PeopleSoft Human Capital Management 9.2

PeopleSoft Global Payroll for Mexico

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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:

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- 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.

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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)

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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

Contact Us

Send your suggestions to psoft-infodev_us@oracle.com.

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

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1

Getting Started with Global Payroll for Mexico

Global Payroll Documentation

This topic discusses:

- Global Payroll application design.
- Global Payroll documentation structure.
- Documentation roadmap.

Global Payroll Application Design

Because the structure of the Global Payroll documentation is similar to the design of the application, the best way to understand the documentation is to review the design of the application itself.

Global Payroll is composed of two complementary parts:

- A core payroll application that includes:
  - A payroll rules engine.
  - A payroll processing framework.
  - Processes and setup steps that apply to all countries.
- Country extensions that include:
  - Statutory and customary objects (payroll rules, payroll processes, reports, additional country-specific pages, and self-service applications).
  - Country-specific rules and elements.

Global Payroll Documentation Structure

Like the application, the documentation for Global Payroll consists of two parts: a core book and separate country extension books.

Core Documentation

Like the core portion of the application, which applies to all countries and enables you to develop rules and process a payroll regardless of location, the core book is country neutral. Thus, while it describes the core set of tools that you can use to develop a payroll, it doesn't discuss the local country rules that have been set up for you. For information about how PeopleSoft has extended core capabilities to meet local requirements, refer to the country extension documentation.

Country Extension Documentation

Just as country extensions in the application address local needs, the country extensions in the documentation cover local functionality. This includes:

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- Any core feature with local extensions.
- Country-specific rule setup.
- PeopleSoft-delivered rules and tables.
- Country-specific pages.
- Country-specific reports.
- PeopleSoft HCM setup, such as bank definitions, that varies by country.
- Implementation information that varies by country.

Documentation Roadmap

The core and the country extension documentation complement each other, therefore, it is important to read both sets of documentation.

What to Read When

You can approach the documentation in the following way:

- If a process setup is shared between the core application and the country extension, read the core documentation first and then the country extension documentation.

  For example, banking is a feature that you first define in the core application and then often continue in the country extension, because most country extensions have some type of banking functionality. You would first read the banking documentation in the core documentation and then the banking documentation in the country extension documentation.
- If a process is set up only in the core application, read the core documentation.
- If a process is set up only in the country extension, read the country extension documentation.

Documentation Audiences

PeopleSoft has identified the following audiences for the documentation:

- Technical

  Technical readers who are interested in the technical design of the application should begin by reading the "Understanding the Core Application Architecture" topic of the core documentation, as well as the background processing information that is mentioned in many of the other topics.

  See PeopleSoft Global Payroll: Understanding the Core Application Architecture.
- Functional

  Functional readers who are interested in defining rules should begin by reading the country-specific functionality described in the country extension documentation. Functional readers can continue to learn about how to use the tools in the core application by reading the topics on defining payroll elements, such as earnings and deductions, in the core documentation.
- Managerial

  Managerial readers should begin by reading the introduction topics of both the core documentation and the country extension documentation to get a high-level overview of the Global Payroll application.

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> **Note**
>
> To fully understand Global Payroll, technical or functional persons who are involved in the application implementation should read the core documentation and the applicable country extension documentation in their entirety.

Global Payroll for Mexico Overview

PeopleSoft Global Payroll for Mexico delivers elements, rules, pages, processes, and reports that work with the PeopleSoft Global Payroll core application to form a complete payroll package for Mexico. You can define earnings, such as the base salary, Aguinaldo, average salary, overtime and profit-sharing (PTU). You can define deductions, such as union fees, parking dues, and personal loans, as well as provisions for vacations, vacation premiums, and Aguinaldo. You can define and process garnishments. With Global Payroll for Mexico, you can calculate and process social security, federal taxes, and state taxes. You can track absences and vacations for employees. With Global Payroll for Mexico, you can calculate termination pay and adjust or reverse an employee's check. You can generate payslips, process banking, and generate reports.

Global Payroll for Mexico Business Processes

PeopleSoft Global Payroll for Mexico provides these business processes:

- Earnings.
- Christmas bonus.
- Average salary.
- Profit sharing (PTU).
- Overtime.
- Deductions.
- Social Security.
- Federal and state taxes.
- Annual adjustment.
- Subsidy factor.
- Absences.
- Vacations.
- Termination pay.
- Garnishments.
- Results adjustments and reversals.
- Net-to-gross payments.
- Payslips.
- Banking.

These business processes are discussed in the business process topics in this documentation.

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Global Payroll for Mexico Integrations

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

- PeopleSoft Human Resources (HR).
- PeopleSoft Time and Labor.
- PeopleSoft General Ledger.

Integration considerations are discussed in the core Global Payroll documentation. Supplemental information about third-party application integrations is located on Oracle's My Oracle Support website.

Related Topics

- PeopleSoft Global Payroll: Understanding Payee Data
- PeopleSoft Global Payroll: Understanding How to Compensate Employees in Global Payroll for Time Reported Through Time and Labor
- PeopleSoft Global Payroll: Understanding the General Ledger Interface

Global Payroll for Mexico 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 Oracle 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* and *PeopleTools: Component Interfaces*

Related Topics

- Application Fundamentals: PeopleSoft HCM Implementation

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Understanding Global Payroll for Mexico

Global Payroll for Mexico

Global Payroll for Mexico is a country extension of the core Global Payroll application. It provides you with the payroll rules, elements, and absence processes that are needed to run a Mexican payroll.

Global Payroll for Mexico Business Processes

Global Payroll for Mexico supports these business processes:

- Earnings.

  Global Payroll for Mexico enables you to define and process different types of earnings, including base salary, bonuses, commissions, overtime, profit sharing (PTU), food coupons, vacation premiums, savings funds, and seniority pay. You can also determine the taxable and nontaxable portion of each earning and deduction, such as for overtime, vacation premium, Sunday premium, savings fund, and Christmas bonus.

  See Understanding Earnings in Mexico.

- Christmas bonus.

  You can calculate the Christmas bonus, (Aguinaldo), that is given to employees. Bonus amounts are based on the length of service and salary and are prorated according to worked days during the year.

  See Defining Parameters for Christmas Bonuses and Vacation Premiums.

- Average salary.

  Global Payroll for Mexico calculates the average salary based on previous balances or periods. The result of this can be used as a base calculation for earnings and deductions.

  See Understanding Earnings in Mexico.

- Profit sharing (PTU).

  You can calculate amounts due to employees as a result of profit sharing. Profit sharing payments are based on two parts: the employee's salary and the worked days from the profit generating year. You can define the profit sharing (PTU) parameters, such as the amount to share, maximum salary, and number of days for temporary employees to be considered into the process. You can generate four different reports for the PTU, including Profit Sharing Project, Eligible Employees, Non-Eligible Employees, and Unpaid Employees.

  See Understanding Earnings in Mexico.

- Overtime.

  You can define the maximum number of double hours per day, the maximum number of occurrences by week, or the maximum number of double hours per week. You can create an annual overtime calendar. You can also record daily and weekly overtime hours for

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employees, including overtime hours, days off worked hours, and holiday hours. You can generate two overtime reports: one with detail and one without detail.

See Understanding Overtime.

- Deductions.

  Global Payroll for Mexico enables you to define and process many different types of deductions for Mexico including before tax, after tax, and nontaxable deductions. Examples of deductions include union fees, parking dues, absences, personal loans, and deductions based on seniority. You can also set up and track provisions, which are accrued expenses, for vacations, vacation premiums, Christmas bonuses, and IMSS (social security) quotas.

  See Understanding Deductions.

- Social security.

  Global Payroll for Mexico enables you to calculate and process different aspects of social security, including IMSS (social security), SAR (retirement), and INFONAVIT (housing). You can calculate IMSS quotas for employers and employees and the fixed, variable, and hourly integrated daily salary (SDI). You can generate several social security reports and interfaces, including the SUA Payee Load interface, SUA Transactions interface, IMSS Hire notification, IMSS Termination notification, IMSS Salary Modification notification, Variability report, Work Risk Disabilities report, and the Base Over Cap report.

  See Understanding Social Security Processing.

- Federal and state taxes.

  You can define and process federal and state taxes. Examples of federal taxes that you can process include the Monthly tax (Art. 113, 114, and 115), Annual tax (Art. 177, 178, and 116), Termination taxes (Art. 112), and other special tax calculation methods, such as RISR 86 and Multiple Months earnings (Art. 91). You can also define which earnings and deductions are eligible for the state tax base according to each state's laws, including those for the most complex state taxes, such as Ciudad Juárez (Chihuahua), Hidalgo, Guerrero, and Chihuahua.

  See Understanding Tax Processing.

- Annual adjustment.

  Global Payroll for Mexico enables you to process year-end calculation of taxes and determine whether the company withheld the correct amount of taxes during the monthly process. Excess withholding can be used to offset withholding for December and the following months. However, the difference can be discounted in a single deduction or multiple deductions, depending on parameters that are provided.

  See Understanding Tax Processing.

- Subsidy factor.

  You can calculate the subsidy proportion of taxes that will apply to employees in the following calendar year. You can set up subsidy factor parameters for your company, calculate the subsidy factor, and generate a Subsidy Factor report. Additionally, a separate process exists that calculates the subsidy factor, which the user enters in the Company table. Payroll then generates federal taxes based on this subsidy factor.

  See Understanding Tax Processing.

- Absences.

  You can track and define different types of absences, including maternity leave, general illness, work risk, work related illness, and in transit work risk. You can create rules for other types of absences, such as for paid-permitted and unpaid-permitted, overlapping

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absences (such as illness during vacation), subsidy rules, and mass absences. You can also generate an absence report and a Risk Factor report, which lists the employees who were on disability due to work-related illnesses or accidents during the year.

See Understanding Absences in Mexico.

- Vacations.

  Global Payroll for Mexico enables you to record and track vacations. You can generate vacation entitlements, create mass vacation takes, handle negative entitlement balances, track accrued vacation premiums for financial reporting, process vacation pay, and generate a vacation report with or without employee detail.

  See Understanding Absences in Mexico.

- Termination pay.

  You can calculate the final check amount for terminated employees. The system enables you to define different termination versions and which earnings and deductions are considered in each version. You can also define which termination versions are linked with each Job/Action reason. Global Payroll for Mexico provides two sample letters for the termination and layoff process.

  See Understanding Absences in Mexico.

- Garnishments.

  Global Payroll for Mexico enables you to define and process garnishments. This includes defining the recipient information and handling the most complex requirements, such as multiple garnishments by an employee with different rules and priorities. Global Payroll for Mexico provides the five most common types of garnishment rules, including fixed amount, net pay percentage, total earnings minus tax percentage, total earnings percentage, and specific earnings minus corresponding tax percentage.

  See Garnishment Types.

- Results adjustments and reversals.

  Global Payroll for Mexico enables you to identify an employee whose check is going to be reversed for a particular calendar and adjust or reverse a check that was already paid to the employee.

  See Understanding Results Adjustments.

- Gross up earnings.

  Global Payroll for Mexico provides two earnings elements that are used for paying a net amount to payees. Starting from the net amount, the system determines the gross amount to process so that after tax deductions have been made, the required net amount remains.

  See Net-to-Gross Processing.

- Payslips.

  You can generate payslips using Global Payroll for Mexico. You can specify the printing order, which earnings and deductions should be printed, and a range of employees to generate their payslips. Sometimes, defining the earnings and deductions that you want excluded on the payslip is easier than defining all the earnings and deductions that you want included. If this is the case, you can define your earnings and deductions this way. Global Payroll for Mexico gives you the choice to set up payslips in the way that works best for your business processes. If you purchased PeopleSoft ePay, you can have employees view their payslips online.

  See Understanding the Payslip Definition Process.

  See PeopleSoft ePay: Understanding ePay Transactions for Global Payroll.

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- Banking.

  You can define source bank and payee bank information. You can run the banking process and specify payment instructions to the bank. The system generates flat files for the top five Mexican banks: Banamex, BBVA Bancomer, Banorte, HSBC, and Scotiabank.

  See Understanding the Banking Process.

Delivered Elements for Mexico

Global Payroll defines each business process for Mexico 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.

This topic discusses:

- Delivered element creation.
- Element ownership and maintenance.

Delivered Element Creation

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

The core application:

- Consists of a payroll rules engine.

  The payroll rules engine is a flexible tool that enables you to define the rules of your payroll system and to run 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. Global Payroll enables you to enter and maintain payroll rules through a set of pages and offers comprehensive features that enable you to work in your preferred language or currency.

- Provides a payroll processing framework.

  The payroll processing framework provides a flexible way to define and run payroll and absence processing flows (such as calendars, run types, pay periods, and process lists).

Country extensions:

- Are built using the core application.
- Consist of statutory and customary objects (country-specific payroll rules, elements, payroll processes, reports, pages, and self-service applications).

Element Ownership and Maintenance

This topic describes PeopleSoft's approach to element ownership and what this means for the maintenance of Mexican payroll rules. This information helps clarify which parts of the system

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you might be required to maintain, what you can modify, and what parts of the system you cannot change.

Element Ownership in Global Payroll

Five types of element ownership are in Global Payroll:

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

Element Ownership in Global Payroll for Mexico

Of the five ownership types described here, only these two are used to define Mexican elements:

- PS Delivered/Maintained.
- PS Delivered/Not Maintained.

Although Global Payroll for Mexico 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 delivered elements to meet your own unique requirements.

This table contains an element-by-element description of the Global Payroll for Mexico approach to element ownership and maintenance.

Element Type	Ownership	Exceptions
Earnings	PS Delivered/Not Maintained	Social security subsidies, cash salary credit, overtime, and profit-sharing earnings.
Deduction	PS Delivered/Not Maintained	Federal taxes (ISR), state taxes, and social security deductions.

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Element Type	Ownership	Exceptions
Variable	PS Delivered/Not Maintained	Variables that are used in social security or tax calculations (federal and state). Variables that are used in component interfaces (mainly in pay group parameters).
Bracket	PS Delivered/Not Maintained	None.
Accumulator	PS Delivered/Not Maintained	In the tax and social security areas, Global Payroll for Mexico delivers four accumulators that are important for payroll and tax calculation. • TOTAL DEDUCCIONES (the only member is TOTAL DEDUCCION N, which contains all the deductions that will affect the net payment). • TOTAL PERCEPCIONES (the only member is TOTAL PERCEPCION N, which contains all the earnings that will add to the net payment). • TOTAL PERC EXENT (the only member is TOTAL PERC EXENT N, which contains all the earnings that will add to the nontaxable base). • TOTAL PERC GRAVAD (the only member is TOTAL PERC GRAVA N, which contains all the earnings that will add to the taxable base).
Element Group	PS Delivered/Not Maintained	Delivered as sample data.
Process List	PS Delivered/Not Maintained	Delivered as sample data.
Section	PS Delivered/Not Maintained	Delivered as sample data.
Formula	PS Delivered/Not Maintained (varies by functional area)	All the formulas that are used in social security, federal tax, state tax, and annual tax adjustment are defined as PS Delivered/Maintained. Otherwise, formulas are defined as PS Delivered/Not Maintained.
Array	PS Delivered/Maintained	None.
Writable Array	PS Delivered/Maintained	None.
Historical Rule	PS Delivered/Not Maintained	Delivered as sample data.
Generation Control	PS Delivered/Not Maintained	Delivered as sample data.

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Element Type	Ownership	Exceptions
Count	PS Delivered/Not Maintained	Federal taxes and social security elements.
Duration	PS Delivered/Not Maintained	Federal taxes and social security elements.
Date	PS Delivered/Not Maintained	Federal taxes and social security elements.
Proration	PS Delivered/Not Maintained	Federal taxes and social security elements.
Rounding rule	PS Delivered/Not Maintained	Federal taxes and social security elements.

Element Naming Conventions in Mexico

Understanding the naming convention that is developed for PeopleSoft-delivered elements can help you determine the element type, the functional area that it serves, and how it is used.

This topic discusses:

- Naming conventions.
- Functional area codes.
- Element type codes (PIN_TYPE).

Naming Conventions

This topic discusses the naming conventions for:

- Primary elements.
- Supporting elements.
- Component names (suffixes).

Additional information about abbreviations that are used in Mexican elements is also discussed in this section.

Primary Elements

Primary elements (such as earnings, deductions, absence take, and absence entitlement elements) do not contain functional area codes or element type codes in their names. Primary elements have names that identify their functions and element types without the use of additional codes. For example, the name of the earnings element SDO POR HORA identifies this element as earnings (SDO [Sueldo]), and more specifically, as an hourly salary element(por hora).

Supporting Elements

For supporting elements (such as variables, formulas, dates, and durations), PeopleSoft uses this naming convention: FF TT NAME.

- FF: Functional area code.

  See Functional Area Codes.

- TT: Type of supporting element.

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See Element Type Codes (PIN_TYPE).

- NAME: Based on a term in Spanish and provides a further means of identifying the element.

For example, in the variable IE VR ESTADO GC:

- IE represents the functional area (state taxes [Impuestos Estatales]).
- VR represents the element type (variable).
- ESTADO GC provides a further means of naming the element (variable identifying the state [estado] used in generation control [GC]).

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

Component Names (Suffixes)

In Global Payroll for Mexico, suffixes are used to name the components of earnings and deduction elements. For example, when you create an earnings, 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, suppose that you define the earnings element named EARN1 with this calculation rule:

EARN1 = Rate × Unit

The system automatically creates two additional elements for the components in the calculation rule:

- Rate element: EARN1_RATE.
- Unit element: EARN1_UNIT.

The system creates suffixes to name the components of the element (_RATE and _UNIT).

In Global Payroll for Mexico, all components and accumulators have:

- Country: MEX
- Separator: _

In Global Payroll, all suffixes fall into one of these types:

- Separator.
- Earnings or deductions component suffixes.
- Earnings or deductions accumulator suffixes.
- Deduction arrears component suffixes.
- Deduction arrears accumulator suffixes.

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- Deduction recipient suffixes.
- Absence entitlement component suffixes.
- Absence entitlement accumulator suffixes.

To view all of the suffixes that are defined for Mexico, use the Element Suffixes page in Global Payroll (core application).

See PeopleSoft Global Payroll: Understanding Elements.

Additional Information About Abbreviations Used in Mexican Elements

Many Mexican elements contain abbreviations that provide additional information about their use in the system (beyond that provided by functional area codes or element type codes). For example, Global Payroll for Mexico delivers the duration element GN DR AÑOS SERV. While the functional area code GN indicates that this element is used across various functional areas (it has general [GN] relevance) and the element type code DR identifies it as a duration element, the abbreviation AÑOS SERV (Service Years [Años de Servicio]) provides additional information about how the element measures time. As you become more familiar with the payroll rules that are created for Mexico, these abbreviations can help you further identify and understand the role that is played by each element.

This table lists the most common abbreviations that are used in the names of Mexican elements.

Abbreviation	Spanish	English
#	Número	Number
%	Porcentaje	Percentage
ACT	Actual	Current
ACUM	Acumulado	Balances
AGUI or AGUIN	Aguinaldo	Christmas bonus
AHOR or AHORR	Ahorro	Savings
ALIM	Alimenticia	Alimony
ANT or ANTIG	Antigüedad	Seniority
ANU	Anual	Annual
ANV or ANIV	Aniversario	Anniversary
ASIG	Asignar	Assign
ASIST	Asistencia	Assistance
CAL	Calendario	Calendar
CALC	Cálculo	Calculation process
CIA	Compañía	Company
COMP	Compensar	Compensate
CRE or CRED	Crédito	Credit
CUO	Cuota	Quote or fee
DED	Deducción	Deduction
DES	Despensa, Descuento, o Descanso	Food, discount, or rest
DESP	Despensa	Food
DEV	Devolución	Return
DIF	Diferencia	Difference

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Abbreviation	Spanish	English
DOB or DOBL	Dobles	Doubles
DOM or DOMIN	Domingo	Sunday
EFE	Efectivo	Cash
ESP	Especial	Special
EX	Exento o Extra	Nontaxable or over
EXC or EXCE	Excedente	In excess
EXE or EXENT	Exento	Nontaxable
FACT	Factor	Factor
FED	Federal	Federal
FES or FEST	Festivo	Holiday
FIC or FICT	Ficto	Fictitious
FIJ	Fijo	Fix
FRE or FREC	Frecuencia	Frequency
GR, GRAV, GRAVA, or GRAVAD	Gravable	Taxable
HOR	Hora	Hours
IMP	Impuesto o Importe	Tax or amount
INC or INCAP	Incapacidad	Disability
ING	Ingresos	Earnings
LIM	Límite	Limit or boundary
LIQ or LIQUIDAC	Liquidación	Layoff
MIN	Mínimo	Minimum
NEG	Negativo	Negative
PER	Periodo	Period
PERC	Percepciones	Earnings
PMA	Prima	Premium
PRES	Préstamo	Loan
PRM or PROM	Promedio	Average
PRO	Producidas	Produced
PROP	Proporción o Proporcional	Proportion or proportional
PROV	Provisión	Provision
PRY	Proyectado	Projected
RET	Retenido	Withheld
RETRO	Retroactivo	Retroactive
RNG	Rango	Rank
RSGO	Riesgo	Risk
SAL	Salario	Salary
SDO	Sueldo	Salary
SEGM	Segmento	Segment
SUB	Subsidio	Subsidy
SUP	Superior	Top limit

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Abbreviation	Spanish	English
TOP	Tope	Cap
TOT	Total	Total
TRA or TRAB	Trabajado	Worked
TRI or TRIP	Triple	Triple
ULT	Último	Last
UNI or UNID	Unidades	Units
VAC or VACAC	Vacaciones	Vacations
VAL	Vales	Coupons
VAR or VARIAB	Variable	Variable
X	Por	Per

Functional Area Codes

For some elements, you need to use a functional area in the naming convention. The two-digit functional area codes are used in naming conventions to identify the functional area where the element is being used.

This table contains the functional area codes that are used in the names of Mexican elements.

Functional Area	Description (Spanish and English)
AA	Ajuste anual de ISR (annual adjustment)
AG	Aguinaldo (Christmas bonus)
AU	Ausentismo (absences)
DE	Deducciones (deductions)
FD	Impuestos Federales (federal taxes)
GN	General - Independiente de área funcional (general use independent of functional area)
IE	Impuestos Estatales (state taxes)
IM	IMSS (Social Security)
LF	Liquidaciones y Finiquitos (terminations)
PA	Pensión Alimenticia (garnishments)
PE	Percepciones (earnings)
PI	Piramidación (gross-up earnings)
PR	Préstamos (loans)
PV	Provisiones (provisions)
RE	Reversiones (reversals)
RU	Reparto de utilidades (profit sharing)
SP	Salario Promedio (average salary)
TE	Tiempo extra (overtime)
VA	Vacaciones (vacations)

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Element Type Codes (PIN_TYPE)

This table contains codes for all of the element types. Because not all element types are delivered for Mexico, not all of these codes appear in the names of Mexican 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	Earnings
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
WA	Writable array

Archiving Data

Global Payroll for Mexico generates a large amount of result data. To keep the amount of saved data manageable, you should periodically archive it. PeopleSoft PeopleTools delivers an archiving tool called the Data Archive Manager. To aid you in archiving your result data using the Data Archive Manager, Global Payroll for Mexico delivers a predefined archive object (GPMX_RSLT_ARCHIVE) and an archive template (GPMXRSLT). The delivered archive template uses queries that select data by calendar group ID (CAL_RUN_ID field).

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> **Note**
>
> Please 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.

Viewing Delivered Elements for Mexico

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

Related Topics

- PeopleSoft Global Payroll: Understanding How to View Delivered Elements

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Defining Country Data

Understanding Global Payroll Core Functionality in Mexico

This topic discusses:

- Retroactivity
- Accumulators
- Segmentation
- Triggers
- Rounding rules
- Rate codes

Related Topics

- Global Payroll for Mexico Business Processes
  Global Payroll for Mexico supports these business processes:

Retroactivity

Retroactivity is the process of going back in time and recalculating prior calendars because changes were made after the original calculation was run. When retroactive processing occurs for a payee, the system recalculates each element generated for the payee. The difference between these results is the retro delta.

In Global Payroll, there are two methods for calculating retro:

- Corrective
- Forwarding

> **Note**
>
> In Mexico, all retro is handled with the forwarding method. This includes both the Default retro method and the On Conflict retro method.

With the forwarding method, payments are calculated in the respective periods, but balance accumulators for the period are not updated. Only the segment accumulators are updated. Deltas are created for each earning, deduction, and segment accumulator used in the process list. These deltas, which are identified on the Retro Process Overrides page, are forwarded to the current period.

The system generates a retro trigger every time you enter a change on the following data.

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Changes in the Employee's Data

Changes in employee data include compensation rate-related changes:

- Status.
- Compensation frequency.
- Standard hours.
- Pay system flag.
- Action for retroactive hire.
- Action for retroactive termination.

Changes in Other Data

Changes in other data including absence take-related changes:

- Positive input
- Overtime
- Pay group

> **Note**
>
> Not all earnings or deductions will have an adjustment for retro. Some of the earnings and deductions are forwarded to one earning or deduction, which then appears as a single adjustment in the current period.

Making Retro SDI Changes in Mexico

In Global Payroll for Mexico, the Process SDI MEX calculation process generates retro triggers for all employees for changes in the SDI, such as changes in minimum wage, SDI, or seniority anniversary.

Related Topics

- Defining Contribution Rates for Social Security
  To define social security contributions, use the Quotas MEX (GPMX_IMS_QUOTA) component.
- PeopleSoft Global Payroll: Understanding General Rules of Retroactive Processing

Accumulators

In Mexico, these types of accumulators are used:

- Annual accumulators to calculate the annual adjustment for taxes and PTU (profit-sharing).
- Monthly accumulators to calculate taxes and social security quotas.
- Weekly accumulators to calculate overtime.

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> **Note**
>
> For every earning and deduction you define, you should carefully determine if it needs to have its own Month to Date and Year to Date accumulators. Avoid creating unnecessary accumulators, since this may affect performance. Most of the accumulators need to have the company defined as User Key 1.

Related Topics

- PeopleSoft Global Payroll: Understanding Accumulators

Segmentation

In Global Payroll, if there is a change to employee details within a pay period that might affect calculation, such as a pay rate increase, the calculation creates two slices. One slice uses the details before the change and the other slice uses the details after the change.

Global Payroll provides two types of segmentation: period segmentation and element segmentation. Period segmentation occurs when more than one gross-to-net calculation is required. Element segmentation occurs when there is a change in the rate that affects the calculation of one or more elements. Element segmentation occurs when you want to calculate a select set of earnings or deductions multiple times, but not the entire gross to net calculation.

In Global Payroll for Mexico, changes in pay group or pay entity produces a period segmentation.

Global Payroll for Mexico delivers some segmentation; however, you can alter these depending on your business needs.

Creating Earnings and Segmentation

Whenever a salary earning is created, you must enter it on the list of elements that will be sliced by the element segmentation that was defined earlier.

To enter the salary earnings on the list:

1. Go to the Segmentation Event Definition page in the core application.
2. Select the COMPRATE event.
3. Find the elements for Mexico, under Country = MEX.
4. Add the new salary earnings.

Related Topics

- PeopleSoft Global Payroll: Understanding Segmentation Setup

Triggers

Triggers are used to detect online changes to data that should result in some type of system action. Examples of common data changes that might use triggers include a new employee hire or a change in pay rate.

Global Payroll provides three types of triggers:

- Iterative − tells the system to process an employee for the current period.
- Segmentation − tells the system to segment a period or element.

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- Retro − tells the system to perform retro processing.

> **Note**
>
> You must first set up an iterative trigger to tell the system that when an event occurs, it should perform the desired action. After that, you can use a trigger to process an employee, perform segmentation, or perform retro processing.

Global Payroll for Mexico delivers some triggers; however, you can alter these depending on your business needs.

Delivered Iterative Triggers

This table lists iterative triggers that are delivered with Global Payroll for Mexico.

Trigger	Changes to:
ADDRESSES	Employee's address record.
COMPENSATION	Employee's compensation record.
CONTRACT_DATA	Employee's contract data record.
EMPLOYMENT	Employee's employment record.
GPMX_REVERSAL	Employee's results reversal record.
GP_ABS_EVENT	Employee's absence records.
GP_ABS_OVRD	Employee's absence records.
GP_OFFCYCL_A_VW	Employee's off-cycle record.
GP_OFFCYCL_C_VW	Employee's off-cycle record.
GP_OFFCYCL_M_VW	Employee's off-cycle record.
GP_OFFCYCL_U_VW	Employee's off-cycle record.
GP_PI_MNL_DATA	Employee's positive input records.
GP_PI_MNL_SOVR	Employee's positive input supporting element override record.
GP_PYE_OVRD	Employee's payee override record (earnings and deductions assignments).
GP_PYE_OVR_SOVR	Employee's payee element assignment supporting element override record.
GP_PYE_SECT_DTL	Employee's payee section detail record.
GP_RTO_TRGR_VW	Retro trigger record.
GP_SEG_TRGR_VW	Segmentation trigger record.
JOB	Employee's job record.
JOB_JR	Employee's Mexico-specific job record.
PERSON	Employee's personal data record.
PERS_DATA_EFFDT	Employee's personal data effective date record.
PERS_SMOKER	Employee's personal data smoker record.
PER_ORG_INST	Employee's personal data organizational institution record.
SCH_ASSIGN	Employee's schedule calendar assignment record.

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Trigger	Changes to:
SCH_MNG_SCH_TBL	Employee's workday overrides record.
TL_PAYABLE_TIME	Employee's Time and Labor payable time record.
WKF_CNT_TYPE	Employee's workforce contract type record.

Delivered Segmentation Trigger

This table lists the segmentation trigger that is delivered with Global Payroll for Mexico.

Trigger	Changes to:
JOB	Employee's job record.

Delivered Retro Triggers

This table lists retro triggers that are delivered with Global Payroll for Mexico.

Trigger	Changes to:
COMPENSATION	Employee's compensation record.
GPMX_REVERSAL	Employee's results reversal record.
GP_ABS_EVENT	Employee's absence records.
GP_ABS_OVRD	Employee's absence records.
GP_PI_MNL_DATA	Employee's positive input records.
GP_PI_MNL_SOVR	Employee's positive input supporting element override record.
GP_PYE_OVRD	Employee's payee override record (earnings and deductions assignments).
GP_PYE_OVR_SOVR	Employee's payee element assignment supporting element override record.
GP_PYE_SECT_DTL	Employee's payee section detail record.
JOB	Employee's job record.
SCH_ASSIGN	Employee's schedule calendar assignment record.

Segmentation Triggers with Earning and Deduction Assignments

In Global Payroll you can define segmentation triggers only for *effective dated* records, with one exception: you can define segmentation triggers for the *begin and end dated* earning and deduction assignment record GP_PYE_OVRD. This exception enables you to assign an earning or deduction to a payee on the Element Assignment by Payee (GP_ED_PYE) or Payee Assignment by Element (GP_ED_ELEM) components, and segment (and prorate) the element when the assignment *begin* date comes after the pay period begin date, and/or the assignment *end* date comes before the period end date.

See PeopleSoft Global Payroll: Understanding Trigger Definition Setup.

See PeopleSoft Global Payroll: Payee Overrides and Segmentation.

Related Topics

- PeopleSoft Global Payroll: Understanding Triggers

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Rounding Rules

In Global Payroll, you can apply rounding to a component of an earning or deduction, the resolved amount of an earning or deduction, or within a formula. Rounding is applied to each of the components first before the resolved amount is rounded. Rounding is applied after proration rules have been applied.

Global Payroll for Mexico delivers these rounding rules:

- Round to Nearest 1 decimal for all accumulators, earnings, and deductions.
- Truncate decimals for accumulators, earnings and deductions that are only acceptable as integer values. For example, to determine the number of vacation days that a payee can take.

Related Topics

- PeopleSoft Global Payroll: Defining Rounding Rule Elements

Understanding Integration Points Used in Global Payroll for Mexico

This topic discusses:

- Integration points
- Service operations
- Component interfaces

Integration Points

Integration points are interfaces between the different PeopleSoft applications such as PeopleSoft Financials and PeopleSoft HR. They allow publication and transfer of database contents from one database to another.

> **Note**
>
> To research the technical details of any integration point used by PeopleSoft applications, refer to the Interactive Services Repository on Oracle's My Oracle Support website.

Service Operations

Global Payroll for Mexico uses two integration points based on service operations architecture (SOA) technology. The messages received within Global Payroll for Mexico are triggered in response to saved field changes in the JOB record in HR.

This table lists the service operations utilized by Global Payroll for Mexico:

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Service Operation	Queue	Handler/ Application Class	Record	Page(s)	Explanation
WORKFORCE_SYNC	PERSON_DATA	SDI Hire Termination Job	JOB	JOB_DATA1	Hire and Termination process: When the JOB.ACTION is HIR, REH, TER, LOF, or COM, a row is added to GPMX_SDI_WA.
WORKFORCE_SYNC	PERSON_DATA	Termination version Job	JOB	JOB_DATA1	Termination process: When the JOB.ACTION is TER, LOF, or COM, a row is added to PS_GP_PYE_SOVR.

Component Interfaces

Global Payroll for Mexico also has some component interfaces (CIs). This table lists these components/application engines and the corresponding component interfaces:

Component	Component Interface
GPMX_PARM_PYGRP component	GP_PAYGROUP_SOVR
GPMX_EE_NOADJ component	GPMX_EMPL_NA
GPMX_LOAN component	GP_PYE_ERN_DED_ASGN
GPMX_OVERTIME component	GP_POSITIVE_INPUT
GPMX_ERNDED_SOVR component	GPMX_SAL_LEVDED
GPMX_ERNDED_SOVR component	GPMX_SAL_LEVERN
GPMX_INTERC (Inter-company Transfer) application engine	CI_GP_ACUM_USER_ADJ
GPMX_MASSABS (Mass Absences) application engine	GP_ABSENCE_EVENT
GPMX_MASS_PI (Mass Positive Input) application engine	GP_POSITIVE_INPUT

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> **Note**
>
> PeopleSoft HCM has reorganized component interface permissions based on functional areas within products. Permissions are now enabled through permission lists that are associated with functional areas or products. Refer to the *PeopleSoft HCM 9.2 - Reorganization of Component Interface Permissions* (Doc ID 2342162.1) article on My Oracle Support for an updated 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.

Setting Up Utilities

To define element mapping, use the Map Elems to Comp/Rcd MEX (GPMX_ELEM_MAP) component.

To define component variables, use the Define Variable Attributes MEX (GPMX_COMP_VARS) component.

> **Note**
>
> This setup is optional and is designed to help technical people manipulate PIN numbers during development.

Pages Used to Set Up Utilities in Global Payroll for Mexico

Page Name	Definition Name	Usage
Map Elems to Comp/Rcd MEX Page	GPMX_ELEM_MAP	Set up the mapping to the fields and variables of an element which are used during development in the components interface objects.
Define Variable Attributes MEX Page	GPMX_COMP_VARS	Define the component variables to be used on the Map Elems to Comp/Rcd MEX page when defining the variable type.

Understanding Element Mapping

The element map plays a critical role when packaging and moving elements and data to other databases.

PIN numbers are used in PeopleCode, component interfaces, and reports to refer to global elements. The PIN number is a consecutive number so it can change between databases or releases; therefore, there is a need to create a utility during development so that the PIN number is not hard-coded. Using the utility also ensures consistency between the PIN number changes.

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PeopleCode Function Example

When you need to use a PIN number in the PeopleCode, use this function to obtain the corresponding PIN number:

```
Declare Function Get_Pin_Num PeopleCode GPMX_DERIVED_EM.PIN_NUM FieldFormula;


&Record_Name = "GPMX_LOAN";


&Date_Pin_Num = Get_Pin_Num("R", &Record_Name, "DATE");
```

There are two ways to map an element:

- By record
- By component

Select *Record* when you need to map a record field into a core Global Payroll element.

Select *Component* when the mapping doesn't depend on a record field; instead, it depends on some behavior on the page, for example, the record is used in more than one place and must map to different core Global Payroll elements.

If you select to map an element by component, you may want to define your component variables before you define your element mapping. You'll do this on the Define Variable Attributes MEX page.

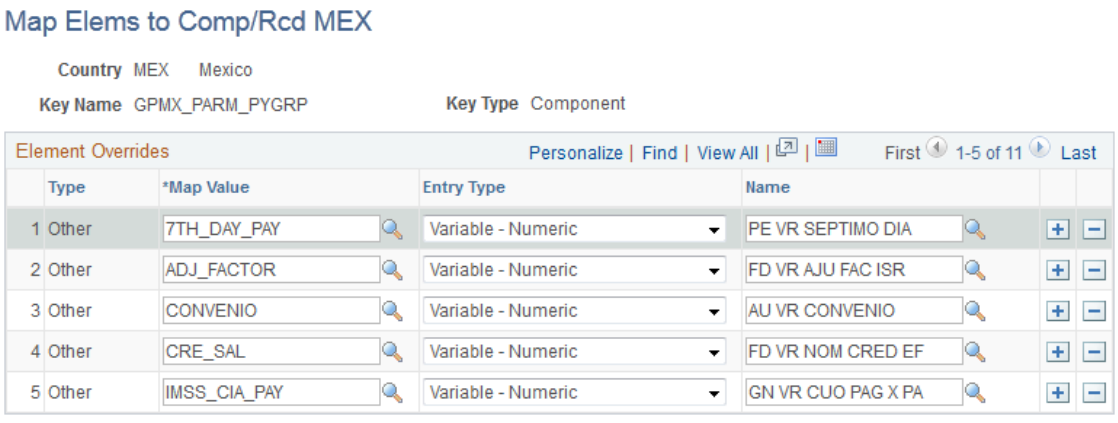
Map Elems to Comp/Rcd MEX Page

Use the Map Elems to Comp/Rcd MEX page (GPMX_ELEM_MAP) to set up the mapping to the fields and variables of an element which are used during development in the components interface objects.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Elements**, and then **Map Elems to Comp/Rcd MEX**

This example illustrates the fields and controls on the Map Elems to Comp/Rcd MEX page . You can find definitions for the fields and controls later on this page.



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Field or Control	Description
Key Type	The key type that your mapping applies to appears here. Values are *Other* and *Field.* **Note:** The **Key Type** field is populated depending on the key type you selected (either Record or Component) and can't be modified.
Map Value	Select the field or value to which you want to map. If you selected Record as the key type, you can select the record fields. If you selected Component as the key type, then you can select the variables defined for the component.
Entry Type	Select the element type on which you want to transform your field or variable. Values are *Accumulator, Bracket- Numeric, Count, Deduction, Earnings, Formula – Numeric, Rate Code, Rate Code – Amount, Variable – Numeric, Variable – Pointer*, and *Variable – Dec+Char+Date+Ptr*. Values depend on the Map Value type. For example, if you select a Character map value, then you can select only character values. **Note:** Although you can see *System Element – Numeric* as a value, you will not be able to select it. The entry type cannot be a system element or a constant.
Name	Select the name of the element.

