTD*. If you also want to display quarter-to-date accumulated amounts, create a new row, give the new row the description *QTD*, and then select the accumulators that correlate to the column headings.

Accumulators 4 to 6

Field or Control	Description
Accumulator 4, Accumulator 5, and**Accumulator 6**	Select the accumulators that you want displayed for the corresponding column. No **Sequence** or**Description** fields exist because the same sequence number and description applies to all six accumulators in the row.

Printed Payslip Example

This diagram shows how column numbers, sequences, and accumulator numbers work together on the printed payslip:

	Column 1 Label	Column 2 Label	Column 3 Label	Continued
Seq 1 Description	Accum 1, Seq 1	Accum 2, Seq 1	Accum 3, Seq 1	
Seq 2 Description	Accum 1, Seq 2	Accum 2, Seq 2	Accum 3, Seq 2	
Seq 3 Description	Accum 1, Seq 3	Accum 2, Seq 3	Accum 3, Seq 3	
Continued				

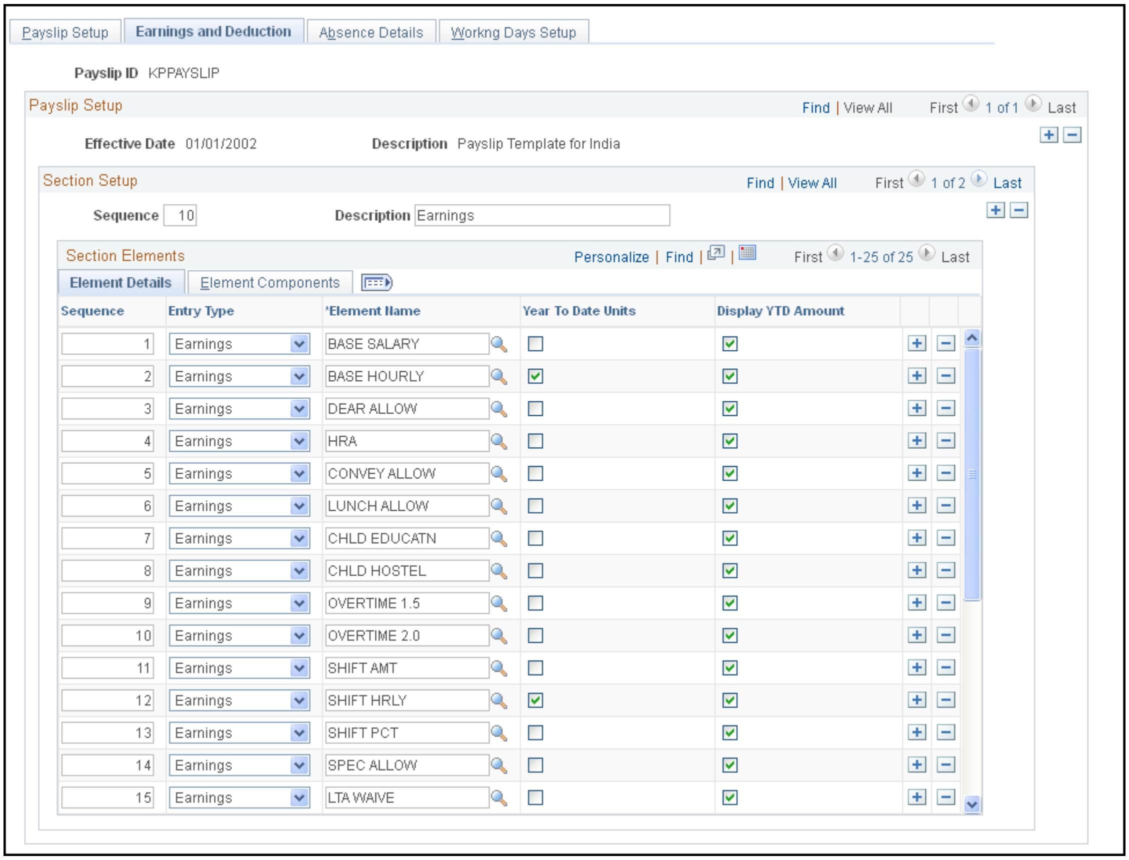
Earnings and Deductions Page

Use the Earnings and Deduction page (GPIN_PSLP1) to create sections of earnings and deductions, select from three description options, and set the element components that the payslip is to display.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Payslips**, and then **Templates IND**, and then **Earnings and Deduction**

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



Section Setup

Field or Control	Description
Description	Descriptions appear as section headings in the payslip region under the heading Payment Details.

Element Details

Field or Control	Description
Year To Date Units and**Display YTD Amount** (Display Year to Date Amount)	Select these check boxes if you want the year-to-date units and amounts for each element to appear in the **Payment Details** region under the heading Year to Date Values.

Element Components

Field or Control	Description
Description Type	Select one of three descriptions to appear for each earning or deduction row in the **Payment Details** region of the payslip. Values are: *Custom:* A text box appears for you to enter a description. *Description:* The element's description as entered on the element's name page in its component. *Element Name:* The element's name from its name page in its component. It also appears on the Elements Details tab.
Print Unit, Print Rate, Print Base, and**Print Percentage**	Select the components of the element's calculation rule that you want to show for each earning or deduction in the sections. You can select only the components in the element's calculation rule. For example, for an earning with a calculation rule of Unit Rate, only the **Print Unit** and**Print Rate** check boxes are available for selection. **Note:** Amount always appears; therefore, it is not an option here.

Absence Details Page

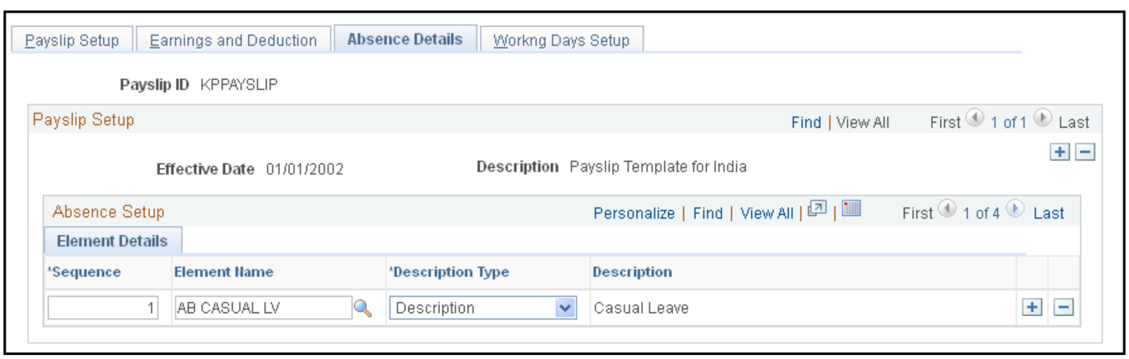
Use the Absence Details page (GPIN_PSLP2) to select the absence elements that the system uses to extract an absence balance to display on the payslip.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Payslips**, and then **Templates IND**, and then **Absence Details**

Absence Details page **(Set Up HCM**, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Payslips**, and then **Templates IND**, and then **Absence Details).**

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



Field or Control	Description
Description Type	Select one of three descriptions to appear for each row in the **Absence Details** region of the payslip. Values are: *Custom:* A text box appears for you to enter a description. *Description:* The element's description as entered on the element's name page in its component. *Element Name:* The element's name from its name page in its component. It also appears on the Elements Details tab.

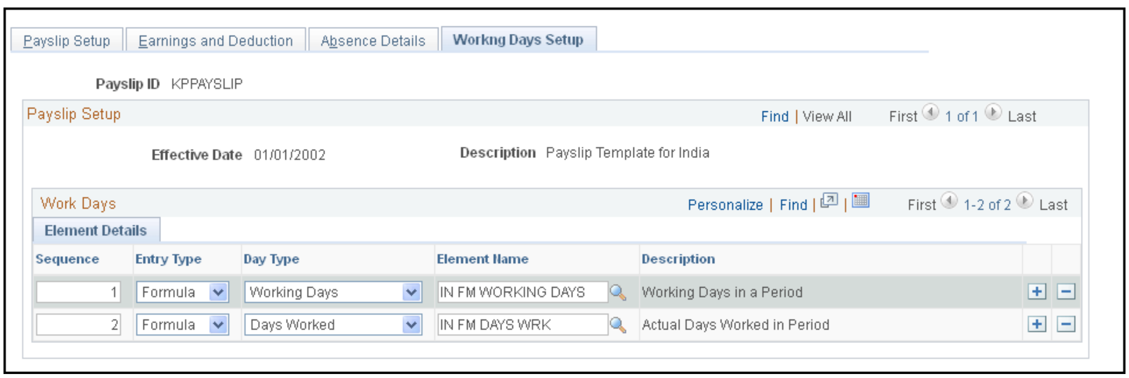
Working Days Setup Page

Use the Workng Days Setup page (GPIN_WORKDAYS) to set the element components for the number of scheduled working days and the number of actual days worked that the payslip displays.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Payslips**, and then **Templates IND**, and then **Workng Days Setup**

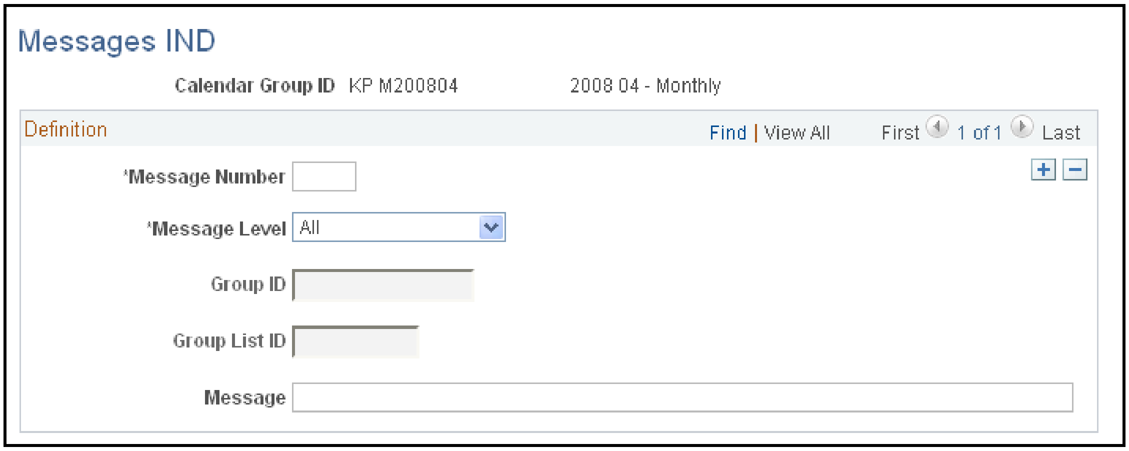
This example illustrates the fields and controls on the Workng Days Setup page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Entry Type	Define a row with an entry type of *Count* and a row with an entry type of *Formula.*
Day Type	For the row with an entry type of *Count,* define a day type of *Working Days.* For the row with an entry type of *Formula,* define a day type of *Days Worked.*
Element Name	For the row with a day type of *Working Days,* select the *GP WORK DAY COUNT* element. For the row with a day type of *Days Worked,* select the *LOP FM DAYS* element.

Messages IND Page

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



Field or Control	Description
Message Number	This is the message ID that the system uses to get the right message for the right payees. Arrays, formulas, and variables combine to get the right message.
Message Level	Select from the following values: *All:* All payees identified in the calendar group. *Group Build:* All payees included in a group that you build by using the Group Build feature in PeopleSoft HR. You can also access the group build pages through the**Set Up HCM**, and then **Common Definitions**, and then **Group Build** navigation. If you select this option, enter a group in the**Group ID** field. *Group List:* All payees in a list that you build by using the Global Payroll Group List feature. If you select this value, enter a group in the**Group List ID** field.
Message	Enter the text of the message to appear on selected payslips.

Related Topics

- PeopleSoft Global Payroll: Creating Group Lists
- PeopleSoft Global Payroll: Creating Group Lists
- Application Fundamentals: Understanding Group Build

Attaching Payslip Templates to Pay Groups

This section provides an overview of payslip template attachments and discusses how to attach payslip templates to pay groups.

Page Used to Attach Payslip Templates to Pay Groups

Page Name	Definition Name	Usage
Link to Pay Group IND Page	GPIN_PYGRP_EXT	Use to attach a payslip template to a pay group.

Understanding Payslip Template Attachments

Attach a payslip template to a pay group by using the Link to Pay Group IND page. A pay group can have multiple payslip templates attached at any one time and a single template can be attached to multiple pay groups. Each payslip template is used in conjunction with a particular run type.

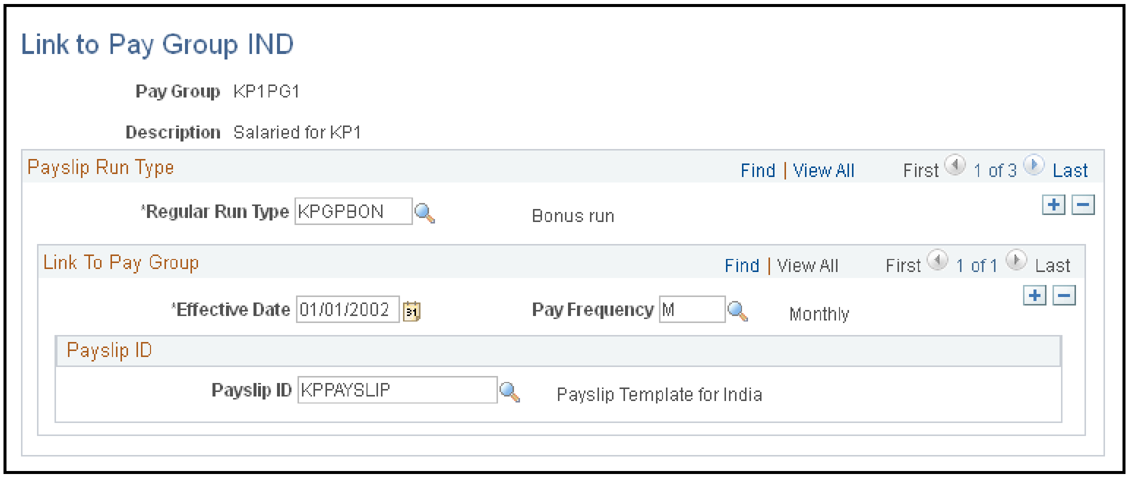
Link to Pay Group IND Page

Use the Link to Pay Group IND page (GPIN_PYGRP_EXT) to use to attach a payslip template to a pay group.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Payslips**, and then **Link to Pay Group IND**, and then **Link to Pay Group IND**

This example illustrates the fields and controls on the Link to Pay Group IND page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Regular Run Type	Select the run type. Define run types on the Run Types page.
Pay Frequency	Select the pay frequency. Define pay frequencies on the Frequency Table page.

Field or Control	Description
Payslip ID	Select the payslip ID for the payslip templates that you want to link to the pay group. Define payslip IDs on the Template Setup & Accumulators page.

Related Topics

- Creating Payslip Templates and Payslip Messages
  To create payslip templates and payslip messages, use the Templates IND (GPIN_PSLP_SETUP) and Messages IND (GPIN_PSLP_MSG) components.
- PeopleSoft Global Payroll: Defining Run Types
- PeopleSoft Global Payroll: Defining Generation Control Frequency

Overriding Payslip Delivery Options

The default delivery option for all payslips is the internal or external address that you selected when you defined the payslip template. You can set an effective-dated override of that default at the payee level to redirect the payslips to a different delivery option.

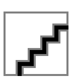
Parameters Page

Use the Parameters page (GPFR_AF_EXTR_PRM) to enter a sending reference and the frequency code for the extraction data.

Navigation:

Global Payroll & Absence Mgmt, and then **Absence & Payroll Processing**, and then **Define Calendars**, and then **Define Extraction Data FRA**, and then **Parameters**

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



On the Parameters Page, enter a previously defined sending reference and the frequency code *A00* for DADS-U,

Payslip Delivery Option IND Page

Use Payslip Delivery IND Page (GPIN_PSLP_PYE) for selecting an effective-dated delivery option for an individual payee that is different from the default on the payslip template.

Navigation:

Global Payroll & Absence Mgmt, and then **Payee Data**, and then **Payslips**, and then **Payslips Delivery Option IND**, and then **Payslip Delivery Option IND**

Creating and Printing Payslips

You print payslips by calendar group ID. You can restrict the payslips printed from the pay run that is associated with the calendar group ID. The template that you defined controls the layout of the printed payslip.

This section discusses how to create and print payslips.

Page Used to Create and Print Payslips

Page Name	Definition Name	Usage
Create/Print Payslips IND Creating and Printing Payslips IND Page	GPIN_PSLP_RC	Lists payee details of period earnings, taxes, and other deductions, and of leave balances and payment distributions.

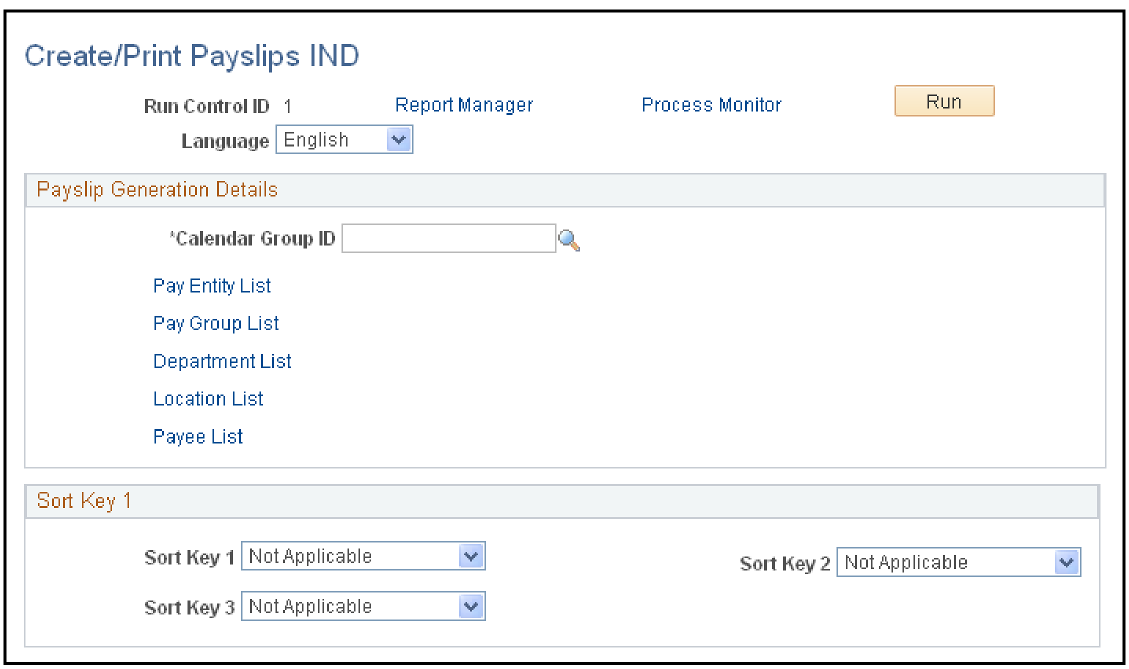
Creating and Printing Payslips IND Page

Use the Create/Print Payslips IND page (GPIN_PSLP_RC) to lists payee details of period earnings, taxes, and other deductions, and of leave balances and payment distributions.

Navigation:

Global Payroll & Absence Mgmt, and then **Payslips**, and then **Create and Print Payslips IND**, and then **Create/Print Payslips IND**

This example illustrates the fields and controls on the Create/Print Payslips IND page. You can find definitions for the fields and controls later on this page.



Payslip Generation Details

Field or Control	Description
Calendar Group ID	Select the calendar group ID for which you want to print payslips. If you do not use one of the links to further refine the payslip print selection, payslips print for the entire set of employees who are represented by the calendar group ID.

You can further refine the payslip print selection by clicking one of the links. Each link accesses a page on which you can select one or more pay entities, pay groups, departments, locations, or payees to include in the payslip print run. If you do use one of the links to further refine the payslip print selection, payslips print only for those pay entities, pay groups, departments, locations, or payees that are selected.

Sort Key 1

You can set up to three sort keys from the following options: *Department, Location, Not Applicable,* or *Pay Entity.* If you select *Not Applicable,* the program prints the payslips by employee ID.

Description of Processes in Payslip Job

The Payslip page launches a job (GPINPYSL) containing two processes in sequence:

1. The Structured Query Report (SQR) GPINPS01 prints the payslip report and provides self-service related information for ePay if ePay is licensed.
2. The GP_EPAY Application Engine process uses the payslip report and self-service related information provided by the prior processes in this job to create self-service payslips for each payee. If ePay is not licensed, this process reports that ePay has not been licensed and finishes successfully.

Related Topics

- PeopleSoft ePay: Setting Up View Payslip

13

Managing Year End Processing

Understanding Year End Processing

Certain legislation requires the annual processing and reporting of relevant payroll data. Global Payroll for India enables you to define the year end report parameters and generate the following reporting forms:

- Form 3A.
- Form 5.
- Form 6.
- Form 7.
- Form 12BA.
- Form 16.
- Form 24.
- Form 24Q e-filing.

Year end processing with Global Payroll for India requires that you:

1. Define the data values of the reporting form.
2. Run the report.

> **Note**
>
> Form 24 and Form 16 are year end reports that are produced by a unique combination of PAN (permanent account number) and TAN (tax deduction account number) numbers. For a single pay entity, several combinations of PAN/TAN might exist, each being generated separately.

Understanding Form 24Q e-Filing Requirements

Per the provisions of the Income Tax Act, 1961, specific entities making payments to deductees for salaries and certain services are required to deduct or collect taxes on these payments at the source (TDS – Tax Deducted at Source / TCS – Tax Collected at Source). The taxes can be deposited at any designated branch of an authorized bank.

In an effort to automate the collection and processing of TDS/TCS tax returns and to provide guidance about who must file electronically, the Income Tax Department has issued notifications Electronic Filing of Returns of Tax Deducted at Source Scheme, 2003 and Electronic Filing of Returns of Tax Collected at Source Scheme, 2005. According to these provisions:

- Beginning June 1, 2003, corporate deductors must file TDS forms electronically, and beginning fiscal year 2004–2005, TCS forms must be filed electronically.

- Starting fiscal year 2004–2005 and thereafter, government deductors must file all their returns electronically (e-TDS/e-TCS).
- Deductors, other than corporate or government, can file either electronic or physical returns.

The National Securities Depository Ltd. (NSDL) is authorized to act as intermediary and receive the e-TDS/e-TCS returns on behalf of the Income Tax Department through TIN-Facilitation Centers established by the NSDL or directly uploaded to the NSDL through their website.

Form 24Q Tax Data Files

The following table lists the tax data files generated by Global Payroll for India for Form 24Q and electronic delivery to the NSDL:

File Name	Description
Annexure1.csv	Includes information about the tax deductor, deductees, and challans. Deductor must submit Annexure I for all four quarters of the financial year.
Annexure2.csv	The salary information for the deductees is displayed in Annexure II. Annexure II should not be submitted in the first three quarters of the financial year, but it must be furnished and submitted in the fourth quarter of the financial year with details of the salaries of all employees for the entire financial year.
Annexure3.csv	Continuation of the breakdown of the TDS detail, by employee. **Note:** Annexure III is not supported in PeopleSoft.
Form24Q.txt	ASCII text file of the tax data for Form 24Q.
GPINQT01_<process_instance>.out	This file is blank if the process runs successfully. It has content only when an error occurred in the process or it is expected to read a message.
SQR_GPINQT01_<process_instance>.log	System log of the tax report generation process. Not required for submission.

Defining Year End Reports

This section discusses different Form data.

Pages Used to Define Year End Reports

Page Name	Definition Name	Usage
Create ECR File IND Page	GPIN_ECR_RC	Create Electronic Chellan Cum Return (ECR) text file. This file is a consolidated return for all the monthly and yearly returns.

Page Name	Definition Name	Usage
Define Form 3A Data IND Page	GPIN_YE_F3A	Define the report for the annual statement of individual payees detailing provident fund contributions and other information during the currency period.
Define Form 5 Data IND Page	GPIN_YE_F5	Define the report containing details of contributions and remittances to the profession tax authorities for the financial year.
Define ESI Form 5 Data Page	GPIN_YE_F6	Define the report for consolidated detailing of contributions and other information for the currency period to the employee state insurance authorities.
Defining Form 12BA Reports	GPIN_YE_F12BA	Define the report submitted to the statutory authorities containing details of perquisites that are provided by the employer to the employees and their valuation and tax status.
Form 24 and Form 16 Reports Page	GPIN_YE_F24_F16	Define the report for: • The annual return for income tax that is submitted regarding salaries paid to all the payees during the preceding financial year. • The annual statement that contains details of the remuneration paid and tax deducted and remitted during the previous year by an employer.
Define Form 24Q Data IND Page	GPIN_QT_F24Q_DTL	Define tax receipt data for Form 24Q quarterly return and statement.

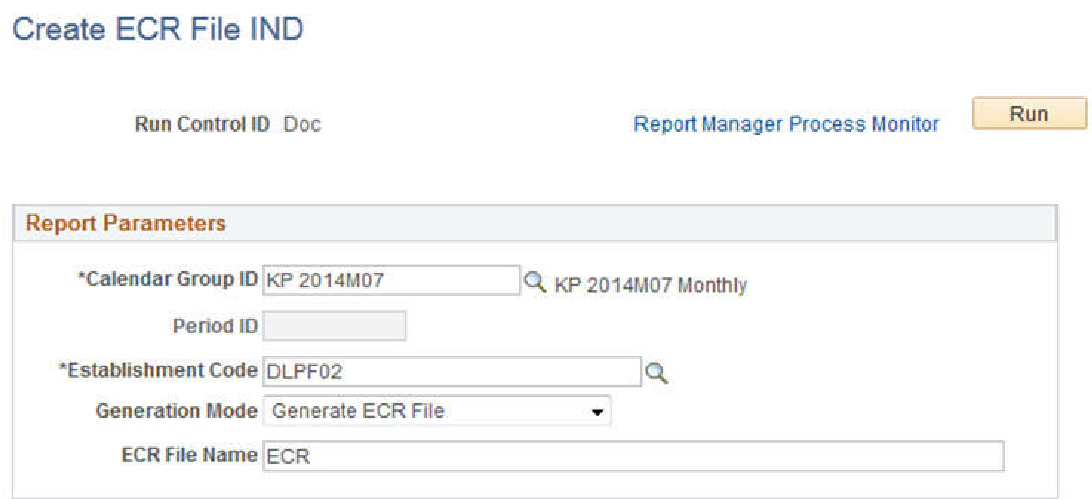
Create ECR File IND Page

Use the Create ECR File IND Page (GPIN_YE_F3A) to create Electronic Chellan Cum Return (ECR) text file.

Navigation:

Global Payroll & Absence Mgmt, and then **Authority Correspondence**, and then **Create ECR File IND**

This example illustrates the controls and definitions of Create ECR File IND page.



Field or Control	Description
Calender Group	Select the calendar group ID that is associated with the pay run for which the ECR file needs to be created.
Establishment Code	Select the Establishment code for which you need to create the ECR file.
Generation Mode	Required flag for running the process in lead ECR data mode in generate ECR file mode.
ECR File Name	Mandatory field to generate ECR file mode.