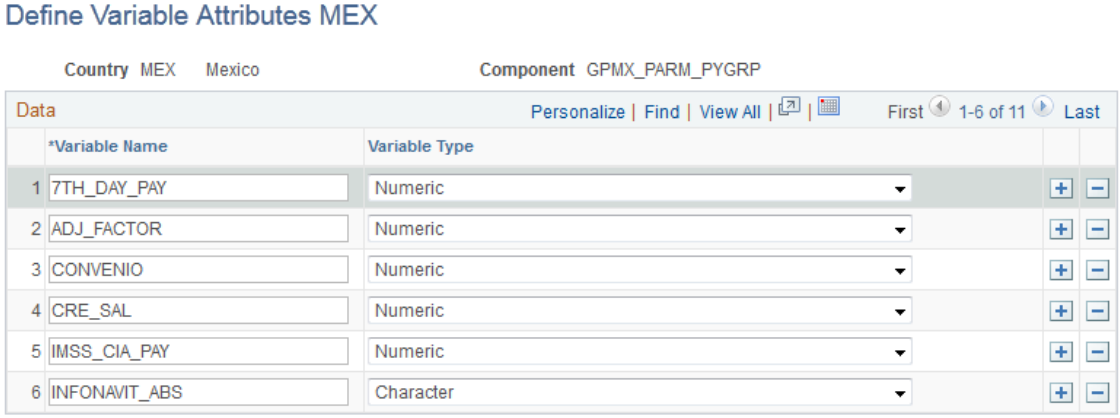
Define Variable Attributes MEX Page

Use the Define Variable Attributes MEX page (GPMX_COMP_VARS) to define the component variables to be used on the Map Elems to Comp/Rcd MEX page when defining the variable type.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Elements**, and then **Define Variable Attributes MEX**

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



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Field or Control	Description
Variable Name	Enter the name of the variable. This can be any name you want to use during PeopleCode development.
Variable Type	Select the variable type. Values are *Character*, *Date*, and *Numeric*. **Note:** Once you've defined your component variables, you can map your elements on the Map Elems to Comp/Rcd MEX page.

Related Topics

- Map Elems to Comp/Rcd MEX Page
  Use the Map Elems to Comp/Rcd MEX page (GPMX_ELEM_MAP) to set up the mapping to the fields and variables of an element which are used during development in the components interface objects.

Setting Up Country Data

To set up minimum wages, use the Minimum Wages MEX (GPMX_MIN_WAGE) component.
To set up general parameters, use the Pay Groups MEX (GPMX_PARM_PYGRP) component.
To set up element lists, use the Element Lists MEX (GPMX_PAYSLIP_FORMA) component.

Pages Used to Set Up Country Data for Mexico

Page Name	Definition Name	Usage
Minimum Wages MEX Page	GPMX_MIN_WAGE	Define minimum wages for each wage zone. You can update this page as minimum wage rates change.
General Parameters Page	GPMX_TAX_PARM	Define general parameters for federal taxes and IMSS quotas.
Element List MEX page	GPMX_PAYSLIP_FORMA	Enter the earnings and deductions that are eligible to print on a payslip. Element lists are used in the payroll results register and in termination/ layoff letters, as well as the payslip generation process.
Unit of Measure and Update MEX Page	GPMX_UMA_VALUES	Define Unit of Measure.
States Code Mex Page	GPMX_STATE_LGL	Map PeopleSoft States with the Legal Codes Mexican states (tags) provided by the SAT.
UMA Element Override MEX Page	GPMX_UMA_SOVR	Define element overrides.
General Parameters MEX Page	GPMX_CFDI_PARAM	Define whether electronic files (CFDI) and payslips must only consider Finalized Calendars

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Page Name	Definition Name	Usage
Unit of Measure INFONAVIT MEX Page	GPMX_MIN_WAGE_INF	To view the daily, monthly and annual values exclusive to INFONAVIT for the system elements.

Understanding Delivered Variables for General Parameters

This table lists some PeopleSoft-delivered variables that are populated into the core application as override variables. You can override these variables through positive input, as an earning/deduction assignment, or at the calendar or payee levels.

Field	Entry Type	Global Payroll for Mexico Element
GPMX_ADJ_FACTOR	Variable	FD VR AJU FAC ISR
GPMX_DAY_FACTOR	Variable	FD VR FAC MEN ISR
GPMX_TAX_METHOD	Variable	FD VR SEL TIP ISR
GPMX_TAX_CRED	Variable	FD VR APL CRE SAL
GPMX_IMS_ER_PAID	Variable	GN VR CUO PAG X PA
GPMX_BASE_DAYS	Variable	IM VR DIAS VARIAB
GPMX_BAS_SAL_IMS	Variable	IM VR BASE SAL IMS
GPMX_PYGRP_CALC	Variable	GN VR TIPO CALC
GPMX_7TH_DAY_PAY	Variable	PE VR SEPTIMO DIA
GPMX_CRE_SAL	Variable	FD VR NOM CRED EF
GPMX_XMAS_AVG	Variable	AG VR PROMEDIO

Note

All of these parameters are mapped to the corresponding variable. You can override the value to any of these variables at any level (pay group, pay calendar, payee) on the corresponding Supporting Element Overrides page. For example, the tax method for a pay group could be defined originally as *Adjustment During the Month,* but you can override this value at the payee level to be *Without Adjustment.*

See General Parameters Page.

Minimum Wages MEX Page

Use the Minimum Wages MEX page (GPMX_MIN_WAGE) to define minimum wages for each wage zone.

You can update this page as minimum wage rates change.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Addl Rates, Ceilings, Values**, and then **Minimum Wages MEX**

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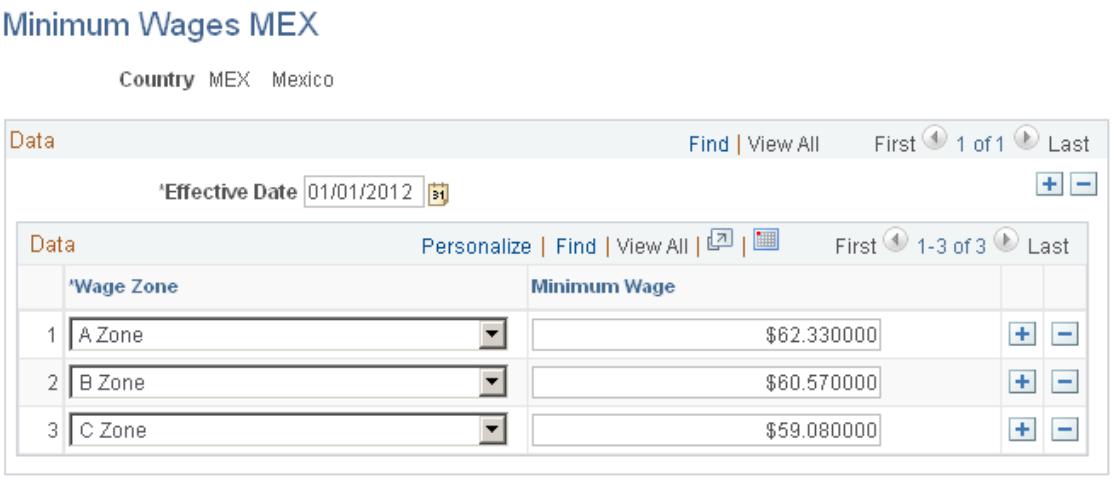
This example illustrates the fields and controls on the Minimum Wages MEX page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Wage Zone	Enter the wage zone. Values are *A Zone*, *B Zone*, and *C Zone*.
Minimum Wage	Enter the minimum wage for the wage zone. The minimum wage in Mexico is determined as a daily amount, not an hourly amount. For example, in A Zone, the minimum wage for the year 2004 is 45.24 MXN (per day). Minimum wages are used in determining several earnings caps such as vacation premium caps and Sunday premiums. For example, the law states that the non-taxable base for a Sunday premium will be equal to one daily minimum wage rate. **Note:** Because minimum wage amounts usually change from year to year, you can update this table by adding a new effective-dated row.

Related Topics

- Understanding Earnings Based on the Minimum Wage
  Some earnings are calculated in relation to the minimum wage. For example, the Sunday premium and savings fund earnings are tax-exempt up to an amount equal to the minimum wage. Any amount over the minimum wage is taxed. To define the minimum wage used in these calculations, use the Minimum Wages MEX page.

General Parameters Page

Use the General Parameters page (GPMX_TAX_PARM) to define general parameters for federal taxes and IMSS quotas.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Framework**, and then **Organizational**, and then **Pay Groups MEX**, and then **General Parameters**

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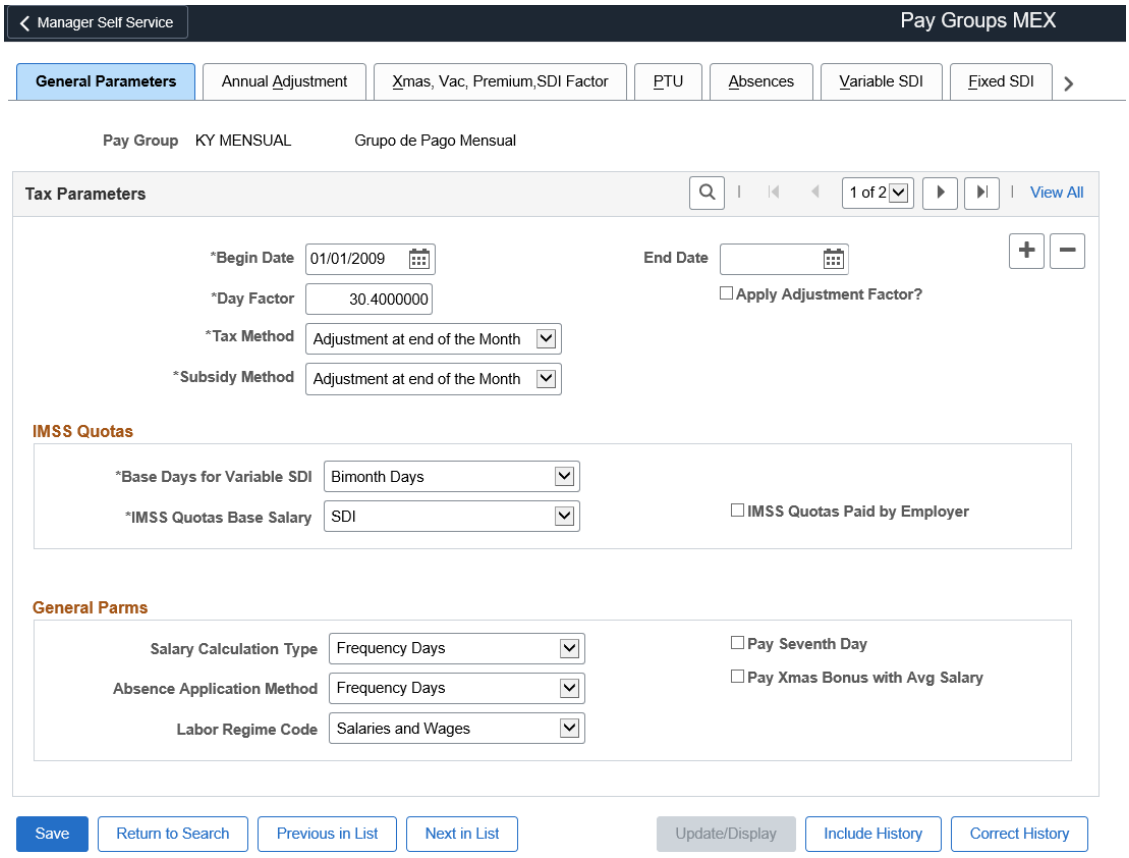
This example illustrates the fields and controls on the General Parameters page. You can find definitions for the fields and controls later on this page.



Tax Parameters

These fields apply to federal tax processing.

Field or Control	Description
Day Factor	If you select the **Apply Adjustment Factor** check box, enter the day factor. Values are *30* or *30.4*, in most cases. The value you select corresponds to the monthly taxable base.
Apply Adjustment Factor?	Select if your company adjusts the payroll for federal taxes. For example, federal taxes in Mexico are due monthly, but let's say that your company has a semimonthly payroll. So, you will divide the number of days so that it's adjusted for the monthly federal taxes. **Note: Day Factor** and**Apply Adjustment Factor** are only used to calculate federal taxes.
Salary Credit only in Adj Prd (adjustment period)	Select if you're going to give a subsidy or salary credit to an employee only in an adjustment period (usually the last period of each month). **Note:** This field does not appear on the page when the value of the **Begin Date** field is*01/01/2008* or later.

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Field or Control	Description
Pay Cash Salary Credit	Select to indicate that the Cash Salary Credit will be paid on a separate payslip (if a separate payroll is run). If you select this check box, the Cash Salary Credit will not appear in an employee's regular payslip. **Note:** This field does not appear on the page when the value of the **Begin Date** field is *01/01/2008* or later.
Tax Method	Select the method used for calculating the month to month tax deduction. The tax methods you can choose from are: *Adjustment During the Month, Adjustment at end of the Month, Annual Projection Method, Semi-monthly Projected* and *Without Adjustment.*
Subsidy Method	Enter the subsidy method. The subsidy methods you can choose from are: *Adjustment During the Month, Adjustment at end of the Month, Payment in the Last Period,* and *Without Adjustment.*

IMSS Quotas

These fields apply to social security setup.

Field or Control	Description
Base Days for Variable SDI	Select the method you'll use for calculating the variable portion of SDI. Values are *60 Days, Bimonth Days, Hourly Payee,* and *Paid Days.* For example, when you select 60 Days, the system always uses 60 days (minus the number of days that the payee was not active) no matter what bimonthly period the system is calculating. If Bimonth Days is selected, then the number of days considered depends on the bimonthly period processed (61 days for the second bimontly period). Paid Days is for payees who do not work on a regular basis. Hourly Payee is for payees whose payment is based on hours worked instead of days worked.
IMSS Quotas Base Salary	Helps to determine if you should pay IMSS quotas for workers with minimum wages by comparing the Minimum Wage to the SDI or Daily Salary. Values are *SDI* and *Salary.*

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Field or Control	Description
IMSS Quotas Paid by Employer	Some companies pay employees' IMSS quotas. If you select this check box, it helps determine whether your company should subtract the IMSS quotas from the employee's earnings or not. **Note:** You'll select the **IMSS Quotas Paid by Employer** check box if the employee quotas will not be deducted from the net pay of the employee. You'll also define which salary type the system will compare to the minimum wage (either the Daily Salary or the SDI) in the**IMSS Quotas Base Salary** field. Although the law states that employers do not need to withhold IMSS quotas for employees with minimum wages, some companies compare the SDI versus the minimum wage instead of the Daily Rate versus the minimum wage to decide if they're going to withhold IMSS quotas for employees with the minimum wage. In Global Payroll for Mexico, you have the choice of how you want to define your IMSS quotas for employees earning minimum wages.

General Parms (parameters)

Field or Control	Description
Salary Calculation Type	Values are *Calendar Days*, *Frequency Days*, and *Hourly*. If you select *Calendar Days*, the salary base will be calculated based on the days of the calendar. If you select *Frequency Days*, the salary paid will be calculated according to the days being processed in the period. If you select *Hourly*, the pay will be calculated for the hours entered at the payee level. It is also possible to calculate salary units based on calendar days for employees with segmentation events in the period. For Calendar Days method for Segmentations, you need to set the value for variable **PE VR SDO F MET 1** to “1”, in the Pay Group SOVR page.
Absence Application Method	Select how you want the system to determine the number of days to be considered for absence calculations in a given calendar period for monthly and semimonthly payrolls. If you select *Calendar Days*, then the system uses the number of calendar days (28, 29, 30, or 31) depending on the month that is being processed. If you select *Frequency Days*, then the system uses 30 as the upper limit for the number of days to be considered for a given month.

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Field or Control	Description
Labor Regime Code	Select the Labor Regime Code. Valid values are: • Income Stock or Bond • Members of Council Directors • Pensioners • Retirees • Salaries and Wages • Salary and Serv Fees Assim • Severance • Similar Others • Similar to Salary Business Act • Similar to Salary Civil Associ • Similar to Salary Cooperative
Pay Seventh Day	Select if workers should be paid for the seventh day in a week. This field is commonly used for union purposes. If you select this check box, it will trigger an earning to separate regular earnings from the seventh day earnings.
Pay Xmas Bonus with Avg. Salary	In Mexico, it's common for employees to receive their Christmas bonus with the daily rate. However, some employees may receive commission or other additional pay. In these cases, the Christmas bonus can be paid by the sum of the daily salary, which results in the average salary. If this situation applies for a pay group, select this check box.

Element Lists MEX Page

Use the Element Lists MEX page (GPMX_PAYSLIP_FORMA) to enter the earnings and deductions that are eligible to print on a payslip.

Element lists are used in the payroll results register and in termination/layoff letters, as well as the payslip generation process.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Reports**, and then **Element Lists MEX**

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

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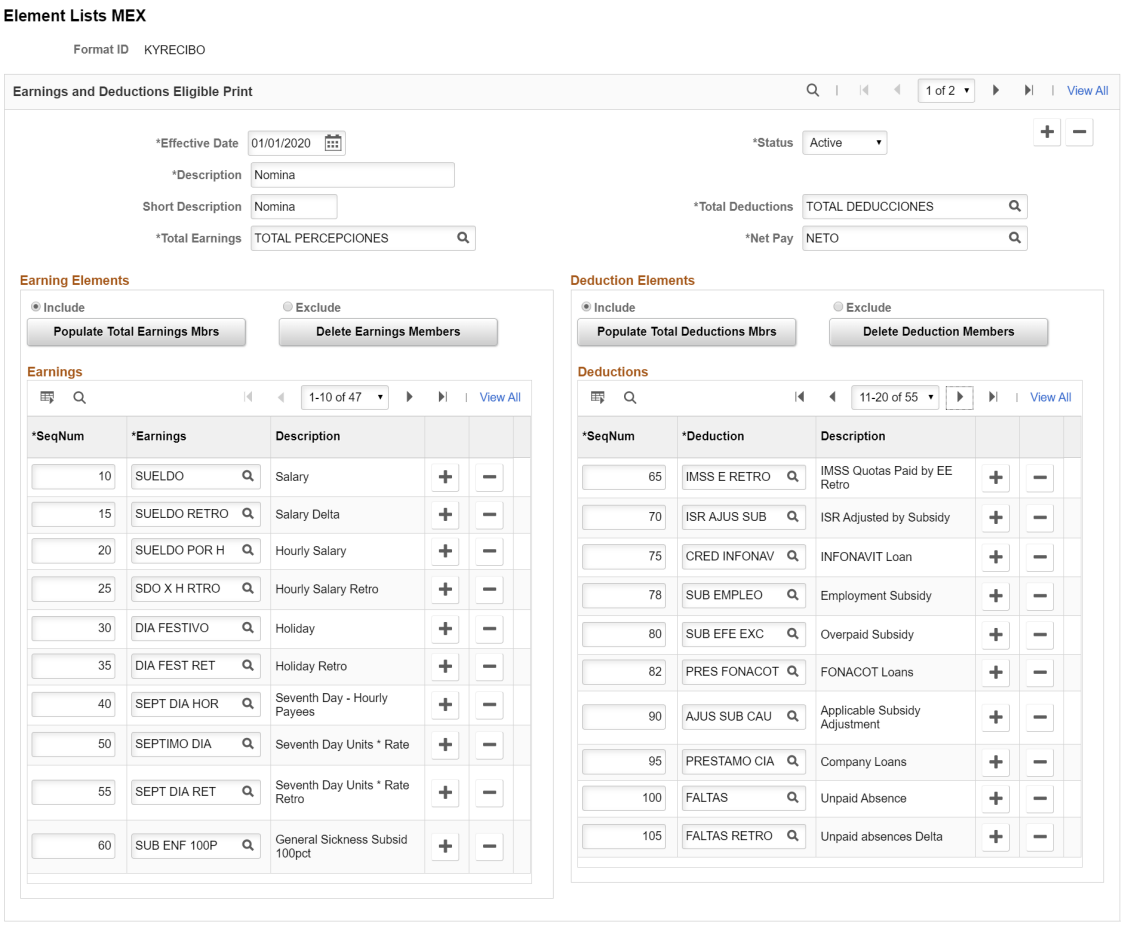

Earnings and Deductions Eligible Print

Field or Control	Description
Effective Date	Date from which the new element created is added to the corresponding element lists. **Note:** If this step is skipped then the new elements are not considered for processing.
Total Deductions	Select the element that corresponds to total deductions.
Total Earnings	Select the element that corresponds to total earnings.
Net Pay	Select the element that corresponds to net pay.

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Earning Elements

Field or Control	Description
Include/Exclude	You can choose to enter the earnings you want included on the payslip or you can choose to enter the earnings you want excluded, depending on what is the easiest way for you to define your payslips. For example, if you have defined 20 types of earnings and you only want to include 5 of them, the easiest way is to include those 5 earnings, instead of excluding the other 15 earnings. On the other hand, if you want to exclude only 3 earnings from the payslip, you can select **Exclude** and then enter the 3 earnings that you want to exclude, instead of including the other 17 earnings.
Populate Total Earnings Mbrs (members) and**Populate Total Deductions Mbrs (members)**	If you click this button, all the earnings and deductions that contribute to the selected accumulator will be populated.

Deduction Elements

The fields on the **Deductions Elements** group box are similar to the fields on the**Earnings Elements** group box.

Earnings

Field or Control	Description
SeqNum (sequence number)	Enter the sequence number for the earnings.
Earnings	Select the individual earnings elements that will be included (or excluded) in the payslip.

Deductions

The fields on the **Deductions** group box are similar to the fields on the**Earnings** group box.

Unit of Measure and Update MEX Page

Use the Unit of Measure and Update MEX page (GPMX_UMA_VALUES) to define Unit of Measure.

> **Note**
>
> UMA is the economic reference in Mexican Pesos to determine the amount of the payment the obligations and assumptions provided for the federal laws. This amount will be updated every year by the Government Institution (INEGI).

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Addl Rates, Ceilings, Values**, and then **Unit of Measure and Update MEX**

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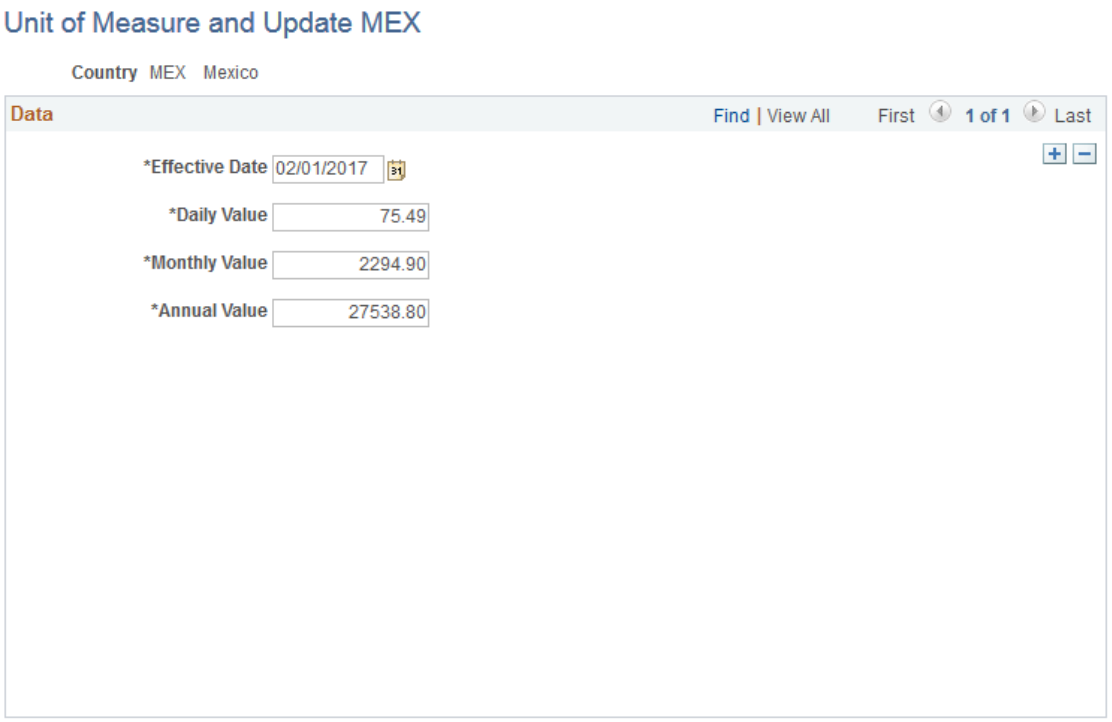
This example illustrates the Unit of Measure and Update MEX page.



The monthly value of the UMA is calculated by multiplying its daily value by 30.4 times and its annual value is calculated by multiplying its monthly value by 12.

States Code Mex Page

Use the State Code MEX page (GPMX_STATE_LGL) to map People Soft States with the Legal Codes Mexican states (tags) provided by the SAT.

Navigation:

Set Up HCM, and then **Install**, and then **Country Specific**, and then **State Code MEX**

This example illustrates the State Code MEX page.

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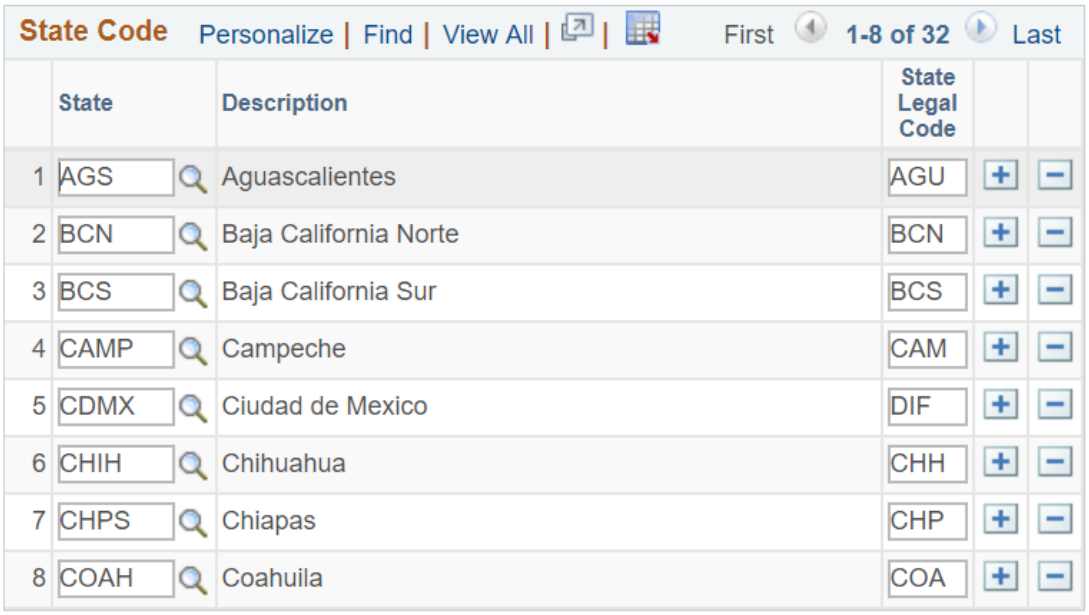
States Code MEX



Field or Control	Description
State	Select a state code. Sates code are stored in the STATE_TBL table in PeopleSoft
State Legal Code	Enter 3 characters SAT legal codes to map to the select State code.

> **Note**
>
> The State Legal code is printed in the tag ClaveEntFed in the CFDI file.

UMA Element Override MEX Page

Use UMA Element Override MEX page (GPMX_UMA_SOVR) to define element overrides.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Framework**, and then **Organizational**, and then **Element Group**, and then **UMA Element Override MEX Page**

This example illustrates the fields and controls on the UMA Element Override MEX Page.

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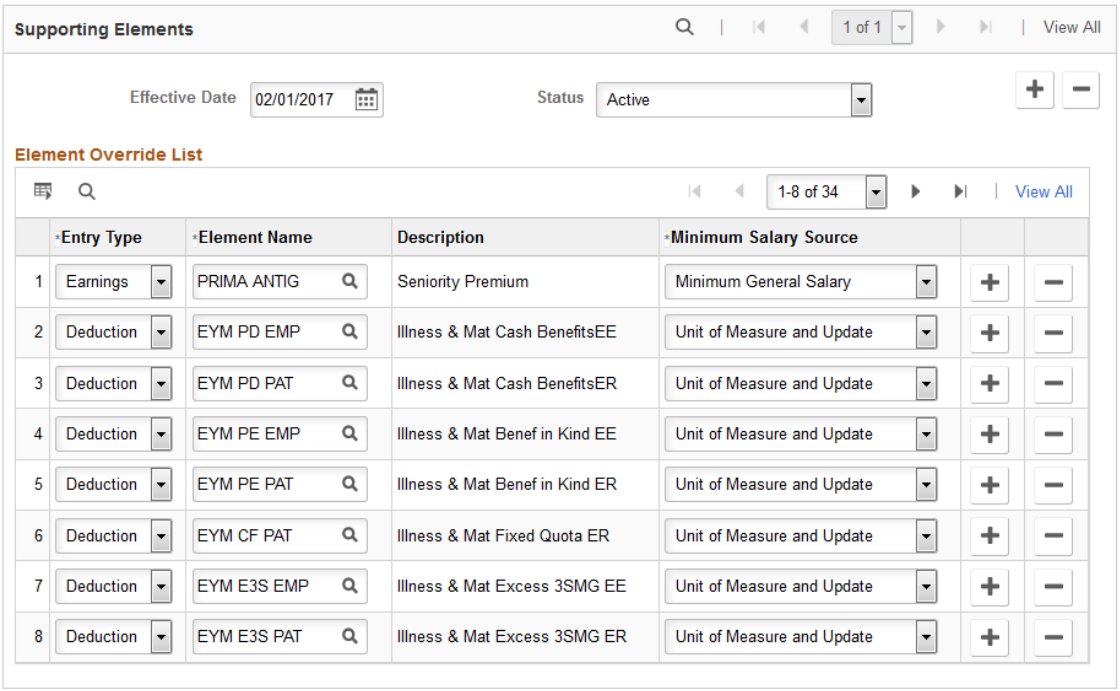
UMA Element Override MEX



Field or Control	Description
Effective Date	The date from which the defined element overrides are applicable.
Status	Status is Active and Inactive for the performance of this page
Entry Type	Define the type of input that will be override to the elements of the system. • Earnings • Deductions • Formula • Bracket • Auto Assigned • System Element • Variable
Element Name	Name of the element that the company uses to pay or discount the income of employees.
Description	Based on selected Element Name, description is populated.
Minimum Salary Source	The value to be used to override the selected element. Valid values are: • Minimum Wage • Unit of Measure and Update

General Parameters MEX Page

Use General Parameters MEX page (GPMX_CFDI_PARAM) to define whether electronic files (CFDI) and payslips must only consider Finalized Calendars.

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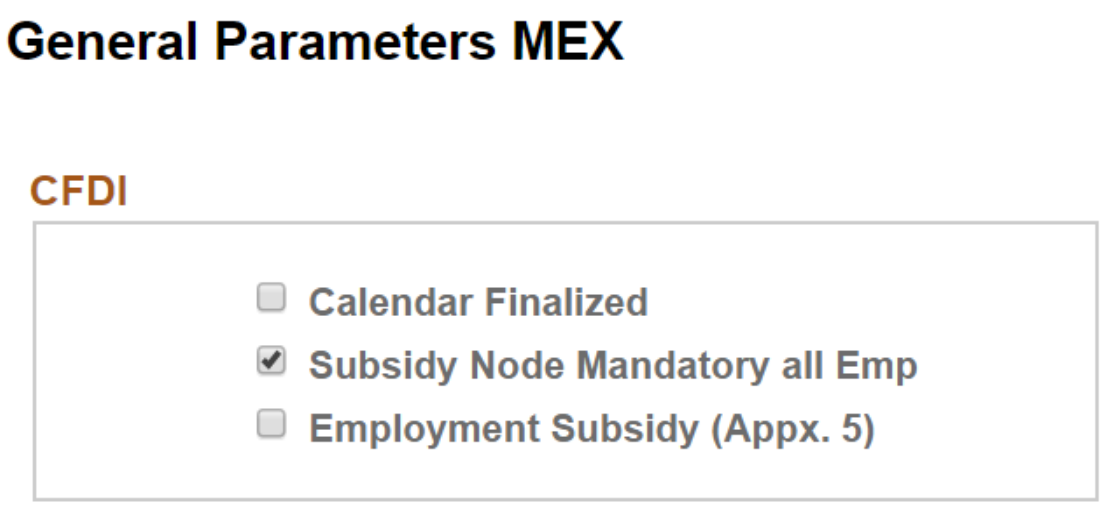
Navigation:

Set Up HCM, and then **Install**, and then **Country Specific**, and then **General Parameters MEX**, and then **CFDI Parameters MEX**

This example illustrates the fields and controls on the General Parameters MEX page.



Field or Control	Description
Calendar Finalized	Select the checkbox if the calendar Group ID on *Create/Print Payslips MEX* page must only display the finalized calendars. By default this option is unchecked. **Note:** Deselect the checkbox if the calendar Group ID on Create/Print Payslips MEX page must select all the calendars (regardless of whether they are finalized or not)
Subsidy Node Mandatory all Emp	Select the checkbox if the node 'SubsidioAlEmpleo' must be displayed for all employees (regardless of whether the Employment Subsidy are processed or not). This checkbox is selected by default.
Employment Subsidy (Appx. 5)	Select the checkbox if you want to show the payroll amount process for employment subsidy element in the node OtrosPagos. This is the default option.

Unit of Measure INFONAVIT MEX Page

Use the Unit of Measure INFONAVIT MEX page to view the daily, monthly and annual values exclusive to INFONAVIT for the system elements and calculation processes that use this value for INFONAVIT purpose.

Navigation:

Set Up HCM , and then **Product Related** , and then **Global Payroll & Absence Mgmt** , and then **Addl Rates, Ceilings, Values** , and then **Unit of Measure INFONAVIT MEX**

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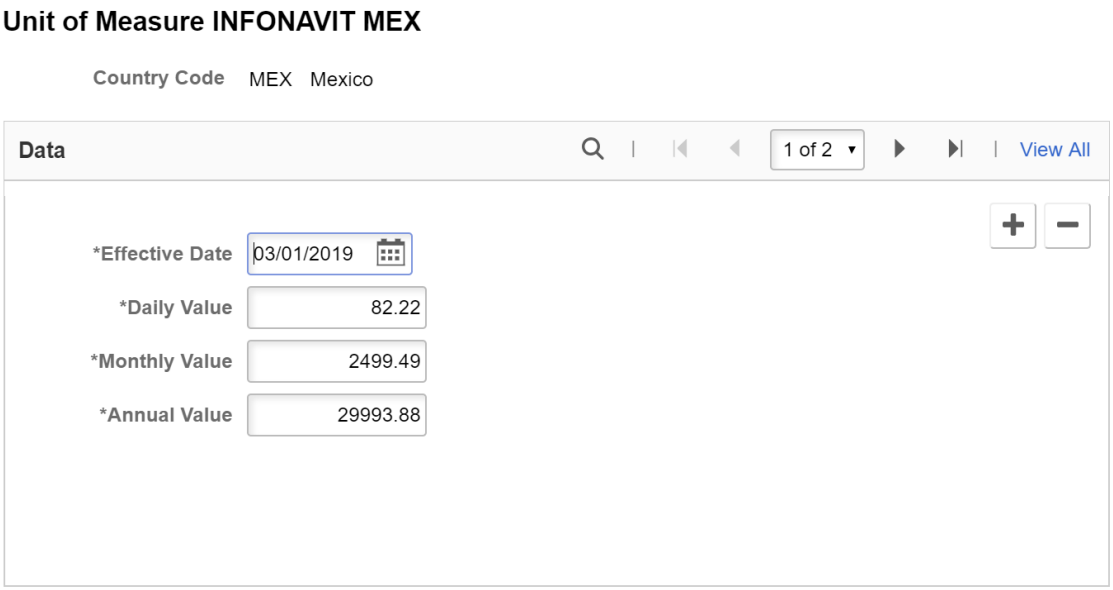
This example illustrates the fields and controls on the Unit of Measure INFONAVIT MEX page.



Field or Control	Description
Country	Refers to the country Mexico.
Effective Date	The date from which the UMI will come into effect.
Daily Value	The daily value of the UMI designated by the government.
Monthly Value	The monthly value of the UMI designated by the government.
Annual Value	The annual value of the UMI designated by the government.

Viewing Delivered Process Lists and Sections

This topic discusses:

- Delivered process lists
- Delivered sections

Delivered Process Lists

This table lists the delivered process lists for Mexico.

Process List	Description
AJUSTE ANUAL	Annual tax adjustment process
AUSENTISMOS	Absences process
CALC AGUINALDO	Christmas bonus process
CALC PTU	PTU process
CALC SDI FIJO	Fixed SDI

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Process List	Description
CALC SDI VARIAB	Variable SDI process
NOMINA	Payroll process
NOMINA CRE SAL	Payroll salary credit
NOMINA ESPECIAL	Special payroll process

Delivered Sections

This table lists the delivered sections for Mexico.

Section	Description
AGUINALDO SEC	Christmas bonus
AGUINALDO WA	Christmas bonus, saving data for validation and reporting purposes
AJUSTE ANUAL 177	Annual tax adjustment calculation using Article 177
AJUSTE ANUAL 1991	Annual tax adjustment calculation using 1991 method **Note:** This section has a status of *Inactive* effective 01/01/2008.
AJUSTE ANUAL WA	Write annual adjustment, saving data for validation and reporting purposes.
AJUSTE REDONDEO	Net pay adjustment
AUSENTISMO AUS	Absences generations
AUSENTISMO NOM	Absences payroll process
CRED SAL EFECTIVO	Salary credit cash
DEDUCCIONES	Deductions
DESPUES IMPUESTOS	To be calculated after taxes
FORMATO 37	Execute Write Array Form 37
GRABA SDI	Saves SDI data.
IMPUESTOS EST	State taxes
IMPUESTOS FED	Federal taxes
INICIALIZACION AUS	Absences initialization
INICIALIZACION NOM	Payroll initialization
LIQ Y FINIQUITOS	Termination pay
PIRAMID PERC/DED	All earnings and deductions
PIRAMIDADO SEC	Gross-up earnings
PRESTAMOS	Loans
PREVISION SOCIAL	Social benefits section
PROMEDIO	Average salary
PROVISIONES	Provisions
PTU SEC	PTU
RETRO	Retro section

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Section	Description
RETRO DEDUCCIONES	Retro deduction section
SALDO VACACIONES	Termination balance days
SALDOS AJUSTE ISR	Pay and discount ISR adjustment
SDI FIJO	Fixed SDI
SDI VARIABLE	Variable SDI
SEGURO SOCIAL	Social security quotas
SUELDO FRE/CAL/HOR	Salary frequency and calendar days
TIEMPO EXTRA	Overtime
VACACIONES AUS	Generate vacations entitlement
VACACIONES NOM	Vacations payroll process

Note

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

Related Topics

- PeopleSoft Global Payroll: Understanding How to View Delivered Elements

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4

Defining Earnings

Understanding Earnings Based on the Minimum Wage

Some earnings are calculated in relation to the minimum wage. For example, the Sunday premium and savings fund earnings are tax-exempt up to an amount equal to the minimum wage. Any amount over the minimum wage is taxed. To define the minimum wage used in these calculations, use the Minimum Wages MEX page.