Note

The employees, who are covered under The Employee's Provident Funds and Miscellaneous Provisions Act, 1952, are required to register their establishment on EPFO (Employee Provident Fund Organization) website for filing Electronic Chellan Cum Return (ECR). This return is a consolidated return for all the monthly and yearly returns (Form 5/10/12A, 3A and 6A) which the employees used to file earlier separately.

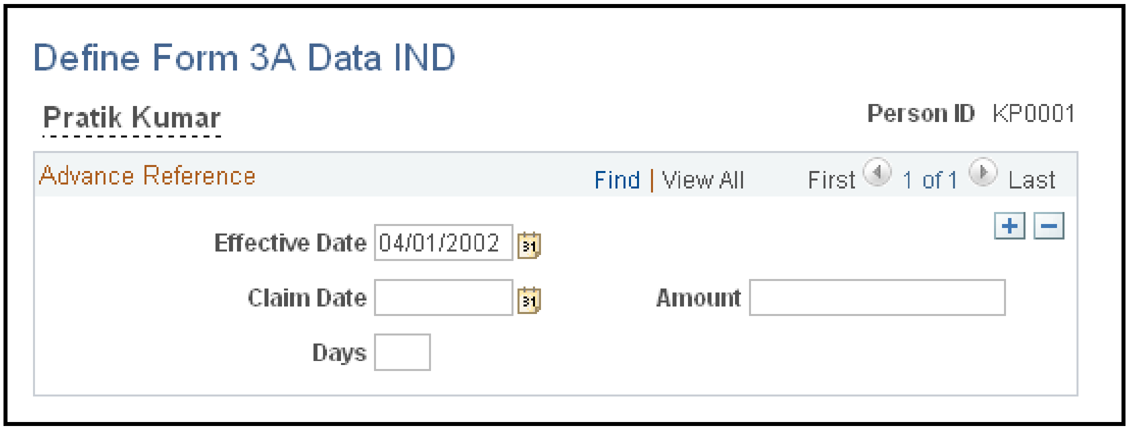
Define Form 3A Data IND Page

Use the Define Form 3A Data IND page (GPIN_YE_F3A) to define the report for the annual statement of individual payees detailing provident fund contributions and other information during the currency period.

Navigation:

Global Payroll & Absence Mgmt, and then **Year-End Processing**, and then **Define Form 3A Data IND**, and then **Define Form 3A Data IND**

This example illustrates the fields and controls on the Define Form 3A Data IND page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Claim Date	Enter the date of the availing advance.
Amount	Enter the amount of the advance amount taken.
Days	Enter the number of days of noncontribution service.

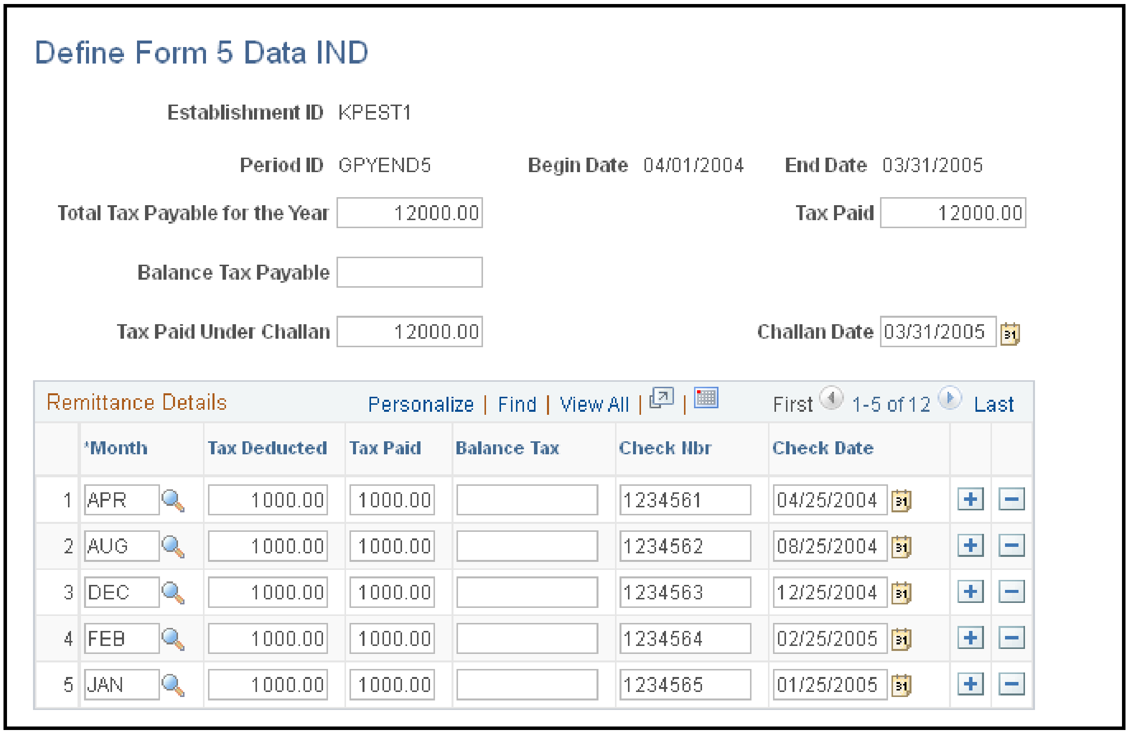
Define Form 5 Data IND Page

Use the Define Form 5 Data IND page (GPIN_YE_F5) to define the report containing details of contributions and remittances to the profession tax authorities for the financial year.

Navigation:

Global Payroll & Absence Mgmt, and then **Year-End Processing**, and then **Define Form 5 Data IND**, and then **Define Form 5 Data IND**

This example illustrates the fields and controls on the Define Form 5 Data IND page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Total Tax Payable for the Year	Enter the total tax payable for the year.
Tax Paid	Enter the tax paid for the year.
Balance Tax Payable	Enter the tax balance that still needs to be paid for the year.
Tax Paid Under Challan	Enter tax paid under challan.
Challan Date	Enter the challan date.
Month	Select the month for which taxes are deducted and remitted.
Tax Deducted	Enter the amount of tax deducted.
Tax Paid	Enter the tax paid for the specific month.
Balance Tax	Enter the tax balance.
Check No (check number)	Enter the number of the check used to pay the tax.
Check Date	Enter the date of the check used to pay the tax.

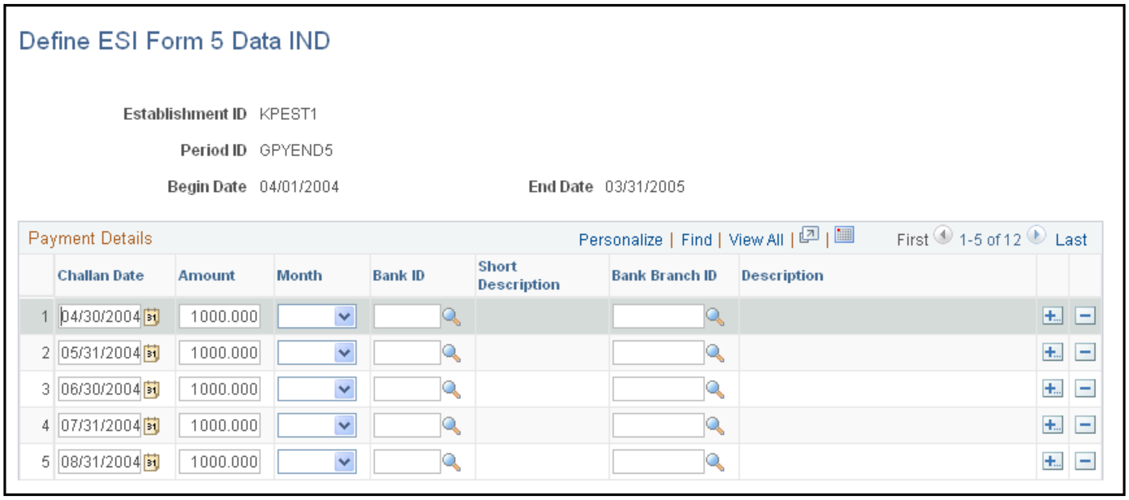
Define ESI Form 5 Data Page

Use the Define ESI Form 5 Data page (GPIN_YE_F6) to define the report for consolidated detailing of contributions and other information for the currency period to the employee state insurance authorities.

Navigation:

Global Payroll & Absence Mgmt, and then **Year-End Processing**, and then **Define ESI Form 5 Data**, and then **Define ESI Form 5 Data**

This example illustrates the fields and controls on the Define ESI Form 5 Data page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Challan Date	Enter the date on which the challan was submitted.
Amount	Enter the amount paid.

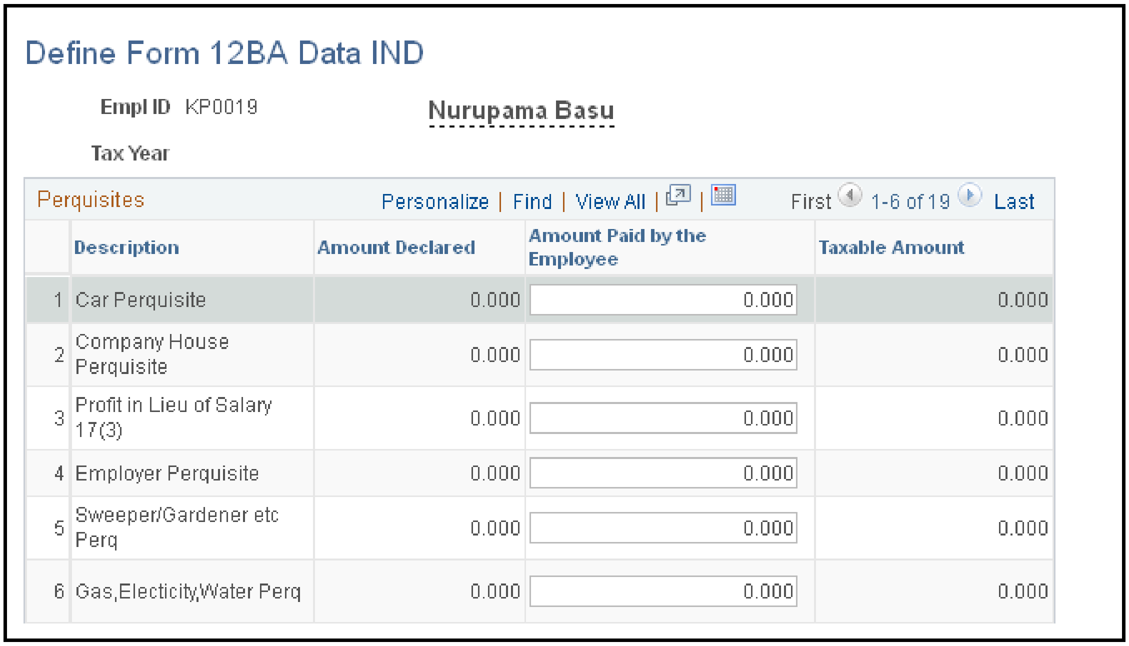
Defining Form 12BA Reports

Use the Define Form 12BA Data IND page (GPIN_YE_F12BA) to define the report submitted to the statutory authorities containing details of perquisites that are provided by the employer to the employees and their valuation and tax status.

Navigation:

Global Payroll & Absence Mgmt, and then **Year-End Processing**, and then **Define Form 12BA Data IND**, and then **Define Form 12BA Data IND**

This example illustrates the fields and controls on the Define Form 12BA Data IND page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Period ID	Enter the period ID for the period on which you want to report.
Amount Paid by the Employee	Enter the amount to be paid by the employee.
Taxable Amount	Displays the amount of the perquisite that is taxable.

Form 24 and Form 16 Reports Page

Use the Form 24 and Form 16 page (GPIN_YE_F24_F16) to define the data for end of year reporting and to process employee and employer data for Form 16, Form 12BA, Form 24. The annual statement contains details of the remuneration paid and tax deducted and remitted during the previous year by an employer.

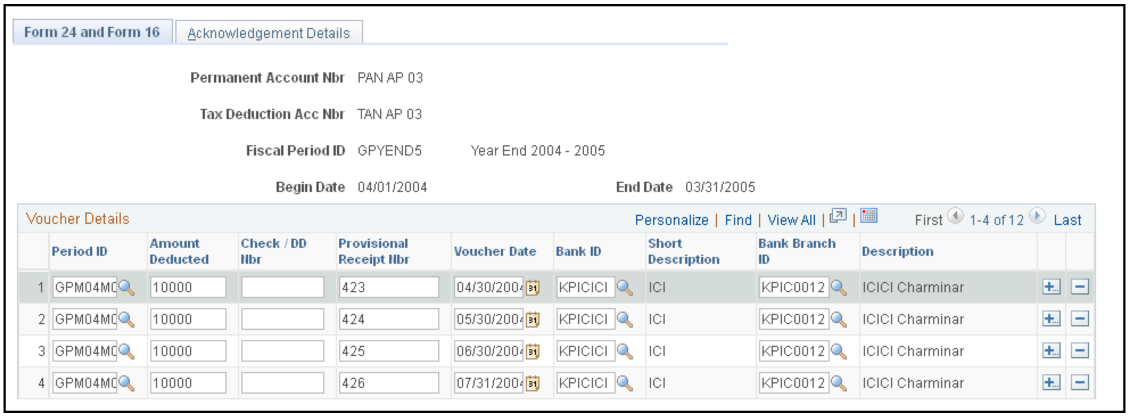
Form 16 is the certificate issued under section 203 of the Income tax Act for tax deducted at source (TDS) from income under the head 'salary'. It is issued on deduction of tax by the employer from an employee's salary and deposit of the same with the government. The certificate provides a detailed summary of the amount paid or credited to the employee and the TDS on the same.

Form 24Q is used for preparing e-TDS returns for the TDS deducted on salary under Section 192 of the Income Tax Act, 1961. It has to be submitted on a quarterly basis by the deductor. It contains details like salaries paid and the TDS deducted of the employees by the employer.

Navigation:

Global Payroll & Absence Mgmt, and then **Year-End Processing**, and then **Define Form 24 and 16 Data IND**, and then **Form 24 and Form 16**

This example illustrates the fields and controls on the Form 24 and Form 16 page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Period ID	Enter the period ID for the period on which you want to report.
Amount Deducted	Enter the remittance amount.
Voucher Number and**Voucher Date**	Enter the remittance voucher number and date.
Bank ID and**Bank Branch ID**	Select the bank ID and bank branch ID for the bank branch from which the monthly remittance was transferred to the central government account. The description appears after you select a bank ID and bank branch.

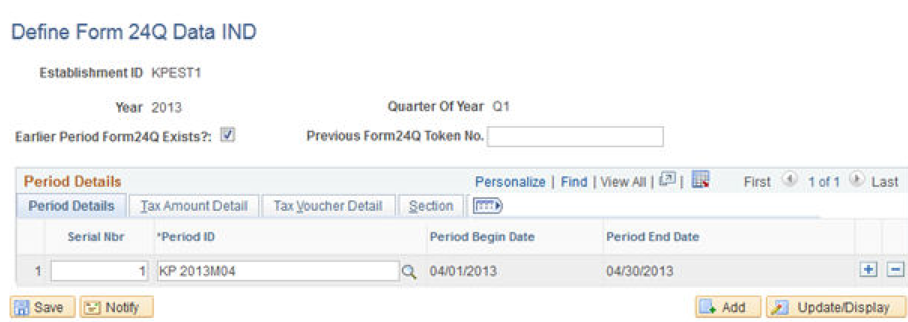
Define Form 24Q Data IND Page

Use the Acknowledgement Details page (GPIN_QT_F24Q_DTL) to define tax receipt data for Form 24Q quarterly return and statement.

Navigation:

Global Payroll & Absence Mgmt, and then **Authority Correspondence**, and then **Define Form 24Q Data IND**, and then **Define Form 24Q Data IND.**

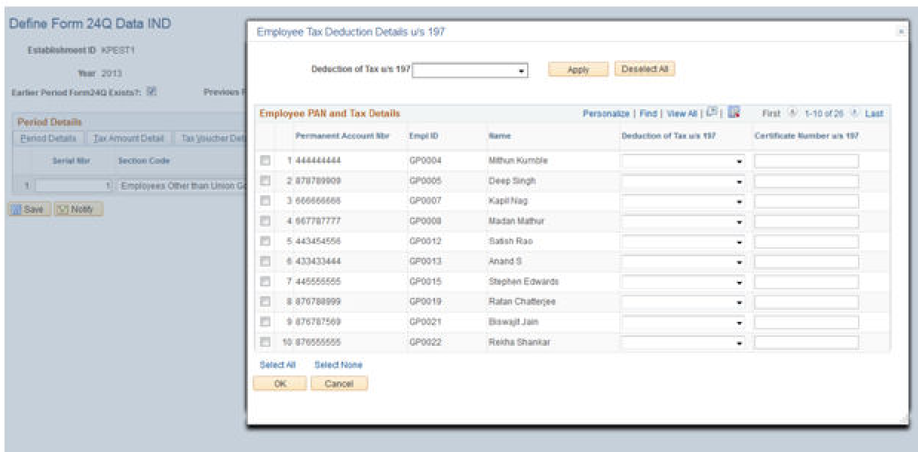
This example illustrates the fields and controls on the Define Form 24Q Data IND page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Serial Nbr (sequence number)	Enter a sequence number for each line item in the report.
Period ID	Select the period ID. The begin date and end date appear as soon as you select the period ID. A period ID is created for each reporting period, such as monthly or annual. If the reporting is monthly, create a period ID for every month for reporting purposes.

Select **Tax Deduction u/s 197 Details** in the **Section** tab.

The screenshot illustrates the Define Form 24Q Data IND Page that shows the employee tax deduction details under section 197.



The Employee Tax Deduction Details u/s 197 lists all the employees' PAN details for the selected establishment. For employees not having PAN and the field for the PAN is not updated, the PAN field is pre-populated with value **PANAPPLIED** and tax deduction at higher Rate. The Admin user has to enter the tax deduction details of employees for each and every period defined in Define Form24Q Data IND page. The tax deduction details and Define Form24Q Data IND pages need to be saved for the changes to take effect in Form24Q - Annexure I file.

Displaying Form 16 Part A and B in Self Service

Global Payroll for India supports display of Form 16 (Part A and B) with digital signature in the Employee Self Service Portal.

Pages Used to Set Up Digital Signature

Page Name	Definition Name	Usage
URL Maintenance (Target URL ID) Page	URL_TABLE	Specify the URL path where the GP India specific Form16 B reports for each employee is generated.
URL Maintenance (Source URL ID) Page	URL_TABLE	Specify the URL path where the Self Service Reporting Framework looks for the specific report.
Create Year End Processing Page	PMN_PRCSLIST	Supports the generation of Form 16 (Part B and 12B)
Enable Self Service Report Page	HCSC_SS_RPT_CNTL	Enables the new report ID **GPINF16F** in Self-Service framework for viewing the reports from the given source URL.

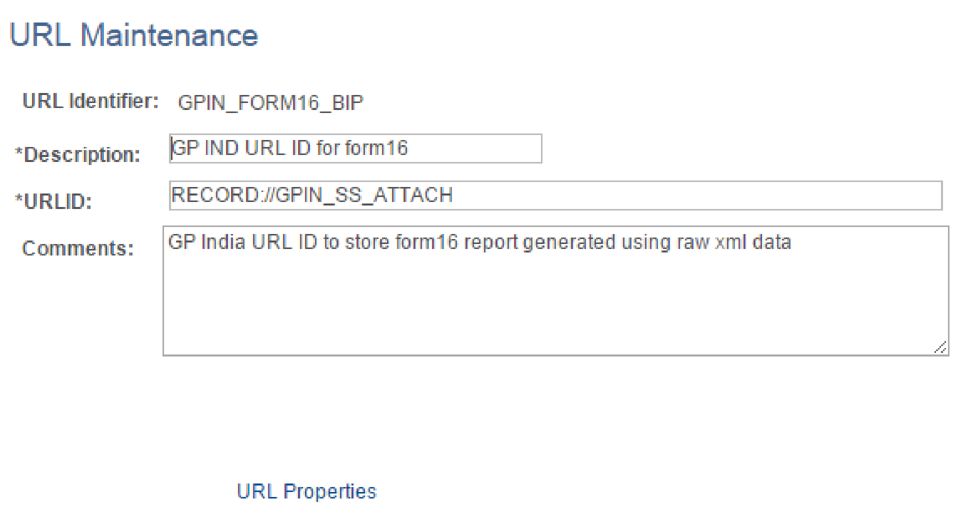
URL Maintenance (Target URL ID) Page

Use the URL Maintenance (Target URL ID) (URL_TABLE)page) to specify the URL path where the GP India specific Form16 B reports for each employee is generated.

Navigation:

People Tools, and then **Utilities**, and then **Administration**, and then **URLs**

This example illustrates the fields and controls on the URL Maintenance (Target URL ID) page.



Field or Control	Description
URL ID	Specify the URL path where the GP India specific Form16 B reports for each employee is generated.
Comments	Enter the description.

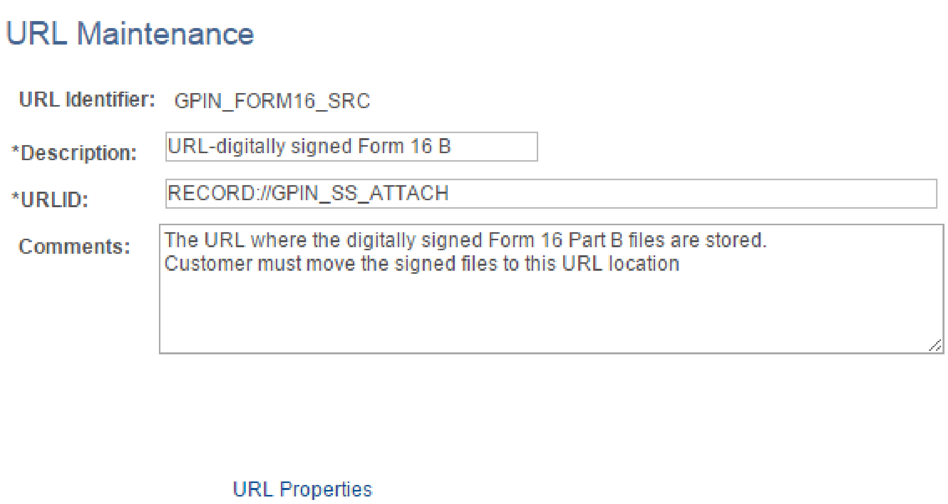
URL Maintenance (Source URL ID) Page

Use the URL Maintenance (Source URL ID) (URL_TABLE) page to specify the URL path where the Self Service Reporting Framework looks for the specific report.

Navigation:

People Tools, and then **Utilities**, and then **Administration**, and then **URLs**

This example illustrates the fields and controls on the URL Maintenance (Source URL ID) page.



Field or Control	Description
URL ID	Specify the URL path where the Self Service Reporting Framework looks for the specific report.
Comments	Enter the description.

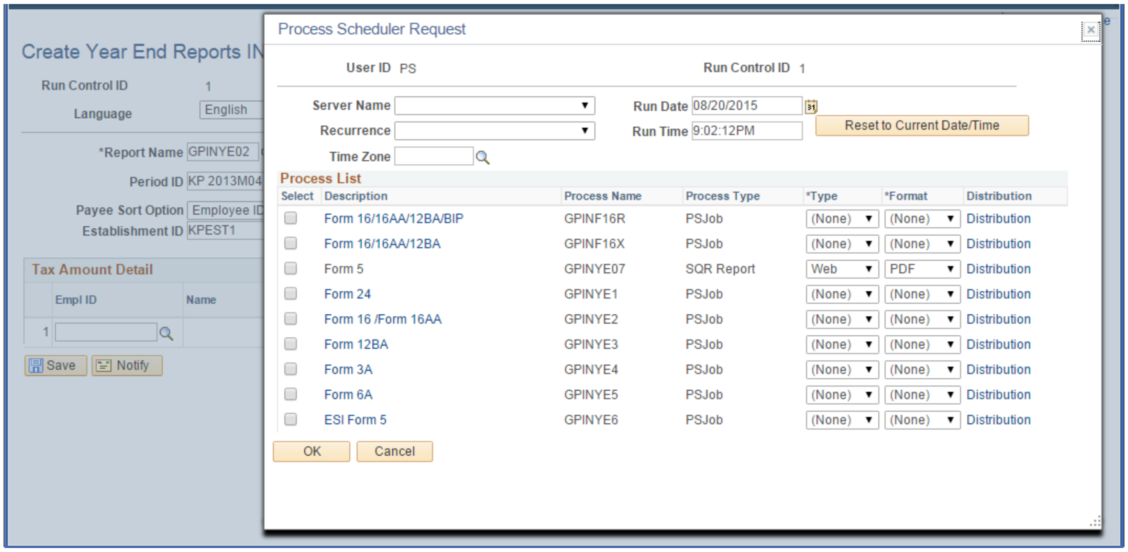
Create Year End Processing Page

Use the Create Year End Processing (PMN_PRCSLIST) page to support the generation of Form 16 (Part B and 12B).

Navigation:

Global Payroll & Absence Mgmt, and then **Year-End Processing**, and then **Create Year End Reports IND**

This example illustrates the fields and controls on the Create Year End Processing page.



Field or Control	Description
GPINF16X	Generates Form 16 (part B) and 12B Data.
GPINF16R	Generates Form 16B (part B), 12B data along with Individual Form16 (part B) .pdf reports are each employee with the specified naming convention in the Target URL ID.

The name convention of the Form 16 .pdf is <PAN>_<ESTABID>_<ASSESSMENT YEAR>.pdf. The assessment year is represented in the format of XX-XX (For example, 14-15)

> **Note**
>
> Form 16 (Part A) has to be downloaded from the traces portal by the payroll administrator.

> **Note**
>
> Payroll administrator has to sign the .pdf documents (digitally outside the system using the USB token) before loading it to the FTP path (Source URL ID) to display in the self-service portal.

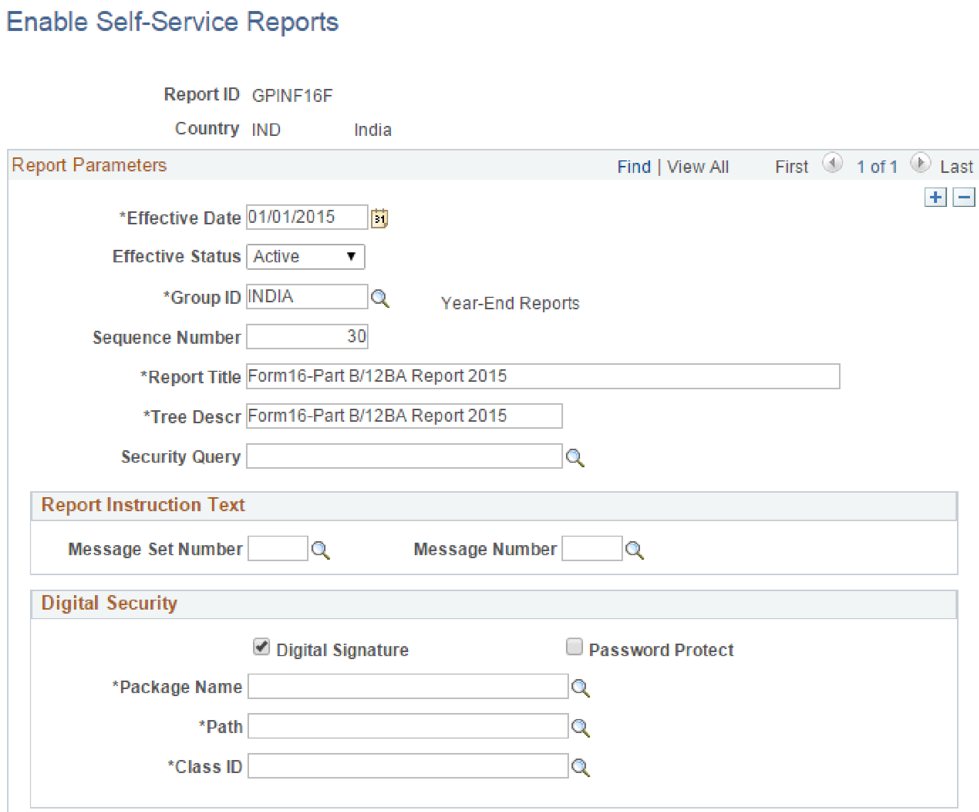
Enable Self Service Report Page

Use the Enable Self Service Report(HCSC_SS_RPT_CNTL) page to enable New Report ID **GPINF16F** in Self-Service framework for viewing the reports from the given source URL.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Self-Service Report Framework**, and then **Enable Self-Service Reports**

This example illustrates the fields and controls on the Enable Self Service Report page.