Related Topics

- Minimum Wages MEX Page
  Use the Minimum Wages MEX page (GPMX_MIN_WAGE) to define minimum wages for each wage zone.

Defining Parameters for Christmas Bonuses and Vacation Premiums

To define parameters for the Christmas bonus, vacation days, vacation premium percentage, the SDI factor, and the vacation premium type, use the Pay Groups MEX (GPMX_PARM_PYGRP) component.

Pages Used to Define Parameters for Christmas Bonuses and Vacation Premiums

Page Name	Definition Name	Usage
Xmas, Vac, Premium, SDI Factor Page	GPMX_SDI_FACTOR	Define the number of Christmas bonus days, vacation days, vacation premium percent, and SDI factor by employee (based on employee seniority).
Absences Page	GPMX_ABS_PYGRP	Define the vacation premium type.

Understanding the SDI Factor Calculation

Christmas bonuses and vacation premiums can be calculated based on either the daily salary or the average salary. To set up the calculation of the Christmas bonus and vacation premium, define an SDI factor on the Xmas, Vac, Premium, SDI Factor page. The SDI factor represents the amount over the daily salary or average salary that the employee makes because of the vacation premium and the Christmas bonus.

Global Payroll for Mexico calculates the SDI factor automatically based on parameters that you enter on the Xmas, Vac, Premium, SDI Factor page. The parameters are:

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- Number of Christmas bonus days.
- Number of vacation premium days.
- Vacation premium percent.

Based on the Christmas bonus days, the vacation premium days, and the vacation premium percent, the system determines the SDI factor, and uses it to:

1. Calculate IMSS quotas.
2. Define the base used to calculate vacation premiums and Christmas bonus amounts.

Example: Calculating the SDI Factor

For example, if the Christmas bonus is 30 days, and the number of vacation days is 10, with a premium of 25 percent, the system calculates the SDI factor as follows:

1. Determine the portion of the SDI factor due to the Christmas bonus by dividing the number of Christmas bonus days by 365 (days in year).

   The result is the percentage over the daily or average salary that must be paid to the employee due to the Christmas bonus.

   > **Note**
   >
   > In this example, divide 30 by 365 (30 / 365 = 0.0821915).

2. Determine the vacation premium portion of the SDI factor by dividing the number of vacation days by 365 (days per year), and multiplying the result by the premium percent.

   The result is the percentage over the daily or average salary that must be paid to the employee due to the vacation premium.

   > **Note**
   >
   > In this example, divide 10 by 365 and multiply the result by 25 percent (10 / 365) × 0.25 = 0.0069).

3. Add the results of steps 1 and 2.

   The result is the percentage over the daily or average salary that must be paid to the employee due to the vacation premium and Christmas bonus.

Related Topics

- Understanding Social Security Processing
  SDI (Salario Diario Integrado) represents the base salary that is used for social security calculations, including contributions to social security and INFONAVIT loan paybacks. It consists of:

Xmas, Vac, Premium, SDI Factor Page

Use the Xmas, Vac, Premium, SDI Factor (Christmas, vacation, premium SDI factor) page (GPMX_SDI_FACTOR) to define the number of Christmas bonus days, vacation days, vacation premium percent, and SDI factor by employee (based on employee seniority).

Navigation:

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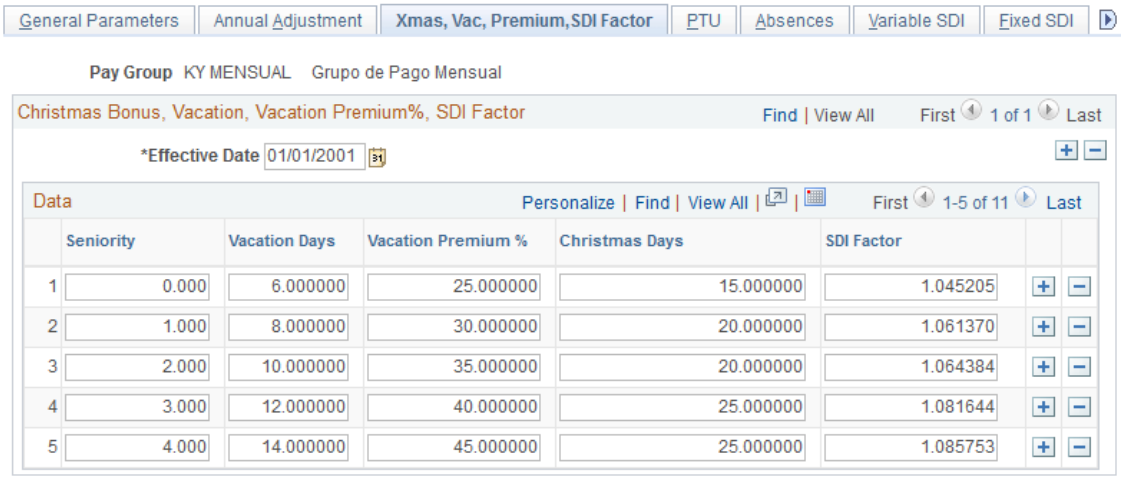
Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Framework**, and then **Organizational**, and then **Pay Groups MEX**, and then **Xmas, Vac, Premium, SDI Factor**

This example illustrates the fields and controls on the Xmas, Vac, Premium, SDI Factor page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Seniority	Enter the seniority level. This field enables you to define changes, based on seniority levels, in the parameters used to calculate the SDI factor (vacation days, vacation premium percent, and Christmas days).
Vacation Days	Enter the vacation days corresponding to the seniority level.
Vacation Premium % (vacation premium percent)	Enter the vacation premium percent corresponding to the seniority level.
Christmas Days	Enter the number of Christmas bonus days corresponding to the seniority level.
SDI Factor	This field is populated automatically based on the values that you entered in the **Vacation Days,Vacation Premium %,** and**Christmas Days** fields.

Absences Page

Use the Absences page (GPMX_ABS_PYGRP) to define the vacation premium type.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Framework**, and then **Organizational**, and then **Pay Groups MEX**, and then **Absences**

On the Absences page (Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Organizational, Pay Groups MEX, Absences), define the vacation premium type.

The vacation premium type determines whether the vacation premium is paid out all at once on a defined date each year (Annual), or on the anniversary of the employee's hire date

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(Anniversary) or from pay period to pay period (Proportional), depending on the number of vacation days that the employee has taken.

> **Note**
>
> The Absences page is discussed in another topic. See Absences Page

Defining PTU (Participacion a los Trabajadores de las Utilidades)

To define the adjustment factor and maximum days for PTU, use the Pay Groups MEX (GPMX_PARM_PYGRP) component. To define PTU parameters and identify PTU elements and payees, use the Define PTU - Profit Share MEX (GPMX_PARM_COMPANY) component.

Pages Used to Define PTU

Page Name	Definition Name	Usage
PTU Page	GPMX_PTU_GP_PYGRP	Set the adjustment factor and maximum days for profit-sharing at the pay group level.
PTU Setup Page	GPMX_PTU_COMPANY1	Define PTU parameters at the company level.
PTU Elements/Payees Page	GPMX_PTU_COMPANY2	Identify the PTU elements and payees. Identify the earnings and deductions used for profit sharing, assign profit sharing elements to accumulators, and exclude ineligible employees from the profit sharing process.

Understanding the PTU Process

To define and run the PTU process:

1. Define the adjustment factor and maximum days for PTU (profit-sharing) on the PTU page.
2. Define PTU parameters on the PTU Setup page.
3. Identify PTU elements and payees on the PTU Elements/Payees page.
4. Run the PTU process on the Calculate PTU-Profit Share MEX page.

> **Note**
>
> Running the PTU process is discussed in another topic.

See Running the PTU (Profit Sharing) Process.

Understanding the Adjustment Factor and Maximum Days for PTU

The PTU page enables you to:

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- Standardize the number of PTU (profit-sharing) days across all pay groups in your company, regardless of the calendar used for each group.

  For example, suppose that you have a monthly pay group based on a 360 day per year calendar (in which all months are defined as having 30 days), and a weekly pay group based on a 365 day calendar (using actual calendar days). To bring the number of profit-sharing days for the monthly pay group up to 365, enter a daily adjustment factor on the PTU page for the monthly pay group. Multiply this amount by 360 to bring the number of days up to 365. In this example, the amount is 365 / 360 (= 1.0138888).
- Define the maximum number of days that can be used in the profit-sharing calculation.

PTU Page

Use the PTU page (GPMX_PTU_GP_PYGRP) to set the adjustment factor and maximum days for profit-sharing at the pay group level.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Framework**, and then **Organizational**, and then **Pay Groups MEX**, and then **PTU**

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

Field or Control	Description
Daily Adjust Factor (daily adjustment factor)	Enter the multiplication factor needed to adjust the number of PTU days for the specified pay group. For example, if your pay group is based on a 360-day-per-year calendar, and you want to adjust the calendar to 365 days, enter 1.013888 (365 / 360).
Max Days (maximum days)	Enter the maximum number of days that can be included in the profit-sharing calculation. For example, you might decide to pay an employee's vacation balance at the moment of termination. At this point, the employee might have more than 365 PTU days. In this case, if the earnings that you use to pay the vacation balance are part of the profit-sharing process, you can reduce the PTU days to 365 (or any other amount).

PTU Setup Page

Use the PTU Setup page (GPMX_PTU_COMPANY1) to define PTU parameters at the company level.

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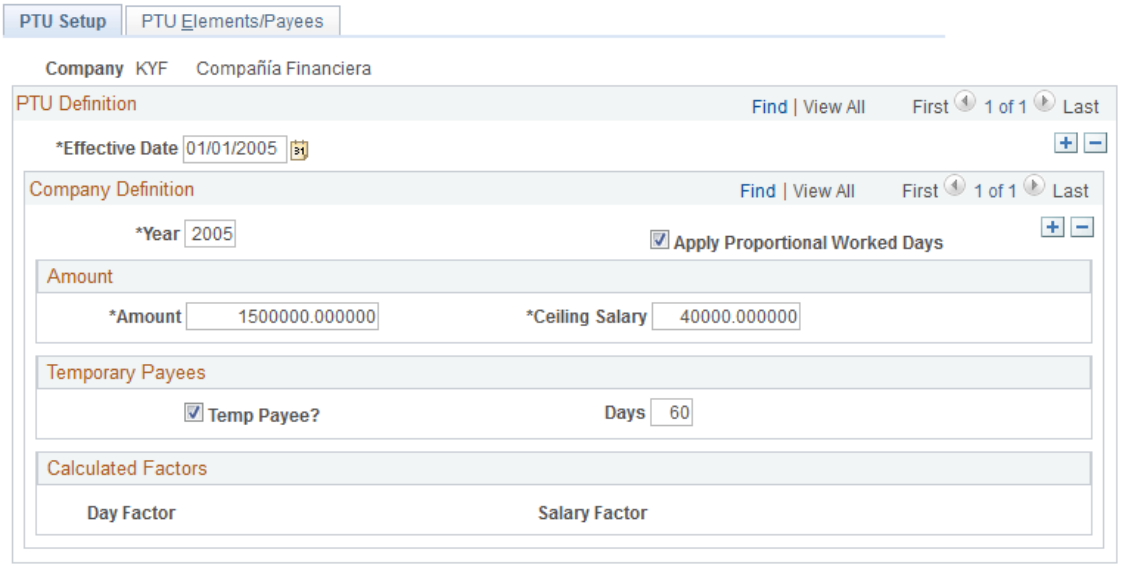
Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Allowances/Other Benefits**, and then **Define PTU-Profit Share MEX**, and then **PTU Setup**

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



Field or Control	Description
Year	Enter the year for which you are processing your profit sharing earnings.
Apply Proportional Worked Days	Select this check box if the ceiling salary used to calculate PTU earnings should be adjusted to reflect the number of days that an employee actually works. For example, if the ceiling salary is 240,000, and an employee works 250 days during the year, the ceiling salary for that employee is reduced proportionally—that is, it is set to 164,383.56 ((240,000 / 365) × 250).
Amount	Enter the amount to be shared.
Ceiling Salary	Enter the maximum amount of an employee's salary that can be used to calculate the employee's portion of PTU earnings. To determine the amount, calculate the salary of the union employee with the highest wages, add 20 percent to this amount, and enter the total in the **Ceiling Salary** field. If an employee who is eligible for profit sharing makes more than the amount that you enter here, profit sharing is capped at this amount.

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Field or Control	Description
Temp Payee? (temporary payee) and**Days**	Select **Temp Payee?** to include all temporary employees in your profit sharing plan. To limit the temporary employees who can participate in the plan, select **Temp Payee?** and enter the number of days that temporary employees must work at your company to participate in profit sharing. For example, if you select**Temp Payee?** and enter *60* in the**Days** field, only temporary employees who work 60 days or more are included in the PTU plan.
Day Factor	Displays the *PTU Total for all Employees/ Worked Days Total for all Employees*. This figure is calculated automatically when you run the PTU process.
Salary Factor	Displays the *PTU Total for all Employees/Salary Sum Total for all Employees*. This figure is calculated automatically when you run the PTU process.

PTU Elements/Payees Page

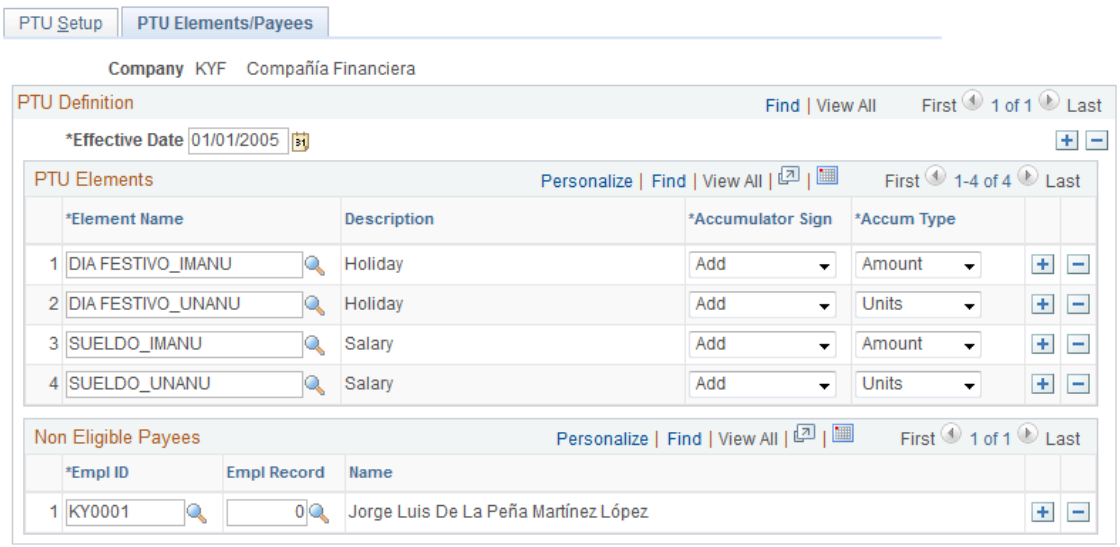
Use the PTU Elements/Payees page (GPMX_PTU_COMPANY2) to identify the PTU elements and payees.

Identify the earnings and deductions used for profit sharing, assign profit sharing elements to accumulators, and exclude ineligible employees from the profit sharing process.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Allowances/Other Benefits**, and then **Define PTU-Profit Share MEX**, and then **PTU Elements/Payees**

This example illustrates the fields and controls on the PTU Elements/Payees page. You can find definitions for the fields and controls later on this page.



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PTU Elements

Field or Control	Description
Element Name	Enter the earnings and deduction accumulators to include in the PTU process.
Accumulator Sign	Select an accumulator sign. Values are: *Add:* Adds the earnings and deduction accumulators specified in the**Element Name** field to the PTU base. *Subtract:* Subtracts the earnings and deduction accumulators specified in the**Element Name** field from the PTU base.
Acum Type (accumulator type)	For each element that you specify in the **Element Name** field, select *Amount* or *Units*. **Note:** When you define an earnings element that you know must be included in the PTU process, create year-to-date accumulators storing both amounts and units for that element. (You can set up an accumulator for units only if the element includes a unit component in its definition.) Otherwise, you will not have the flexibility to accumulate both units and amounts.

Non Eligible Payees

Enter the employee ID and employee record number for employees who do not qualify for inclusion in the profit sharing process.

Setting Up Frequently Used Supporting Element Overrides

To define frequently used supporting element overrides in Mexico, use the Earn/Ded SOVRs MEX (GPMX_ERNDED_SOVR) component.

Page Used to Set Up Frequently Used Supporting Element Overrides

Page Name	Definition Name	Usage
Earn/Dedn SOVRs MEX Page	GPMX_ERNDED_SOVR	Set up SOVRs at the earnings and deduction level for variables used in key calculations.

Understanding Frequently Used Supporting Element Overrides in Mexico

Global Payroll for Mexico enables you to define the most frequently used supporting element overrides (SOVRs) for earnings and deductions on the Earn/Dedn SOVRs MEX page. This includes the following:

- Supporting elements used to specify a tax method.
- Supporting elements used to select earnings and deductions for inclusion in the Minimum Wage Salary Level report (report GPMXAA01).

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- Supporting elements used to associate earnings and deductions with a termination version.

Before you can run a payroll, a Minimum Wage Salary Level report, or a termination process, you must:

- Enter basic information on the Earn/Dedn SOVRs MEX page about which earnings and deductions to include in each tax method and each row of the Minimum Wage Salary Level report.
- Specify which earnings and deductions to include in each termination version.

Understanding Element Overrides

The information that you enter on the Earn/Dedn SOVRs MEX page is inserted as a supporting element override for these variables at the earnings and deduction level:

Type of Override	Variable
Tax Method	FD VR METODO ISR
Salary Level Group	AA VR NIVEL SAL
Termination Versions	Variables LF VR VER FINIQ 01 through LF VR VER FINIQ 10

Related Topics

- Understanding Termination Setup
  In Global Payroll for Mexico, the process used to trigger termination payments is based in a termination version. A termination version is a collection of actions and reasons that can trigger specific termination earnings and deductions.
- Understanding Tax Processing
  This topic discusses about taxes, tax methods and tax processing in Mexico.
- Global Payroll for Mexico Reports: A to Z
  The table in this topic lists the PeopleSoft Global Payroll for Mexico reports, sorted by report ID.

Earn/Dedn SOVRs MEX Page

Use the Earn/Dedn SOVRs MEX (Earnings/Deductions SOVRs MEX) page (GPMX_ERNDED_SOVR) to set up SOVRs at the earnings and deduction level for variables used in key calculations.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Elements**, and then **Payroll Elements**, and then **Earn/Ded SOVRs MEX**

This example illustrates the fields and controls on the Earn/Dedn SOVRs MEX page. You can find definitions for the fields and controls later on this page.

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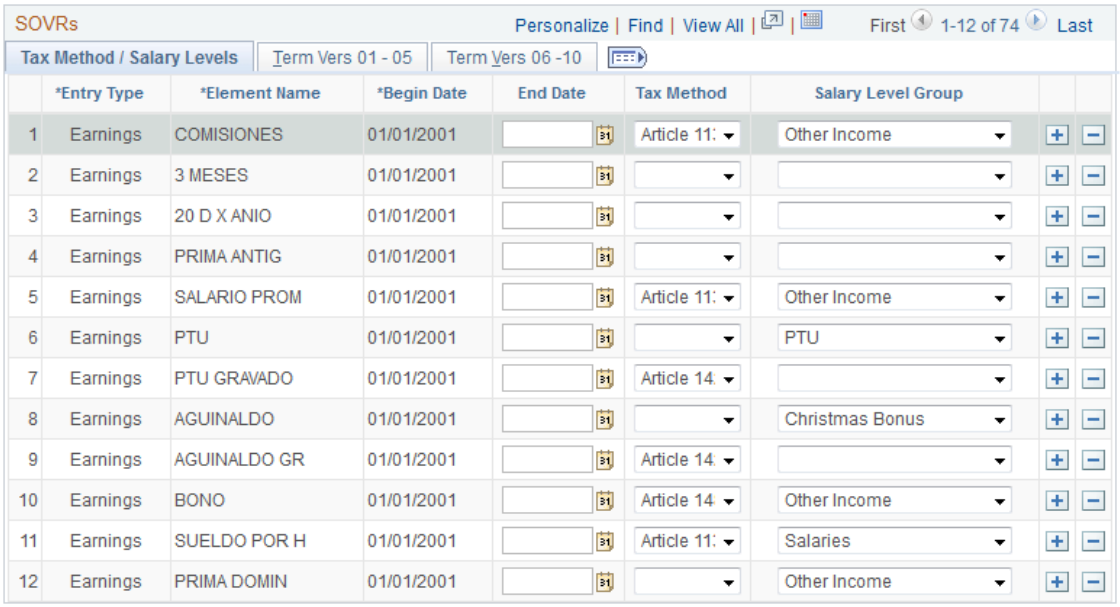
Earn/Dedn SOVRs MEX


SOVRs

Personalize | Find | View All | First 1-12 of 74 Last

Tax Method / Salary Levels | Term Vers 01 - 05 | Term Vers 06 -10

	*Entry Type	*Element Name	*Begin Date	End Date	Tax Method	Salary Level Group
1	Earnings	COMISIONES	01/01/2001		Article 11:	Other Income
2	Earnings	3 MESES	01/01/2001			
3	Earnings	20 D X ANIO	01/01/2001			
4	Earnings	PRIMA ANTIG	01/01/2001			
5	Earnings	SALARIO PROM	01/01/2001		Article 11:	Other Income
6	Earnings	PTU	01/01/2001			PTU
7	Earnings	PTU GRAVADO	01/01/2001		Article 14	
8	Earnings	AGUINALDO	01/01/2001			Christmas Bonus
9	Earnings	AGUINALDO GR	01/01/2001		Article 14	
10	Earnings	BONO	01/01/2001		Article 14	Other Income
11	Earnings	SUELDO POR H	01/01/2001		Article 11:	Salaries
12	Earnings	PRIMA DOMIN	01/01/2001			Other Income

Tax Method/Salary Levels Tab

Field or Control	Description
Entry Type	For a Minimum Wage Salary Level report: Define the type of element to include in the report. You can include only earnings or deductions. For tax method selection: Define the type of element to which you want to apply a tax method using the **Tax Method** field. You can include only earnings or deductions.
Element Name	For a Salary Level report: Enter the name of the earnings or deductions element to include in the Minimum Wage Salary Levels report (report GPMXAA01). For tax method selection: Enter the name of the earnings or deductions to which you want to apply a tax method using the **Tax Method** field.
Begin Date	Enter the begin date of the supporting element override.
End Date	Enter the end date of the supporting element override.
Tax Method	Define the tax method to apply to each earnings and deduction identified in the **Entry Type** and**Element Name** fields.
Salary Level Group	For a Minimum Wage Salary Level report, specify the salary level group in which you want to include the earnings or deductions identified in the **Element Name** field.

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Term Vers 01-05 and Term Vers 06-10 Tabs

Field or Control	Description
Term Vers 01-10 (termination versions 1-10)	This field is used to associate earnings and deductions with termination versions. For each earnings or deduction that you identify in the **Entry Type** and**Element Name** fields, specify the termination versions (the grouping of termination actions and reasons) for which the earnings and deductions can be paid. Select up to 10 different termination versions for each earnings and deduction. **Note:** To associate a termination version with an earnings or deduction, the termination version must already be defined on the Termination Version and Termination Action Reason pages, and the earnings or deduction must be linked to one of the delivered variables LF VR VER FINIQ 01 through LF VR VER FINIQ 10 on the Supporting Elements Override page. (LF VR VER FINIQ 01 through LF VR VER FINIQ 10 are delivered variables representing termination versions.)

See Understanding Termination Setup.

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5

Defining Social Security Contributions

Defining Contribution Rates for Social Security

To define social security contributions, use the Quotas MEX (GPMX_IMS_QUOTA) component.

> **Note**
>
> In Mexico, "social security quota" is used to refer to social security contributions.

Page Used to Define Social Security Quotas

Page Name	Definition Name	Usage
Quotas MEX Page	GPMX_IMS_QUOTA	Define payee and employer contribution rates to social security for each IMSS branch.

Understanding Contribution Rates for Social Security

Global Payroll for Mexico initially delivers the rates and ceiling days that the system uses to calculate employee and employer contributions to each branch of social security. You must maintain this data when the government issues changes.

To calculate contributions to a branch of social security, the system:

1. Compares the employee's integrated daily salary (SDI) amount to the (Minimum Wage * Ceiling Days).
2. Multiplies the minimum amount by the contribution rate.

> **Note**
>
> Global Payroll for Mexico calculates the SDI factor automatically based on parameters you enter on the Xmas, Vac, Premium, SDI Factor page. Once the system has calculated the SDI factor, it uses the SDI factor to calculate IMSS quotas. The Xmas, Vac, Premium, SDI Factor page is discussed in another topic.

Example: Calculating the Employer Contribution to RETIRO

Suppose an employee's integrated daily salary (SDI) amount is 100 MXN, the minimum wage is 45.24, the employer contribution is 0.02, and the day ceiling is 25. The system calculates the employer RETIRO contribution as follows:

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1. Compares SDI (100) to the Minimum Wage * Ceiling Days (45.24 * 25 = 1131.00) and determines that 100 is the smaller amount.
2. 100 * .02 = 2.00 MXN

Now, if the employee's SDI amount is 1200 MXN, then the Minimum Wage * Ceiling Days (45.24 * 25 = 1131.00) is lower. The RETIRO contribution is 1131.00 * .02 = 22.62 MXN

Related Topics

- General Parameters Page
  Use the General Parameters page (GPMX_TAX_PARM) to define general parameters for federal taxes and IMSS quotas.
- Defining Parameters for Christmas Bonuses and Vacation Premiums
  To define parameters for the Christmas bonus, vacation days, vacation premium percentage, the SDI factor, and the vacation premium type, use the Pay Groups MEX (GPMX_PARM_PYGRP) component.

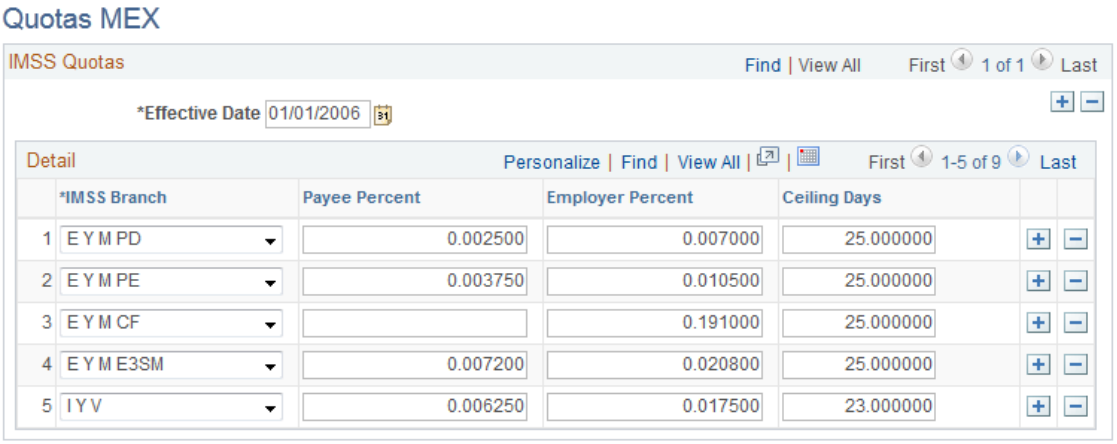
Quotas MEX Page

Use the Quotas MEX page (GPMX_IMS_QUOTA) to define payee and employer contribution rates to social security for each IMSS branch.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Social Security/Insurance**, and then **Quotas MEX**

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



Field or Control	Description
IMSS Branch	Select the IMSS branch for which you want to define contribution rates.
Payee Percent	Specify the percentage of SDI that the payee contributes.
Employer Percent	Specify the percentage of the employee's SDI that the employer contributes.

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Field or Control	Description
Ceiling Days	Enter the number of days that the system should use to calculate the SDI ceiling for the branch.

Defining Fixed SDI

To define parameters for the fixed SDI process, use the Pay Groups MEX (GPMX_PARM_PYGRP) component.

Page Used to Define Fixed SDI

Page Name	Definition Name	Usage
Fixed SDI Page	GPMX_FIXSDI_PARM	Select the elements that contribute to fixed SDI and how they integrate for the fixed SDI calculation.

Understanding the Fixed SDI Process

There are some minimum elements established by law that must contribute to fixed SDI. However, you can also select additional elements that contribute to fixed SDI. Examples of additional elements include those that are related to job data events, such as hiring and salary changes.

To define and run the fixed SDI process:

1. Select additional elements that contribute to fixed SDI and define the integration parameters for these elements on the Fixed SDI page.
2. When a new job data event occurs (hiring or salary changes, for example), a new payee SDI data row will be inserted automatically updating the payee fixed SDI data.

   It's also possible to run the fixed SDI calculation due to a minimum salary change or anniversary by running the mass SDI data update. For mass SDI updates, run the fixed SDI process on the Process SDI MEX page.

See Running the SDI Batch Processes.

See Running Social Security Reports.

Fixed SDI Page

Use the Fixed SDI page (GPMX_FIXSDI_PARM) to select the elements that contribute to fixed SDI and how they integrate for the fixed SDI calculation.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Framework**, and then **Organizational**, and then **Pay Groups MEX**, and then **Fixed SDI**

This example illustrates the fields and controls on the Fixed SDI page: Calculation Base tab. You can find definitions for the fields and controls later on this page.

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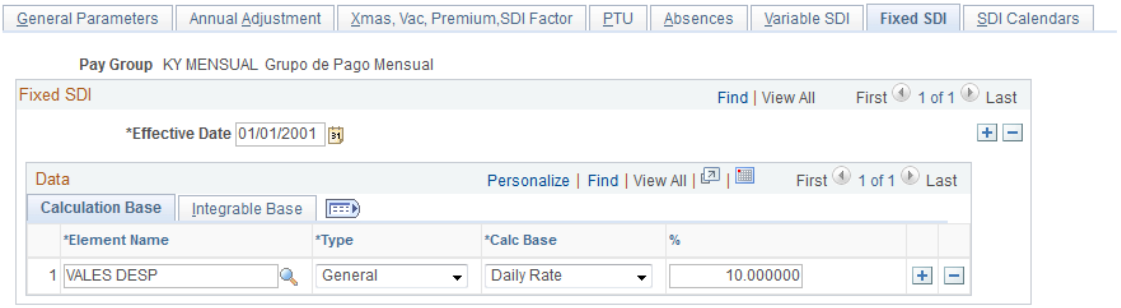
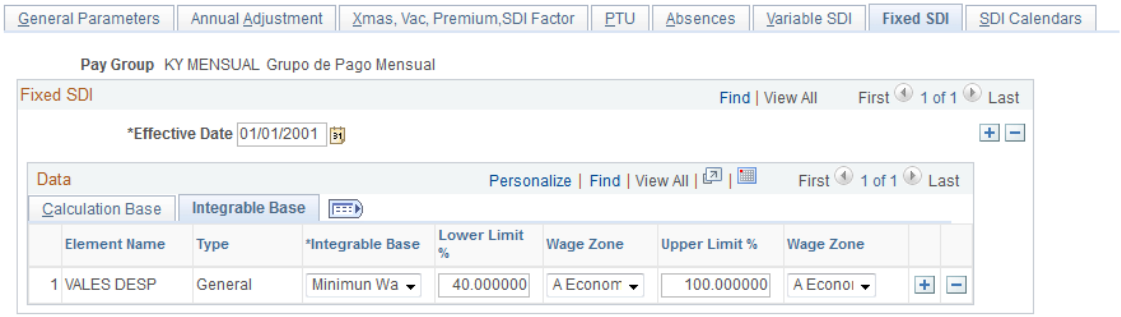


Field or Control	Description
Element Name	Select the earnings element other than the legal minimum (Christmas Bonus and Vacation Premium), that contributes to fixed SDI.
Type	Define whether this element will be applied by individual payee or in general to the entire pay group. Values are *By Payee* or *General.*
Calc Base (calculation base)	Select the calculation base for the element. Values are *Amount, Daily Rate, Days, Min Wage,* and *SDI.*
Amount	Indicate the value for the flat amount of the element.
%	This field appears when you select *Daily Rate* for the**Calc Base.** Enter the percentage of the SDI or daily rate that will be part of the Fixed SDI value.

Fixed SDI Page: Integrable Base Tab

This example illustrates the fields and controls on the Fixed SDI page: Integrable Base tab. You can find definitions for the fields and controls later on this page.



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Field or Control	Description
Integrable Base	Select the integrable base for the element. Each element integrable base can be based on the whole base or a certain percentage of the daily rate, minimum wage, or SDI. Values are *All, Daily Rate, Min Wage,* and *SDI.* Depending on the integrable base selected, some of the following fields will appear or not, and should be filled out accordingly.
Lower Limit % (lower limit percentage)	Indicate the lower limit percentage of integration for the element.
Wage Zone	Select the wage zone for the lower limit percentage. Values are *A Zone, B Zone, C Zone,* and *Payee Zone.*
Upper Limit % (upper limit percentage)	Indicate the upper limit percentage of integration for the element.
Wage Zone	Select the wage zone for the upper limit. Values are *A Zone, B Zone, C Zone,* and *Payee Zone.*

Defining Variable SDI

To define parameters for the Variable SDI process, use the Pay Groups MEX (GPMX_PARM_PYGRP) component.

Page Used to Define Variable SDI

Page Name	Definition Name	Usage
Variable SDI Page	GPMX_VAR_SDI_PARM	Select the earnings, accumulators, and formulas used in the Variable SDI process for a pay group.
SDI Calendars Page	GPMX_SDI_CALENDARS	Specify the months in which variable SDI elements accumulate.

Understanding the Variable SDI Process

With tax reforms effective December 20, 2001, the Variable SDI process is now run bimonthly instead of monthly. In order to accommodate this legislative change, you will:

1. Indicate the method for calculating the variable SDI on the Base Days for Variable SDI field on the General Parameters page.

   Choices are 60 Days, Bimonth Days, Hourly Payee, or Paid Days.
2. Define variable SDI parameters for a pay group on the Variable SDI page.
3. (Optional) Insert calendars on the SDI Calendars page to specify the month to which each weekly or biweekly calendar accumulates.
4. Run the Variable SDI process on the Calculate Absence and Payroll page.

   You must create a bimonthly calendar and execute the CALC SDI VARIAB process list.

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Related Topics

- General Parameters Page
  Use the General Parameters page (GPMX_TAX_PARM) to define general parameters for federal taxes and IMSS quotas.
- Running the SDI Batch Processes
- Running Social Security Reports

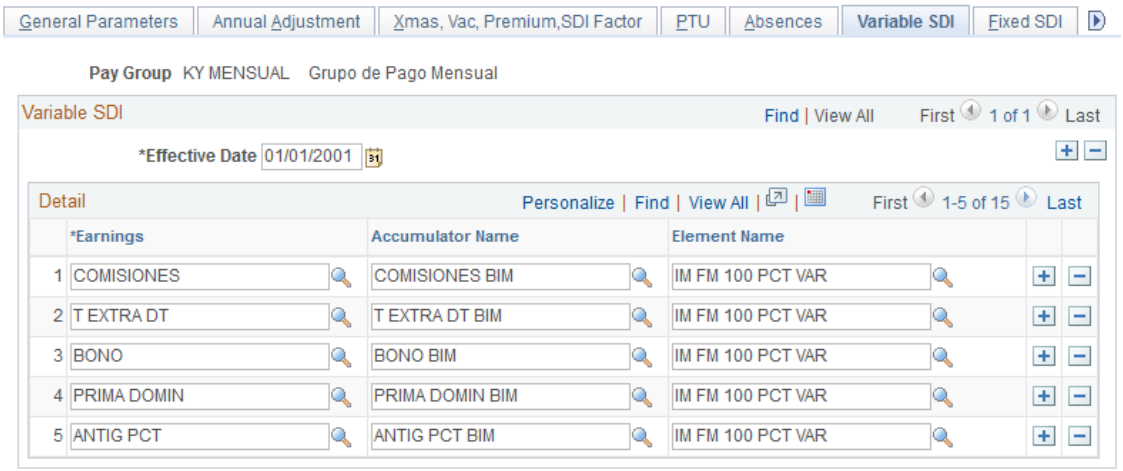
Variable SDI Page

Use the Variable SDI page (GPMX_VAR_SDI_PARM) to select the earnings, accumulators, and formulas used in the Variable SDI process for a pay group.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Framework**, and then **Organizational**, and then **Pay Groups MEX**, and then **Variable SDI**

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



Field or Control	Description
Earnings	Select the earnings that will be used in the Variable SDI process.
Accumulator Name	Select the accumulators that correspond to the earnings for the Variable SDI process.
Element Name	Select one of the three formulas (integration methods) available: IM FM 100% VAR, IM FM TOP VAL IMSS, or IM FM PREMIO INT.

Related Topics

- Modifying the Variable SDI Process
  Global Payroll for Mexico delivers a process list (CALC SDI VARIAB) for calculating variable SDI. If you need to add earnings that contribute to the variable SDI amount, follow the procedure below.