To know more about enabling self service reports, see Application Fundamentals: Enable Self-Service Reports Page

Field or Control	Description
Digital Signature	Check to enable digital signature.
Password Protect	Check to enable password protection in the forms.

Generating Year End Reports

This section discusses how to generate year end reports.

Pages Used to Generate Year End Reports

Page Name	Definition Name	Usage
Create Year End Reports IND Page	GPIN_PR_RC	Use to generate forms 3A, 5, 6, 12BA, 16, and 24.
Print ESI Form 6 Page	GPIN_FORM7_RC	Use to generate form 6 half-year report of consolidated employer and employee insurance contributions.

Page Name	Definition Name	Usage
Print Form 24Q IND Page	GPIN_24Q_RC	Use to generate Form 24Q and related tax files for electronic submission.

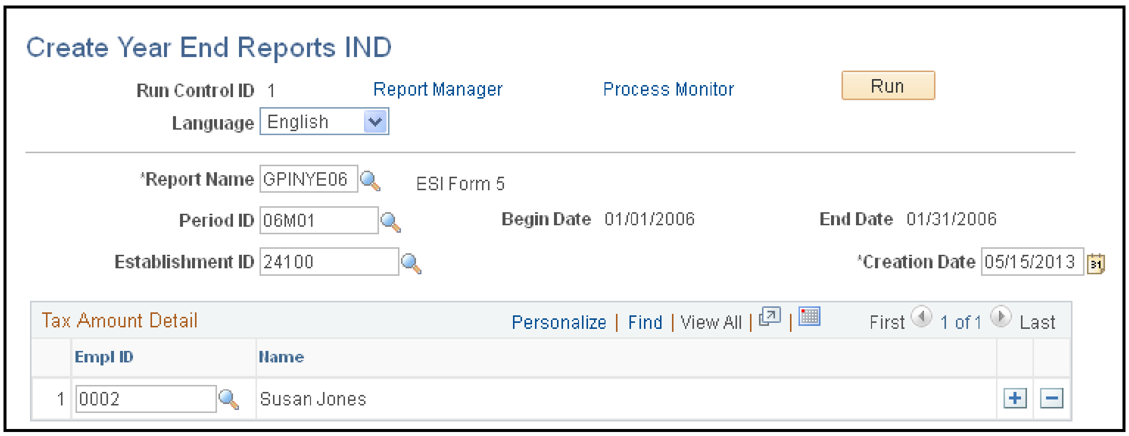
Create Year End Reports IND Page

Use the Create Year End Reports IND page (GPIN_PR_RC) to use to generate forms 3A, 5, 6, 12BA, 16, and 24.

Navigation:

Global Payroll & Absence Mgmt, and then **Year-End Processing**, and then **Create Year End Reports IND**, and then **Create Year End Reports IND**

This example illustrates the fields and controls on the Create Year End Reports IND page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Report Name	Select the report name. Define report names on the Report Setup page.
Period ID	Select the appropriate period ID. The begin date and end date appear as soon as you select the period ID.
Payee Sort Option	Select a sort order for the report. Options are: • *Employee ID, Employee Rcd Nbr:* Employee ID, employee record number. • *Name, Employee Rcd Nbr:* Name, employee record number. **Note:** This field is available only when you select the following reports: Form 16, Form 3A, and Form 6A.
Establishment ID	Select an establishment ID only if you are running the Form 5 report.

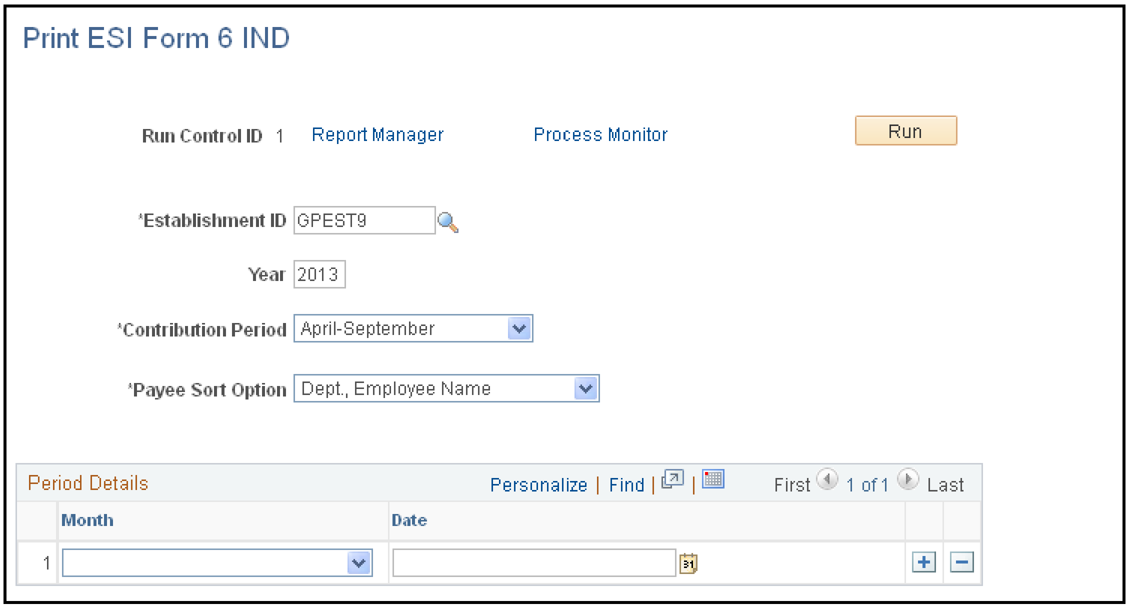
Print ESI Form 6 Page

Use the Print ESI Form 6 IND page (GPIN_FORM7_RC) to use to generate form 6 half-year report of consolidated employer and employee insurance contributions.

Navigation:

Global Payroll & Absence Mgmt, and then **Authority Correspondence**, and then **Print ESI Form 6 IND**, and then **Print ESI Form 6**

This example illustrates the fields and controls on the Print ESI Form 6 IND page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Year	Enter the fiscal year of the report period.
Contribution Period	Select the six-month period covering the social insurance contributions.

Field or Control	Description
ESI Challan Number	Enter the challan numbers with which the social insurance payments were made.

Print Form 24Q IND Page

Use the Print Form 24Q IND page (GPIN_24Q_RC) to use to generate Form 24Q and related tax files for electronic submission.

Navigation:

Global Payroll & Absence Mgmt, and then **Authority Correspondence**, and then **Print Form 24Q IND**, and then **Print Form 24Q IND**

This example illustrates the fields and controls on the Print Form 24Q IND page. You can find definitions for the fields and controls later on this page.

Field or Control	Description
Payee Sort Option	Select a method to display employee information. Available options are *Employee ID, Employee Rcd Nbr* (employee record number) and *Name, Employee Rcd Nbr.*
Report Filed for Quarter	Select the **Report Filed for Quarter** check box if the answer to the question listed in the column 1 (e) of the Form 24Q is *Yes.* The question listed in the column 1 (e) is this: Has any statement been filed earlier for this quarter (Yes/No)?
Provisional Receipt Nbr. (provisional receipt number)	Enter the provisional receipt number that is available in Form 24Q, column 1 (f), if the answer to the column 1 (e) question is *Yes.*

14

Creating Payee Reports

Understanding Payee Data Reporting

For certain payroll business processes, you need to generate reports to comply with legislative reporting requirements, verify data, or convey payroll information within your organization. Legislated reports are required for processes such as employee state insurance (ESI), provident fund, medical allowance, leave travel allowance, and year end processing. Global Payroll for India provides setup and run control reporting pages to address your reporting needs.

To create payee reports:

1. Define report fields.
2. Define break levels to control how data is sorted for the report.
3. Define the report format.
4. Map Global Payroll elements to the defined report fields.
5. Launch the report run control.

Global Payroll for India provides delivered functionality for the following payee reports:

- Newly enrolled payees.
- Terminated payees.
- New hires.
- Profession tax.
- ESI remittance.
- Provident fund remittance.
- Leave travel allowance and medical allowance taxable amounts.

Related Topics

- Global Payroll for India Reports: A to Z
  This table lists the Global Payroll for India reports, sorted by report ID.
- Generating Year End Reports
  This section discusses how to generate year end reports.

Defining Payee Reports

To define payee reports, use the Payee Report Fields IND (GPIN_PR_FLD_TABLE), Payee Report Break Levels IND (GPIN_PR_BRK_LVLS), Payee Report Setup IND (GPIN_PR_SETUP), and Payee Report Element Map IND (GPIN_PR_EMAP) components.

This section provides an overview of element mapping.

Pages Used to Define Payee Reports

Page Name	Definition Name	Usage
Payee Report Fields IND Page	GPIN_PR_FIELDS	Define the individual payee data items as report fields that will appear in a report.
Payee Report Break Levels IND Page	GPIN_PR_BRK_LVLS	Define the break levels for a report. You can select any system element or variable that resolves to a character value. select only elements that are resolved for a payee. Otherwise, the report will not break properly.
Payee Report Setup IND Page	GPIN_PR_SETUP	Define the report format. Identify the break levels and report fields valid for the report.
Payee Report Element Map IND Page	GPIN_PR_ELEM_MAP	Map Global Payroll elements to report fields.

Understanding Element Mapping

After you define valid report fields and a report setup (format), you must map Global Payroll elements to the report fields. The mapping of elements enables you to specify multiple elements that make up a report field. For example, if a salary field is to be printed on a report and several elements must be added together in order to print this field on a report, you can select the Global Payroll elements that make up this field.

The **Entry Type** field prevents an element of the wrong type from being selected, based on the variable type. For example, a report field that has been defined as a field type of character, allows only Global Payroll elements that resolve to character values to be selected.

The following table specifies the types of Global Payroll elements that can be mapped to a report field, based on the field type defined:

Field Type	Types of Elements Allowed
Numeric	Auto Assigned Accumulator Segment Accumulator Bracket – Numeric Deduction Earning Formula – Monetary and Decimal System Element – Numeric Variable – Numeric
Character	Bracket – Character Formula – Character System Element – Character Variable – Character

Field Type	Types of Elements Allowed
Date	Calendar Date Bracket – Date Date Formula – Date System Element – Date Variable – Date

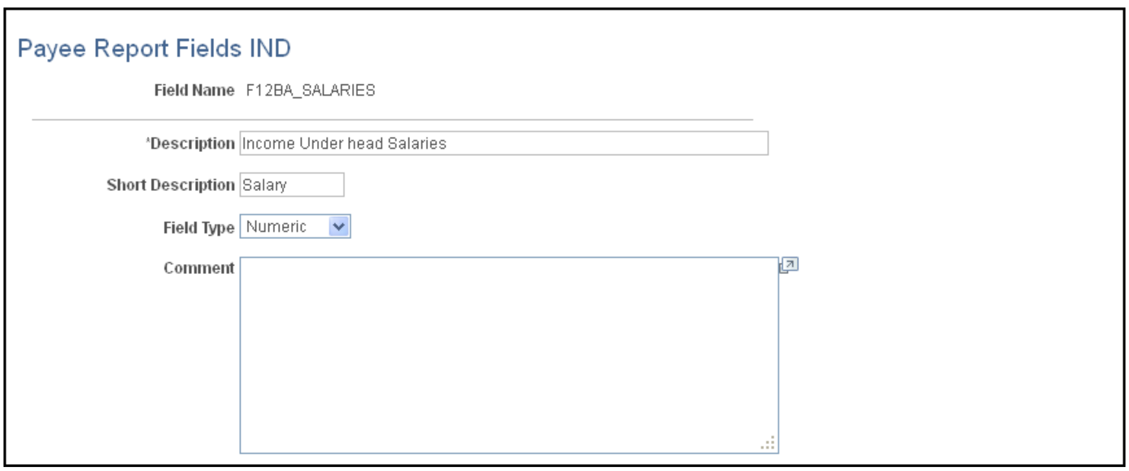
Payee Report Fields IND Page

Use the Payee Report Fields IND page (GPIN_PR_FIELDS) to define the individual payee data items as report fields that will appear in a report.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Reports**, and then **Payee Report Fields IND**, and then **Payee Report Fields IND**

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



Field or Control	Description
Field Name	Displays a unique field identifier for a report. Maximum of 15 characters.
Description	Enter the description of the report field that is printed on a report.
Short Description	Enter a brief description of the report field. If left blank, this field displays the first 10 characters of the **Description** field.
Field Type	Defines the format of the data for the field. Select *Numeric*, *Character*, or *Date*. After you select a field type for a report field, you cannot alter it.
Comment	Additional information about the field.

Payee Report Break Levels IND Page

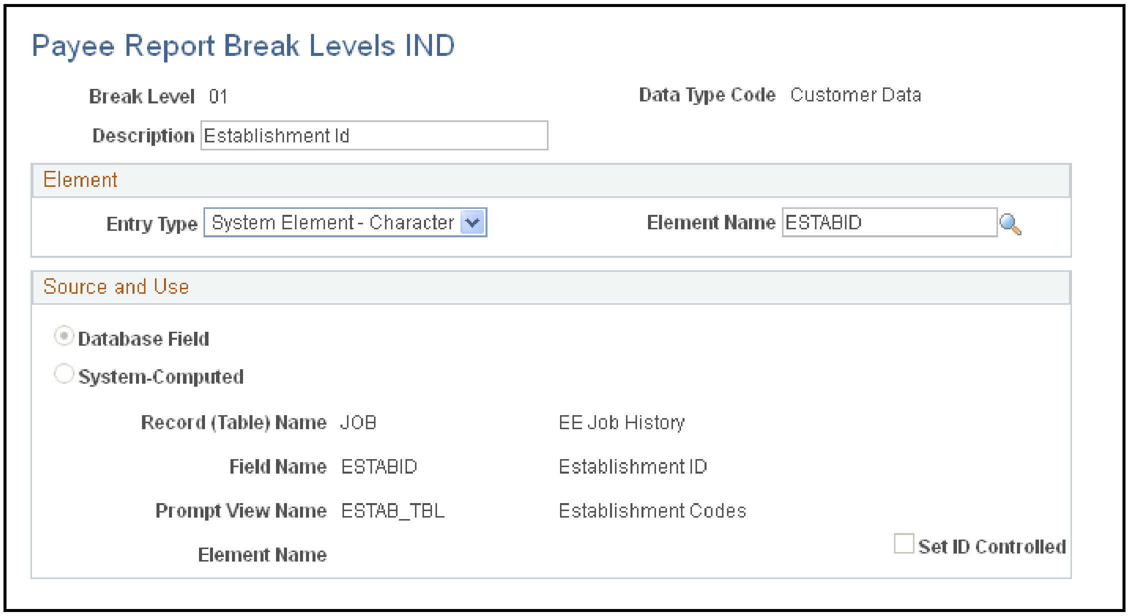
Use the Payee Report Break Levels IND page (GPIN_PR_BRK_LVLS) to define the break levels for a report.

You can select any system element or variable that resolves to a character value. select only elements that are resolved for a payee. Otherwise, the report will not break properly.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Reports**, and then **Payee Report Break Levels IND**, and then **Payee Report Break Levels IND**

This example illustrates the fields and controls on the Payee Report Break Levels IND page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Break Level	A number that identifies the break level code.
Date Type CD	Values are *System Data* (for PeopleSoft-delivered break level) and *Customer Data* (for all other break levels).

Element

Field or Control	Description
Entry Type	Select the entry type of the element that you're associating with the break level. Values are *System Element - Character* and *Variable - Character*.

Field or Control	Description
Element Name	Select the system element or variable that you're associating with the break level. For example, if you define pay groups at the break level, select the GP PAYGROUP element.

> **Note**
>
> Any element that you select must be resolved and stored.

Source and Use

If you select a system element, information that is contained on the Source and Use page of GP_PIN appears in this group box.

Payee Report Setup IND Page

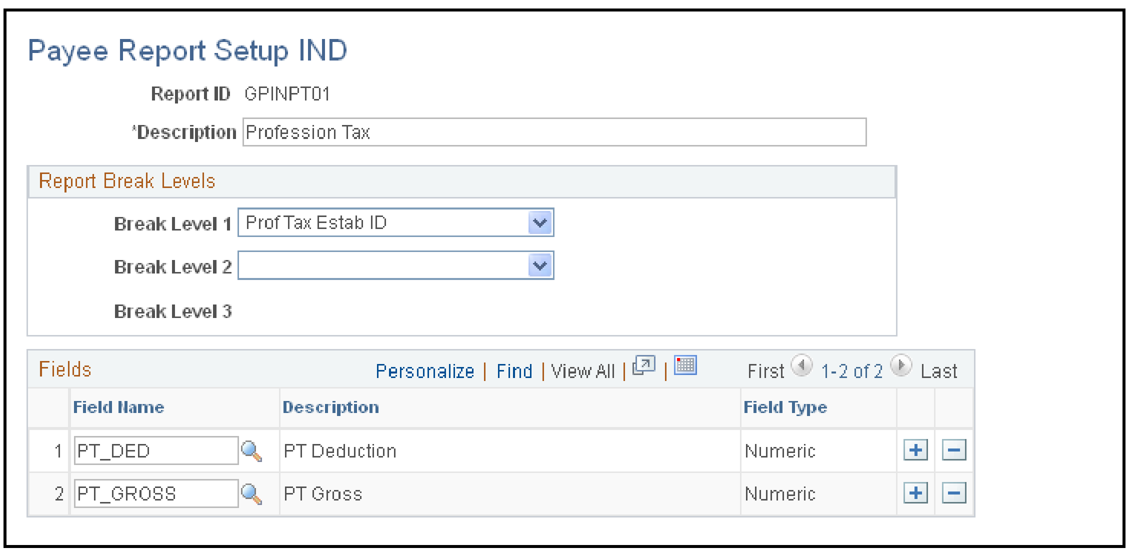
Use the Payee Report Setup IND page (GPIN_PR_SETUP) to define the report format.

Identify the break levels and report fields valid for the report.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Reports**, and then **Payee Report Setup IND**, and then **Payee Report Setup IND**

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



Field or Control	Description
Report ID	Displays the name of the Structured Query Report (SQR) that you are defining.

Field or Control	Description
Description	Enter a description of the SQR.

Report Break Levels

Field or Control	Description
Break Level 1, Break Level 2, and**Break Level 3**	Select the first, second, and third break levels for the report.

Fields

Field or Control	Description
Field Name	Select a report field (defined on the Payee Report Fields page) to be used in the report. The corresponding description and field type appear when you select a report field.

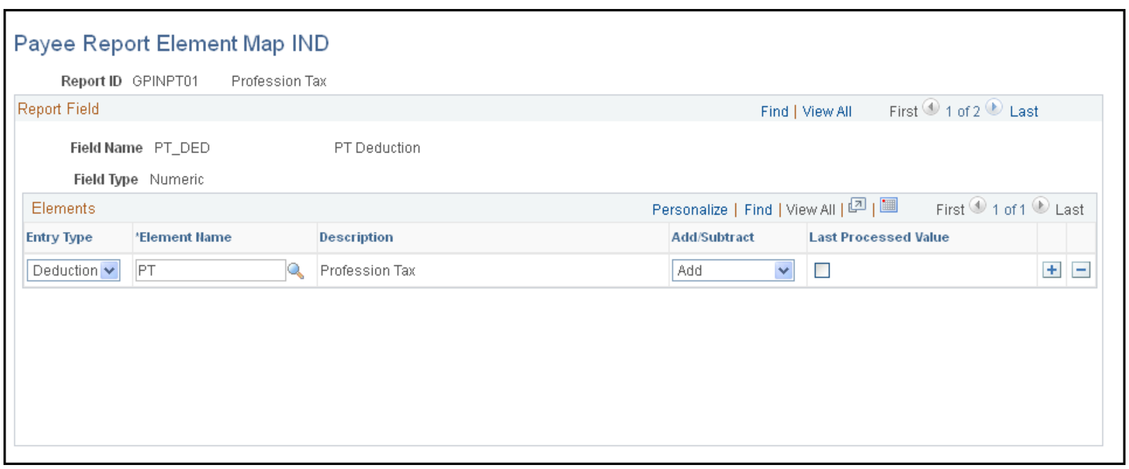
Payee Report Element Map IND Page

Use the Payee Report Element Map IND page (GPIN_PR_ELEM_MAP) to map Global Payroll elements to report fields.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Reports**, and then **Payee Report Element Map IND**, and then **Payee Report Element Map IND**

This example illustrates the fields and controls on the Payee Report Element Map IND page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Report ID	Displays the name of the SQR that you are mapping.

Report Field

Field or Control	Description
Field Name	Displays the report field that has been defined on the Report Setup page.
Field Type	Displays the format of the report field as defined on the Payee Report Fields page.

Elements

Field or Control	Description
Entry Type	Select the type of element to be mapped to the report field. This changes depending on the field type.
Element Name	Enter the name of the element to be mapped to the report field. The corresponding description appears when you select an element name.
Add/Subtract	Select whether the element adds or subtracts from the total on the report.
Last Processed Value	Select for the tax calculation to consider the last processed value for reporting purposes. This field was introduced for Form 24Q.

Generating Payee Reports

This section provides an overview of the report generation process.

Pages Used to Generate Payee Reports

Page Name	Definition Name	Usage
Enroll and Term Reports IND Page	GPIN_PR_GPINPY01	Generate enrollment and termination reports.
#unique_221	GPIN_PR_RC	Generate ESI remittance statement reports.
PF Remittance Statement IND Page	GPIN_PR_RC	Generate provident fund remittance statement reports.
Print LWF Report Page	GPIN_FORMLWF_RC	Run LWF form A.

Understanding the Report Generation Process

When you run the payee report process, an Application Engine payee report extract process runs first. The extract process retrieves the run control and determines which report to run. The appropriate report setup is also retrieved along with the break levels and element mapping that is associated with the report. So the process runs in this order:

1. The payee report extract process (Application Engine) gathers information about the report.
2. SQR runs the actual report.

Related Topics

- Understanding Provident Funds
  Payees who are employed by a company must join a recognized provident fund. The employers category determines which provident fund the employees should join. For instance, all government employees will be covered under Government Provident Fund (GPF). Private sector employees are generally covered under the recognized provident fund. Organizations have a choice to be covered under the Regional Provident Fund Commissioner (RPFC) or have their own setup, formed under a trust, which will report to the RPFC periodically. Generally large employers have their own trusts, and the onus of managing the contributions rests on the employer itself, guided by a board of trustees. Note that the PeopleSoft software does not provide for the compliances of a trust; it provides only for employers covered under the RPFC.
- Understanding ESI
  ESI is a Social Security plan that is designed to provide subsidized or free medical assistance to employees and their dependents during the course of their employment, or if an employee becomes unable to work due to specific circumstances. With Global Payroll for India, you can register payees under an ESI program and process the appropriate deductions during the normal payroll cycle.
- Maintaining Tax Declarations
  This section provides information on how to enter the payee related information.
- Processing Leave Travel Allowances
  This section provides an overview of leave travel allowances.
- Processing Medical Allowances
  This section provides an overview of medical allowances.

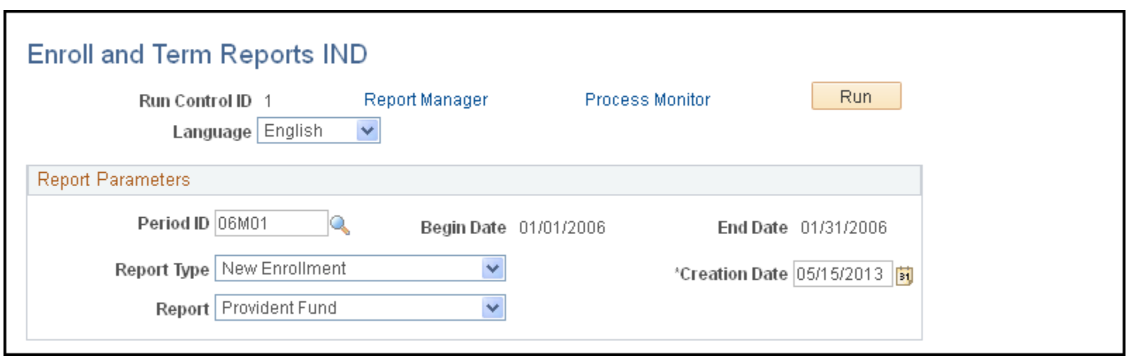
Enroll and Term Reports IND Page

Use the Enroll and Term Reports IND page (GPIN_PR_GPINPY01) to generate enrollment and termination reports.

Navigation:

Global Payroll & Absence Mgmt, and then **Absence and Payroll Processing**, and then **Reports**, and then **Enroll and Term Reports IND**, and then **Enroll and Term Reports IND**

This example illustrates the fields and controls on the Enroll and Term Reports IND page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Period ID	Select the period ID that identifies the pay period to be used for the report. When you enter a value in this field, the associated begin date and end date appear.
Report Type	Select whether to generate a new enrollment or termination report.
Report	Select whether to generate an ESI or provident fund report.

Contingency Funds

Contingency fund contributions follow the same rules as for ARRCO/AGIRC. For organizations with more than ten payees, there is only a single contribution from the employer. For organizations with less than ten payees, no contribution is triggered.

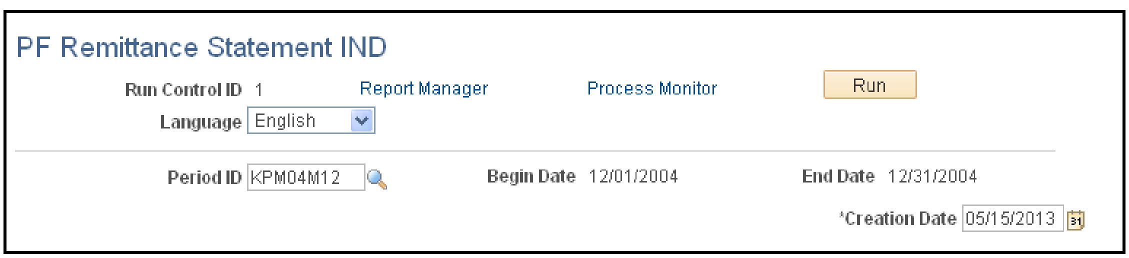
PF Remittance Statement IND Page

Use the PF Remittance Statement IND (provident fund remittance statement IND) page (GPIN_PR_RC) to generate provident fund remittance statement reports.