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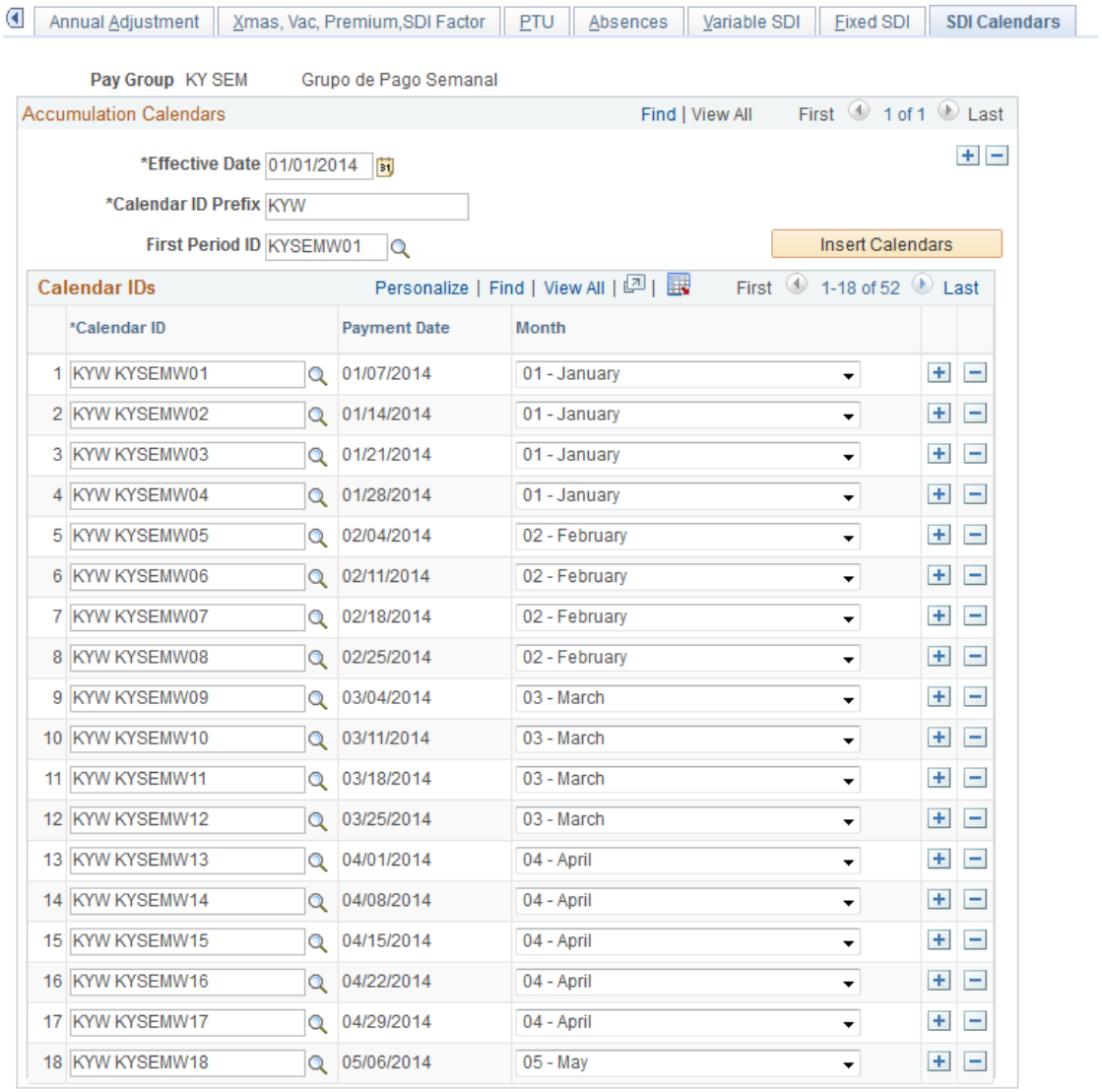
SDI Calendars Page

Use the SDI Calendars page to specify the months in which elements accumulate.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Framework**, and then **Organizational**, and then **Pay Groups MEX**, and then **Variable SDI**

This example illustrates the fields and controls on the SDI Calendars page.



Use this page to associate a set of existing calendars to a pay group. You can then specify the month in which each calendar accumulates earning amounts, ensuring that the system calculates variable SDI using the appropriate monthly amounts.

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> **Note**
>
> You must have already created a set of weekly or biweekly calendars to add to this page. For more information on creating a set of calendars, see PeopleSoft Global Payroll: Creating a Set of Calendars.

Accumulation Calendars

Field or Control	Description
Effective Date	Enter the effective date for the set of calendars you are inserting.
Calendar ID Prefix	Enter the prefix for the calendars that you want to insert. The value that you enter in this field must exactly match the prefix of the calendars that you want to insert.
First Period ID	Enter the first period ID of the set of calendars you want to insert.
Insert Calendars	Click to insert all the calendars that match the **Calendar ID Prefix** and **First Period ID** that you entered.

Calendar IDs

Field or Control	Description
Calendar ID	Displays the calendar IDs that you inserted.
Payment Date	Displays the payment date for each calendar ID.
Month	Displays the month in which the system accumulates earnings for this calendar ID. You can edit this field to make the system accumulate earnings in a different month. **Note:** You cannot edit this field for calendars that have already been calculated or finalized.

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6

Defining Taxation

Defining Federal Taxes

Federal tax definition begins on the General Parameters page, where you define the tax method for adjusting federal taxes.

> **Note**
>
> The General Parameters page is discussed in another topic.

Once you've defined federal taxes, you can process federal tax contributions during regular payroll runs and generate a Federal Taxes report at the end of the year.

Related Topics

- General Parameters Page
  Use the General Parameters page (GPMX_TAX_PARM) to define general parameters for federal taxes and IMSS quotas.
- Federal Tax Processing
  To process federal taxes:

Defining Annual Tax Adjustments

To define annual adjustments, use the Pay Groups MEX (GPMX_PARM_PYGRP) component.

Page Used to Define Annual Adjustments

Page Name	Definition Name	Usage
Annual Adjustment Page	GPMX_PARM_PAYGRP	Define the parameters to calculate the annual adjustment for each pay group in your company.

Understanding Annual Tax Adjustment Setup

Begin defining annual adjustments parameters on the Annual Adjustments page.

Once you've defined annual adjustment parameters, you can update annual tax adjustments by entering tax data from other employers and specify employees who are exempt from the process.

Related Topics

- Updating Annual Tax Adjustments

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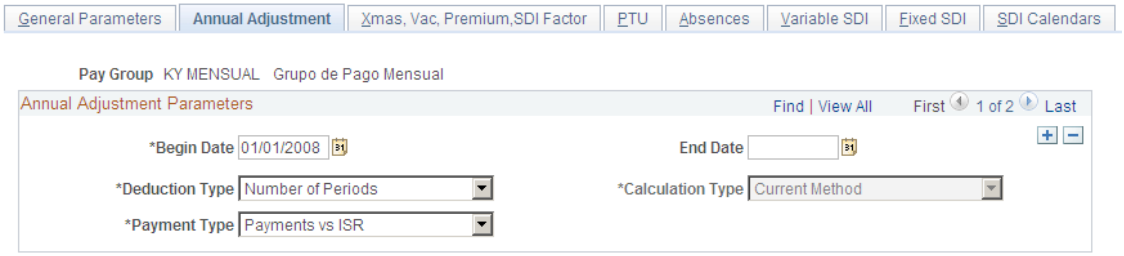
Annual Adjustment Page

Use the Annual Adjustment page (GPMX_PARM_PAYGRP) to define the parameters to calculate the annual adjustment for each pay group in your company.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Framework**, and then **Organizational**, and then **Pay Groups MEX**, and then **Annual Adjustment**

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



Field or Control	Description
Begin Date and **End Date**	Enter the date range of the annual adjustment parameters. Certain fields and field values are available only if the **Begin Date** and **End Date** are prior to 01/01/2008.

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Field or Control	Description
Deduction Type	Define how the system will handle the annual tax adjustment in case you have a debit at the end of the year. Values are *Bracket*, *Number of Periods*, and *Single Deduction*. If you select *Number of Periods*, the system will use the data in the bracket AA BR RNG DES PER in order to determine in how many pay periods the debit will be discounted. For example, if there is a 5000.00 MXN debit, based on the data of the bracket, the system will withhold 1000.00 MXN during five periods. If you select *Bracket*, the system will use the data in the bracket AA BR RNG DES SAL in order to determine the amount that needs to be withheld each pay period. The range will depend on the employee's daily rate. For example, if there is a 3000.00 MXN debit, and an employee has a 300.00 MXN daily rate, based on the data of the bracket, the system will withhold 100.00 MXN each pay period until it reaches the 3000.00 MXN amount. If you select *Single Deduction*, the system will withhold the complete debit amount in a single pay period. If the net pay is not enough to cover the amount of the deduction, the system will consider the remaining amount as an arrear and it will be deducted in future pay periods.
Calculation Type	Some companies calculate the annual tax adjustment with the method that existed in the year 1991. In this field, you'll specify which method to use when calculating the annual tax adjustment. Values are *Both – Current & 1991*, *Current Method*, and *Method 1991*. Once you've selected the *Both – Current & 1991* method, the system then selects the method with the smaller tax. **Note:** The values *Both – Current & 1991* and *Method 1991* are available only if the **Begin Date** and **End Date** are prior to 01/01/2008.

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Field or Control	Description
Payment Type	If you have a tax credit at the end of the year, select one of the options to define how you will receive the credit. Values are *Payments vs ISR* and *Single Payment.* Either you'll select to get a payment or you'll have a credit applied to next year's ISR (federal taxes). If you select *Payments vs ISR,* it means that you'll get a credit on the regular tax versus the difference until this credit is covered. For example, let's say that an employee has 2400 MXN worth of taxes deducted for the year (100 MXN each semimonthly payroll). In the annual tax adjustment process, the system calculates that the real annual tax should be 2100 MXN. This means that there's a credit of 300 MXN due to the employee. If you calculate the next regular payroll, the system would ordinarily withhold 100 MXN (the regular tax for the employee's regular earnings). However, the system won't withhold any amount during 3 payroll periods (to make up for the difference between 2100 MXN and 2400 MXN). The system will cover the regular tax deduction with the credit that the employee has until it is covered.
Return Credit	Enter the date when the salary credit annual difference will be paid to the employee. **Note:** This field appears only if the **Begin Date** and **End Date** are prior to 01/01/2008.

Defining Multiple Information Report Parameters

To define multiple information report parameters, use the Multiple Info Parameters MEX (GPMX_ANNL) component.

Page Used to Define Multiple Information Report Parameters

Page Name	Definition Name	Usage
Multiple Info. Parameters MEX Page	GPMX_ANNL	Define multiple information report parameters for a company.

Understanding the Multiple Information Report Setup

Starting on January 1, 2004, there is a new statutory requirement to submit the Multiple Information report to the government. With Global Payroll for Mexico, you can comply with this new legal requirement

To create the Multiple Information report:

1. Define Multiple Information report parameters on the Multiple Info Parameters MEX page.

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Before you can generate the Multiple Information report, you need to map corresponding values representing the fields on the report to the payroll elements in Global Payroll for Mexico. You'll map the elements on the Multiple Info Parameters MEX page.

2. Run the Multiple Information report on the Multiple Information MEX page.

   You will generate the Multiple Information report at the end of the year, after having finished the payroll fiscal year. The output will be a flat file that will be loaded up to the SAT (Servicio de Administracíon Tributaria) system.

> **Note**
>
> The Multiple Information report page is discussed in another topic.

See Running Tax Reports.

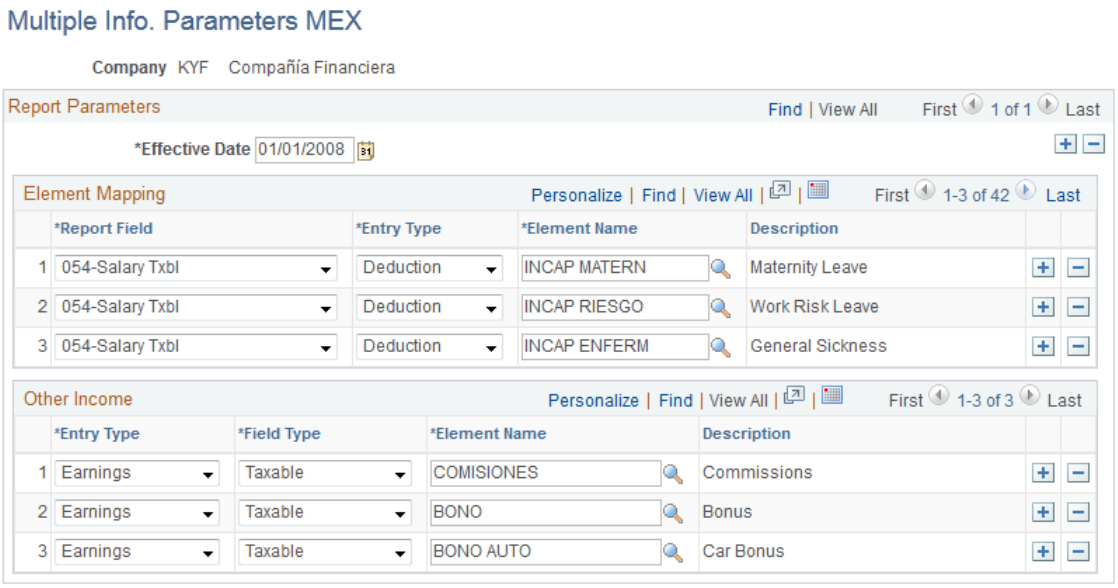
Multiple Info. Parameters MEX Page

Use the Multiple Info. Parameters MEX page (GPMX_ANNL) to define multiple information report parameters for a company.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Taxes**, and then **Multiple Info. Parameters MEX**, and then **Multiple Info. Parameters MEX**

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



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Element Mapping

Field or Control	Description
Report Field	Select the field on the Multiple Information report to which the element will be mapped.
Entry Type	Define the entry type for the element. Values are *Accumulator, Deduction,* and *Earnings.*
Element Name	Select the element which will map to the Multiple Information report.

Other Income

Other Income field values are for any other earnings or deduction that don't have a specific row defined in the Element Mapping section.

Field or Control	Description
Entry Type	Define the entry type for the element. Values are *Deduction* and *Earnings.*
Field Type	Select *Taxable* or *NonTaxable* for the earnings or deduction entry type.
Element Name	Select the element which will map to the Multiple Information report.

Defining State Taxes

To define earnings and deductions by state, use the Earn/Ded by State MEX (GPMX_STATE_TAXES) component. To define state and local taxes for a company, use the State Rates by Company MEX (GPMX_SP_ST_TAXES) component.

Pages Used to Define State Taxes

Page Name	Definition Name	Usage
Earn/Dedn by State MEX Page	GPMX_STATE_TAXES	Define which earnings and deductions will be part of a state's tax base.
State Rates by Company MEX Page	GPMX_SPST_TAXES	Define state and local taxes at the company level. This only applies to companies operating in Chihuahua and/or Ciudad Juarez.

Understanding State Tax Setup

To define state taxes, you need to define earnings and deductions by state, state tax rates, and state tax rates by company.

Once you've defined state taxes, you can process state tax contributions during regular payroll runs and generate the State Taxes by Location report every month.

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Related Topics

- State Tax Processing
  In Mexico, only employers pay state taxes. Each state defines which earning and deduction types are part of its taxable income and the applicable rates.

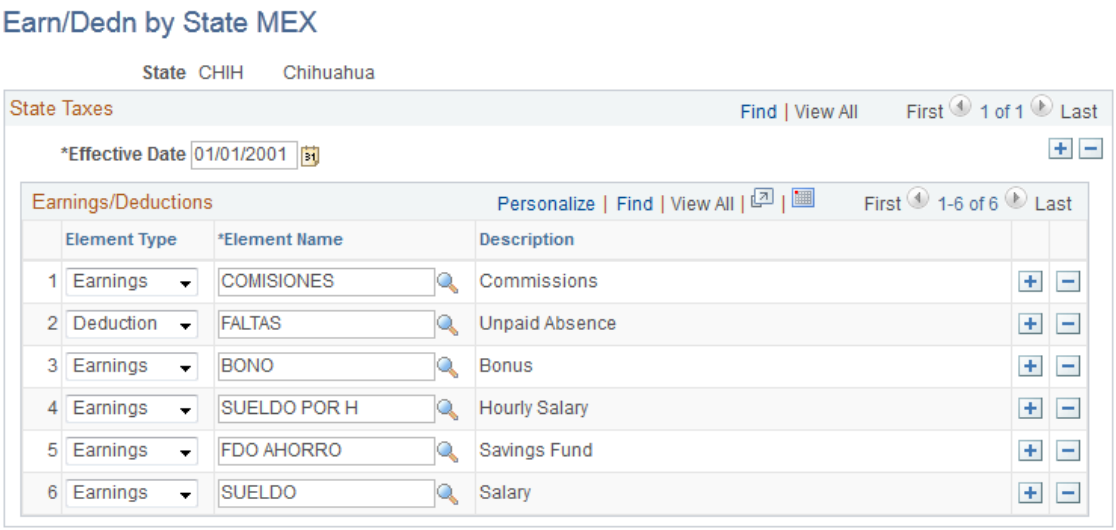
Earn/Dedn by State MEX Page

Use the Earn/Dedn by State MEX page (GPMX_STATE_TAXES) to define which earnings and deductions will be part of a state's tax base.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Taxes**, and then **Earn/Dedn by State MEX**

This example illustrates the fields and controls on the Earn/Dedn by State MEX page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Element Type	Select the element type. Values are *Deduction* and *Earnings.*
Element Name	Select the earning or deduction element to be added to the state tax base. **Note:** This data is loaded into the payroll process with the IE AR ST TAX CNCPT array.

State Rates by Company MEX Page

Use the State Rates by Company MEX page (GPMX_SPST_TAXES) to define state and local taxes at the company level.

This only applies to companies operating in Chihuahua and/or Ciudad Juarez.

Navigation:

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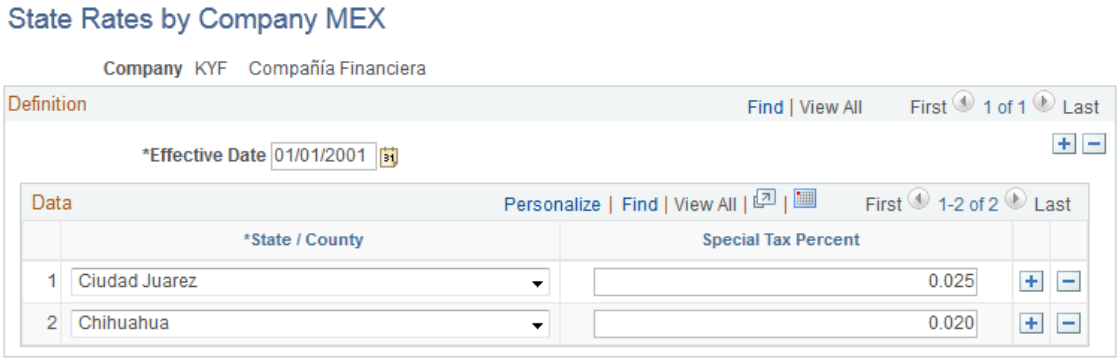
Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Taxes**, and then **State Rates by Company MEX**, and then **State Rates by Company MEX**

This example illustrates the fields and controls on the State Rates by Company MEX page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
State/County	Select *Chihuahua, Ciudad Juarez,* or *Hidalgo.*
Special Tax Percent	Enter the state tax rate for your company.

> **Note**
>
> Chihuahua is the only state in Mexico that taxes a company's earnings based on the number of employees it has, so the state tax rates vary for each company.
>
> It's difficult to determine the number of employees in a company before the payroll process, so you must determine the number of employees in your company and then the corresponding tax rates for your company individually.
>
> You'll also define local tax rates for Ciudad Juarez on this page. The local tax rate varies depending on the amount of minimum wages of the entire payroll earnings in a month. This information can also be difficult to determine prior to running a payroll. Therefore, you can load this data into the payroll process with the IE AR ES CIA array.

Setting Up Inter-Company Transfer Processing

Pages Used to Set Up Inter-Company Transfer Processing

Page Name	Definition Name	Usage
Action Reasons Page	ACTION_REASON_TBL	Define or modify personnel action reasons.

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Page Name	Definition Name	Usage
Inter-Company Parameters MEX Page	GPMX_INTERCOM_PARM	Define which accumulators, earnings, and deduction elements from the prior company to carry over to the new company for employees with inter-company transfers. The Inter-Company Transfer process uses these mappings to move the employee's finalized payroll values for these elements between internal companies.

Related Topics

- Processing Inter-Company Transfers

Understanding Inter-Company Transfer Processing

The government requires that companies report employee's income from former and current employers separately on Form 37—the annual earnings and deductions legal report. This applies to employees who change jobs between unaffiliated companies as well as to employees who transfer from one internal company to another. Global Payroll for Mexico provides functionality to meet the Form 37 tax reporting requirements for inter-company transfers where the internal companies have a different employer RFC within the system. Use this feature to maintain the accumulators, earnings, and deductions for employees when the employees do inter-company transfers. After processing the data, you can generate the Form 37 report with separate company reporting data for employees with inter-company transfers.

Inter-Company Transfer Process

The Inter-Company Transfer feature centers around the Inter-Company Transfer Application engine process (GPMX_INTERC). The Inter-Company Transfer process:

- Identifies which employees have qualifying inter-company transfers to process.
- Confirms that the last payroll that includes the transferring employee is finalized.
- Loads the specified earnings, deduction, and accumulator elements of the former company and their values based on the values last calculated by the payroll engine.
- Inserts the specified elements and their values into the Define Prior Employer Data MEX page as former employer data.
- Updates the values of the specified elements of the former company to zero.

Steps to Process Inter-Company Transfers

To process inter-company transfers:

1. Define the accumulators, earnings, and deductions to transfer from the former company to new company on the Inter-Company Parameters MEX page.
2. Define the action and reason code combinations that qualify for inter-company transfer processing by selecting the Inter-Company Transfer check box on the Action Reason page of HR.

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3. Use the Job Data component in HR to add a new Job record on the Job Data component for the employee with: (a) an action and reason code combination that is set up for inter-company transfers, and (b) an updated Company field value for another internal company.

   Whenever you enter a new row of job data for an employee in the Job Data component and the specified action and reason code combination is set up for inter-company transfers, the system sends the data from HR to Global Payroll for Mexico via the WORKFORCE_SYNC service operation in Integration Broker. The system transfers this data only when the action and reason code combination is set up for inter-company transfers and the Global Payroll for Mexico country extension is selected on the Installation Table page.

4. Verify that the system successfully transmitted the inter-company transfer data from HR to Global Payroll for Mexico for the employee on the Inter-Company Payee Detail MEX page.

   The system loads data for the inter-company transfers into this table. If you do not see the employee in this table, the system has not transmitted the HR data. Verify that you have selected Global Payroll for Mexico on the Installation Table page, set up the action and reason code combination for inter-company transfers on the Action Reason page, entered correctly the job data for the employee's inter-company transfer on the Job Data component, and enabled PeopleTools Integration Broker to send the WORKFORCE_SYNC service operation.

5. Verify that the last payroll of the transferring employee is finalized through the Results By calendar Group component.

   Within the same component, also note the calculated results for the earnings, deductions, and accumulators that you specified on the Inter-Company Transfer Mapping page.

6. Run the Inter-Company Transfer process on the Inter-Company Transfer MEX run control page to process the data for inter-company transfers.

   Select to either adjust accumulator balances or undo processing. The process includes only the employees who are in the specified calendar group and pay group, who have a new Job record with a qualifying action and reason code combination for inter-company transfers, and who has their last payroll finalized.

7. Verify that the process updated the employee's inter-company transfer data on the Inter-Company Payee Detail MEX page.

8. Verify that the specified accumulators adjusted appropriately for the old company on the Adjust Accumulator Balance page by accessing the employee's data for the calendar involved in the inter-company transfer processing.

   If you ran the process to adjust accumulator balances, the accumulators adjust to zero. If you ran the process to undo processing, the accumulators adjust to their original values.

9. Verify that the accumulators that you defined as part of the inter-company transfer mapping appear as former employer data for the employee on the Define Prior Employer Data MEX page.

   The accumulator values should match the values from the last payroll run. If you ran the process to undo processing, the accumulator data for the employee is deleted from this page only.

Action Reasons Page

Use the Action Reasons page (ACTION_REASON_TBL) to define or modify personnel action reasons.

Navigation:

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Set Up HCM, and then **Product Related**, and then **Workforce Administration**, and then **Action Reasons**

Use the Inter-Company Transfer check box on the Action Reason page (Set Up HCM, Product Related, Workforce Administration, Action Reasons) in HR to indicate the action and reason code combinations that are valid for processing inter-company transfers within Global payroll for Mexico. To access the page, select **Set Up HCM**, and then **Product Related**, and then **Workforce Administration**, and then **Action Reasons.**

See PeopleSoft Human Resources Administer Workforce: Defining Personnel Actions and Reasons.

Inter-Company Parameters MEX Page

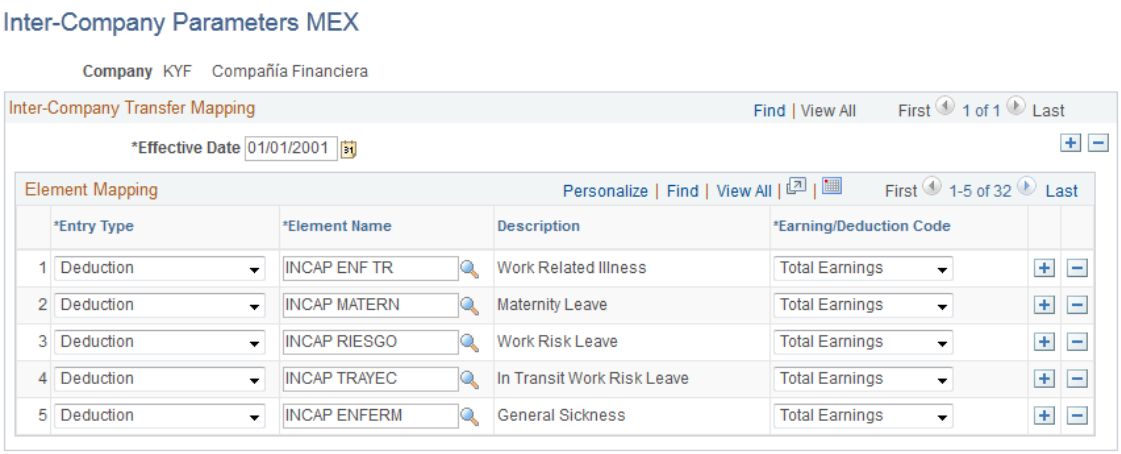
Use the Inter-Company Parameters MEX page (GPMX_INTERCOM_PARM) to define which accumulators, earnings, and deduction elements from the prior company to carry over to the new company for employees with inter-company transfers.

The Inter-Company Transfer process uses these mappings to move the employee's finalized payroll values for these elements between internal companies.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Taxes**, and then **Inter-company Parameters MEX**

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



Field or Control	Description
Effective Date	Enter the effective date on which the element mapping for inter-company transfers becomes valid.

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Field or Control	Description
Entry Type	Select the type of element that you are mapping from one company to another for inter-company transfers. This element mapping definition is used to insert specified earnings, deduction, and accumulator elements into the Define Prior Employer Data MEX page as former employer data. Your choices are **Earnings, Deduction,** or**Accumulator.**
Element Name and**Description**	Select the element that you are mapping from one company to another for inter-company transfers. The system prompts you to select from elements based on the specified entry type.
Earning/Deduction Code	Select the earning or deduction code to which you are mapping the specified element to prior employer data. The Inter-Company Transfer process uses this mapping of accumulators to earning/deduction codes to populate the Define Prior Employer Data MEX page with the employee's accumulator values from the former company.

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7

Defining Absence Rules

Setting Up Absences

To define absences, use the Pay Groups MEX (GPMX_PARM_PYGRP) component.

Page Used to Set Up Absences

Page Name	Definition Name	Usage
Absences Page	GPMX_ABS_PYGRP	Define the absence parameters for a pay group.

Absences Page

Use the Absences page (GPMX_ABS_PYGRP) to define the absence parameters for a pay group.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Framework**, and then **Organizational**, and then **Pay Groups MEX**, and then **Absences**

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

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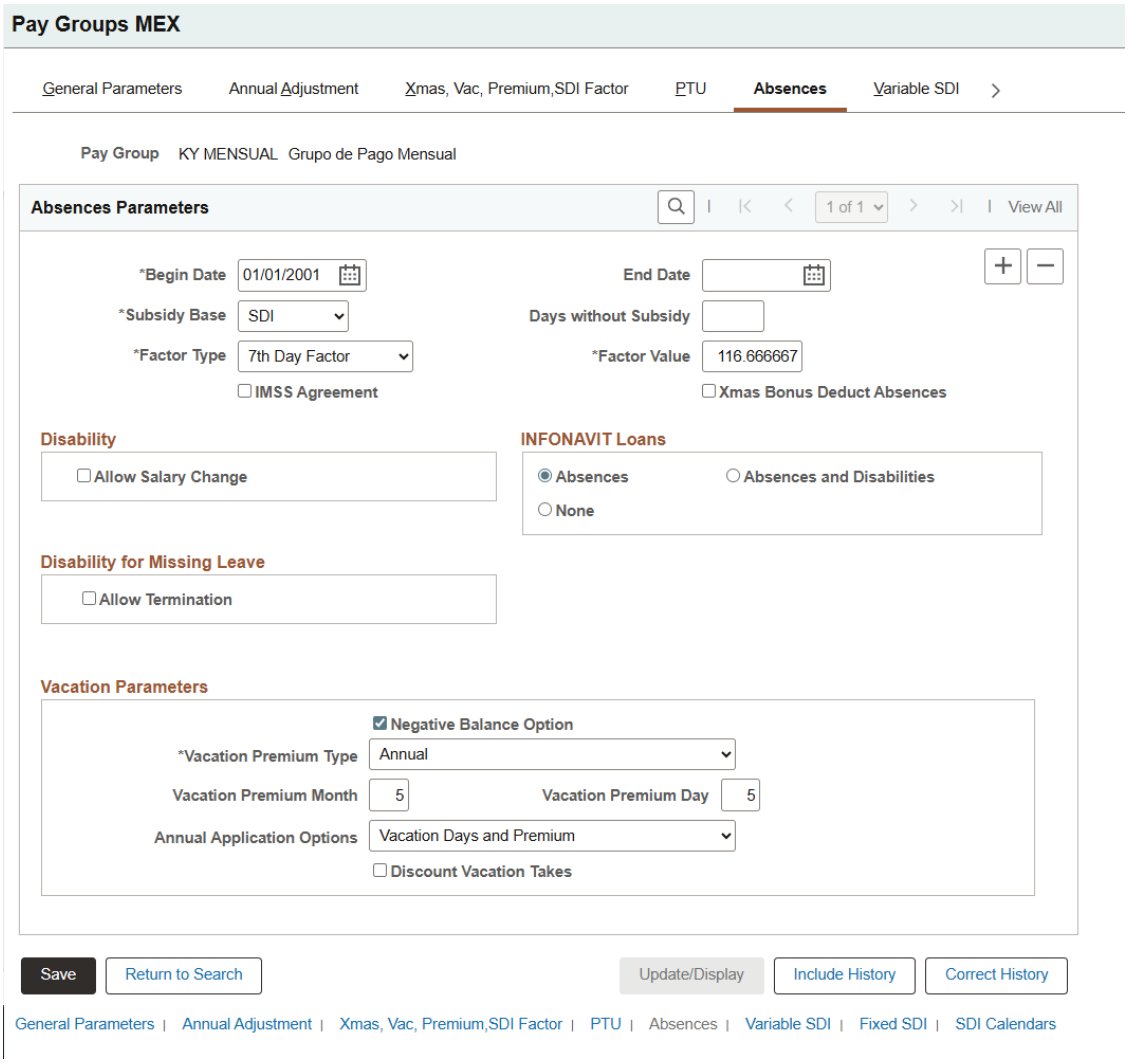

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Absences Parameters

Field or Control	Description
Subsidy Base	Select the subsidy base for disabilities. Values are *Daily Salary, SDI, SDI Complement,* and *Without Subsidy.* Your company can subsidize the difference between what IMSS pays employees and what their regular earnings are. The three most common methods are SDI, SDI Complement, and daily salary. For the SDI method, the company pays 100 percent of the SDI for the first three days of the disability and 40 percent of SDI from the fourth day on. This 40 percent will be capped up to the SDI. For the SDI Complement method, the 40 percent will be capped up to the difference between the 60 percent of SDI and the 100 percent of the daily rate. For the daily salary method, the company pays 100 percent of the daily salary for the first three days. From the fourth day on, the company pays the difference between the daily salary and what IMSS pays (usually 60 percent of SDI) capped up to the daily rate.
Days without Subsidy	Enter the number of days without a disability subsidy. Because the IMSS does not pay for the first three days of a disability, some companies pay for those days to cover the difference.
Factor	Select the factor for general absences. Values are *6th & 7th Day Factor, 7th Day Factor, Other,* and *Without Factor.* For example, if an employee works Monday through Friday and is absent only one day, the employee receives a discount for the sixth and seventh days. Enter the amount of the factor in the field next to the**Factor** field. The absence is deducted using this factor. For example, if you select *Without Factor,* the amount equals 100 MXN. If you select *6th & 7th Day Factor,* the amount equals 140 MXN. If you select *7th Day Factor,* the amount equals 116.67 MXN.
IMSS Agreement	Select if your company has an agreement with IMSS to calculate disability subsidies. If you have an agreement with IMSS, your company pays the employee directly, and IMSS pays the subsidy to the company instead of the employee. This parameter will cause the earning SUB ENF CONV to appear instead of the other two subsidy earnings (SUB ENF 40% and SUB ENF 100%). This subsidy will be the same as paying employees their regular salary earnings.

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Field or Control	Description
Xmas Bonus Deduct Absences	Select this check box to have the payroll process deduct employee absences from the Christmas bonus payment calculation for payees in the specified pay group. The system inserts a row with the variable AG VR APLICA AUS and numeric value equal to 1 in the grid on the Pay Groups - Supporting Element Overrides page for the specified pay group. Deselect this check box to exclude employee absences from the Christmas bonus payment calculation. The system changes the numeric value of the variable to 0. By default this check box is deselected.

Disability

Field or Control	Description
Allow Salary Change	Select to enable salary changes for employees during disability.

INFONAVIT Loans

Use this group box to define the kind of absences that affect the discount amount for INFONAVIT loans.

Field or Control	Description
Absences	Select this option to indicate that the payroll process reduce the INFONAVIT loan discount by the absences that the payee has during the payroll process period.
Absences and Disabilities	Select this option to indicate that the payroll process reduce the INFONAVIT loan discount by the absences and disabilities that the payee has during the payroll process period.
None	Select this option to indicate that the payroll process does not reduce the INFONAVIT loan amount due to Payee's absences and disabilities.

Disability for Missing Leave

Field or Control	Description
Allow Termination	Select this option to enable termination for employees during disability.

Vacation Parameters

Field or Control	Description
Negative Balance Option	Select to enable employees to carry a negative absence balance.

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Field or Control	Description
Vacation Premium Type	Define the calculation method for the vacation premium. Values are: *Anniversary:* Employee is paid the entire vacation premium on the employment anniversary. *Annual:* Employee is paid the entire vacation premium on a specified date that you define. *Proportional:* Employee is paid the vacation premium on an as-used basis. For example, if an employee used three days of vacation in one month, out of a total of ten days vacation for the year, the employee receives 3/10 of the vacation premium in that month's pay.
Vacation Premium Month	If you select *Annual* as the Vacation Premium Type, enter the month that the vacation premium will be paid. Values are 01–12, depending on the number of the month.
Vacation Premium Day	If you select *Annual* as the Vacation Premium Type, enter the day that the vacation premium will be paid. Values are 01–31, depending on the day of the month.
Annual Application Options	If you select *Annual* as the Vacation Premium Type, the Annual Application Options field appears. Values are *Vacation Premium* and *Vacation Days and Premium.* In Global Payroll for Mexico, there are two different earnings codes, one for Vacation Take Days and another for Vacation Premium. If you select *Vacation Premium* , the earnings code for the Vacation Premium appears on that pay period. If you select *Vacation Take Days and Vacation Premium,* then two earnings codes will be generated—one for the Vacation Take Days and one for the Vacation Premium.
Discount Vacation Takes	If you select *Annual* as the Vacation Premium Type, the Discount Vacation Takes field appears. Select this check box if you want the vacation takes that occurred during the annual period to be discounted from either the vacation premium or the vacation days payment.

Setting Up Vacations

Handling Negative Vacation Balances

You can enable negative vacation balances for employees by selecting the Negative Balance Option check box on the Absences page.

- If you do not enable negative balances, the system generates an error message and does not process the vacation take if the vacation take goes over the accumulated balance.
- If you enable negative balances, you can set a limit to the negative balance by either a fixed amount or a percentage of the next absence entitlement to be generated.

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For example, if an employee's next vacation entitlement is 12 days, and you set the limit for negative balances to 50 percent, then the system takes a limit of 6 days.

Related Topics

- Absences Page
  Use the Absences page (GPMX_ABS_PYGRP) to define the absence parameters for a pay group.

Defining Vacation Premiums

Employees in Mexico receive a vacation premium, which is at least 25 percent of their salary. Vacation premiums are paid in one of three ways:

- Anniversary: Employees receive their entire vacation premium on their employment anniversaries, regardless of whether they already took the vacation.
- Annual: Employees receive their entire vacation premium for the year on a date the company specifies.
- Proportional (spread all along the vacation takes): Employees receive their vacation premiums as they take vacation throughout the year.

  This way, employees do not receive vacation premium pay in advance, but receive it as they use it.

> **Note**
>
> You can override the payment date at the payee level. If an employee is terminated before the vacation premium date, you can calculate the proportional days and pay the employee at the time of termination.

You'll define the payment option for vacation premiums on the Absences page.

Related Topics

- Absences Page
  Use the Absences page (GPMX_ABS_PYGRP) to define the absence parameters for a pay group.

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8

Defining Overtime

Defining Overtime in Mexico

To define overtime calendars, use the Pay Group OVT Calendars MEX (GPMX_OVR_CAL) component. To define overtime parameters, use the Pay Group OVT Parameters MEX (GPMX_OVR_PAR) component.

> **Note**
>
> Before processing overtime in Mexico, you must define overtime parameters by pay group, as well as weekly overtime calendars by pay group.

Pages Used to Define Overtime

Page Name	Definition Name	Usage
Pay Group OVT Calendars MEX Page	GPMX_OVR_CAL	Define the weekly overtime calendar for a pay group. This is a tool to create an automatic calendar.
Pay Group OVT Parameters MEX Page	GPMX_OVR_PARMS	Define the overtime parameters for a pay group.

Pay Group OVT Calendars MEX Page

Use the Pay Group OVT Calendars MEX page (GPMX_OVR_CAL) to define the weekly overtime calendar for a pay group.

This is a tool to create an automatic calendar.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Framework**, and then **Organizational**, and then **Pay Group OVT Calendars MEX**

This example illustrates the fields and controls on the Pay Group OVT Calendars MEX page. You can find definitions for the fields and controls later on this page.

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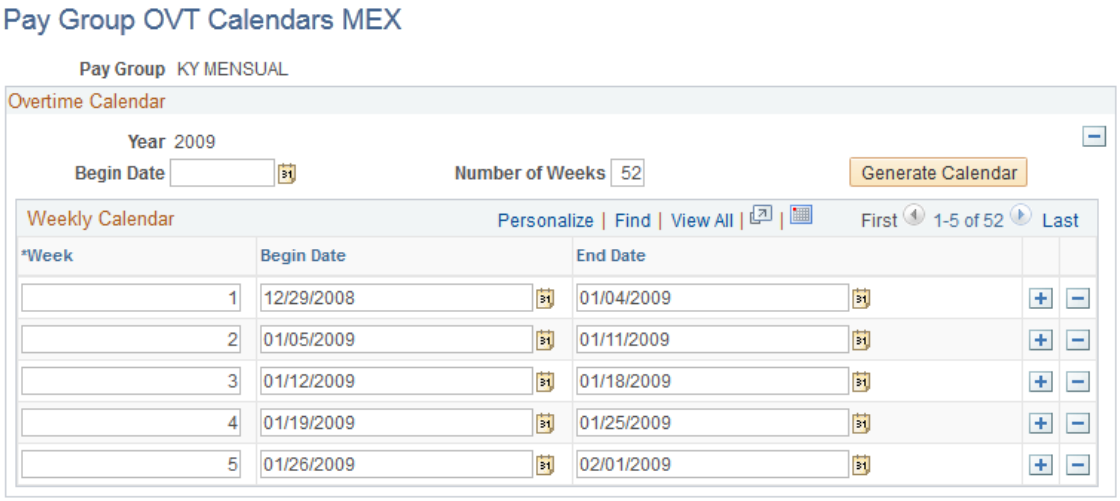

Overtime Calendar

Field or Control	Description
Year	Enter the year for the overtime calendar that you want to create.
Begin Date	Enter the begin date for the overtime calendar.
Number of Weeks	Specify the number of weeks that you are going to create the overtime calendar for. **Note:** In Mexico, overtime is defined by a weekly period. The frequency of a payroll is not considered a factor in determining overtime calendars.
Generate Calendar	Click the **Generate Calendar** button to create an overtime calendar. Once you've clicked**Generate Calendar,** the overtime calendar information is automatically created.

Weekly Calendar

Field or Control	Description
Week	The week number for the overtime calendar appears.
Begin Date/End Date	The begin and end dates for the week appear.

Pay Group OVT Parameters MEX Page

Use the Pay Group OVT Parameters MEX page (GPMX_OVR_PARMS) to define the overtime parameters for a pay group.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Framework**, and then **Organizational**, and then **Pay Group OVT Parameters MEX**

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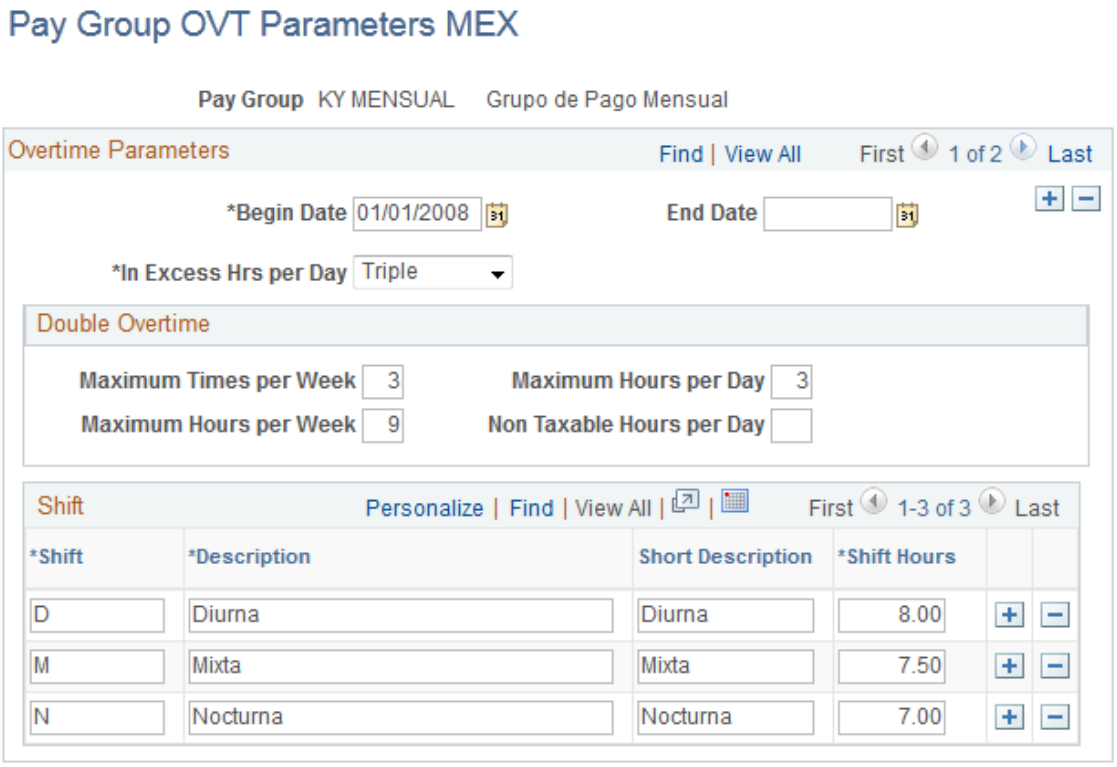
This example illustrates the fields and controls on the Pay Group OVT Parameters MEX page. You can find definitions for the fields and controls later on this page.



Overtime Parameters

Field or Control	Description
Begin Date/End Date	Enter the begin and end dates for the overtime parameters.

Double Overtime

Field or Control	Description
Maximum Times per Week	Specify the maximum number of days in a week that the overtime is going to be paid as double. For any amount above this parameter, overtime will be paid as triple.
Maximum Hours per Day	Specify the maximum number of hours in a day that will be paid as double. For any amount above this parameter, overtime will be paid as triple.
Maximum Hours per Week	Specify the maximum hours in a week that the overtime will be paid double. For any number of hours per week above this, overtime will be paid as triple. This parameter should always be *9* since it's legally defined.

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Field or Control	Description
Non Taxable Hours per Day	Specify the number of hours in a day that double overtime is non-taxable. The system counts any double-overtime hours in excess of this value for a given day as taxable. When you enter overtime, the system calculates the non-taxable hours and displays the results in the Double Hours and Double Hours Total fields on the pages of the Enter Overtime MEX component.
In Excess Hrs. per Day (in excess hours per day)	Define how the system should calculate overtime hours that fall between three hours a day and three days a week and the first nine hours. Values are *Double* and *Triple*. **Note:** These four parameters are taken into consideration when you enter overtime data in order to split the double and triple overtime. Depending on the value in the **In Excess Hrs. per Day** field, the system may override the value for the TE VR FACTEX variable at the pay group level. This variable is used during payroll calculation in order to determine whether the In Excess Hours are going to be paid at a double rate or triple rate for overtime.

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9

Setting Up Terminations

Understanding Termination Setup

In Global Payroll for Mexico, the process used to trigger termination payments is based in a termination version. A termination version is a collection of actions and reasons that can trigger specific termination earnings and deductions.

In Global Payroll for Mexico, both payees and termination earnings and deductions are associated with termination versions. When you define a termination earning or deduction, you link it to one or more termination versions. When you terminate a payee, the payee is automatically linked to the termination version representing the action and the reason for his termination. In this way, the system can identify and process only those earnings and deductions associated with the same termination version.

Elements Used in the Termination Process

This table lists the elements used in the process that triggers termination pay.

Element	Description
LF GC VER FINIQ	Generation control element that determines whether earnings or deductions should be paid in response to a payee's termination. This element is based on the generation control formula LF FM VER FINIQ GC.
LF VR CRED SAL	Delivered variable that defines whether the salary credit option should be considered for the termination ISR (tax) calculation. This variable defaults to "Y" but can be overridden at the payee or Calendar ID level to avoid the salary credit use in the FD FM TOT ISR SDO formula.
LF VR MOTIVO BAJA	Delivered variable that contains the termination reason.
LF VR VER FINIQ 01, LF VR VER FINIQ 02, LF VR VER FINIQ 03, LF VR VER FINIQ 04, LF VR VER FINIQ 05, LF VR VER FINIQ 06, LF VR VER FINIQ 07, LF VR VER FINIQ 08, LF VR VER FINIQ 09, LF VR VER FINIQ 10	These 10 delivered variables represent different termination versions and are linked to different earnings and deductions to identify which earnings or deductions should be paid for each combination of termination actions and reasons.
LF VR VER FINIQ EE	Delivered variable that contains the termination version (representing the termination action and reason) for a terminated payee. **Note:** Termination versions are defined on the Termination Version and Action/Reasons MEX pages.

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Element	Description
WORKFORCE_SYNC	Service operation that enables the delivered Global Payroll variables LF VR VER FINIQ EE and LF VR MOTIVO BAJA to be inserted in the supporting element override table at the payee level (thus associating a terminated payee with the termination version that applies to the payee's termination). The handler/application class that inserts these variables is GPMX_Termination_version_job handler and associated application class.

Steps for Triggering Termination Pay

These elements are used to trigger termination pay, as outlined here:

1. When a payee is terminated or laid off and the appropriate action/reason codes are entered on the Job Data pages in PeopleSoft HR, the system uses the service operation WORKFORCE_SYNC to insert the Global Payroll variables LF VR VER FINIQ EE (containing the termination version) and LF VR MOTIVO BAJA (containing the termination reason) as supporting element overrides at the payee level (Global Payroll & Absence Mgmt, Payee Data, Create Overrides, Supporting Elements). In other words, the service operation links the payee to the termination version (the action and reason combination) that applies to the payee's specific termination.

   > **Note**
   >
   > The only actions capable of triggering the service operation used to insert the variables LF VR VER FINIQ EE and LF VR MOTIVO BAJA in the supporting element override table at the payee level are TER (termination), LOF (layoff), and COM (completion).

2. Just as each terminated payee is linked to a termination version , each termination earning or deduction is linked to a termination version (using the variables LF VR VER FINIQ 01 through LF VR VER FINIQ 10) on the Supporting Elements Override page of the Earnings component or Deductions component.
3. When a payee is terminated or laid off, Global Payroll for Mexico uses the generation control element LF GC VER FINIQ (in combination with the formula LF FM VER FINIQ GC) to include in the payee's final payment only those earnings and deductions that are part of the termination version associated with the payee in Step 1. This is done by means of the following comparison:
   - When you run a payroll, the generation control element (which is linked to each delivered termination earnings or deduction on the Calculation page of the Earnings component or Deductions component) checks the payee's termination version, as represented by the variables LF VR VER FINIQ EE (containing the termination version) and LF VR MOTIVO BAJA (containing the termination reason).
   - At the same time, the generation control element checks the termination versions associated with each delivered termination earnings and deduction element on the Supporting Elements Override page of the Earnings component or Deductions component. If the payee's termination version (represented by the variables LF VR VER FINIQ EE and LF VR MOTIVO BAJA) equals the termination version (represented by the variables LF VR VER FINIQ 01 through LF VR VER FINIQ 10)

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associated with an earnings or deduction on the Supporting Elements Override page, the earnings or deduction can be processed.

Related Topics

- Creating New Termination Earnings and Deductions
- Setting Up Frequently Used Supporting Element Overrides
  To define frequently used supporting element overrides in Mexico, use the Earn/Ded SOVRs MEX (GPMX_ERNDED_SOVR) component.
- PeopleSoft Global Payroll: Understanding Earning and Deduction Elements

Defining Termination Versions and Action/Reasons

To define termination versions, use the Versions MEX (GPMX_TERM_VERSION) component. To define termination action/reasons, use the Action/Reasons MEX (GPMX_TERM_ACTN_RSN) component.

Pages Used to Define Termination Versions and Action/Reasons

Page Name	Definition Name	Usage
Version MEX Page	GPMX_TERM_VERSION	Define termination versions.
Action/Reasons MEX Page	GPMX_TERM_ACTN_RSN	Define qualifying actions and reasons for triggering termination pay.

Understanding Termination Versions

Global Payroll for Mexico groups the qualifying actions and reasons for making termination payments into termination versions. Different termination action and reason combinations trigger different sets of termination earnings.

To define termination versions and then trigger the payments associated with a termination version, you must do the following:

1. Define your termination versions on the Versions MEX page.
2. Define the associated actions/reasons that will trigger payment on the Action/Reasons MEX page.
3. On the Job Data pages in HR, specify *Termination, Completion,* or *Layoff* as the action and enter a corresponding reason.

   When you specify *Termination, Completion,* or *Layoff* as the action in combination with a qualifying reason, termination pay will be processed for the terminated or laid off payees—as long as the termination or layoff action/reason combination is recognized, by generation control, as valid for triggering termination payments.

   See PeopleSoft Human Resources Administer Workforce: Understanding Job Data.
4. Generate a termination letter using the Termination/Layoff Letter page.

> **Note**
>
> The Termination/Layoff Letter page is documented in another topic.

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Related Topics

- Understanding Termination Payments

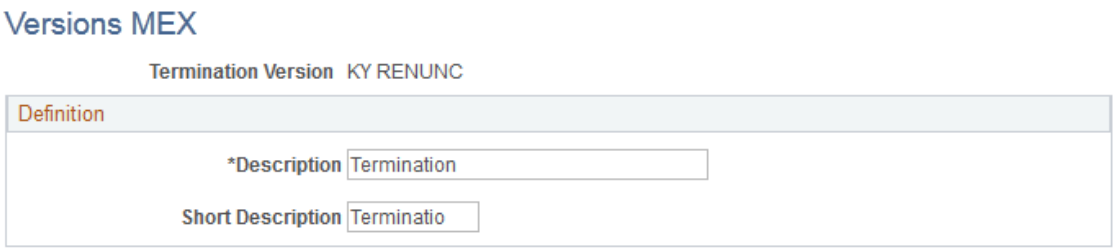
Version MEX Page

Use the Versions MEX page (GPMX_TERM_VERSION) to define termination versions.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Terminations**, and then **Versions MEX**

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



Field or Control	Description
Termination Version	Name and describe the termination version. This version name enables you to group all of the qualifying actions and reasons for making a set of termination payments.

Action/Reasons MEX Page

Use the Action/Reasons MEX page (GPMX_TERM_ACTN_RSN) to define qualifying actions and reasons for triggering termination pay.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Terminations**, and then **Action/Reasons MEX**

This example illustrates the fields and controls on the Action/Reasons MEX page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Action and**Action Description**	Specify the action corresponding to a termination version that triggers termination pay in combination with a specific reason. The system displays the description of the selected action.
Reason and**Description**	Specify the reason corresponding to a termination version that triggers termination pay in combination with the specified action. The system displays the description of the selected reason.
Termination Version	Indicate the termination version for the action and reason combination that you specified trigger termination pay. **Note:** Termination versions are assigned at the action and reason level. When a payee is terminated, a service operation inserts the version as a supporting element override at the payee level. This is explained in detail in another topic. See Understanding Termination Payments.
Termination/Layoff	Specify whether the reason for the payee's departure is *Layoff* or *Termination.* **Note:** This information is inserted as a supporting element override (variable) at the payee level and is used in formulas that trigger and process termination payments. For example, the seniority premium is always paid for layoffs, but it is paid for a termination only if the payee has 15 or more years of seniority.

Creating New Termination Earnings and Deductions

Pages Used to Create New Termination Earnings and Deductions

Page Name	Definition Name	Usage
PeopleSoft Global Payroll: Supporting Element Overrides Page	GP_ELM_DFN_SOVR	Associate earnings and deductions with termination versions.
Earn/Dedn SOVRs MEX Page	GPMX_ERNDED_SOVR	Define which earnings and deductions should be paid or deducted for each termination version.
PeopleSoft Global Payroll: Earnings - Calculation Page	GP_ERN_DED_CALC	Associate a generation control element with an earnings or deduction element.
PeopleSoft Global Payroll: Field-by-Field Definition Page	GP_FORMULA1	Define a generation control formula.
PeopleSoft Global Payroll: Variables - Definition Page	GP_VARIABLE	Define a new variable to represent a termination version.

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Understanding How to Create New Termination Earnings and Deductions

PeopleSoft delivers a number of sample termination earnings and deductions. You can modify these elements to fit your needs, or create new termination elements using the delivered elements as your guide.

If you create new termination earnings and deductions, you must associate them with the delivered termination versions to which they correspond.

> **Note**
>
> The sample termination earnings and deductions are discusses in another topic.

See Understanding Termination Payments.

Earnings and Deductions That are Paid as Part of Each Termination Version

To specify the earnings and deductions that should be paid or deducted as part of each termination version, you have two options:

- Using the Supporting Elements Override page of the Earnings component or Deductions component in the core application, associate any of the 10 delivered variables (LF VR VER FINIQ 01 through LF VR VER FINIQ 10) with each new earnings or deduction element. These variables represent up to 10 different termination versions.
- Using the Earn/Dedn SOVRs MEX page in Global Payroll for Mexico, define which earnings and deductions should be paid or deducted as part of each termination version. This page enables you to insert a supporting element override (SOVR) at the earnings or deduction level.

See PeopleSoft Global Payroll: Understanding Earning and Deduction Elements.

Override Values for Variables Associated with the New Earnings and Deductions

To specify the override values of the variables (LF VR VER FINIQ 01–10) you associated with the new earnings and deduction elements, you have two options:

- Use the Values tab on the Supporting Elements Override page.

  On this tab, specify which termination versions defined on the Termination Versions page will be represented by the variables LF VR VER FINIQ 01−10.
- Use the Earn/Dedn SOVRs MEX page in Global Payroll for Mexico.

Paying New Earnings and Deductions When a Payee is Terminated

To pay the new earnings or deduction only when a payee is terminated and only as part of its corresponding termination version, assign the generation control element LF GC VER FINIQ to the earnings or deductions on the Calculation page of the Earnings component or Deductions component using the Generation Control field.

Creating More than 10 Termination Versions

To create more than 10 termination versions, complete these steps using the delivered termination elements as your model:

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1. Define a new termination version on the Termination Version and Action/Reasons MEX pages (VER11, for example).
2. Create additional variables using the Variable component for each termination version in excess of 10 (LF VR VER FINIQ 11, for example).
3. Using the Supporting Elements Override page of the Earnings component or Deductions component in the core application, add the new variable to all of the earnings and deductions that you want to make part of this version.

> **Note**
>
> Remember to set the value of this variable to VER11 to represent the new termination version.

4. Modify the LF GC VER FINIQ generation control formula to include this new variable as part of the comparison process that determines whether the variable LF VR VER FINIQ EE, inserted as a supporting element override at the payee level, equals the new variable that you created.

   This is a generation control formula before and after the modification:

   Before Modification:

   If LF VR VER FINIQ EE <> " And LF VR VER FINIQ EE In (LF VR VER FINIQ 01 LF VR VER FINIQ 02 LF VR VER FINIQ 03 LF VR VER FINIQ 04 LF VR VER FINIQ 05 LF VR VER FINIQ 06 LF VR VER FINIQ 07 LF VR VER FINIQ 08 LF VR VER FINIQ 09 LF VR VER FINIQ 10) Then

   1 >> LF FM VER FINIQ GC

   Else

   0 >> LF FM VER FINIQ GC

   Endif

   After Modification:

   If LF VR VER FINIQ EE <> " And LF VR VER FINIQ EE In (LF VR VER FINIQ 01 LF VR VER FINIQ 02 LF VR VER FINIQ 03 LF VR VER FINIQ 04 LF VR VER FINIQ 05 LF VR VER FINIQ 06 LF VR VER FINIQ 07 LF VR VER FINIQ 08 LF VR VER FINIQ 09 LF VR VER FINIQ 10 LF VR VER FINIQ 11) Then

   1 >> LF FM VER FINIQ GC

   Else

   0 >> LF FM VER FINIQ GC

   Endif

Related Topics

- PeopleSoft Global Payroll: Defining Element Definition Overrides
- PeopleSoft Global Payroll: Earnings - Calculation Page
- Earn/Dedn SOVRs MEX Page
  Use the Earn/Dedn SOVRs MEX (Earnings/Deductions SOVRs MEX) page (GPMX_ERNDED_SOVR) to set up SOVRs at the earnings and deduction level for variables used in key calculations.
- PeopleSoft Global Payroll: Field-by-Field Definition Page

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- PeopleSoft Global Payroll: Variables - Definition Page

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10

Creating Payslips

Understanding the Payslip Definition Process

In Mexico, companies have to provide a standard payslip that contains information such as the number of worked days and wages. The payslip is delivered to employees depending on the payment frequency (Weekly, Biweekly, Semimonthly, or Monthly). It can be printed or generated as digital payslip.

In Global Payroll for Mexico, you can define the criteria to print out your payslips, so that it displays exactly the information you require. You can prioritize the sort criteria and select the earnings and deductions you want included in the payslip.

To define payslips:

1. (Optional) Create a Group Criteria in HR.
2. Create a Group ID Definition on the Group Build Definition component in HR. See Application Fundamentals: Setting Up Group Definitions

   You must have defined a Group ID before you can generate a payslip in Global Payroll for Mexico. Every time you run the payslip process, the Group ID is refreshed.
3. Define the sort criteria for your payslip on the Sort IDs MEX page . See Defining Payslip Sort IDs
4. Select the earnings and deductions you want included on the payslip on the Element Lists MEX page.
5. Generate the payslip on the Payslip Report page. SeeRunning the Payslip Report

> **Note**
>
> The Element Lists MEX Page can be used for payslips, as well as for the Payroll Results Register and the termination/layoff letters.

The Payslip page launches a Job (GPMXPYSL) containing two processes in the sequence:

1. The Structured Query Report (SQR) GPMXPS01 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 will report that ePay has not been licensed and will complete with success.

See PeopleSoft ePay: Setting Up View Payslip.

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> **Note**
>
> When running the GPMXPYSL Job, the following **Type** and**Format** options can be used with ePay: *None* and *None* (defaults to Web and PDF), or *Web* and *PDF* or *File* and *PDF.* If using *File* and *PDF,* do not use a modified output destination from the Process Scheduler Request page.

As a legal requirement, the electronic payslip, CFDI (Comprobante Fiscal Digital por Internet – Fiscal Digital Receipts by Internet) is sent to the SAT to notify all the payments included on the payroll. CFDI's are created by payroll regardless to its frequency (weekly, semi-monthly, monthly, bi-weekly, etc.) and these files need to be delivered to SAT prior or on the payment date. It's also mandatory to provide CFDI's for annual or special payrolls such as Christmas Bonus, Profit Sharing, Final Payments, Special Payments, etc. These files are provided by the SAT with the technical requirements to create the Electronic Payslips (CFDI for Payroll).

- Once you run the payslip CFDI/XML process, save the generated CFDI/XML file in a folder.
- Simulate Stamping with data that the PAC is sending to SAT.
- Save CFDI/XML file in the server and using a document editor add the UUID_CFDI print that simulates the XML information .
- In the run page, select the option Upload Certifícate and run the payslip after uploading the saved file.
- Verify the CFDI/XML with the UUID_CFDI information
- Run the Auxiliary Folios Report MEX with information that are in the XML database.

Related Topics

- Application Fundamentals: Understanding Group Build

Defining Payslip Sort IDs

To define payslip sort IDs, use the Sort IDs MEX (GPMX_SORTID) component.

Page Used to Define Sort IDs

Page Name	Definition Name	Usage
Sort IDs MEX Page	GPMX_SORTID	Define the printing order selection for the payslip. The Sort ID is used in the payslip generation process.

Sort IDs MEX Page

Use the Sort IDs MEX page (GPMX_SORTID) to define the printing order selection for the payslip.

The Sort ID is used in the payslip generation process.

Navigation:

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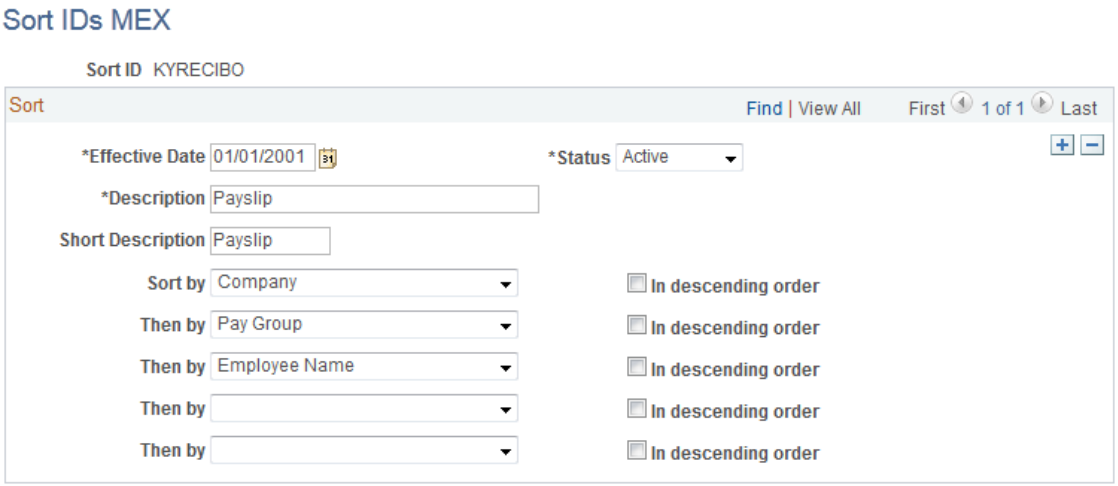
Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Payslips**, and then **Sort IDs MEX**

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



Field or Control	Description
Sort By	Define what you want the payslip to sort by first. Values include *Company, Department, Employee ID, Employee Name, Employee Type, Location, Pay Group, Pay Entity,* and *Supervisor Code.* Once you've defined your sort criteria, this is the order in which the payslip will print information.
Then By	Select what the next sort criteria will be. You can define sorting of up to five criteria. Values are the same for all Sort fields.
In descending order	Select if you want the sort order to be in descending order. The default is in ascending order, so if you want to print in descending order, you must specify this by selecting this check box.

Viewing Payslips

If you licensed ePay, employees can view their payslips online using the self-service View Payslip transaction. To aid in resolving questions raised by employees about their payslips, the payroll administrator can view employees' self service payslips in an online view that replicates the employees' view.

As an employee, use the View XML Payslip MEX page (GPMX_SS_XML) to filter and view all your available XML payslips for a specific date range.

Navigation:

Self Service, and then **Payroll and Compensation** , and then **View XML Payslip MEX**

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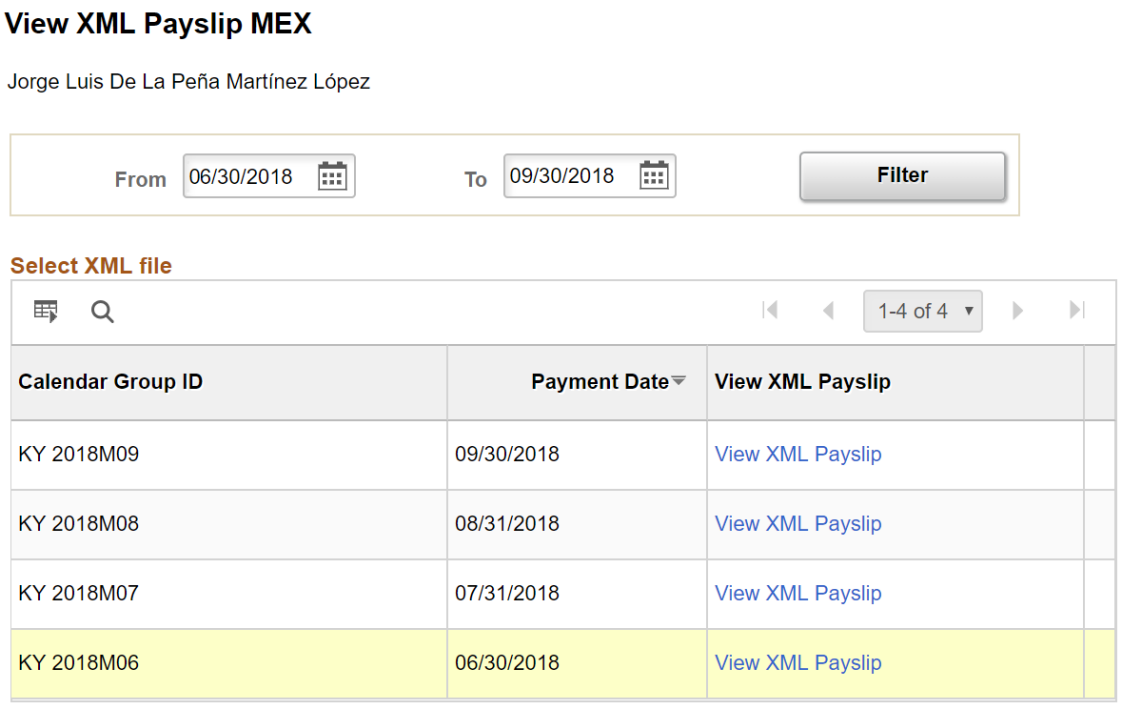
This example illustrates the View XML Payslip MEX Page.



Field or Control	Description
From and To	Specify the date range for which you want to retrieve and display XML data on the page.
Filter	Click this button to filter the page. Based on date range provided, all the available XML payslips are listed with Payment Date and Calendar Group ID. Click the View XML Payslip link to view payslip.

Related Topics

- PeopleSoft ePay: Viewing Payslips Online

Running the Payslip Report

Using Global Payroll for Mexico the employer can generate printed payslips or digital payslips for each employee. There will also be a digital certificate on the receipt of payment of the employee.

The electronic invoice, CFDI (Comprobante Fiscal Digital por Internet –Fiscal Digital Receipts by Internet) are placed in the server and are sent to the SAT to notify all the payments included on the payroll.

This topic discusses on how to generate payslips.

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Page Used to Run the Payslip Report

Page Name	Definition Name	Usage
Create/Print Payslips MEX Page	GPMX_RC_PAYSLIP	Generates the payslip. Note that you must first define the Group ID to generate the payslip. All groups selected in the Group ID field will automatically be created during the payroll run.

Create/Print Payslips MEX Page

Use the Create/Print Payslips MEX page (GPMX_RC_PAYSLIP) to run the Printed Payslip Job PSJob process. This job runs the Payslip Preparation process, followed by the Printed Payslip SQR report , and the Create Self Service Payslip process (GP_EPAY). You must set up payslips on the payslip definition pages before running the payslip processes. Also check the configuration elements in Legal Code Payslip MEX page.

When you run the report, the system creates an XML file and stores it in the server. A user can view the XML file in their browser, create a PDF file from the XML and then print it.

Navigation:

Global Payroll & Absence Mgmt, Payslips, Print Payslips MEX

This example illustrates the fields and controls on the Create/Print Payslips MEX page.

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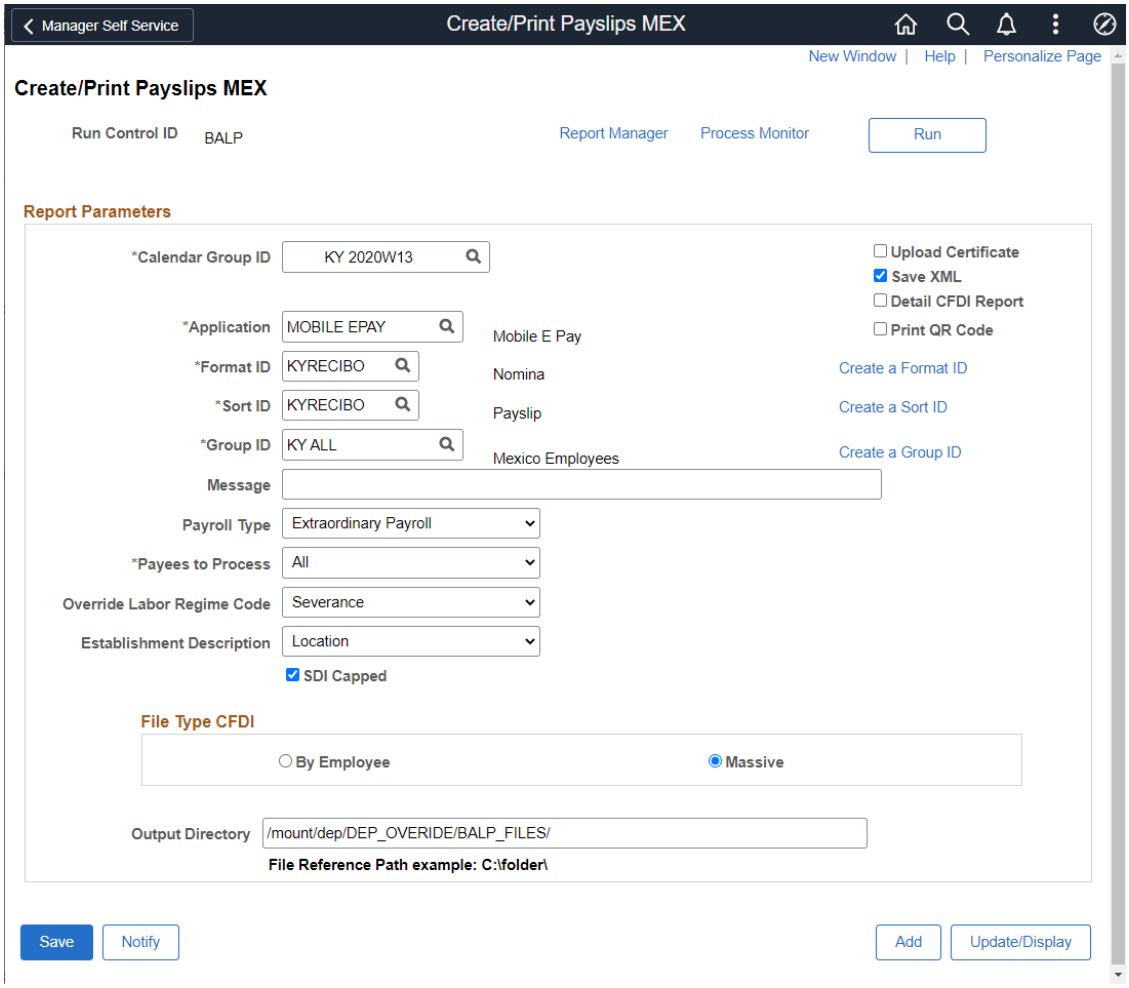

Field or Control	Description
Calendar Group ID	Select the calendar group for which you want to load payslip result data.
Format ID	Select the Format ID. This value is defined on the Element Lists MEX page and defines the elements listed in the Payslip.
Sort ID	Select the Sort ID. This value is defined on the Sort IDs MEX page.
Group ID	Enter the criteria that you want to use to select employees.
Message	The text you enter here will be printed in the Payslip
Payroll Type	Identifies the payroll type that will be generated. Select the payroll as ordinary payroll or extraordinary payroll.

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Field or Control	Description
Payees to Process	Select the payees to process. Valid Values are: • *All*: If you select this option, system generates the CFDI for all the employees (with and without error) that belong to Calendar Group ID. • *Error*: If you select this option, system generates only the CFDI for the employees that was marked on error in a previous process. If the process has not been run before and this option is selected, the process won't generate any CFDI.
Override Labor Regime Code	Select the option as 'Severence' to override the Labor Regime Code for terminated employees. **Note:** The Override Labor Regime Code will be validated if Extraordinary Payroll has been select in Payroll Type. This option overrides the Labor Regime Code for terminated employees but not for severance employees.
Establishment Description	The Valid Values are: • **Location:** CFDI prints the establishment description using the Establishment associated to Employee's Location. This is the default option. • **Job Data:** CFDI prints the establishment description using the Employee's Establishment (the one entered in Job).
SDI Capped	Select this check box if the SDI capped information needs to be printed in the Payslip. By default, it is selected.
Upload Certificate	Select the check box while you upload the certified file. The File Reference path will be the path where the XMLs from the PAC of the corresponding calendar group were placed.
Save XML	Select the check box to create the XML to send to the PAC. The files are created in the server path defined in the run control page.
Detail CFDI Report	Select this check box to if the element's information needs to be printed in the CFDI Report MEX.
Print QR Code	Select this check box to print QR code.
Create a Format ID	Click the link to access the Element Lists MEX page.
Create a Sort ID	Click the link to access the Sort IDs MEX page.
Create a Group ID	Click the link to create a Group ID.
File Type CFDI	Identifies the file type that will be generated. Valid values are: • By Employee: Refers to generate a file for each employee processed in the payroll. • Massive: Refers to generate one file with all employees processed in the payroll having a cut employee.

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Field or Control	Description
Output Directory	Specify the directory where generated XML files are stored. XML output (in the form of file) is generated and stored in the specified file output directory.

Click the Run button to run the payslip process.

> **Note**
>
> Provide a valid file path where the CFDIs (information provided by the PAC) belong to the selected calendar. If there is a mismatch in between the XMLs and the selected Calendar Group the information will be replaced by the last processed file by XML Application Engine which uploaded the Certificate.

CFDI — Fiscal Digital Receipts by Internet

As a legal requirement, the electronic payslip, CFDI (Comprobante Fiscal Digital por Internet – Fiscal Digital Receipts by Internet) is sent to the SAT to notify all the payments included on the payroll. CFDI's are created by payroll regardless to its frequency (weekly, semi-monthly, monthly, bi-weekly, etc.) and these files need to be delivered to SAT prior or on the payment date. It's also mandatory to provide CFDI's for annual or special payrolls such as Christmas Bonus, Profit Sharing, Final Payments, Special Payments, etc. These files are provided by the SAT with the technical requirements to create the Electronic Payslips (CFDI for Payroll).

- Once you run the payslip CFDI/XML process, save the generated CFDI/XML file in a folder.
- Simulate Stamping with data that the PAC is sending to SAT.
- Save CFDI/XML file in the server and using a document editor add the UUID_CFDI print that simulates the XML information .
- In the run page, select the option Upload Certifícate .
- In the File Reference Path field, specify the location where XML files need to be stored when SAT returns the file with the government information.

This example illustrates the fields and controls on the Create/Print Payslips MEX page when Upload Certificate is selected.