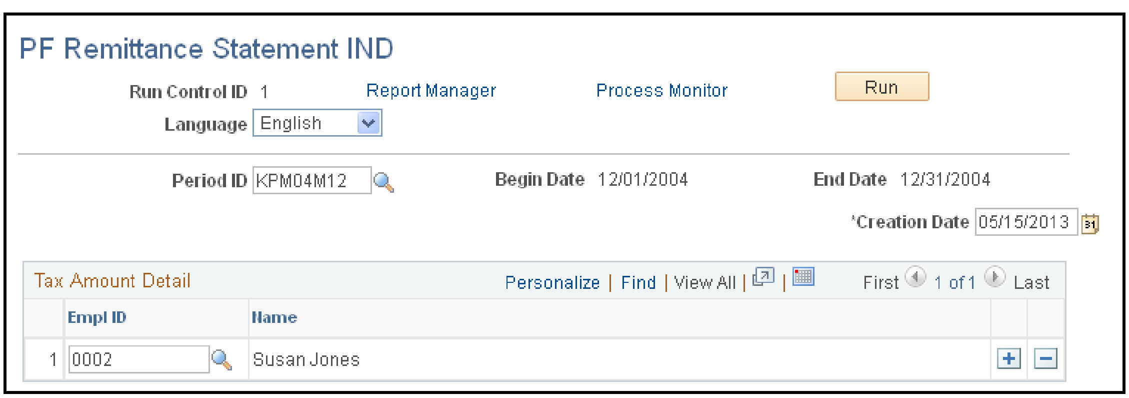
Navigation:

Global Payroll & Absence Mgmt, and then **Absence and Payroll Processing**, and then **Reports**, and then **PF Remittance Statement IND**, and then **PF Remittance Statement IND**

This example illustrates the fields and controls on the PF Remittance Statement IND page (1 of 2). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the PF Remittance Statement IND page (2 of 2). You can find definitions for the fields and controls later on this page.



Field or Control	Description
Period ID	Select the period ID that identifies the pay period to be used for the report. When you enter a value in this field, the associated begin date and end date appear.
Payee Sort Option	Select a sort order for the report. Options are: • *Employee ID, Employee Rcd Nbr:* Employee ID, employee record number. • *Name, Employee Rcd Nbr:* Name, employee record number.

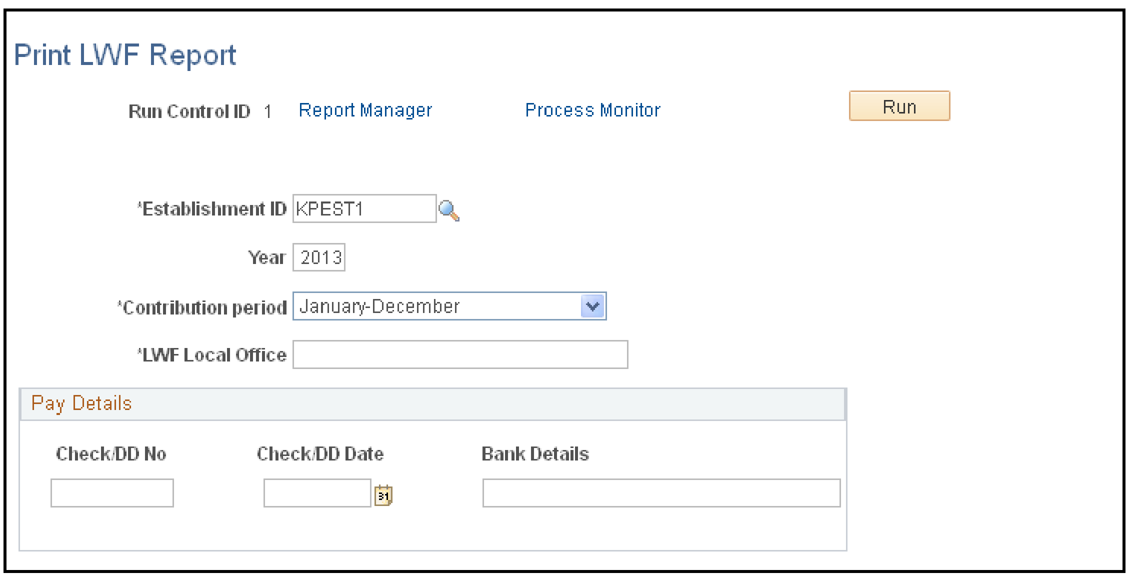
Print LWF Report Page

Use the Print LWF Report (print labour welfare fund report) page (GPIN_FORMLWF_RC) to run LWF form A.

Navigation:

Global Payroll & Absence Mgmt, and then **Authority Correspondence**, and then **Print LWF Report**, and then **Print LWF Report**

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



This report prints the contribution made by the employer and employee toward LWF.

Running Form 7

See Print ESI Form 6 Page.

15

Accumulators

Understanding Accumulators

Many accumulator elements have been created as integral parts of the Global Payroll for India functionality. Knowing the delivered accumulators and how they are used will enhance your ability to implement Global Payroll for India.

Use the Accumulators page in the core PeopleSoft Global Payroll application to see the members of each accumulator and other accumulator configuration details.

Related Topics

- PeopleSoft Global Payroll: Understanding Accumulators

Delivered Accumulators

The accumulators listed in the following table are delivered with Global Payroll for India:

Accumulator	Description	Related Functionality
BASE SALARY YTDA	Base Salary Earning – Calendar Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
BASE SALARY FYDA	Base Salary Earning – Fiscal Calendar Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
BASE HOURLY YTDA	Basic Hourly Earning – Calendar Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
BASE HOURLY YTDU	Basic Hourly Earning – Calendar Year to Date (Units)	You can print the accumulated value on the payslip and other reports.
BASE HOURLY FYDA	Basic Hourly Earning – Fiscal Calendar Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
BASE HOURLY FYDU	Basic Hourly Earning – Fiscal Calendar Year to Date (Units)	You can print the accumulated value on the payslip and other reports.
DEAR ALLOW YTDA	Dearness Allowance Earning – Calendar Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
DEAR ALLOW FYDA	Dearness Allowance Earning – Fiscal Calendar Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.

Accumulator	Description	Related Functionality
ER AC BASIC PAY	Basic Pay Earning (Base + Dearness Allowance)	Stores the basic pay components (base salary/ hourly and dearness allowance). This accumulator is used for the calculation of other allowances.
HRA AC EXM FYTDA	Year-to-date accumulator to hold HRA AC EXM SEG + RTO HRA EXM. This is calculated at the end of the calculation.	You can print the accumulated value on the payslip and other reports.
HRA AC EXM SEG	segment accumulator to hold the monthly HRA exemption HRA FM EXMPT.	You can print the accumulated value on the payslip and other reports.
HRA AC SAL FMTDA	MTD accumulator to hold the value of HRA FM SAL SEG (Segment salary for HRA) minus RTO BASE SAL)	You can print the accumulated value on the payslip and other reports.
HRA PTDA	House Rent Allowance – Calendar Period to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
HRA_FMTDA	MTD accumulator to hold the value of HRA	You can print the accumulated value on the payslip and other reports.
HRA FPDA	House Rent Allowance – Fiscal Calendar Period to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
HRA MTDA	House Rent Allowance – Calendar Month to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
HRA FMDA	House Rent Allowance – Fiscal Calendar Month to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
HRA QTDA	House Rent Allowance – Calendar Quarter to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
HRA FQDA	House Rent Allowance – Fiscal Calendar Quarter to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
HRA YTDA	House Rent Allowance – Calendar Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
HRA FYDA	House Rent Allowance – Fiscal Calendar Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
ER AC BASE PLUS	Basic Pay plus other Allowance	Stores additional earnings that make up basic pay. Delivered basic pay earnings are basic salary, basic hourly, and dearness allowance. This accumulator is customer-maintained.

Accumulator	Description	Related Functionality
ESI ARR	Employee State Insurance Arrears	Total of add to arrears less payback amount for employee ESI.
ESI ER ARR	Employee State Insurance Employer Contribution Arrears	Total of add to arrears less payback amount for employer ESI.
ESI GROSS WAGES	Employee State Insurance Gross Wages	Total of base salary, HRA, DA, and so on.
PF GROSS WAGES	Provident Fund Gross Wages	Total of base salary and DA.
PF ARR	Provident Fund Arrears	Total of add to arrears less payback amount for employee PF.
PF ER ARR	Provident Fund Employer Contribution Arrears	Total of add to arrears less payback amount for employer PF.
PF ER PEN ARR	Provident Fund Pension Employer Contribution Arrears	Total of add to arrears less payback amount for employer PF Pension.
PF ER ADMIN ARR	Provident Fund Employer Administration Charge Arrears	Total of add to arrears less payback amount for employer PF Admin Charge.
PF ER EDLI ARR	Provident Fund Employer EDLI Arrears	Total of add to arrears less payback amount for employer PF EDLI.
PF ER EDLIA ARR	Provident Fund Employer EDLI Administration Charge Arrears	Total of add to arrears less payback amount for employer PF EDLI Admin Charge.
PF VOL ARR	Provident Fund Voluntary Contribution Arrears	Total of Add to Arrears less payback amount for PF Voluntary Contribution.
SEG AC BASE SAL	Segment Accumulator to hold the Base Salary and their retro values.	
TDS TAXABLE EARN	Taxable Earnings	Total of previous employment and current earnings.
TDS TOTAL EXEMPT	Total Exemptions	Total of previous employment and current exemptions such as house rent allowance, conveyance allowance, leave travel allowance, medical allowance, and so on.
TDS GROSS SALARY	Gross Salary	Taxable earnings less total exemptions.

Accumulator	Description	Related Functionality
TDS TOTAL DEDUCT	Total Deductions	TDC Total Deduct only accumulates the standard deduction for the employee for the year and the Profession tax paid by the employee. This also includes the Profession tax paid from a previous employer. Standard deductions for a previous employer are not included.
TDS SALARY INCOME	Salary Income	The amount chargeable under the Head of Income Salaries for the purposes of tax.
TDS OTHER INCOME	Other Income	Total of other income such as capital gains, losses, and so on.
TDS CHAPTER VI A	Chapter VIA Deductions	Total of Chapter VIA deductions.
TDS TOT TAX INCOME	Total Taxable Income	Total income used to determine basic tax liability of the employee. Derived by gross total income less total Chapter VIA deductions.
TDS GROSS TOT INC	Gross Total Income	The sum of all sources of income before considering Chapter VIA deductions.
TDS REBATE NONINF	Noninfrastructure Rebates	Total noninfrastructure rebates.
TDS REBATE INFR	Infrastructure Rebates	Total infrastructure rebates.
TDS TOT REBATES 88	Total Rebates 88	Total noninfrastructure rebates, infrastructure rebates, and other rebates.
TDS NET TAX PAYBL	Net Tax Payable	Net tax liability less Rebates 88.
TDS TOT TAX CREDIT	Total Tax Credit	Total of all rebates and other credits.
PERQUISITES	Value of Benefit Given in Kind	Total perquisites for the current period. If additional perquisites are added, this accumulator must be updated.
TDS HRA RECD	House Rent Allowance Received	The amount of previous employment and current house rent allowance amount received in the fiscal period.
SAL FOR HRA	Salary for House Rent Allowance	The salary for which house rent allowance is determined.
TDS NET TAX LIAB	Net Tax Liability	The calculated tax deducted at source liability for the fiscal year.
TDS TAX PAYABLE	Tax Payable	The net tax liability for tax deducted at source less any previous tax deducted at source deducted.

Accumulator	Description	Related Functionality
TDS TAX BALANCE	Balance Tax to Deduct	The calculated balance of tax payable for the year, which is the tax payable less the current month's deductions.
TDS SPOT TAX WAGES	Spot taxed Earnings Segment Accumulator	
TDS ARR	Arrears	Total of add to arrears less payback amount for TD.
PT GROSS WAGES	Profession Tax – Gross Wages	Stores profession-tax gross wages.
AB PRIV LV BAL	Absence – Privilege Leave Balance	Stores privilege leave balance for use in reporting and calculations of leave.
AB PRIV LV ENT	Absence – Privilege Leave Entitlement	Stores privilege leave entitlement for use in reporting and calculations of leave.
AB PRIV LV ADJ	Absence – Privilege Leave Adjustments	Stores privilege leave adjustment for use in reporting and calculations of leave.
AB CASUAL LV BAL	Absence – Casual Leave Balance	Stores casual leave balance for use in reporting and calculations of leave.
AB CASUAL LV ENT	Absence – Casual Leave Entitlement	Stores casual leave entitlement for use in reporting and calculations of leave.
AB CASUAL LV ADJ	Absence – Casual Leave Adjustments	Stores casual leave adjustment for use in reporting and calculations of leave.
AB SICK LV BAL	Absence – Sick Leave Balance	Stores sick leave balance for use in reporting and calculations of leave.
AB SICK LV ENT	Absence – Sick Leave Entitlement	Stores sick leave entitlement for use in reporting and calculations of leave.
AB SICK LV ADJ	Absence –Sick Leave Adjustments	Stores sick leave adjustment for use in reporting and calculations of leave.
LOSS OF PAY CYTDA	Loss of Pay – Calendar Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
LOSS OF PAY CYTDU	Loss of Pay – Calendar Year to Date (Units)	You can print the accumulated value on the payslip and other reports.
LOSS OF PAY FYTDA	Loss of Pay – Fiscal Calendar Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
LOSS OF PAY FYTDU	Loss of Pay – Fiscal Calendar Year to Date (Units)	You can print the accumulated value on the payslip and other reports.