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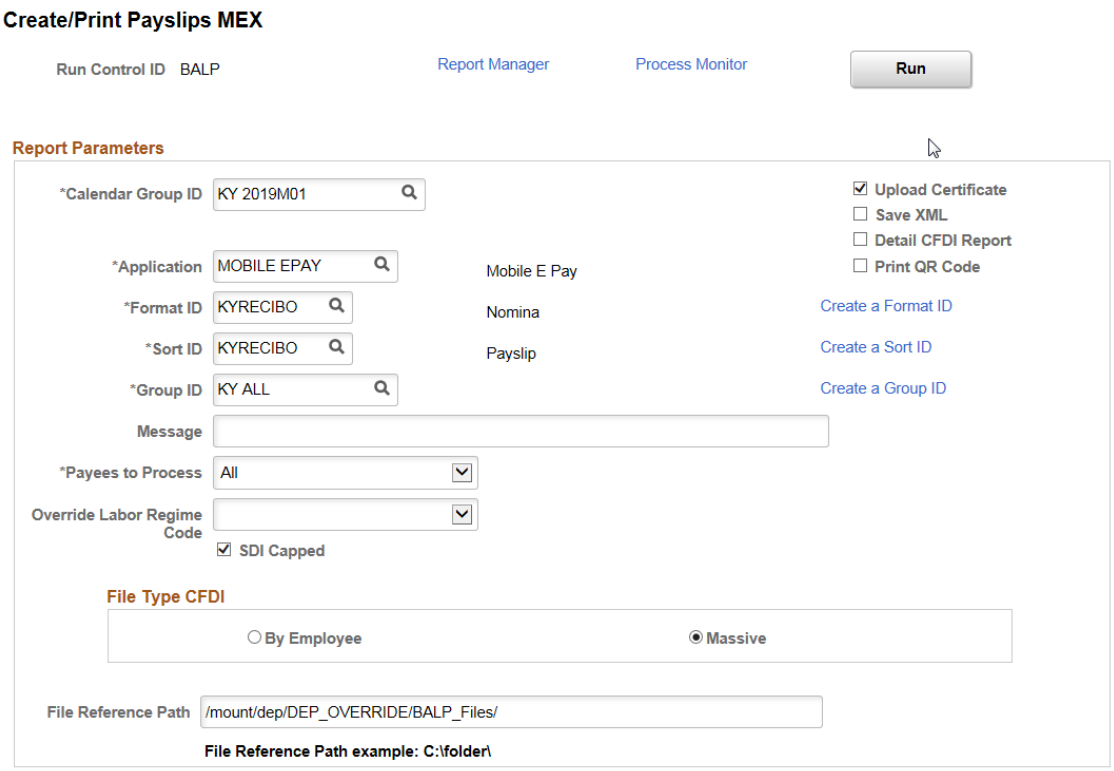

- Run the payslip after uploading the saved file
- Verify the CFDI/XML with the UUID_CFDI information
- Payslip is printed with the new fields.
- Payslips and XMLs are available through self-service. The employee will be able to inquire his/her XML by each paid period, also the XML can be saved in a directory or on a device.

> **Note**
>
> CFDI information is extracted from the table PS_GPMX_DIG_TBL where CFDIs are stored.

The CFDI process will print CURP's mask according to gender if the employee is a foreigner.

Related Topics

- Setting Up CFDI
  As a legal requirement, the electronic payslip, CFDI (Comprobante Fiscal Digital por Internet –Fiscal Digital Receipts by Internet) is sent to the SAT to notify all the payments included on the payroll. CFDI's are created by payroll regardless of its frequency (weekly, semi-monthly, monthly, bi-weekly, etc.) and these files need to be delivered to SAT prior or on the payment date. It's also mandatory to provide CFDI's for annual or special payrolls such as Christmas Bonus, Profit Sharing, Final Payments, Special Payments, etc. These files are provided by the SAT with the technical requirements to create the Electronic Payslips (CFDI for Payroll).

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Payee Message CFDI MEX Page

Use the Payee Message CFDI MEX Page to validate the data issues generated for the employees while processing Regular Payroll and the CFDI process. Using this data, the user can correct the errors and regenerate the XML for SAT.

> **Note**
>
> This page shows only the calendar which has been processed after by Create/Print Payslips MEX and with issues detected.

Navigation:

Global Payroll & Absence Mgmt > Absence and Payroll Processing > Review Absence/Payroll Info > Payee Message CFDI MEX

This example illustrates the Payee Message CFDI MEX Page.

Field or Control	Description
Calendar Group ID	Select the calendar group ID for which you want to validate the issues.
Empl ID	Shows the employee ID for which data issues are reported.
Empl Record	Shows the employee record number of the employee to process in CFDI.
Sequence	Establishing the sequence based on the employee errors.
Description	Review the messages that are generated during the CFDI process.

Setting Up CFDI

As a legal requirement, the electronic payslip, CFDI (Comprobante Fiscal Digital por Internet – Fiscal Digital Receipts by Internet) is sent to the SAT to notify all the payments included on the payroll. CFDI's are created by payroll regardless of its frequency (weekly, semi-monthly, monthly, bi-weekly, etc.) and these files need to be delivered to SAT prior or on the payment date. It's also mandatory to provide CFDI's for annual or special payrolls such as Christmas Bonus, Profit Sharing, Final Payments, Special Payments, etc. These files are provided by the SAT with the technical requirements to create the Electronic Payslips (CFDI for Payroll).

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Using the Legal Codes Paylist MEX component user can configure CFDI .

Pages for Setting Up CFDI

Page Name	Definition Name	Usage
Legal Codes CFDI Page	GPMX_LEGAL_CODE	Used to define the CFDI report parameters and to map elements.
Other Pmt Mapping Page	GPMX_CFDI_OPMT	Used to map the payment elements.
Info Node CFDI Page	GPMX_INFO_NODE_CFD	Used to define receipt node's attributes.
SNCF Entities	GPMX_CFDI_SNCF	Used to define SNCF Entities

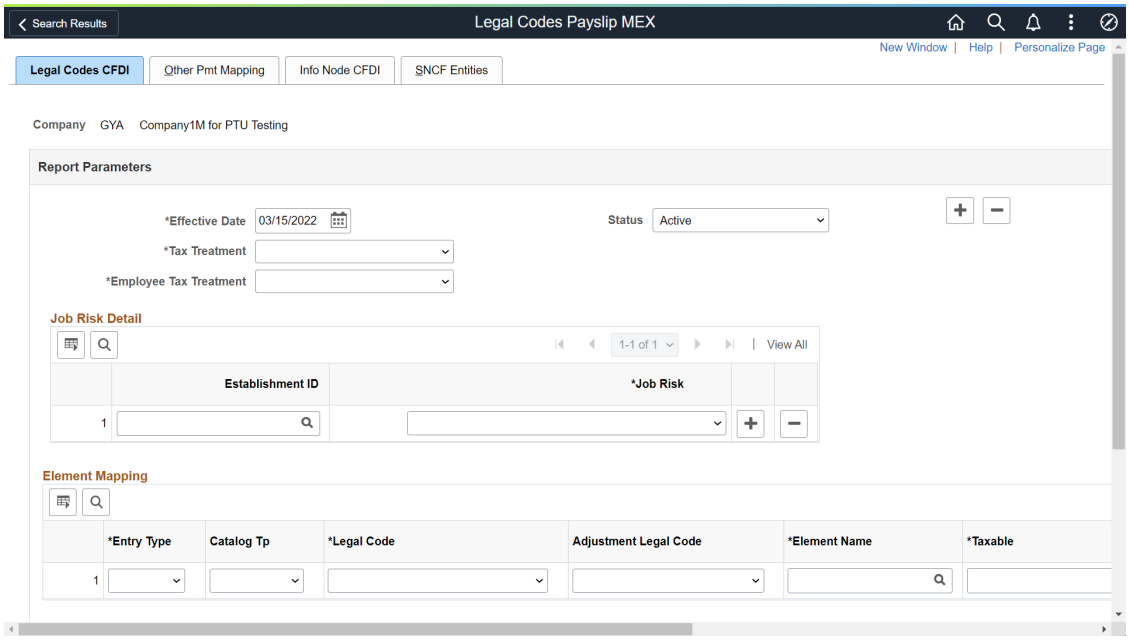
Legal Codes CFDI Page

Use the Legal Codes CFDI page (GPMX_LEGAL_CODE) to define the CFDI report parameters and to map elements.

Navigation:

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Reports, Legal Codes Payslip MEX, Legal Codes CFDI page

This example illustrates the fields and controls on the Legal Codes CFDI page.



Field or Control	Description
Company	The Company for which the Legal Code Payslip setup is defined.
Effective Date	Date from which the setup is applicable.

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Field or Control	Description
Status	Defines whether or not the setup is valid. The default value for this field is Active. Values are: • Active. • Inactive
Tax Treatment	Option provided by SAT to identify the class of Tax regime.
Employee Tax Treatment	Select a default employee tax treatment for the company. Available option is: Wage & Salaries & Assimilated.

Field or Control	Description
Job Risk Detail	
Establishment ID	The Establishment Id where the employee's job risk is determined by the establishment that is associated with the employee's location.
Job Risk	The code to identify the Employer’s classification based on the activities performed by the employees. Valid values are: • Class I • Class II • Class III • Class IV • Class V • Not Applicable **Note:** ‘Not Applicable’ option is available only if you use/add an effective date > = 08/13/2017.

Field or Control	Description
Element Mapping	
Entry Type	Select the type of element to include in the report. Values are: • Earnings • Deductions
Catalog Type	Select the catalog type to which the Legal Code belongs. Values are: • Earnings • Deductions **Note:** There are discrepancies for some element types between SAT and GP Mexico. For example, ‘Employee Subsidy’ is treated as an earnings for the SAT while in GP Mexico ‘Employee Subsidy’ is reported as a deduction.
Legal Code	Legal code is the SAT catalog to report earnings and deductions. System displays the options based on the selected Catalog Type, If the catalog type is selected as deduction then the deductions catalog is displayed otherwise it displays the earnings catalog.

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Field or Control	Description
Adjustment Legal Code	Contains the Adjustment codes defined by SAT to be used to report Adjustments. Adjustments are triggered when a negative value is found in payroll results, its value changes to positive and is stored in an element including original element's name.
Element Name	Enter the name of the earnings or deductions element to include in the CFDI report. System displays the options based on the selected Entry Type. If the entry type is selected as deduction then the deductions catalog is displayed otherwise it displays the earnings catalog. **Note:** If the Taxable and Non taxable are empty, the amount of this element will be printed as 100% taxable. The description of this element will be printed in the report.
Taxable	The element that contains the Taxable Base for the corresponding element. System displays the options based on the selected Entry Type. If the entry type is selected as deduction, then the deductions catalog is displayed otherwise it displays the earnings catalog. **Note:** The description printed in CFDI file takes the description's Element name. If you just enter an Element in this field (Non taxable are empty), the amount of this element will be printed as 100% taxable. This element could be equal to Element Name.
Non Taxable	The element that reports the Non-Taxable Base for the corresponding element. System displays the options based on the selected Entry Type. If the entry type is selected as deduction then the deductions catalog is displayed otherwise it displays the earnings catalog. **Note:** If just enter an Element in this field (Taxable are empty), the amount of this element will be printed as 100% non-taxable. This element could be equal to Element Name.
Add	This field defines when an element sum or not sum to Total Earnings or Total Deductions depends on the Entry Type, however always must to print in the CFDI report. • If the check box is selected, it means the amount must to sum to the Total. • If the check box is not selected, it means the amount must to NOT sum to the Total. **Note:** By default the check box is selected.
Severence	Select this field to indicate that the element will be printed on the *Complemento* node of Severance. **Note:** The Severance option is used only in special payroll severance process.

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Field or Control	Description
Overtime Detail	
Element Name	Enter the name of Overtime element. If this section is populated then the information must to print in Overtime node on CFDI report. Valid values: All earnings.
Overtime Type	Defines the overtime type. Valid Values are: • Double • Triple

Field or Control	Description
Disability Detail	
Element Name	Enter the name of Disability element. If this section is populated then the information must to print in Disability node on CFDI report. Valid values: All deductions
Absence Type	Identifies the Absence Type. Valid values are: • Sickness • Maternity • Work Accident • Care Leave Children w/Cancer

> **Note**
>
> Selection of correct options in Legal Code Mex page will ensure that the correct value are send to SAT.

Other Pmt Mapping Page

Use the Other Pmt Mapping page to map the payment elements.

Navigation:

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Reports, Legal Codes Payslip MEX, Other Pmt Mapping page

This example illustrates the Other Pmt Mapping page.

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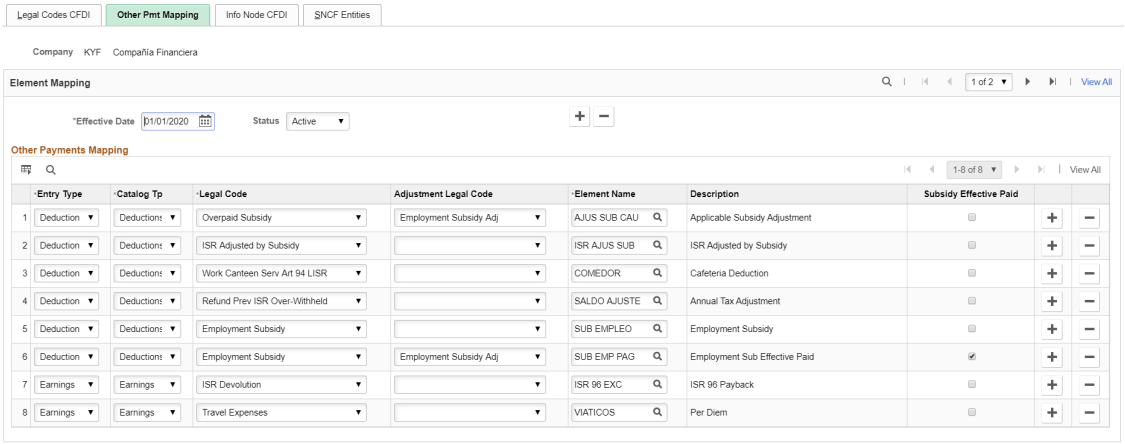

Field or Control	Description
Entry Type	Select the element type. Valid values are: • Earnings • Deductions
Catalog Tp	Select the catalog type to which the Legal Code belongs to.
Legal Code	Select the legal code defined by SAT.
Adjustment Legal Code	The Adjustment codes defined by SAT to be used to report Adjustments. Adjustments are triggered when a negative value is found in payroll results, its value changes to positive and is stored in an element including original element's name.
Element Name	Name of the element. The value will be reported with the selected Legal Code.
Subsidy Effective Paid	Select this field to indicate that the element corresponds at subsidy effective paid.

Info Node CFDI Page

Use the Info Node CFDI page (GPMX_INFO_NODE_CFD) to define receipt node's attributes.

Navigation:

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Reports, Legal Codes Payslip MEX, Info Node CFDI page

This example illustrates the fields and controls on the Info Node CFDI page.

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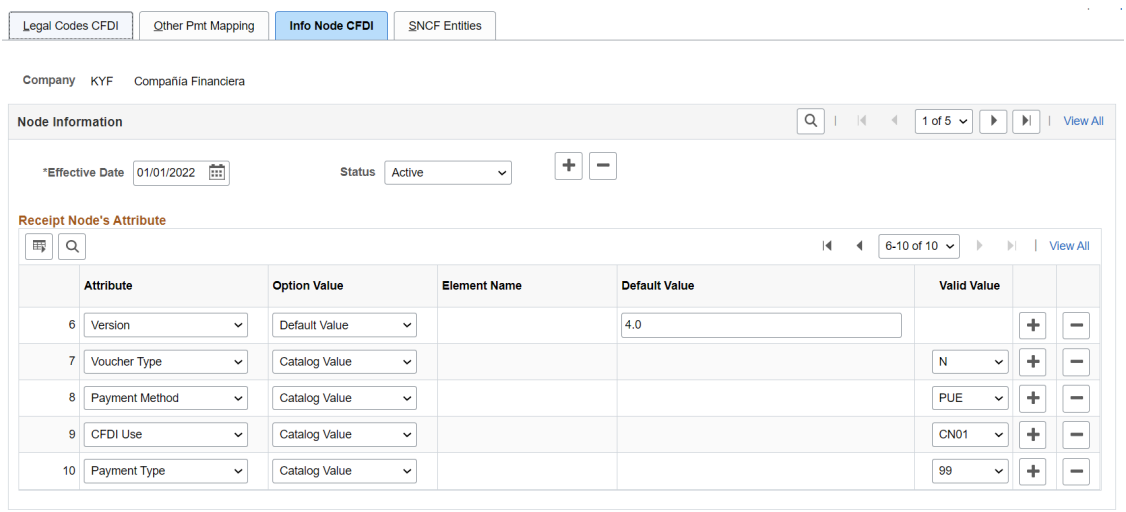

Field or Control	Description
Company	The Company to which the Info Node CFDI setup will apply to.
Effective Date	Date in which the setup takes effect.
Status	Defines whether or not the setup is valid. The default value for this field is Active.
Attribute	Select the attribute from the following: • Serial • Folio • Certificate Number • Certificate • Stamp • Voucher Type • Payment Method • CFDI Use • Payment Type
Option Value	Select the option value to be printed in the XML from the following: • Default Value: If you select this, you can enter a default value. • System Elements: If you select this, the attribute's value will be printed according the value of the selected element. • Do not Print: If you select this the attribute will not be printed. • Sequence: If you select this, the attribute's value will be printed as consecutive number, with format 9999999999. • Catalog Value: If you select this, the attribute's value will be printed according the Valid Value selected.
Element Name	Select the system element. This field is displayed only if you select 'System Elements' in the Option Value field.

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Field or Control	Description
Default Value	Enter the default value to be displayed in the XML file. This field is enabled only if you select 'Default Value' in the Option Value field.
Valid Value	Select the Valid Value. Displays the values according the Attribute selected. **Note:** This field is displayed only when Catalog Value is selected in the Option Value field.

> **Note**
>
> If this step is skipped then the attributes will not be printed in XML File.

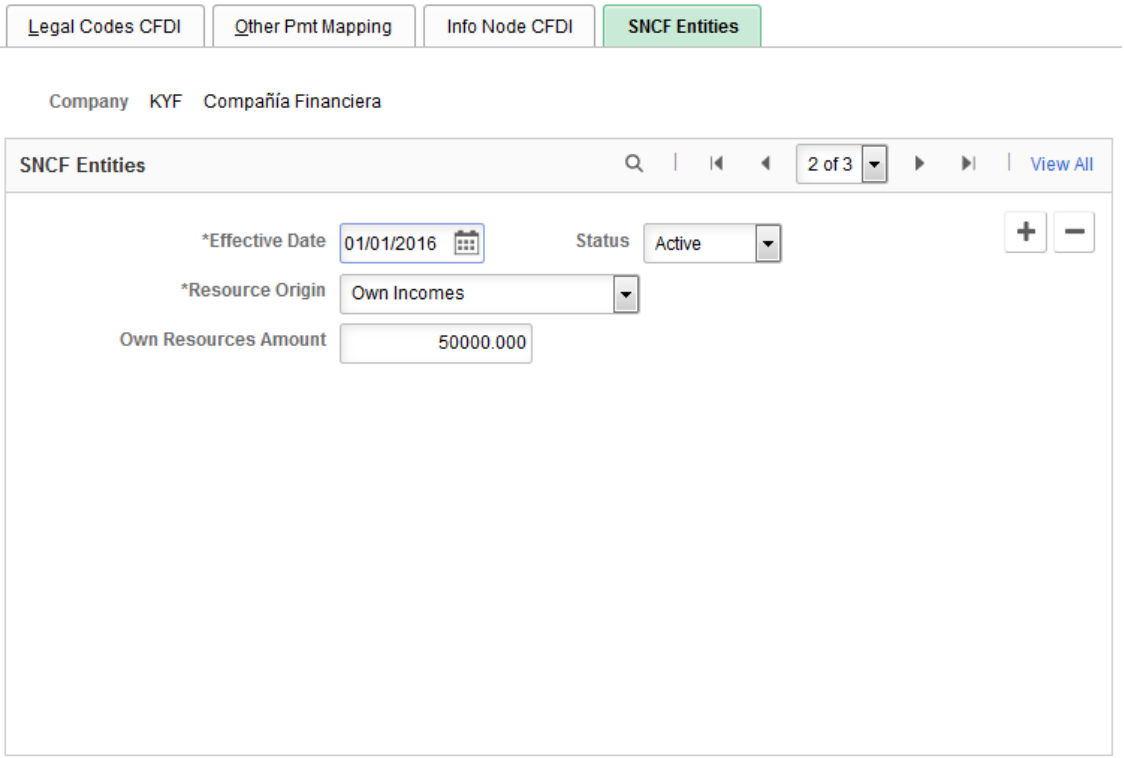
SNCF Entities

Use the SNCF Entities page to define the SNCF Entities.

Navigation:

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Reports, Legal Codes Payslip MEX, SNCF Entities page

This example illustrates the fields and controls on the SNCF Entities page.



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Field or Control	Description
Effective Date	Date used to define the effectiveness of the data being entered.
Resource Origin	Defines the source of funds used to pay the payroll, this data applies only for government entities: Federal Incomes, Mixed Incomes, Own Resources Amount. • **Own Incomes: Used to define the amount of own incomes when Resource Origin selection value is Mixed Incomes.** • **Federal Incomes: These are the Revenue paid by federal entities, municipalities or territorial demarcations of the Federal District, autonomous agencies and local and municipal entities with federal resources, other than the participations.** • **Mixed Incomes: These are the Revenue paid by federal entities, municipalities or territorial demarcations of the Federal District, autonomous agencies and local and municipal entities charged to their participation or other local income and with federal resources other than the participations.**
Own Resources Amount	Revenue paid by federal entities, municipalities or territorial demarcations of the Federal District, autonomous agencies and local and municipal entities charged to their interests or other local income.

Related Topics

- Create/Print Payslips MEX Page
  Use the Create/Print Payslips MEX page (GPMX_RC_PAYSLIP) to run the Printed Payslip Job PSJob process. This job runs the Payslip Preparation process, followed by the Printed Payslip SQR report , and the Create Self Service Payslip process (GP_EPAY). You must set up payslips on the payslip definition pages before running the payslip processes. Also check the configuration elements in Legal Code Payslip MEX page.

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11

Tracking Earnings

Understanding Earnings in Mexico

This topic lists prerequisites and discusses:

- Earnings types
- Earnings and accumulators

Prerequisites

Before you can track different earnings types, you must set up certain parameters for each earning type:

- Define the SDI factor for Christmas bonuses and vacation premiums.
- Define PTU (profit sharing).
- Set up frequently used supporting element overrides (SOVRs).

> **Note**
>
> All of these steps are discussed in another topic.

Earnings Types

The different earnings types in Mexico include base salary, bonuses, commissions, overtime, PTU (profit sharing), food coupons, vacation premiums, savings funds, seniority pay, and social benefits. You define earnings using the Earnings component.

Related Topics

- Viewing Delivered Earnings Elements
- PeopleSoft Global Payroll: Understanding Earning and Deduction Elements

Earnings and Accumulators

This topic discusses how to integrate new earnings elements into Global Payroll for Mexico.

This information helps to ensure that any new element that you create fits into the existing logic and organization of Global Payroll for Mexico and is included in the correct calculations of such things as taxes and Social Security.

To ensure that the new earnings elements that you create are used correctly in other calculations, you must be able to identify the accumulators to which they should contribute, because the value of the accumulated earnings is critical to these other processes. The

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accumulator elements to which you will add your own elements are the same ones that Global Payroll for Mexico has created for the delivered earnings elements.

> **Important**
>
> You can add new earnings elements only to accumulators for which the ownership category is PS Delivered/Not Maintained. These accumulators are members of other, PeopleSoft maintained, accumulators on which Global Payroll for Mexico bases all of its formulas and calculations.

If you must define earnings that are partially nontaxable, create these three earnings elements:

- One for the total amount of the earnings.
- One for the taxable portion of the earnings.
- One for the nontaxable portion of the earnings.

Make the earnings representing the total amount a member of the TOTAL PERCEPCION N accumulator, the earnings representing the taxable portion a member of the TOTAL PERC GRAVA accumulator, and the earnings representing the nontaxable portion a member of the TOTAL PERC EXENT N accumulator. Use the Earn/Dedn SOVRs MEX page to define the tax method that is used to calculate the earnings representing the taxable portion.

This table lists the most relevant accumulators that are delivered by Global Payroll for Mexico and that are used for federal tax purposes.

Accumulator	Description
BASE ISR	Taxable base
GRAVADO ANUAL	Yearly taxable
GRAVADO ANUAL N	Yearly taxable not maintained
GRAVADO MENSUAL	Monthly taxable
GRAVADO MENSUAL N	Monthly taxable not maintained
ISR RETENIDO	Total ISR withheld
NETO	Net pay
TOTAL DEDUCCIONES	Total deductions
TOTAL DEDUCCION N	Total deductions not maintained
TOTAL PERC EXENT	Nontaxable total earnings
TOTAL PERC EXENT N	Nontaxable total earnings not maintained
TOTAL PERC GRAVAD	Taxable total earnings
TOTAL PERC GRAVA N	Taxable total earnings not maintained
TOTAL PERCEPCIONES	Gross pay
TOTAL PERCEPCION N	Gross pay not maintained

Related Topics

- Setting Up Frequently Used Supporting Element Overrides
  To define frequently used supporting element overrides in Mexico, use the Earn/Ded SOVRs MEX (GPMX_ERNDED_SOVR) component.

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Running the PTU (Profit Sharing) Process

Page Used to Run the PTU Process

Page Name	Definition Name	Usage
Calculate PTU-Profit Share MEX Page	GPMX_RC_PTU001	Run the PTU process.

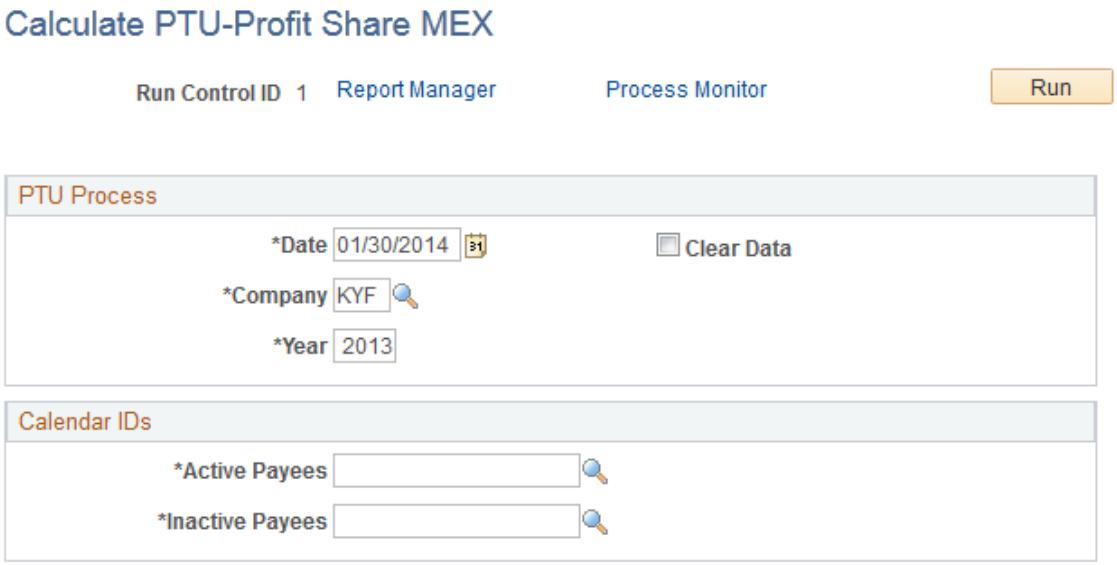
Calculate PTU-Profit Share MEX Page

Use the Calculate PTU-Profit Share MEX page (GPMX_RC_PTU001) to run the PTU process.

Navigation:

Global Payroll & Absence Mgmt, and then **Absence and Payroll Processing**, and then **Prepare Payroll**, and then **Profit Share PTU Process MEX**

This example illustrates the fields and controls on the Calculate PTU-Profit Share MEX page. You can find definitions for the fields and controls later on this page.



The PTU process generates two instances of positive input: one for the PTU IMP SAL element, and the other for the PTU IMP DIAS element. The PTU process also calculates the Day Factor and Salary Factor values that will be inserted in the PTU Setup page.

PTU Process

Enter the date, company, and year for which you want to run the process.

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Field or Control	Description
Clear Data	If you select this check box, the system will delete previously loaded data. If you deselect this check box, the PTU process will load new data into the Calendar IDs for active and inactive payees.

Calendar IDs

Field or Control	Description
Active Payees	Enter the calendar ID of the active payees to process. The electronic file transfer (EFT) for active payees will be as usual.
Inactive Payees	Enter the calendar ID of the inactive payees to process. The most common way to pay inactive payees is on an individual basis. Once the PTU process is executed, you can create a Period ID, Calendar ID, and Calendar Group ID to run the payroll process.

Setting Up the Coupons Interface

Pages Used to Set Up the Coupons Interface

Page Name	Definition Name	Usage
Define Payee Data MEX Page	GPMX_PAYEE_DATA	Define coupon accounts for payees.
Create Coupons Interface MEX Page	GPMX_COUPONS_INT	Define the coupons interface. If you provide your employees with restaurant, food, or gas coupons, use this page to send flat files to the coupon provider with information about your company and the coupon elements (earnings) that you have defined.

> **Note**
>
> After you've sent the flat file to the coupon provider, you can also generate a printed report of coupons.

Define Payee Data MEX Page

Use the Define Payee Data MEX page (GPMX_PAYEE_DATA) to define coupon accounts for payees.

Navigation:

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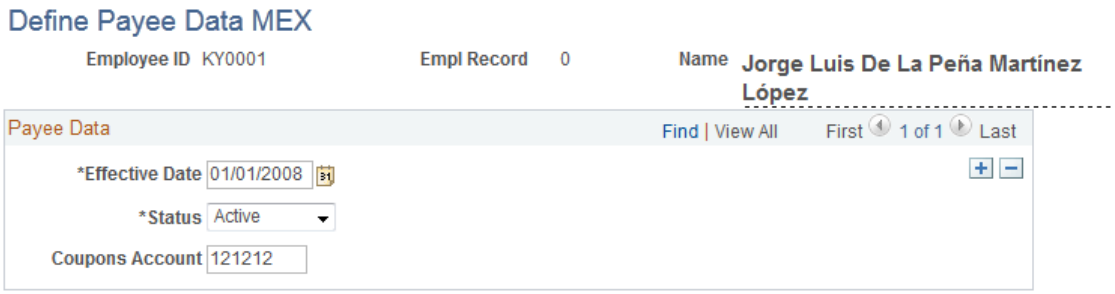
Global Payroll & Absence Mgmt, and then **Payee Data**, and then **Define Payee Data MEX**

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



Field or Control	Description
Coupons Account	Enter a coupon account number for the payee.

Create Coupons Interface MEX Page

Use the Create Coupons Interface MEX page (GPMX_COUPONS_INT) to define the coupons interface.

If you provide your employees with restaurant, food, or gas coupons, use this page to send flat files to the coupon provider with information about your company and the coupon elements (earnings) that you have defined.

Navigation:

Global Payroll & Absence Mgmt, and then **Absence and Payroll Processing**, and then **Coupons Interface MEX**

This example illustrates the fields and controls on the Create Coupons Interface MEX page. You can find definitions for the fields and controls later on this page.

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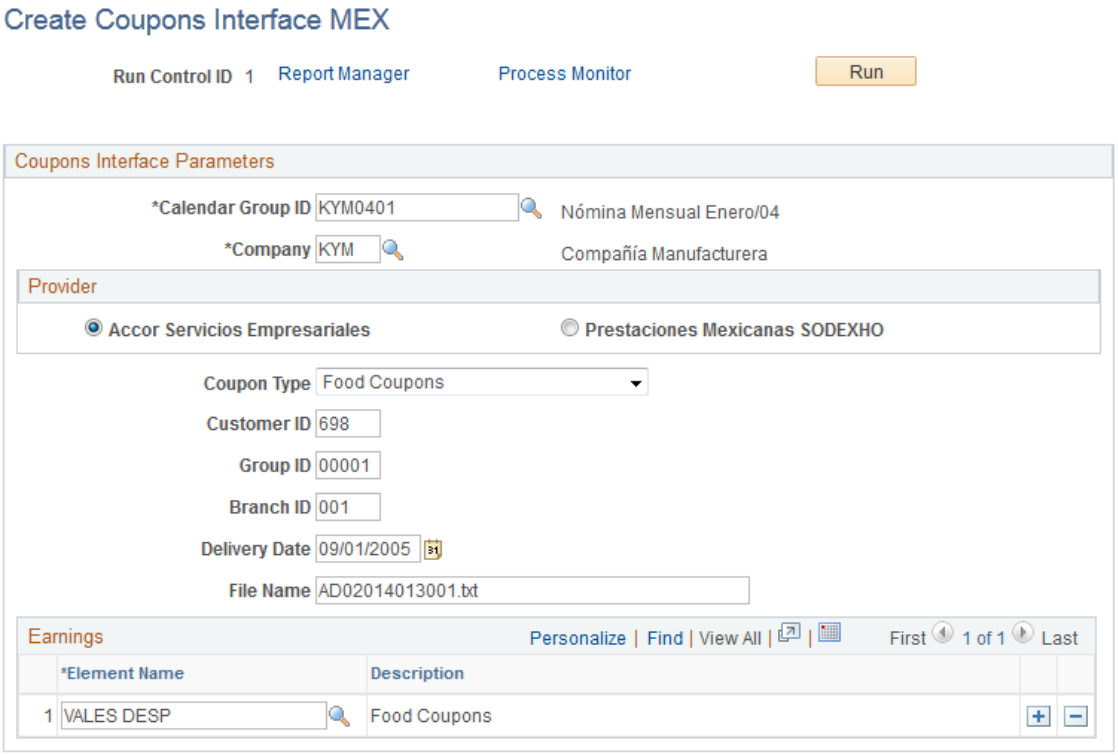

Coupons Interface Parameters

Field or Control	Description
Calendar Group ID	Select the calendar group ID for which you want to generate the flat file.
Company	Select your company.
Provider	Select either Accor or SODEXHO as the coupon provider.
Coupon Type	Select the type of coupon for which you are generating the data file. Values are *Electronic Food Coupons, Food Coupons, Gas Coupons, Restaurant Coupons,* and *Uniform Coupons.*
Customer ID	Enter your customer ID. This field appears only if the coupon provider is Accor. (Accor should provide this ID.)
Group ID	Enter the group ID as indicated by the coupons provider.
Branch ID	Enter the Branch ID of the coupon provider as indicated by the coupons provider.
Delivery Date	Enter the date when the coupons will be given to payees.
File Name	Displays a default file name and the mandatory file type for Accor or SODEXHO . Depending on the provider that you select, you can update the file name, . The file type is set by the coupon provider.

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Earnings

Field or Control	Description
Element Name	Enter the earnings that include the amount of the restaurant, food, or gas coupons. You can enter multiple earnings.

Using Batch Positive Input

Page Used for Batch Positive Input

Page Name	Definition Name	Usage
Manage Pos Input via Batch MEX Page	GPMX_PI_BATCH	Load batch positive input or delete previously loaded batch positive input.

Understanding Batch Positive Input

You can use Batch Positive Input Application Engine process (GPMX_PI_BTCH) to reduce time-consuming data entry in Global Payroll for Mexico by loading data into the system in batch from a flat file. You can use the process for loading earnings, deductions, and supporting element overrides. You can also use the process to delete previously loaded data according to the batch code that you specify.

To use this functionality, you must create a flat file which contains the data that you want to load. This text file can be in plain text or csv format but must follow a specific layout for batch positive input processing, as described later in this section. When you run the Batch Positive Input process it reads the information from the flat file and loads the data into the positive input records. You can then access this data through the Positive Input page in the core application.

For example, you could enter and trigger bonuses for all of your employees using batch positive input, or you could trigger mass deductions. Suppose that an employer has an agreement with a cell phone company to provide half the employee population with a 50 percent discount rate on calls. Instead of entering each of the monthly cell phone invoices (deductions) for each employee, the cell phone company could generate a flat file with a layout that loads this invoice information using a batch process.

Manage Pos Input via Batch MEX Page

Use the Manage Pos Input via Batch MEX page (GPMX_PI_BATCH) to load batch positive input or delete previously loaded batch positive input.

Navigation:

Global Payroll & Absence Mgmt, and then **Absence and Payroll Processing**, and then **Prepare Payroll**, and then **Manage Pos Input via Batch MEX**

This example illustrates the fields and controls on the Manage Pos Input via Batch MEX page. You can find definitions for the fields and controls later on this page.

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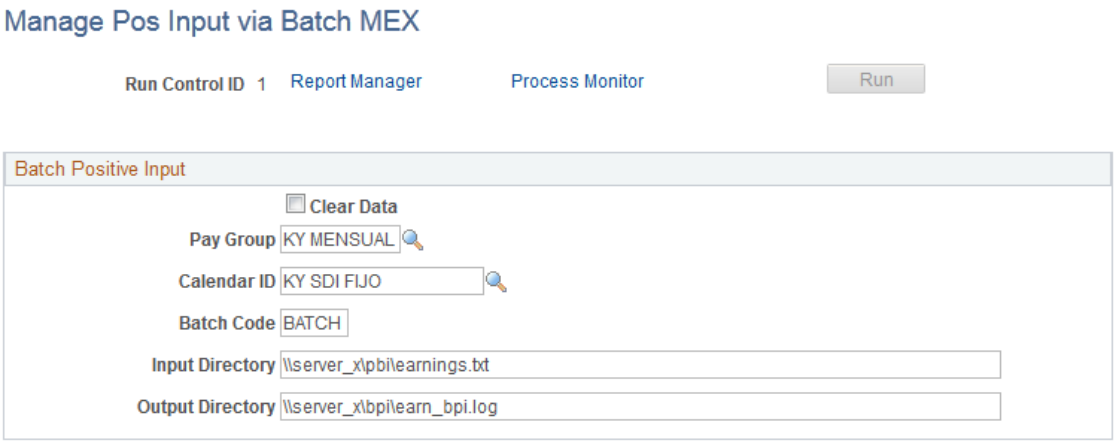

Field or Control	Description
Clear Data	If you select this check box, the system will delete previously loaded data. If you deselect this check box, the batch process will load new data into the Positive Input tables for payroll purposes.
Pay Group	Enter the pay group for which you want to load batch positive input.
Calendar ID	Enter the calendar ID for the pay group that you identified in the **Pay Group** field.
Batch Code	Enter the batch code ID that identifies all of the transactions contained in the flat file. This field enables you to delete information loaded by mistake, because it serves as the identifier of that information.
Input Directory	Specify the location of the flat file containing the batch positive input (flat file directory).
Output Directory	If the batch process finds errors, it generates a log file containing the errors. Use this field to specify where the system should place the error log (error log directory).

> **Note**
>
> You do not need to specify input and output directories when deleting values because the process determines the data to delete according to the batch code that you specify.

Flat File Layout for Batch Positive Input

When you create flat files for the batch positive input process, reproduce this file definition for earnings and deductions:

Field	Initial Position	Length	Default Value
EMPLID	1	11	Not applicable.

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Field	Initial Position	Length	Default Value
EMPL_RCD	12	3	Not applicable.
PIN_NM	15	18	Not applicable.
GP_UNIT	33	20	Not applicable.
GP_AMT	53	20	Not applicable.
GP_RATE	73	20	Not applicable.
GP_PCT	93	11	Not applicable.
PC_BASE	104	20	Not applicable.
DEPTID	124	10	Not applicable.
JOBCODE	134	6	Not applicable.

When you create flat files for the batch positive input process, reproduce this file definition for supporting elements:

Field	Initial Position	Length	Default Value
EMPLID	1	11	Not applicable.
EMPL_RCD	13	3	Not applicable.
PIN_NM	16	18	Not applicable.
PIN_NM (SOVR)	34	18	Not applicable.
SOVR_VAL_CHAR	52	25	Not applicable.
SOVR_VAL_NUM	77	18	Not applicable.
SOVR_VAL_DT	95	10	Not applicable.

Here's an example of a flat file for earnings and deductions:

Field	Example
EMPLID	KY003
EMPL_RCD	0
PIN_NM	COMISIONES
GP_UNIT	12.58
GP_AMT	11.36
GP_RATE	10
GP_PCT	1.3
GP_BASE	25.36
DEPTID	43000
JOBCODE	550000

Note

This flat file definition applies to both earnings and deductions that you load using batch positive input.

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Here is an example of a flat file for a supporting element override:

Field	Example
EMPLID	KY004
EMPL_RCD	0
PIN_NM	COMISIONES
PIN_NM (SOVR)	FD VR METODO ISR
SOVR_VAL_CHAR	142
SOVR_VAL_NUM	(blank)
SOVR_VAL_DT	(blank)

Related Topics

- Global Payroll for Mexico Reports: A to Z
  The table in this topic lists the PeopleSoft Global Payroll for Mexico reports, sorted by report ID.

Managing Mass Positive Input

Pages Used to Manage Mass Positive Input

Page Name	Definition Name	Usage
Manage Mass Positive Input MEX Page	GPMX_PI_MASS_ERDED	Load Positive Input Information to a group of Payees. Enter the processing parameters for mass positive input of payees earnings and deductions, and then run the process to insert this data into the positive input table.
Calendars to Process Page	GPMX_PI_MASS_SEC	Enter supporting element overrides for elements in the mass positive input processing. You can enter a rate code or a numeric value for a percent, base, rate, unit, or amount component; change the currency; add a description; and enter begin and end dates. You can also override system and variable elements associated with positive input, such as department, job code, or rate as of date.

Understanding Mass Positive Input

The Mass Positive Input feature enables you to insert earnings and deductions in mass into the positive input table for a group of payees in a specific calendar. When define parameters for the Mass Positive Input Application Engine process (GPMX_MASS_PI), you must:

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- Specify the pay group and calendar to which the payees belong.
- Enter a batch code, which the process saves to each payee's positive input record that it adds.
- Specify the payees to include in the processing by either group build or by listing the payees individually.
- Enter the earning or deductions that you want to insert as positive input for the specified employees.
- Enter supporting element overrides for the specified earnings and deductions.

Being able to select specific payees or create groups of payees enables you to load positive input for a specific subset of payees within a pay group that are associated with a given calendar. Also, being able to enter earnings, deductions, and supporting element overrides details for payees in mass saves valuable time by eliminating repeated data entry. You might use this process, for example, to pay a year end bonus for all payees of a given department or payees participating in a specific project. Or for union purposes, sometimes there are agreements to apply a flat amount discount to all the union payees in a given payroll run.

When you run the Mass Positive Input process it validates the pay group for the specified payees. Then the process inserts a new record into the positive input table that contains the earning, deductions, and supporting element overrides for the specified payees for the given calendar. If a record already exists for the payee in the positive input table, the process inserts the new record with a new instance number.

You can also use the Mass Positive Input process to delete records from the positive input table that were previously inserted by the process. The process is able to recognize and delete records according to the batch code assigned to the record.

Manage Mass Positive Input MEX Page

Use the Manage Mass Positive Input MEX page (GPMX_PI_MASS_ERDED) to load Positive Input Information to a group of Payees.

Enter the processing parameters for mass positive input of payees earnings and deductions, and then run the process to insert this data into the positive input table.

Navigation:

Global Payroll & Absence Management, and then **Absence And Payroll Processing**, and then **Prepare Payroll**, and then **Manage Mass Positive Input MEX**

This example illustrates the fields and controls on the Manage Mass Positive Input MEX page. You can find definitions for the fields and controls later on this page.

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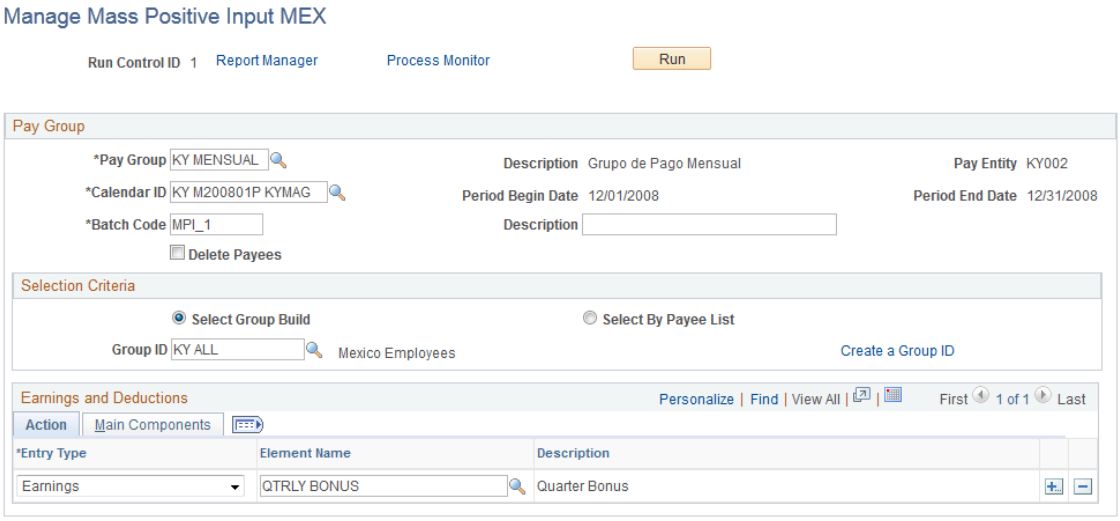

Pay Group

Field or Control	Description
Pay Group	Select the pay group that contains the payees for which you want to process mass positive input. The system displays of **Description** and the**Pay Entity** of the selected pay group. The Mass Positive Input process uses the combination of the specified pay group and calendar to determine the payees eligible to be included in the processing.
Calendar ID	Select the calendar for which you want to process mass positive input. The system displays the **Begin Date** and the**Period End Date** of the specified calendar. The Mass Positive Input process uses the combination of the specified pay group and calendar to determine the payees eligible to be included in the processing.
Batch Code	Enter a unique code to identify each instance of Mass Positive Input process run. Batch codes assist in further identifying a positive input entry with which a payee record is associated. You can use this identifier as a search value on the Positive Input By Calendar page. When inserting data into the positive input table, the process assigns the batch code to each record that it inserts for the run. When using the Mass Positive Input process to delete previously inserted mass positive input, the process search for the specific batch code and deletes all associated records that meet the processing parameters.

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Field or Control	Description
Description	Enter a description of the positive input to be stored in the GP_RSLT_PI_DATA record. You might use this feature to print a description besides the element description defined on the Element Name page (GP_PIN) when printing payslips or reports.
Delete Data	Select this check box to have the Mass Positive Input process delete positive input data that the process previously inserted on another run. The process deletes data from the positive input table that matches the processing parameters that you specify.

Select Payee List

Field or Control	Description
Select Group Build	Select this option to include payees associated with a specific group build in the processing. The system displays the **Group ID** field and the**Create a Group ID** link.
Group ID	Select the group build for which you want to process mass positive input. This field display only if you select the **Select Group Build** option.
Create a Group ID	This field display only if you select the **Select Group Build** option. The system displays the Group Build Definition component for you to create a new group ID definition.
Select By Payee List	Select this option to include only the specific payees that you specify in the processing. The system displays the **Payee List** group box for you to list the specific payees to include.

Payee List

Field or Control	Description
EmplID	Select the employee to include in the mass positive input processing.
Empl Rcd Nbr	Select the employee record number of the employee to include in mass positive input processing.
Name	The system display the name of the listed employee.

Earnings and Deductions

To enter positive input for a payee:

1. On the **Action** tab, select the earning or deduction element for which to enter positive input and specify the action to take during processing.

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2. On the **Main Components** tab, enter numeric values for the components of the element's calculation rule, if applicable.
3. To enter a numeric value for percent or base or to select a rate code element for any components of the element's calculation rule, click the **Details** link on the**Main Components** tab.

   You can also override the value of a system or variable element, if applicable.

> **Note**
>
> The fields that you can complete depend on the value that you select in the **Entry Type** field and the calculation rule used by the earning or deduction element.

Field or Control	Description
Entry Type	Select *Earnings* or *Deduction* to indicate the type of element for which you're entering positive input.
Element Name and**Description**	Select the name of the element for which to enter positive input. The system displays the description of the selected element. You can select from those elements that meet all these conditions: • Have the same entry type that you selected. • Enable positive input as an override, as specified on the Element Name (GP_PIN) page. • Are defined for a country that is associated with your user rules profile (on the User Rules Profile page). If your user rules profile is set up as specific country with a value of *Mexico,* you see only elements that are set up for Mexico and those set up for *ALL* countries.
Unit	If unit is a component of the element's calculation rule, you can enter a positive or negative number of units in this field. To select a rate code element to retrieve the unit's value from HR, click the **Details** link to access the Calendars to Process page. If you don't enter a value and the units are defined on the element's Calculation page, the system checks the element's as of date to determine the appropriate value.
Rate	Similar to the **Unit** field.

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Field or Control	Description
Amount	Enter a positive or negative amount to override the element's calculation rule. The system uses this amount to resolve the element, regardless of its calculation rule. If you enter an amount, you can still enter a numeric value in the **Unit** or**Rate** field—if these are components of the element's calculation rule. Although the values that you enter aren't used for calculations, the system moves them to the earnings and deductions results table, making the information available for payslips. For example, if you have an earnings element defined as rate × units and enter an amount and a rate, the system uses the amount that you enter to resolve the element and passes the amount and rate to the results table.
Currency Code	When you select a rate or amount, the code for the processing currency appears (as defined by the element definition or the pay entity). To use another currency, select it here.
Details	Click the **Details** button to access the Calendars to Process page, where you can select a rate code or enter a numeric value for any component of the element's calculation rule (percent, base, rate, amount, or unit). You can also override a variable or system element that is associated with this instance of positive input, such as the business unit, department, or job, and enter other instructions. A check mark appears in the **Details** check box if instructions have been entered on the Calendars to Process page.
Action Type	Select the type of action to perform when processing this instance of positive input. Values are *Override*, *Add*, *Do Not Process*, and *Resolve to Zero*. When you select *Resolve to Zero*, you cannot enter information on the Calendars to Process page. See PeopleSoft Global Payroll: Action Types and Processing Rules.

Calendars to Process Page

Use the Calendars to Process page (GPMX_PI_MASS_SEC) to enter supporting element overrides for elements in the mass positive input processing.

You can enter a rate code or a numeric value for a percent, base, rate, unit, or amount component; change the currency; add a description; and enter begin and end dates. You can also override system and variable elements associated with positive input, such as department, job code, or rate as of date.

Navigation:

Click the **Details** button on the Manage Mass Positive Input MEX page.

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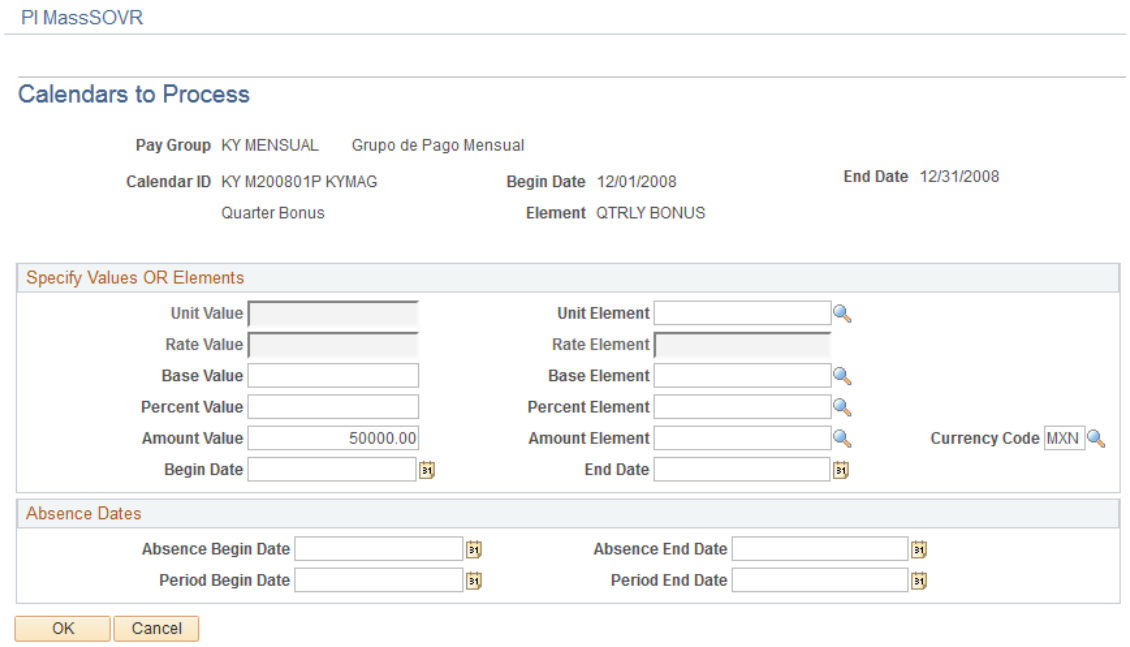
This example illustrates the fields and controls on the Calendars to Process page. You can find definitions for the fields and controls later on this page.



Specify Values OR Elements

The fields for units, rate, base, and percent are enabled only when they are components of the calculation rule for the selected earning or deduction element. Any numeric values that you entered on the Positive Input page appear here.

You can enter a positive or negative numeric value or select a rate code element that retrieves the unit value from HR. If you don't enter a value for the component and the component's value is defined on the element's Calculation page, the system uses the element's as of date to determine the value.

Field or Control	Description
Begin Date and**End Date**	Enter the start date for the instance of positive input. If you enter a begin date, you must also enter an end date, and vice versa. The system doesn't use the begin date for processing. Enter the end date if it differs from the calendar end date. If the calendar period is segmented, the end date that you enter determines the segment or slice to which the instance of positive input is assigned. The end date must be on or before the calendar end date.
Currency Code	When you enter a value in the **Rate Value**,**Base Value,** or**Amount Value** field, the code for the processing currency (as defined by the element definition or the pay entity) appears in this field. To use another currency, select it from the list.

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Absence Dates

Complete the following fields if you're entering positive input for an earning or deduction element associated with an absence take.

Field or Control	Description
Absence Begin Date and**Absence End Date**	Enter the dates of the absence event.
Period Begin Date	Enter the later of the begin date of the absence event or of the calendar period.
Period End Date	Enter the earlier of the end date of the absence event or of the calendar period.

Supporting Element Overrides

You can override system or variable elements associated with an instance of positive input. For example, you can override the department, job code, or location associated with an instance. When you override the job code for a nonbase-pay earnings element, the system uses the compensation rate that's applicable to the job that you specify.

An override applies to one instance of positive input only. After the instance is resolved, the supporting element reverts to its previous value. The fields that you can complete depend on the element's format: numeric, character, or date. You cannot enter monetary values.

> **Note**
>
> The **Supporting Element Overrides** group box may appear different from the exhibit shown in this documentation. Using the configurable element overrides feature, you can modify the labels, fields, and prompt displays for each element, thereby enhancing the ease and accuracy of data entry for supporting element overrides.

See PeopleSoft Global Payroll: Understanding Element Override Configurations.

Field or Control	Description
Element Entry Type	Select the type of element to override. Values are *SystemElem* and *Variable*.
Element Name	Enter the name of the element to override, from elements that meet all the following conditions: • Have the same entry type that you selected. • Enable positive input as an override (as specified on the Element Name page). • Match your operator preference definition.
Character Value	If the supporting element that you selected uses character values, you can enter up to 25 characters in this field. The field is unavailable when you select the system element of department, job code, or location.
Numeric Value	Enter the number for system use if the supporting element uses numeric values.

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Field or Control	Description
Date Value	Enter the date for system use if the supporting element uses date values.

Related Topics

- PeopleSoft Global Payroll: Defining Rate Code Elements
- PeopleSoft Global Payroll: Segmentation Considerations
- PeopleSoft Global Payroll: Understanding Element Override Configurations

Running Earnings Reports

Pages Used to Run Earnings Reports

Page Name	Definition Name	Usage
Balances MEX Page	GPMX_RC_ACCUM	Provides a monthly summary of all the accumulator members of the earnings total accumulator and the deductions total accumulator.
ANN - Christmas Bonus MEX Page	GPMX_RC_XMAS01	Details the Christmas bonus amounts and taxes.
Create Coupons Interface MEX Page	GPMX_COUPONS_INT	Creates a flat file and a printed report of coupons. The flat file is transferred to the provider, which could be either Accor or SODEXHO.
Payroll Results Register MEX Page	GPMX_RC_PAYRSL	Summarizes the payroll results.
ANN - PTU-Profit-Share MEX Page	GPMX_PTU	You can run four different reports from the ANN - PTU-Profit-Share MEX run control page, including reports for eligible payees, ineligible payees, projects, and unpaid payees. You can select these reports individually or run all four of them together.

Payroll Results Register MEX Page

Use the Payroll Results Register MEX page (GPMX_RC_PAYRSL) to summarizes the payroll results.

Navigation:

Global Payroll & Absence Mgmt, and then **Absence and Payroll Processing**, and then **Reports**, and then **Payroll Results Register MEX**, and then **Payroll Results Register MEX**

The Payroll Results Register report contains all payroll information, such as earnings, deductions, and gross and net results for each selected employee. Payroll information to be

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printed depends on the format ID. The employee information to be printed depends on the calendar group ID, pay groups, and employee parameters that are selected.

Before you run the Payroll Results Register report, you'll need to enter the earnings and deductions that are eligible to print on a payslip on the Format ID page.

> **Note**
>
> The Format ID page is discussed in another topic.

Related Topics

- Element Lists MEX Page
  Use the Element Lists MEX page (GPMX_PAYSLIP_FORMA) to enter the earnings and deductions that are eligible to print on a payslip.

Viewing Delivered Earnings Elements

> **Note**
>
> The earnings elements for Mexico are defined as PS Delivered/Not Maintained. Therefore, you can modify these elements to fit your needs, and when necessary, create your own earnings using the delivered elements as your guide.

Related Topics

- PeopleSoft Global Payroll: Understanding Earning and Deduction Elements

Delivered Earnings (By Earnings Type)

This topic discusses the main delivered earnings (by earnings type). The earnings types are:

- Produced units (Destajos).
- Seniority-based.
- Bonuses and commissions.
- Sunday premium.
- Salary.
- Average salary.
- Savings fund.
- Food coupons.
- Seventh day.
- PTU.
- Vacation premiums and Christmas bonuses.
- Social benefits (Previsión Social).

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Produced Units(Destajos)

Earnings of the produced units type (destajos) depend on the number of units produced. To trigger this type of earnings, use positive input or the Earning/Deduction Assignment page to enter the number of units in the unit component of the C UNI IMP and C UNI U*R elements. This unit value is used in the calculation of these earnings:

- UNI PRO IMP: Returns a fixed amount based on the number of produced units.
- UNI PRODUC: Calculates an amount based on the number of units and the rate per unit.

The delivered earnings for produced units include:

Earnings	Description
UNI PRO IMP	This earnings element is used to calculate flat amounts based on units produced and is assigned a value by the formula PE FM U PRO I F. To calculate these earnings, the PE FM U PRO I F executes the bracket element PE BR TARIFA X UNI, which returns the correct amount depending on the number of units (the number of units is the search key in the bracket and the amount is the lookup value). For example, this earnings element could be used to calculate the correct flat amount for an employee who earns 100 for selling 500 units, 600 for selling 2000 units, 700 for selling 3000 units, and so forth. **Note:** The units used in the search key of the bracket PE BR TARIFA X UNI must be entered through positive input or on the Earning/Deduction Assignment page for the element C UNI IMP.
UNI PRO U*R	This earnings element is used to calculate amounts based on both units produced and rates per unit and is assigned a value by the PE FM U PRO T X U formula. To calculate this earnings element, the PE FM U PRO T X U formula runs the PE BR TARIFA X UNI bracket element, which contains all of the data needed to calculate an amount based on the number of units and the rate per unit (the number of units is the search key in the bracket and the lookup value is the rate per unit). For example, this earnings element could be used to calculate the correct amount for an employee who earns 0.05 per unit for selling 1000 units, 0.10 for selling 2000 units, 0.15 for selling 3000 units, and so forth. **Note:** The units used in the search key of the PE BR TARIFA X UNI bracket must be entered through positive input or on the Earning/Deduction Assignment page for the C UNI U*R element.

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Seniority-Based Earnings

Seniority-based earnings are contingent upon the number of years of service (or seniority) at the time of processing (the period end date). Depending on the seniority level, various components of these earnings—for example, percentages, calculation bases, or amounts—could change.

The delivered seniority-based earnings include:

Earnings	Description
ANTIG DIAS	The calculation rule for this earnings element is Rate × Unit, in which the rate is a daily rate (contained in the DAILY RT system element) and the PE FM PER B ANT D formula returns the unit (number of days to pay). To determine the units to apply (at the time of calculation), the PE FM PER B ANT D formula runs the GN BR BASADA ANTIG bracket, which returns the number of days for each seniority range (seniority is the search key and the number of days to pay is the lookup value). For example, you can use this element to calculate seniority earnings for employees who receive three days at a daily rate of 600 after one year of service, seven days at this rate after three years of service, and so forth. **Note:** The DAILY RT system element is calculated on the Job Data pages based on the pay components that you enter. See PeopleSoft Human Resources Administer Workforce: Understanding Job Data.
ANTIG IMP P	This earnings element has a calculation rule of Amount, in which the PE FM PER B ANT I formula returns the amount. To determine the correct amount to use (at the time of calculation), the formula runs the GN BR BASADA ANTIG bracket, which contains the amounts that apply to each seniority range. For example, you can use this earnings element to calculate the correct amount for employees who receive 1000 after one year of service, 2000 after three years of service, and so forth.

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Earnings	Description
ANTIG PCT	The calculation rule for this earnings element is Base × Percent, in which the base is a flat amount, and the percent is returned by the PE FM PER B ANT % formula. To determine the correct percentage (at the time of calculation), the PE FM PER B ANT % formula runs the GN BR BASADA bracket, which returns the percent for each seniority range (the seniority range is the search key and the percent is the lookup value). For example, you can use this element to calculate seniority earnings for employees who receive 50 percent of a flat amount of 10,000 after one year of service, 75 percent of the same amount after three years of service, and so forth.

Bonuses and Commissions

The delivered earnings for bonuses and commissions include:

Earnings	Description
BONO	The calculation rule for this earnings element is Rate × Unit, and the unit component must be entered by positive input. If no positive input exists for a payee, the earnings are not calculated. **Note:** The rate component of this earnings element comes from the DAILY RT system element and is calculated on the Job Data pages based on the pay components that you enter. See PeopleSoft Human Resources Administer Workforce: Understanding Job Data.
COMISIONES	This earnings element has a calculation rule of Amount, in which the amount is entered by positive input. If there is no positive input for a payee, the earnings are not calculated.

Sunday Premium

Sunday premiums are based on the number of Sundays that each payee worked. Mexican law requires that each worked Sunday be paid at 125 percent of base salary; the law also says that an amount up to the minimum wage is exempt from taxes for each Sunday worked.

To trigger the calculation of this premium, you must enter—by positive input—the number of worked Sundays in the unit component of the PRIMA DOMIN element (this earnings element has a calculation rule of Unit × Rate × Percent, with the rate coming from the DAILY RT system element, and the percent defined as 125 percent).

The PRIMA DOMIN element calculates the total Sunday premium without regard to taxes. However because there is a tax exempt and a taxable portion of the Sunday premium, two other earnings have been defined to resolve these: PRIMA DOM EX (tax exempt portion) and PRIMA DOM GR (taxable portion). To trigger the calculation of these last two earnings, enter only the units (Sundays worked) in the unit component of the PRIMA DOMIN element. The system automatically calculates the taxable and nontaxable amounts.

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The delivered earnings for the Sunday premium include:

Earnings	Description
PRIMA DOM EX	The PE FM PRIMA D EX formula resolves the earnings element. Its function is to calculate the Sunday premium up to the minimum wage amount for each day that you enter.
PRIMA DOM GR	The PE FM PMA DOM GRAV formula resolves the earnings element. For each Sunday worked, it calculates the Sunday premium in excess of the nontaxable minimum wage.
PRIMA DOMIN	Use this element to calculate the total amount of the Sunday premium. It has a calculation rule of Unit × Rate × Percent, with the rate coming from the DAILY RT system element and the percent defined as 125 percent. **Note:** The DAILY RT system element is calculated on the Job Data pages based on the pay components that you enter. See PeopleSoft Human Resources Administer Workforce: Understanding Job Data.

Salary

Global Payroll for Mexico provides two types of salary elements: SUELDO and SUELDO POR H. Each has its own calculation rule.

The delivered earnings for salary include:

Earnings	Description
SUELDO	Depending on the pay group parameters, this earnings element calculates the unit based on the calendar days or frequency days. Use this earnings element to process the most common type of salary element, in which the salary is based on the number of days worked. It has a calculation rule of Unit × Rate, in which the rate comes from the DAILY RT system element and the PE FM SUELDO UNI formula returns the unit that represents the actual number of work days. This formula calculates the number of days based on the period begin and end dates and includes a proration factor that enables it to manage new hires and terminations who work less than a full period. For example, suppose that you have an employee in a monthly payroll with DAILY RT = 50. If the employee was hired on the third day of the month (January), SUELDO is calculated as 50 × (31 − 2) = 1450. **Note:** The DAILY RT system element is calculated on the Job Data pages based on the pay components that you enter. See PeopleSoft Human Resources Administer Workforce: Understanding Job Data.

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Earnings	Description
SUELDO POR H	This earnings element calculates the most common type of hourly salary element. It has a calculation rule of Unit × Rate, in which the rate comes from the HOURLY RT system element and the units (hours) are entered by positive input in each payroll process. Therefore, the system calculates SUEL POR H only for payees who have positive input for these earnings. **Note:** The DAILY RT system element is calculated on the Job Data pages based on the pay components that you enter. See PeopleSoft Human Resources Administer Workforce: Understanding Job Data.

Average Salary

The average salary is a calculation base for other earnings. For example, some companies pay overtime based on the average of the (Daily Rate) + (Bonuses) + (Special Compensation).

The delivered earnings for average salary includes:

Earnings	Description
SALARIO PROM	This earnings element calculates the average salary based on the SP HR SAL PROM historical rule.

Savings Fund

The savings fund is one of the most common benefits that companies in Mexico provide to their employees. It is typically calculated as a percentage of the salary base.

The FDO AHORRO element calculates the basic benefit. However, because there is a tax exempt and a taxable portion of the savings fund, Global Payroll for Mexico delivers two additional elements to resolve these based on the amount of the FDO AHORRO: FDO AHOR EX and FDO AHOR GR elements.

The delivered earnings for the savings fund include:

Earnings	Description
FDO AHORR EX	This element holds the nontaxable portion of the savings fund benefit. Its value is calculated by the PE FM TOPE FONDO formula, and is defined as (13%) × (Minimum Wage Zone Salary of Employee) × (Worked Days).
FDO AHORR GR	This element holds the taxable portion of the savings fund benefit. Its value is calculated by the PE FM FONDO EMP GR formula. The taxable base is defined as the difference between FDO AHORRO and FDO AHOR EX. If the difference is negative, there is no taxable base.

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Earnings	Description
FDO AHORRO	The calculation rule for this earnings element is Base × Percent, in which the base is calculated by the PE FM FONDO A EMPL formula and the percent is defined (by way of example) as 13 percent. The PE FM FONDO A EMPL formula calculates the base as follows: ((Calendar Days) − Absences) × (Daily Rate). For example, suppose that you have an employee with a daily rate of 300, and the employee is absent for two days in the month (January). In this case, FDO AHORRO is calculated as follows: (31 − 2) × 300 × 13% = 1,131. **Note:** The DAILY RT system element is calculated on the Job Data pages based on the pay components that you enter. See PeopleSoft Human Resources Administer Workforce: Understanding Job Data.

Food Coupons

Food coupons are one of the most common benefits that companies in Mexico provide to their employees. Typically, the coupon is calculated as a percentage of the salary base.

The VALES DESP element calculates the basic benefit. However, because there is a tax exempt and a taxable portion of the food coupon, Global Payroll for Mexico delivers two additional elements to resolve these based on the amount of VALES DESP: VALES DES EX, and VALES DES GR.

The delivered earnings for food coupons include:

Earnings	Description
VALES DES EX	This element holds the nontaxable portion of the food coupon. Its value is calculated by the PE FM TOP VAL IMP formula.
VALES DES GR	This element holds the taxable portion of the food coupon. Its value is calculated by the PE FM VALES DESP G formula. The taxable base is the difference between VALES DESP and VALES DES EX. If the difference is negative, there is no taxable base.

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Earnings	Description
VALES DESP	The calculation rule for this earnings element is Base × Percent, in which the base is calculated by the PE FM VALES DESP formula, and the percentage is defined (by way of example), as 10 percent. The PE FM VALES DESP formula calculates the base as follows: ((Calendar Days) − Absences) × (Daily Rate). For example, suppose that you have an employee with a daily rate of 500, and that the employee is absent for four days in the month (January). In this case, VALES DESP is calculated as follows: (31 − 4) × 500 × 10% = 1,350. **Note:** The DAILY RT system element is calculated on the Job Data pages based on the pay components that you enter. See PeopleSoft Human Resources Administer Workforce: Understanding Job Data.

Seventh Day

This element enables you to calculate seventh day (Sunday) earnings for employees who work six or fewer days in a week.

The delivered seventh day earnings include:

Earnings	Description
SEPT DIA HOR	Resolves an employee's seventh day earnings based on the hours worked in the period. The calculation rule is as follows: ((Period Hours / (Period Hours − Rest Hours [Sunday])) − 8) × (Hourly Salary). For example, if the work period is 112 hours with 16 rest hours, the calculation is as follows: ((114 / 98) − 8) × (Hourly Salary) = (1.17 − 1) × (Hourly Salary) = 0.17 × (Hourly Salary). This means that for every worked hour, the payee will receive 0.17 of his hourly salary as SEPTIMO DIA. **Note:** To pay seventh day earnings, set this up as part of your pay group parameters.
SEPTIMO DIA	Using the PE PO SEPT DIA SD O proration element, SEPTIMO DIA resolves an employee's seventh day earnings based on the days worked in the period. The calculation rule is as follows: ((Period Days / (Period Days − Rest Days [Sunday])) − 1) × (Daily Salary). For example, if the work period is 14 days with 2 rest days, the calculation is as follows: ((14 / 12) − 1) × (Daily Salary) = (1.17 − 1) × (Daily Salary) = 0.17 × (Daily Salary). This means that for every worked day, the payee will receive 0.17 of his daily salary as SEPTIMO DIA. **Note:** To pay seventh day earnings, set this up as part of your pay group parameters.

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PTU

The basic profit sharing earnings are calculated by the PTU element. However, because there is a tax exempt and a taxable portion of these earnings, Global Payroll for Mexico delivers two additional elements to resolve these based on the amount of the PTU: PTU EXENTO and PTU GRAVABLE elements.

> **Note**
>
> PTU amounts are calculated based on other earnings that an employee receives. To specify which earnings to include in the calculation of profit sharing, use the PTU Elements/Payees page.

See PTU Elements/Payees Page.

The delivered PTU earnings include:

Earnings	Description
PTU	Profit sharing
PTU EXENTO	Nontaxable profit sharing
PTU GRAVABLE	Taxable profit sharing
PTU IMP DIAS	PTU Days Amount
PTU IMP SAL	PTU Salary Amount

Vacation Premiums and Christmas Bonuses

Vacation premiums and Christmas bonuses can be based on either the daily rate or the average salary. To set up vacation premiums and Christmas bonuses, use the Xmas, Vac, Premium, SDI Factor page.

See Xmas, Vac, Premium, SDI Factor Page.

The delivered earnings for vacation premiums and Christmas bonuses include:

Earnings	Description
AGUINALDO	Christmas bonus
AGUINALDO EX	Nontaxable Christmas bonus
AGUINALDO GR	Taxable Christmas bonus

Social Benefits(Previsión Social)

Social benefits (Previsión social) are earnings derived from disability subsidies, scholarships for employees and their dependents, child care, sport and cultural activity fees, as well as other benefits given to employees according to the law and labor contracts.

Global Payroll for Mexico delivers three earnings, three formulas, and a section for social benefits.

The delivered earnings for social benefits include:

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Earnings	Description
PREV SOC EX	Use this earning to calculate nontaxable social benefits. The calculation rule is Amount, with the PS FM PREV SOC EX formula used as the amount element. It compares the daily salary plus PREV SOCIAL against 7 times the minimum wage to identify the nontaxable part of PREV SOCIAL.
PREV SOC GR	Use this earning to calculate taxable social benefits. The calculation rule is Amount, with the PS FM PREV SOC GR formula used as the amount element.
PREV SOCIAL	Use this earning to calculate the total general social benefits. The calculation rule is Amount, with the TOTAL PREV SOCIAL accumulator used as the amount element. All social benefits earnings should be defined as contributing to this accumulator.

Delivered Earnings Process Lists and Sections

Delivered earnings for Mexico are processed and calculated in different process lists. Most basic earnings are calculated as part of the NOMINA process list and are included in the section called PERCEPCIONES. However, the PERCEPCIONES section recurs in other process lists, and there are numerous other earnings elements—Christmas bonus, termination pay, and so forth—that are processed elsewhere.

This table displays the main process list and sections used to calculate earnings elements for Mexico:

Process List	Section
NOMINA	INICIALIZACION NOM
	SUELDO FRE/CAL/HOR
	TIEMPO EXTRA
	PERCEPCIONES
	PROMEDIO
	VACACIONES NOM
	AGUINALDO SEC
	AUSENTISMO NOM
	SALDO VACACIONES
	LIQ Y FINIQUITOS
	RETRO
	PREVISION SOCIAL
	IMPUESTOS FED
	SEGURO SOCIAL
	SALDOS AJUSTE ISR
	RETRO DEDUCCIONES
	PRESTAMOS

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Process List	Section
	DESPUES IMPUESTOS
	DEDUCCIONES
	PROVISIONES
	IMPUESTOS EST
	PIRAMIDADO SEC
	AJUSTE REDONDEO
	FORMATO 37
	AGUINALDO WA

Note

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

Related Topics

- PeopleSoft Global Payroll: Understanding How to View Delivered Elements

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12

Defining Deductions

Understanding Deductions

Deduction Types

In Mexico, there are different types of deductions:

- Before taxes − reduces the net salary and the taxable gross for federal retention. Examples are maternity leave, tardiness, and sick leave.
- After taxes – reduces the net salary. Examples are savings fund and union contributions.
- Subject to state tax − represents all deductions that are subtracted from the taxable base of the state tax. Examples are disabilities and absences.
- State taxes − each state has its own taxable base.

> **Note**
>
> You define deductions using the Deductions component.

Related Topics

- PeopleSoft Global Payroll: Understanding Earning and Deduction Elements

Deductions and Accumulators

To ensure that the new deductions you create are used correctly in other calculations, you need to know which accumulators they should contribute to, since the value of the accumulated deductions is critical to these other processes. The accumulators to which you will be adding your deductions are the same ones that Global Payroll for Mexico has created for the delivered deductions. These include:

- Any deduction that you want to contribute to the net pay should be included in the TOTAL DEDUCCION N accumulator.
- Any deduction that you want to subtract the taxable base for federal tax purposes should be included in the BASE ISR accumulator.

  Also, each of these deductions should have a supporting element override for the variable FD VR METODO ISR with the corresponding value depending on which tax method you want to affect (113, 142, 148, or 112).

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Understanding Provisions

Provisions in Mexico

A provision is an accrued expense for a company.

Provisions are generated for two main reasons:

- To cover the earnings financially, so that when your company has to pay this earning, it is prepared to do so.

  From a general ledger perspective, each provision is a debt that your company is accruing, and sooner or later, it has to be paid. So, debt accounts are balanced with the use of provisions.

- To keep track of costs.

  Although the employee receives his earnings at the end of the year or on his anniversary date, the cost is generated every day that the employee works. Costs can be controlled and distributed accordingly to the real cost generation.

In Global Payroll for Mexico, you can generate three types of provisions:

- Christmas bonus provision
- Vacation provision
- Vacation premium provision

The vacation premium and Christmas bonus are legal earnings that are assigned to an employee on a yearly basis, depending on his seniority. For every day that an employee works, he earns a fraction of these earnings. Even if an employee leaves the company before receiving his bonus, a proportional part of this earning will be paid in his termination pay.

Provision Definition

While Global Payroll for Mexico delivers deductions for the Christmas bonus provision, vacation provision, and vacation premium provision, you can also create your own deductions for other provisions.

To define a provision:

1. Define the provision on the Deductions component.
2. The payroll process will calculate the proportional amounts of the provision for the period corresponding to the actual days worked.

Related Topics

- PeopleSoft Global Payroll: Understanding Earning and Deduction Elements

Provision Processing

This topic provides an overview of provision calculation and discusses:

- Christmas bonus provisions
- Vacation provisions
- Vacation premium provisions

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Provision Calculation

Global Payroll for Mexico delivers deductions that are used to calculate provisions for vacation, vacation premium, and Christmas bonus. All of these provisions are defined as non-taxable for ISR and are not subject to state taxes. These earnings do not affect any other earning, deduction, or accumulator.

The system calculates the proportion of the provision for each pay period in terms of Actual Worked Days for an employee. Every time a regular payroll process is run, the system determines the corresponding quantities of provisions for vacation, vacation premium, and Christmas bonus according to the procedures detailed below.

Christmas Bonus Provisions

To determine the corresponding amount of the Christmas bonus provision, this formula is used:

(Days of Christmas bonus according to seniority/365 days * Worked days in the period) * (Salary type)

Here's an example:

- Days of Christmas bonus = 25
- Worked days in a period = 15
- Daily salary = 100.00

The formula calculates the corresponding amount of the Christmas bonus provision as:

(25/365 * 15) * 100.00 = 102.74

> **Note**
>
> An employee's salary can be taken from either his daily salary rate or any average salary. You can choose which salary type you want to use in calculating the Christmas bonus provision. Global Payroll for Mexico delivers the provision calculation using the daily salary. Seniority has to be calculated to the date of the Christmas bonus payment, not to the processing date, nor the period begin or end date. Otherwise, the provision will not be accurate. The provision has to reflect the payment that the employee is going to receive as a Christmas bonus in December. By law, this date is no later than December 20.