Accumulator	Description	Related Functionality
LOAN ARR	Generic Loans – Arrears	Total of add to arrears less payback amount for Generic Loans.
ADVANCE ARR	Generic Advances – Arrears	Total of add to arrears less payback amount for Advances.
LA AC LOAN PAY	Generic Loan Payments	Loan pay accumulator.
LA AC ADV PAY	Generic Advances Payments	Advance pay accumulator.
BASE SALARY YTDF	Base Salary – Fiscal Calendar Year to Date	Calculated base salary for the current fiscal year used in the calculation of tax deducted at source.
MA AC ALLOW AMT	Medical Allowance – Fiscal Calendar Year to Date Amounts Paid	Used in determining the medical allowance claims amount to be reimbursed.
LTA NON TAX YTDA	Leave Travel Allowance – Calendar Year to Date Non-Taxable Earning	You can print the accumulated value on the payslip and other reports.
LTA NON TAX FYDA	Leave Travel Allowance – Fiscal Calendar Year to Date Non-Taxable Earning	You can print the accumulated value on the payslip and other reports.
LTA TAX YTDA	Leave Travel Allowance – Calendar Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
LTA TAX FYDA	Leave Travel Allowance – Fiscal Calendar Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
LTA PAYOUT YTDA	Leave Travel Allowance Payouts – Calendar Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
LTA PAYOUT FYDA	Leave Travel Allowance Payouts – Fiscal Calendar Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
LTA WAIVE YTDA	Leave Travel Allowance Waived Earning – Calendar Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
LTA WAIVE FYDA	Leave Travel Allowance Waived Earning – Fiscal Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
MA NON TAX YTDA	Medical Allowance Non-Taxable Earning – Calendar Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
MA NON TAX FYDA	Medical Allowance Non-Taxable Earning – Fiscal Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
MA TAX YTDA	Medical Allowance Taxable Earning – Calendar Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
MA TAX FYDA	Medical Allowance Taxable Earning – Fiscal Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.

Accumulator	Description	Related Functionality
MA PAYOUT YTDA	Medical Allowance Payouts – Calendar Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
MA PAYOUT FYDA	Medical Allowance Payouts – Fiscal Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
MA WAIVE YTDA	Medical Allowance Waived Earning – Calendar Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
MA WAIVE FYDA	Medical Allowance Waived Earning – Fiscal Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
RENT CYTDA	Rent Allowance Earning – Calendar Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
RENT FYTDA	Rent Allowance Earning – Fiscal Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
LUNCH ALLOW CYTDA	Lunch Allowance Earning – Calendar Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
LUNCH ALLOW FYTDA	Lunch Allowance Earning – Fiscal Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
CONVEY ALLOW CYTDA	Conveyance Allowance Earning – Calendar Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
CONVEY ALLOW FYTDA	Conveyance Allowance Earning – Fiscal Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
OVERTIME 1.5 CYTDA	Overtime (Time and a Half) Earning – Calendar Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
OVERTIME 1.5 CYTDU	Overtime (Time and a Half) Earning – Calendar Year to Date (Units)	You can print the accumulated value on the payslip and other reports.
OVERTIME 1.5 FYTDA	Overtime (Time and a Half) Earning – Fiscal Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
OVERTIME 1.5 FYTDU	Overtime (Time and a Half) Earning – Fiscal Year to Date (Units)	You can print the accumulated value on the payslip and other reports.
OVERTIME 2.0 CYTDA	Overtime (Double Time) Earning – Calendar Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
OVERTIME 2.0 CYTDU	Overtime (Double Time) Earning – Calendar Year to Date (Units)	You can print the accumulated value on the payslip and other reports.
OVERTIME 2.0 FYTDA	Overtime (Double Time) Earning – Fiscal Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.

Accumulator	Description	Related Functionality
OVERTIME 2.0 FYTDU	Overtime (Double Time) Earning – Fiscal Year to Date (Units)	You can print the accumulated value on the payslip and other reports.
BONUS CYTDA	Bonus Earning – Calendar Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
BONUS FYTDA	Bonus Earning – Fiscal Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
SPEC ALLOW CYTDA	Special Allowance Earning – Calendar Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
SPEC ALLOW FYTDA	Special Allowance Earning – Fiscal Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
SHIFT PCT CYTDA	Shift Allowance Percentage Earning – Calendar Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
SHIFT PCT CYTDU	Shift Allowance Percentage Earning – Calendar Year to Date (Units)	You can print the accumulated value on the payslip and other reports.
SHIFT PCT FYTDA	Shift Allowance Percentage Earning – Fiscal Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
SHIFT PCT FYTDU	Shift Allowance Percentage Earning – Fiscal Year to Date (Units)	You can print the accumulated value on the payslip and other reports.
SHIFT AMT CYTDA	Shift Allowance Fixed Amount Earning – Calendar Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
SHIFT AMT FYTDA	Shift Allowance Fixed Amount Earning – Fiscal Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
SHIFT HRLY CYTDA	Shift Allowance Hourly Earning – Calendar Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
SHIFT HRLY CYTDU	Shift Allowance Hourly Earning – Calendar Year to Date (Units)	You can print the accumulated value on the payslip and other reports.
SHIFT HRLY FYTDA	Shift Allowance Hourly Earning – Fiscal Year to Date (Amounts)	You can print the accumulated value on the payslip and other reports.
SHIFT HRLY FYTDU	Shift Allowance Hourly Earning – Fiscal Year to Date (Units)	You can print the accumulated value on the payslip and other reports.
ER AC BASE PY CUST	Customer Basic Pay Earning	Stores additional earnings that make up basic pay that have been defined by the customer.

Accumulator	Description	Related Functionality
ER AC BONUS PAY	Customer Basic Pay plus Other Earnings	Used to determine earnings upon which bonus pay calculations are based. The customer can add additional earnings into the ER AC BONUS CUST accumulator for use in the calculation.
ER AC BONUS CUST	Customer Bonus Pay	Stores additional earnings that make up bonus pay that have been defined by the customer.
IN AC GROSS	Gross Wages	Sum of all gross wages paid to an employee. Used on payslips and other reports.
IN AC NET	Net Pay for Banking Purposes	Net pay used for transmitting data to the bank.
PT ARR	Profession Tax Arrears	Total of add to arrears less payback amount for profession tax.
TDS REBATE OTH	Total Other Rebates	Total other rebates.
ESI GROSS WAGES FYTD	ESI Gross Wages Fiscal Year to Date	Total of accumulator ESI gross wages.
PF GROSS WAGES FYTD	PF Gross Wages Fiscal Year to Date	Total of accumulator PF gross wages.
PT GROSS FYTD	PT Gross Wages Fiscal Year to Date	Total of accumulator PT gross wages.
PT GROSS SEMI ANNL	PT Gross Wages for the Semi Annual period	Total of accumulator PT gross wages.
TDS PROJECT WAGES	Projected Wages for the Fiscal Year for TDS	Stores the projected wages for the fiscal year for TDS purposes.
TDS NON PROJ WAGES	One Time Wages (not to be projected)	Stores the wages that should not be projected when calculating TDS. The customer can add additional earnings that are for one-time payments (nonregular payments).

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Global Payroll for India Reports

Global Payroll for India Reports: A to Z

This table lists the Global Payroll for India reports, sorted by report ID.

For more information about running these reports, refer to:

For more information about running these reports, refer to:

- The corresponding topic in this product documentation.
- *PeopleTools: Process Scheduler*
- *PeopleTools: BI Publisher for PeopleSoft*
- *PeopleTools: SQR Language Reference for PeopleSoft*.

For samples of these reports, see the Report Samples that are published with this online documentation.

Global Payroll for India Reports

Report ID and Report Name	Description	Navigation	Run Control Page
GPINPT01 PT Remittance Report	Calculates and reports on profession taxes.	**Global Payroll & Absence Mgmt**, and then **Taxes**, and then **Profession Tax Report IND**, and then **Profession Tax Report IND**	GPIN_PR_RC
GPINPY01 NEW ESI ENROLLMENT (new employee state insurance enrollment)	Generates a list of employees enrolled in employee state insurance (ESI).	**Global Payroll & Absence Mgmt**, and then **Absence and Payroll Processing**, and then **Reports**, and then **Enroll and Term Reports IND**, and then **Enroll and Term Reports IND**	GPIN_PR_GPINPY01
GPINPY01 List Of Employees Terminated From ESI (list of employees terminated from employee state insurance)	Generates a list of employees terminated from ESI.	**Global Payroll & Absence Mgmt**, and then **Absence and Payroll Processing**, and then **Reports**, and then **Enroll and Term Reports IND**, and then **Enroll and Term Reports IND**	GPIN_PR_GPINPY01

Report ID and Report Name	Description	Navigation	Run Control Page
GPINPY01 NEW PF ENROLLMENT (new provident fund enrollment)	Generates a list of employees enrolled in provident funds.	**Global Payroll & Absence Mgmt**, and then **Absence and Payroll Processing**, and then **Reports**, and then **Enroll and Term Reports IND**, and then **Enroll and Term Reports IND**	GPIN_PR_GPINPY01
GPINPY01 List Of Employees Terminated From PF (list of employees terminated from provident fund)	Generates a list of employees terminated from provident funds.	**Global Payroll & Absence Mgmt**, and then **Absence and Payroll Processing**, and then **Reports**, and then **Enroll and Term Reports IND**, and then **Enroll and Term Reports IND**	GPIN_PR_GPINPY01
GPINRM01 ESI Remittance (employee state insurance remittance)	Generates ESI remittance statement reports.	**Global Payroll & Absence Mgmt**, and then **Absence and Payroll Processing**, and then **Reports**, and then **ESI Remittance Statement IND** , and then **ESI Remittance Statement IND**	GPIN_PR_RC
GPINRM02 Provident Fund Remittance	Generates provident fund remittance statement reports.	**Global Payroll & Absence Mgmt**, and then **Absence and Payroll Processing**, and then **Reports**, and then **PF Remittance Statement IND**, and then **PF Remittance Statement IND**	GPIN_PR_RC
GPINTX Allowance Taxable Amount IND (list of taxable medical allowance amount of employees)	Calculates and reports on medical allowance taxable amounts.	**Global Payroll & Absence Mgmt**, and then **Taxes**, and then **Allowance Taxable Amounts IND**, and then **Allowance Taxable Amounts IND**	GPIN_PR_GPINTX01
GPINTX List of Taxable LTA Amount of Employees (list of taxable leave travel allowance amount of employees)	Calculates and reports on leave travel allowance taxable amounts.	**Global Payroll & Absence Mgmt**, and then **Taxes**, and then **Allowance Taxable Amounts IND**, and then **Allowance Taxable Amounts IND**	GPIN_PR_GPINTX01

Report ID and Report Name	Description	Navigation	Run Control Page
GPINYE1 Form 24 (Income Tax)	Generates details of all payments made to the employees, and the deductions and remittances made by the employer on behalf of the employee for the preceding financial year.	**Global Payroll & Absence Mgmt**, and then **Year-End Processing**, and then **Create Year End Reports IND**, and then **Create Year End Reports IND**	GPIN_PR_RC
GPINQT1 Print Form 24Q IND	Generates details of all payments made to employees, and TDS deductions and remittances made by the employer on behalf of the employee for the preceding quarter. Generates TDS tax data files for electronic submission.	**Global Payroll & Absence Mgmt**, and then **Authority Correspondence**, and then **Print Form 24Q IND**, and then **Print Form 24Q IND**	GPIN_24Q_RC
GPINYE2 Form 16 /Form 16AA (Income Tax)	Generates Form 16 income tax data at the end of the year or upon employee termination. Generates required annual statements of remuneration paid to the employee and the taxes deducted from the employee and remitted to the tax authorities for the preceding financial year. One statement per employee is generated.	**Global Payroll & Absence Mgmt**, and then **Year-End Processing**, and then **Create Year End Reports IND**, and then **Create Year End Reports IND**	GPIN_PR_RC
GPINYE3 Form 12BA Data	Generates Form 12BA for every employee who has been paid taxable perquisites or profits in lieu of salary. Accompanies Form 16, Form 24, or both.	**Global Payroll & Absence Mgmt**, and then **Year-End Processing**, and then **Create Year End Reports IND**, and then **Create Year End Reports IND**	GPIN_PR_RC
GPINYE4 Form 3A Data	Generates Form 3A to provide details of employee provident fund contributions for the previous year. Accompanies Form 6A.	**Global Payroll & Absence Mgmt**, and then **Year-End Processing**, and then **Create Year End Reports IND**, and then **Create Year End Reports IND**	GPIN_PR_RC

Report ID and Report Name	Description	Navigation	Run Control Page
GPINYE5 Form 6A Data	Generates Form 6A to provide details of employee provident fund contributions for the previous year. Accompanies Form 3A.	**Global Payroll & Absence Mgmt**, and then **Year-End Processing**, and then **Create Year End Reports IND**, and then **Create Year End Reports IND**	GPIN_PR_RC
GPINYE06 Form 6 Data	Generates Form 6 biannually to report employer contributions to the Employee State Insurance Corporation.	**Global Payroll & Absence Mgmt**, and then **Year-End Processing**, and then **Create Year End Reports IND**, and then **Create Year End Reports IND**	GPIN_PR_RC
GPINYE7 Form 5	Generates Form 5 to report details of contributions and remittances of professional tax.	**Global Payroll & Absence Mgmt**, and then **Year-End Processing**, and then **Create Year End Reports IND**, and then **Create Year End Reports IND**	GPIN_PR_RC
GPINPY02 ESI Form 6	Generates Form 6 to provide half-year reporting of consolidated employer and employee insurance contributions, by month.	**Global Payroll & Absence Mgmt**, and then **Authority Correspondence**, and then **Print ESI Form 6 IND**, and then **Print ESI Form 6 IND**	GPIN_FORM7_RC
GPINPY03 LWF Form A	Generates LWF registration information.	**Global Payroll & Absence Mgmt**, and then **Authority Correspondence**, and then **Print LWF Report**, and then **Print LWF Report**	GPIN_FORMLWF_RC