The Christmas bonus provision will not be included in the NET accumulator (TOTAL NETO), since this deduction won't be deducted from the employee.

Vacation Provisions

To determine the corresponding amount of the vacation provision, this formula is used:

(Number of days according to the vacation table/365 days * Worked days in the period) * (Salary type)

Here's an example:

- Vacation days = 25
- Days worked in a period = 15
- Daily salary = 100.00

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The formula calculates the corresponding amount of the vacation provision as:

(25/365 * 15) * 100.00 = 102.74

> **Note**
>
> An employee's salary can be taken from either his daily salary rate or any average salary. You can choose which salary type you want to use in calculating the vacation provision. Global Payroll for Mexico delivers the provision calculation using the daily salary. Seniority has to be calculated to the date of the next anniversary, not to the processing date, nor the period begin or end date. Otherwise, the provision will not be accurate. The provision has to reflect the payment that the employee is going to receive as vacation on the date that the employee earns the entitlement.

The vacation provision will not be included in the NET accumulator (TOTAL NETO), since this deduction won't be deducted from the employee.

Vacation Premium Provisions

To determine the corresponding amount of the vacation premium provision, this formula is used:

(Number of days according to the vacation table/365 days * Worked days in a period) * (Percentage of vacation premium) * (Salary type)

Here's an example:

- Days of vacation = 20
- Days worked in a period = 15
- Daily salary = 100.00
- Vacation premium percent = 25%

The formula calculates the corresponding amount of the vacation premium provision as:

((20/365 * 15) * (25%)) * 100.00 = 20.55

> **Note**
>
> An employee's salary can be taken from either his daily salary rate or any average salary. You can choose which salary type you want to use in calculating the vacation premium provision. Global Payroll for Mexico delivers the provision calculation using the daily salary. Seniority has to be calculated to the date of the next anniversary, not to the processing date, nor the period begin or end date. Otherwise, the provision will not be accurate. The provision has to reflect the payment that the employee is going to receive as vacation on the date that the employee earns the entitlement.

The vacation premium provision will not be included in the NET accumulator (TOTAL NETO), since this deduction won't be deducted from the employee.

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> **Note**
>
> You can generate a provisions report in Global Payroll for Mexico.

Related Topics

- Viewing Delivered Provisions
  This table lists the provision deductions for Mexico:
- Global Payroll for Mexico Reports: A to Z
  The table in this topic lists the PeopleSoft Global Payroll for Mexico reports, sorted by report ID.

Understanding Batch Positive Input

You can use batch positive input to reduce time-consuming data entry in Global Payroll for Mexico. Batch positive input can be used for earnings or deductions.

For example, you could enter and trigger bonuses for all of your employees using batch positive input, or you could trigger mass deductions. Suppose that an employer has an agreement with a cell phone company to provide half the employee population with a 50 percent discount rate on calls. Instead of entering each of the monthly cell phone invoices (deductions) for each employee, the cell phone company could generate a flat file with a layout that loads this invoice information using a batch process.

> **Note**
>
> Setting up the flat file for batch positive input is discussed in another topic. See Using Batch Positive Input

Running Deduction and Provision Reports

Pages Used to Run Deduction and Provision Reports

Page Name	Definition Name	Usage
Balances MEX Page	GPMX_RC_ACCUM	Provides a monthly summary of all the accumulator members of the earnings total accumulator and the deductions total accumulator.
Provisions MEX Page	GPMX_RC_PROV	Summarizes all provisions, including vacation, vacation premium, and Christmas bonus. This report has two options: with or without detail.

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Viewing Delivered Deductions

> **Note**
>
> The deduction elements for Mexico are defined as PeopleSoft Delivered/Not Maintained. This means that you can modify these elements to fit your needs, and when necessary, create your own earnings using the delivered elements as your guide.

Delivered Deductions

This table lists the delivered deductions for Mexico:

Deductions	Description
AJUST REDOND	Seniority based deduction - Amount
ANTIG IMPORT	Seniority based deduction - Amount
ANTIG PORCEN	Seniority based deduction - Percent
AYU DEFUNC	Death allowance
COMEDOR	Cafeteria deduction
CRED INFONAV	INFONAVIT loan
CUOTA SINDIC	Union dues
FALTANTE CAJ	Cashier difference
FDO AHOR EMP	Savings fund employee contribution
FDO AHOR EMT	Savings fund employee capped contribution
FDO AHOR C T	Savings fund employer capped contribution
FDO AHOR CIA	Savings fund employer contribution
PENSION ALIM	Garnishment
PRES FONACOT	FONACOT loans
PRESTAMO CIA	Company loans
PROV AGUIN	Christmas bonus provision
PROV PMA VAC	Vacation premium provision
PROV VACAC	Vacation provision
SEGURO MEDIC	Medical insurance
SEGURO VIDA	Life insurance
SEGURO VIV	House insurance damages.
	This deduction sums the CRED INFONAV deductions for employees who have INFONAVIT loans in the first payroll run of every two-month period.
VALES COMIDA	Food coupons deduction
CRED INF P B	Housing loan deduction. This deduction tracks the housing loan amount that should be carried over to the next Bi-month period.

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Deductions	Description
CRED INF P A	This deduction tracks the amount that was withheld in previous payroll and that belongs to current Social Security bi-month period. Therefore, it should be included in Loans reports in order to match SUA amount.

Delivered Deduction Process Lists and Sections

In Global Payroll for Mexico, deductions are processed and calculated within different process lists. Most deductions are calculated as part of the NOMINA process list, and are included in the section called DEDUCCIONES. However, the DEDUCCIONES section recurs in other process lists and there are numerous other deduction elements, such as termination pay, that are processed elsewhere.

This table lists the main process list and sections used to calculate deduction elements for Mexico.

Process List	Section
NOMINA	AJUSTE REDONDEO
	AUSENTISMO NOM
	DEDUCCIONES
	DESPUES IMPUESTOS
	IMPUESTOS EST
	IMPUESTOS FED
	PRESTAMOS
	PROVISIONES
	RETRO DEDUCCIONES
	SALDOS AJUSTE ISR
	SEGURO SOCIAL

> **Note**
>
> A complete list of delivered process lists and sections used to calculate deductions and other elements can be found in another topic.

Related Topics

- Viewing Delivered Process Lists and Sections
  This topic discusses:

Viewing Delivered Provisions

This table lists the provision deductions for Mexico:

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Deduction	Description
PROV AGUIN	Christmas bonus provision
PROV PMA VAC	Vacation premium provision
PROV VACAC	Vacation provision

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

Related Topics

- PeopleSoft Global Payroll: Understanding How to View Delivered Elements

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Tracking Loans

Understanding Loans in Mexico

In Mexico, there are different types of loans:

- Company loans — given to an employee by the company.
- Faltante de Caja loans.

  A Faltante de Caja loan (cashier loan) occurs in the retail sector. When the cash register balance does not match between the existing cash and the cash reported, the cashier must replace the missing amount. This can be done with a loan.
- INFONAVIT loans — given for purchasing housing.
- FONACOT loans — given for purchasing appliances, such as refrigerators.

Assigning Loans

Page Used to Define Loan Assignments

Page Name	Definition Name	Usage
Request Loans MEX Page	GPMX_LOAN	Define loan assignment information and a repayment schedule for payee.

Request Loans MEX Page

Use the Request Loans MEX page (GPMX_LOAN) to define loan assignment information and a repayment schedule for payee.

Navigation:

Global Payroll & Absence Mgmt, and then **Payee Data**, and then **Loans**, and then **Request Loans MEX**

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

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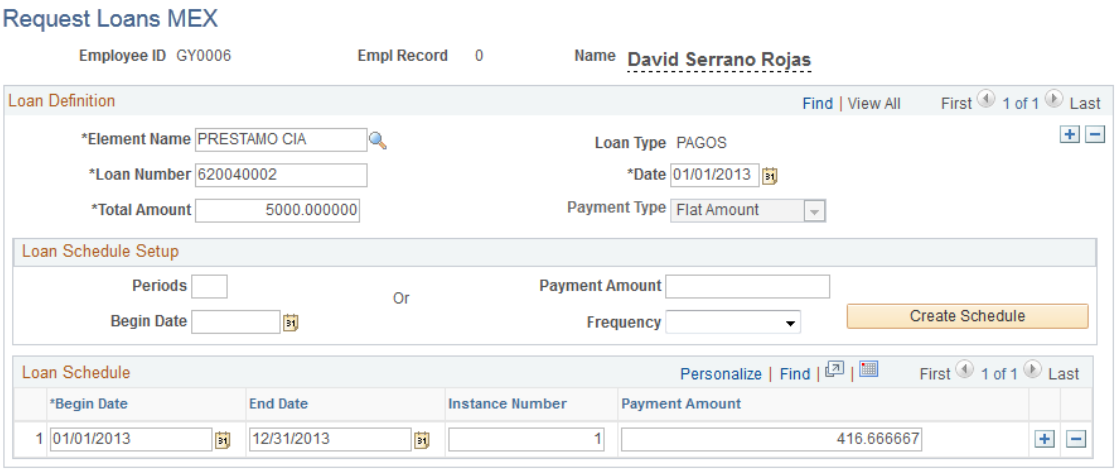

> **Note**
>
> PeopleSoft Global Payroll for Mexico delivers the DIVIDE PRESTAMO driver accumulator that enables you to assign multiple loan deductions to an employee and process them for the same payroll calendar run by tracking their balances individually.

Loan Definition

Field or Control	Description
Element Name	Select the element name that corresponds to the loan.
Loan Type	Displays the loan type. The system considers only deductions with a category of "PR" (loans), which are defined in the Category field on the Deduction Name page. Four types of loans have been defined in Customer Fields on the Deduction Name page: *CRED INFONAV* – for INFONAVIT loans *PRESTAMO CIA* – for company loans *PRES FONACOT* – for FONACOT loans *FALTANTE CAJ* – for cashier loans
Loan Number	Enter the loan number.
Date	Enter the date on which the loan was given.
Total Amount	Enter the total amount of the loan.

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Field or Control	Description
Payment Type	Select the payment type: *Amount, Percentage* or *x Minimum.* The**Payment Type** field applies only to INFONAVIT loans and refers to the type of loan that was originally granted. If an *Amount* loan was granted, then a flat amount will be discounted each period from the employee's payslip. If a *Percentage* loan was granted, you must enter the percentage that is to be discounted in the**Infonavit %** field. If a*x Minimum* loan was granted, you must enter the number of minimum wages that is to be discounted on the**x Min Wages** field. **Note:** Depending on the value you select in the **Payment Type** field, different fields appear in the**Loan Schedule** group box.

Loan Details

In this grid you can record all the INFONAVIT Loans Action Types used by the SUA Loans Report.

Field or Control	Description
Date	Enter the date that the loan action type comes into effect for the INFONAVIT loan.
Action Type	Select the action type of the INFONAVIT loan. The system displays all of the possible loan action types used by the SUA Loans reports.

Loan Schedule Setup

Field or Control	Description
Periods	If the loan will be repaid over a period of time, you'll specify the number of periods here. If you don't know the fixed amount of a loan payment, but you know the number of periods required to discount the total amount, then you can generate your loan schedule based on the number of periods. In other words, you will define either the **Periods** field or the**Amount** field, but not both.
Amount	If the loan is a fixed amount (for a one-time repayment), enter the amount here. If you don't know the total number of periods required to discount the total amount, but you know the discount to take off each period, then you can generate your loan schedule based on the number of periods to determine the payment amount each period.
Begin Date	Enter the date on which the loan repayment begins. The begin date must be after the loan date.

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Field or Control	Description
Frequency	Specify the frequency of the loan repayment. Values are *Biweekly*, *Monthly*, *Semimonthly*, and *Weekly*.
Create Schedule	If you selected a Company Loan (PRESTAMO CIA) or a FONACOT Loan (PRES FONACOT), click the **Create Schedule** button. When you click**Create Schedule,** the loan schedule is automatically created in one row indicating Begin Date, End Date and Payment Amount.

Loan Schedule

Field or Control	Description
Begin Date/End Date	Enter the begin and end dates for the period of time on which the payment amount is valid.
Instance Number	The system automatically populates this field, establishing the sequence based on the payee and loan type. This enables you to assign more than one loan of the same type to a payee.
Payment Amount	If you selected *Amount* in the**Payment Type** field, the**Payment Amount** field appears. Enter the flat amount that is to be deducted from an employee's payslip.
x Min Wages (times minimum wages)	If you selected *X Minimum* in the**Payment Type** field, the**x Min Wages** field appears. Enter the number of minimum wages that will be the payment for each period.
Infonavit % (percentage)	If you selected *Percentage* in the**Payment Type** field, the**Infonavit %** field appears. Enter the percentage that is to be deducted from an employee's payslip. Typically, this is *20%*, *25%*, or *30%*. If the loan was granted before January 30, 1998, the system looks up the value on the INFONAVIT Loans Percentage page and retrieves the corresponding discount. Otherwise, it will discount the percentage entered. For example, let's say that an employee has a loan granted on January 1, 1997 with a 20% discount, an SDI of 100, and a minimum daily salary of 42.15 MXN. The number of times the minimum wage that the employee's salary is will be calculated as 100/42.15 = 2.3724792. When the system is processing the loan data, it looks up the value entered on the INFONAVIT Loans Percentage page and sees that the number of times the minimum wage of 2.37 for a loan at 20% has a discount of 15.70%. See Understanding Social Security Processing.

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Creating Deduction Assignments for Loan Schedules

Understanding Deduction Assignments

After you define a loan schedule, the system creates a deduction assignment for each loan schedule. This is performed by a component interface. The process creates a link to the Element Assignment By Payee page using the following supporting elements.

> **Note**
>
> Make sure that each loan deduction you are using has a component reference name HC_GPMX_LOAN_GBL defined for it. You can define a component reference name for a loan deduction in Set Up HCM, Product Related, Global Payroll & Absence Mgmt, System Settings, Configuration by Element.

Field	Variable
Loan Number	PR VR NUM PRESTAMO
Total Amount	PR VR MONTO TOTAL
Date	PR VR FECHA
Payment Amount	PR VR PAGO
Infonavit % (only for INFONAVIT loans)	PR VR PCT INFONAV
Times Minimum Wage	PR VR NUM SAL MIN

All of these variables are used by the process to keep track of each loan balance separately. These variables are also used to calculate the deduction for each loan.

Defining Deduction Assignments by Positive Input by Loan Type

This topic outlines what you need to define in the deduction assignment for each loan type. You define deduction assignments on the Positive Input page in the core application.

See PeopleSoft Global Payroll: Understanding Positive Input.

Company Loans

The loan number, total amount, loan date, and payment amount must be defined on the Positive Input page.

Faltante de Caja

The loan number, loan date, and total amount must be defined on the Positive Input page. The legal ceiling is calculated to determine the monthly payment. The legal ceiling is based on the monthly salary wage zone.

INFONAVIT Loans

The loan number, loan date, total amount, and either percentage, payment amount, or number of minimum wages must be defined on the Positive Input page.

There are three different types of INFONAVIT loans:

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- By Percentage.
- By Amount.
- By x Minimum Wages.

To calculate By Percentage loans:

1. Determine the initial SDI for the employee (bimonthly).
2. Calculate the payment based on the number of minimum wage zone salaries and the loan percentage.
3. Return the minimum between the payment and balance amount.

To calculate By Amount loans, find the minimum between the loan payment and the balance amount.

To calculate By x Minimum Wages loans, find the minimum between the Minimum Wage x Minimum Wage number and the balance amount.

The Mexican government has revised the regulations governing INFONAVIT (Housing Institute) loans, with the new rules taking effect on July 1, 2025. These changes will impact how payroll systems manage deductions for INFONAVIT loans, requiring that deductions align precisely with the amounts indicated on the INFONAVIT form, irrespective of any employee absences or disabilities. Notably, deductions will no longer be adjusted downward due to such absences, and they must not exceed the employee's net pay. In cases where the net pay is inadequate to cover the deduction, employers are now obligated to inform INFONAVIT, as opposed to previously having to compensate for the shortfall. Additionally, any outstanding INFONAVIT loan amounts cannot be carried over to subsequent paychecks, and for employees earning minimum wage, deductions are capped at 20% of their salary.

FONACOT Loans

The loan number, loan date, total amount, and payment must be defined on the Positive Input page.

You'll prorate the payment between the monthly days in the period and multiply this factor by the worked days.

Related Topics

- Understanding Social Security Processing
  SDI (Salario Diario Integrado) represents the base salary that is used for social security calculations, including contributions to social security and INFONAVIT loan paybacks. It consists of:

Calculating Loan Payments

Understanding System Elements for Loan Payment Calculation

There are several formulas and system elements to calculate loan payments.

Elements	Description
PR FM TOPE CAJA	The maximum discount per pay period
MONTHLY RT	Monthly rate
PS VR SAL MIN MES	Monthly minimum salary for the zone
PR VR MONTO TOTAL	Total loan amount

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Elements	Description
PR FM PAGO CIA	Company loan payment
PR FM PAGO CAJA	Cashier loan payment
PR FM PAGO INF	INFONAVIT payment
PR FM PAGO FONACOT	FONACOT loan payment

Calculating the Different Loan Types

This topic discusses how to calculate the different loan types.

Company Loans

When an employee has one company loan, a loan payment amount is determined and deducted from the employee's pay regularly as agreed upon by the company and the employee.

When an employee has more than one company loan, payment numbers are assigned to each loan and each loan has a separate cash balance.

Number	Loan Amount	Monthly Payment	Cash Balance
Payment number	Loan Balance	If the loan balance is lower than what you defined, then the monthly payment is equal to the loan balance; else the monthly payment is as defined by you.	Loan amount − Monthly payments

Faltante de Caja

You'll define these parameters in the system:

Number	Faltante de Caja	Legal Ceiling	Operator	Cash Balance	Monthly Payment
Payment number	Cash balance + new Faltante de Caja	(Monthly salary − Monthly wage zone) * 30 %	Faltante de Caja < or > legal ceiling	Faltante de Caja − Monthly payments	If Faltante de Caja < legal ceiling, then monthly payment =Faltante de Caja; else, if legal ceiling > 0, then monthly payment = legal ceiling; else = 0.

INFONAVIT Loans

Employees can repay INFONAVIT loans in several ways:

- Fixed amount − a monthly fixed amount will be deducted from the employee's pay.

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- Percentage − depending on the original loan agreement, 20%, 25%, or 30% of an employee's pay will be deducted.
- Number of times the minimum wages − the number of times the minimum wage that is to be deducted from an employee's pay is defined.

You'll define your loan payment option on the Request Loans MEX Page.

FONACOT Loans

The system automatically sets the Payment Type as Amount and the frequency for FONACOT loans as monthly. The payment is calculated as follows:

Payment = (Monthly payment / 30) * (Days in the period − Absences)

The days in the period are taken depending on the period frequency, for example, monthly (30 days), semimonthly (15 days), biweekly (14 days), and weekly (7 days).

Running Loan Reports

Pages Used to Run Loan Reports

Page Name	Definition Name	Usage
Loans by Calendar MEX Page	GPMX_RC_LOANS_CAL	Lists all loans by Calendar Group ID.
Loans MEX Page	GPMX_RC_LOANS_PYE	Lists all loans by payee.

Viewing Delivered Loan Elements

Global Payroll for Mexico delivers these loan deductions:

Deduction	Description
CRED INFONAV	INFONAVIT loans
FALTANTE CAJ	Cashier loans
PRES FONACOT	FONACOT loans
PRESTAMO CIA	Company loans

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

Related Topics

- PeopleSoft Global Payroll: Understanding How to View Delivered Elements

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Updating Social Security Contributions

Understanding Social Security Processing

SDI (Salario Diario Integrado) represents the base salary that is used for social security calculations, including contributions to social security and INFONAVIT loan paybacks. It consists of:

- Fixed SDI, which is the payee's daily rate plus Aguinaldo (Christmas bonus), vacation premium, food coupons, or any other benefits the payee receives regularly.
- Variable SDI, which includes benefits that vary from one pay period to another, such as Sunday premium, triple overtime, and commissions.

The process for defining and updating social security contributions in Mexico consists of these steps:

1. (Optional) Update the social security contribution table and the repayment of INFONAVIT loans table.

   Global Payroll for Mexico delivers rules that compute fixed and variable SDI for payees and calculate deductions for social security and repayment of INFONAVIT loans. The calculations are based on tables that contain rates and ceilings. PeopleSoft HRMS delivers the data for these tables initially, but you must keep the tables current.

   > **Note**
   >
   > You can update the social security contribution table on the Quotas MEX Page.

2. View and update SDI wage data for payees on the Maintain SDI Data MEX page.
3. Select additional elements that contribute to fixed SDI and define the integration parameters for these elements on the Fixed SDI page.
4. Define Variable SDI for a pay group on the Variable SDI page.

   > **Note**
   >
   > Before you can run the Variable SDI process, you must define Variable SDI for a pay group by selecting the earnings, accumulators, and formulas used in the Variable SDI process. See Variable SDI Page.

5. Run SDI processes to calculate new SDI amounts when certain events or changes occur, such as employee anniversaries, or at the end of two months, if variable earnings are paid. The two SDI processes are:
   - Process SDI MEX (SDI FIJO).
   - Variable SDI (SDI VARIABLE).

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Social Security Reports

Global Payroll for Mexico generates several reports for social security. It also provides the two interfaces that are required for paying social security contributions through the Sistema Unico de Autodeterminacion (SUA). SUA is the software that the Social Security Institute provides to calculate all employer and payee quotas.

> **Note**
>
> In Mexico, "social security quota" is used to refer to social security contributions.

Viewing and Updating SDI Data for Payees

Page Used to View and Update SDI Data

Page Name	Definition Name	Usage
Maintain SDI Data MEX Page	GPMX_SDI_DATA	View a payee's SDI data and override the Fixed SDI amount.

Understanding Updates to SDI Data

The system automatically creates a new row of SDI data for a payee when:

- A payee is hired, terminated, or has a salary change.
- The Fixed or Variable SDI process is run and the system detects a change to SDI.

The SUA interfaces generate two flat files (one with payee data and one with transactions). The SUA system loads these files via a batch process and generates the payee and employer quotas every two months.

Then the employer calculates the corresponding quotas that need to be paid bimonthly and the quotas that are reported every two months. This is done with the SUA software. Once the quotas are calculated, the employer has to pay the corresponding amount to the bank.

You can view events that have caused changes to a payee's SDI data. You can also override a payee's Fixed SDI amount.

Maintain SDI Data MEX Page

Use the Maintain SDI Data MEX page (GPMX_SDI_DATA) to view a payee's SDI data and override the Fixed SDI amount.

Navigation:

Global Payroll & Absence Mgmt, and then **Payee Data**, and then **Social Security/ Insurance**, and then **Maintain SDI Data MEX**

This example illustrates the fields and controls on the Maintain SDI Data MEX page. You can find definitions for the fields and controls later on this page.

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IMSS/SAR

Field or Control	Description
Minimum Wage A Zone	Displays the daily minimum wage for wage zone A, as defined on the Minimum Wages MEX page.
Minimum Wage Empl Zone (minimum wage employee zone)	Displays the daily minimum wage for the employee's zone. (The employee's wage zone is determined by the establishment that is associated with the employee's location.)
Ceiling Days Matern & Illness (ceiling days maternity and illness)	Displays the ceiling days that apply to social security contributions for maternity and illness. This number comes from the EYMPD row on the Quotas MEX page.
Ceiling Days Disab & Life (ceiling days disability and life)	Displays the ceiling days that apply to social security contributions for disability and life. This number comes from the IYV row on the Quotas MEX page.
Max Ceiling Matern & Illness (maximum ceiling maternity and illness)	Displays the maximum contribution base that the payee can have for maternity and illness. The system calculates this amount by multiplying the minimum wage for Zone A by the ceiling days for maternity and illness.
Max Ceiling Disab & Life (maximum ceiling disability and life)	Displays the maximum contribution base that the payee can have for disability and life. The system calculates this amount by multiplying the minimum wage for the employee's zone by the ceiling days for disability and life.

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Field or Control	Description
Fixed SDI	Displays the fixed SDI amount that is calculated by the SDI FIJO process. This amount is reported to Social Security when a payee is hired or the payee's salary changes. You can override the amount, if necessary.
SDI Factor	Displays the SDI factor that is defined for the payee's pay group on the Xmas, Vac, Premium, SDI Factor page. The system uses the SDI factor to calculate Fixed SDI.
Variable SDI	Displays the variable SDI amount that is calculated by the SDI VARIABLE process. Variable SDI is added to the Fixed SDI in the SDI Total.
Total SDI	Displays the total of the fixed and variable SDI amounts. This amount is reported to the IMSS, when there's a change.
Difference SMG and Daily Rate	Displays the difference between the minimum wage for Zone A and the employee's daily rate.

Action/Reason

The information in this group box is populated automatically based on changes made in HR.

Field or Control	Description
Action and**Reason**	Displays the action and reason code that defines the action. This information comes from HR.
IMSS Notice	Indicates the type of IMSS notice that will be generated. You associate IMSS Notices with Action/Reason codes in the Mexico section of the Action Reason page in HR.
SUA Reason	Indicates the type of transaction that will be reported to IMSS. You associate SUA Reason with Action/Reason codes in the Mexico section of the Action Reason page in HR.

Related Topics

- Understanding the SDI Factor Calculation
  Christmas bonuses and vacation premiums can be calculated based on either the daily salary or the average salary. To set up the calculation of the Christmas bonus and vacation premium, define an SDI factor on the Xmas, Vac, Premium, SDI Factor page. The SDI factor represents the amount over the daily salary or average salary that the employee makes because of the vacation premium and the Christmas bonus.
- PeopleSoft Human Resources Administer Workforce: Defining Personnel Actions and Reasons

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Processing Mass SDI Changes

Page Used to Run the Mass SDI Process

Page Name	Definition Name	Usage
Process SDI MEX Page	GPMX_RC_SDI	Generate the SDI record for anniversary and SMG changes and run the SDI calculation process.

Understanding Mass SDI Processing

You can process mass SDI changes for seniority anniversaries and minimum wage changes on the Process SDI MEX page. The system uses Application Engine to process the SDI calculation and will insert new SDI data for employees having seniority anniversaries in the corresponding period, or for employees having an SDI data change derived from minimum wage changes.

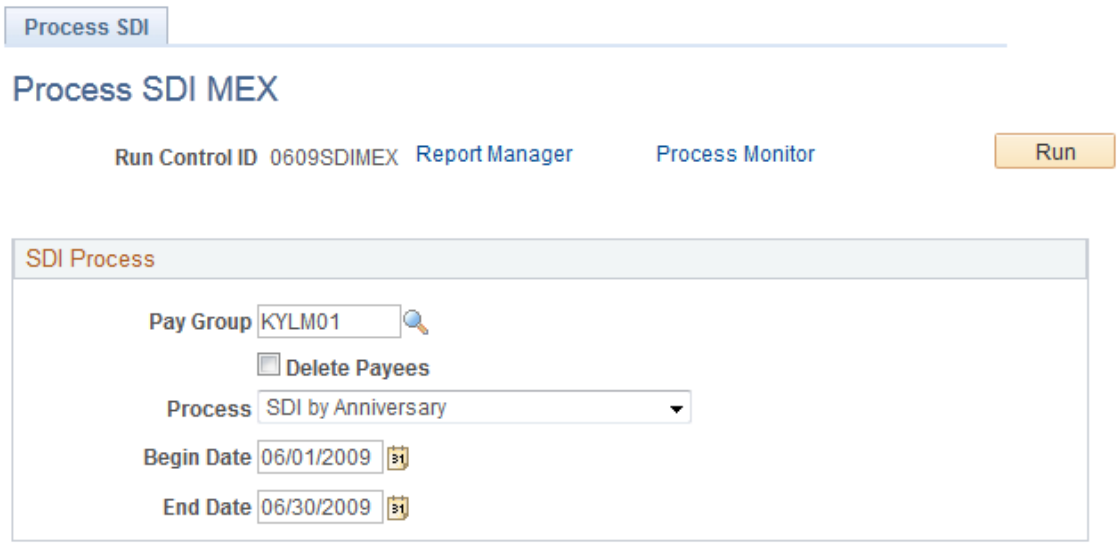
Process SDI MEX Page

Use the Process SDI MEX page (GPMX_RC_SDI) to generate the SDI record for anniversary and SMG changes and run the SDI calculation process.

Navigation:

Global Payroll & Absence Mgmt, and then **Absence and Payroll Processing**, and then **Prepare Payroll**, and then **SDI Process MEX**

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



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SDI Process

Field or Control	Description
Pay Group	Select the pay group for which the SDI process will be run.
Delete Data	Select this check box when you want to delete existing SDI data inserted by previous SDI by Anniversary or SDI by SMG Change processes during the period defined by the **Begin Date** and**End Date.** This is useful when recalculating SDI.
Process	Select one of these values: *SDI Mass Calculation* *SDI Triggers* *SDI by Anniversary* *SDI by SMG Change*
Date	Enter the date when you want to calculate SDI for mass changes or minimum wage changes. The system displays this field only when you select either *SDI Mass Calculation* or *SDI by SMG Change* in the**Process** field.
Year and**Bimonth**	Enter the year and bimonth when you want the system start triggering SDI deductions. The system displays these field only when you select *SDI Triggers* in the**Process** field.
Begin Date and**End Date**	Enter the begin and end date for the period during which a payee's anniversary or minimum wage change must fall. The system displays these fields only when you select *SDI by Anniversary* in the**Process** field.

Generating IMSS Notices

Page Used to Review Generated IMSS Notices

Page Name	Definition Name	Usage
IMSS Notices Control Page	GPMX_IMS_CONTR	Record reported events that generated a notice to IMSS for a payee and displays the method of notification used.

Understanding IMSS Notices

When a payee is hired, rehired, has a salary change, or is terminated, you must report the event to IMSS. These reports can be:

- Printed notice (IMSS Printed Notices).
- Magnetic device notice (IMSS Mag. Media Notices).
- EDI (electronic transmission) notice (IMSS EDI Notices).

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The run control page that you use to generate the notice depends on the selected reporting method. When you generate the notice, the system marks the corresponding check boxes on the IMSS Notice Control page. You use the IMSS Notice Control page to review the events reported for a payee.

> **Note**
>
> The IMSS reports are discussed later in this documentation.

See Running Social Security Reports.

IMSS Notices Control Page

Use the IMSS Notices Control page (GPMX_IMS_CONTR) to record reported events that generated a notice to IMSS for a payee and displays the method of notification used.

Navigation:

Global Payroll & Absence Mgmt, and then **Social Security/Insurance**, and then **Review IMSS Notices MEX**, and then **IMSS Notices Control**

IMSS Notice Control

Select the type and form of notice you would like to generate for the payee.

> **Note**
>
> You can clear a generated IMSS notice if you want to regenerate it.

Related Topics

- Global Payroll for Mexico Reports: A to Z
  The table in this topic lists the PeopleSoft Global Payroll for Mexico reports, sorted by report ID.

Running the SDI Batch Processes

Understanding the SDI Batch Process

When you run the payroll process, the system produces two writable arrays related to social security:

- IM_WA_DATOS_SDI, which contains information for both fixed and variable SDI amounts.
- IM_WA_REP_VARIAB, which is used to generate the Variable SDI report.

Before you run the payroll process, you can launch two additional social security processes: one from the SDI for Anniversary and SMG page, and the other from the Payroll/Absence Run Control page. These processes calculate new SDI amounts, which are the basis for all the Social Security earnings and deductions, such as employee and employer contributions and loan paybacks. The two processes are:

- Fixed SDI process (SDI FIJO).

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Run this process if your organization offers benefits that contribute to fixed SDI. You can run this as often as needed to generate data for IMSS notifications.

You should also run the Fixed SDI process every time there is a massive salary increase , a minimum wage change, or changes caused by employment anniversaries.

- Variable SDI process (SDI VARIABLE).

  Run this payroll process bimonthly to calculate variable SDI figures from the previous two months. The system will add the variable earnings for the last two months and divide them by the number of paid days for the two previous months minus unpaid absences according to the pay group parameters defined on Pay Groups MEX component. The Variable SDI process is run in January, March, May, July, September, and November. The calculations are also used in the Variable SDI report.

Modifying the Fixed SDI Process

If your organization offers benefits (in addition to the Christmas bonus and vacation premium) that contribute to fixed SDI, you must select additional elements that contribute to fixed SDI and define the integration parameters for these elements on the Fixed SDI page. Then you must run the Fixed SDI process to calculate fixed SDI. (The Application Engine program takes into account the Christmas bonus and vacation premium when it calculates fixed SDI.)

Modifying the Variable SDI Process

Global Payroll for Mexico delivers a process list (CALC SDI VARIAB) for calculating variable SDI. If you need to add earnings that contribute to the variable SDI amount, follow the procedure below.

To include an earnings in the Variable SDI process:

1. Select the earning that is a member of the SDI bimonthly accumulator.

   This is very important. If the bimonthly accumulator does not exist for the earning, you must create a new one. Select the earning and the corresponding accumulator on the Variable SDI page.

2. Select one of the three formulas (integration methods): IM FM 100% VAR, IM FM TOP VAL IMSS, or IM FM PREMIO INT on the Variable SDI page.

All earnings belong to one of the three formulas (integration methods). Below are some examples:

Earning	Formula
BONO	IM FM 100% VAR
VALES DESPENSA	IM FM TOP VAL IMSS
COMISIONES	IM FM 100% VAR
PREMIO DE ASIST	IM FM PREMIO INT

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> **Note**
>
> Do not add the earnings elements to the SDI VARIABLE section.
>
> The order in which you run the SDI FIJO (Process SDI MEX) and SDI VARIABLE processes is very important because the fixed process (SDI FIJO) depends on the variable process (SDI VARIABLE). For example, the date for the SDI FIJO corresponds to a hiring or salary increase date for the payee and the SDI VARIABLE as defined by law is the first day of each two months based on the earnings of the previous two months.

Related Topics

- Defining Variable SDI
  To define parameters for the Variable SDI process, use the Pay Groups MEX (GPMX_PARM_PYGRP) component.

Running Social Security Reports

Pages Used to Run Social Security Reports

Page Name	Definition Name	Usage
Fixed SDI Report MEX Page	GPMX_RC_FIX_SDI	Lists the details of the fixed SDI calculations for a specified period for payees with SDI data changes.
Variable SDI Report MEX Page	GPMX_RC_VARIABI	Lists the details of the variable SDI calculations for a bimonthly period.
ANN- Risk Factor Report MEX Page	GPMX_RC_ABSENCE	Lists all payees with work-related disabilities in a specified year.
IMSS Report Notices MEX Page	GPMX_RC_IMSS_PRN	Provides hiring, salary change, or termination details for selected payees. This report is submitted to IMSS in printed format.
IMSS Mag Notices MEX Page	GPMX_RC_IMSS_MMD	Provides hiring, salary change, or termination details for selected payees. This report is submitted to IMSS in magnetic media format.
IMSS EDI Notices MEX Page	GPMX_RC_IMSS_EDI	Provides hiring, salary change, or termination details for selected payees. This report is submitted to IMSS in EDI format.
IMSS Base Over Cap Report MEX	GPMX_RC_CAP_BSE	Lists the payees who have a surplus over the cap on 3, 18, and 25 minimum wages.

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Page Name	Definition Name	Usage
SUA - Payee File MEX Page	GPMX_RC_SUA001	Generate a flat file and printed report for SUA with payee data such as name, hire date, and so on. The system includes only employees hired or rehired in a given period.
SUA - Transact File MEX Page	GPMX_RC_SUA002	Create a flat file and a printed report for SUA with transactions of each payee for a given period. This report includes payee transactions data for terminations, pay rate changes, rehires, absences, and disabilities that should be reported to SUA.
SUA - Affiliation File MEX Page	GPMX_RC_SUA001	Generate the SUA flat file and a printed report with employee affiliation data, for employees hired or rehired in a given period.
SUA - Loans File MEX Page	GPMX_RC_SUA001	Generate the SUA flat file and a printed report with employee INFONAVIT loans data.
SUA - Disabilities File MEX Page	GPMX_RC_SUA001	Generate the SUA flat file and a printed report with employee disabilities data.

ANN- Risk Factor Report MEX Page

Use the ANN- Risk Factor Report MEX page (GPMX_RC_ABSENCE) to lists all payees with work-related disabilities in a specified year.

Navigation:

Global Payroll & Absence Mgmt, and then **Social Security/Insurance**, and then **ANN- Risk Factor Report MEX**, and then **ANN- Risk Factor Report MEX**

The Risk Factor report lists all employees who had a disability from a work risk during the year. It takes the information that is entered in the Absence Event Input Detail page, within the Absence Event component. In particular, the Risk Factor report takes the following information: Illness Type, Illness Document Number, Permanent Illness Percentage, and Death Indicator. All other necessary information is retrieved from the Absence Event page.

The Risk Factor report creates an ASCII output file for the IMSS software, so that it can be loaded up as a batch file. The output file contains the following data (in this order):

- An automatically generated serial number.
- Company name.
- Company address.
- Period (year).
- Establishment ID.
- Social security number.

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- Employee name.
- Illness, whether it's a relapse or reappraisal.
- Illness begin date.
- Risk type.
- Subsidized days.
- Percentage of permanent illness (only for work accidents and work illnesses).
- Death indicator (in case of death, a "D" will display.)
- Illness end date.

Viewing Delivered Social Security Elements

Delivered Social Security Deductions

This table lists the delivered social security deductions for Mexico:

Deductions	Description
EYM CF PAT	Illness & Mat Fixed Quota Employer
EYM E3S EMP	Illness & Mat Excess 3SMG Employee
EYM E3S PAT	Illness & Mat Excess 3SMG Employer
EYM PD EMP	Illness & Mat Cash Benefits Employee
EYM PD PAT	Illness & Mat Cash Benefits Employer
EYM PE EMP	Illness & Mat Benefits in Kind Employee
EYM PE PAT	Illness & Mat Benefits in Kind Employer
RT PATRON	Work Risk
IYV EMP	Disability and Life Employee
IYV PAT	Disability and Life Employer
GYPS PAT	Child Care & Social Pre Employer
CYV PAT	Unemployment & Old Age Employer
CYV EMP	Unemployment & Old Age Employee
CUOTA IMSS E	IMSS Quotas Paid by Employee
CUOTA IMSS P	IMSS Quotas Paid by Employer
CUO IMSS CYV	IMSS Quot Unemploy & Old Age
CUO IMSS EYM	IMSS Quot Illn & Mat Dis & Life
SAR	Retirement (SAR)
INFONAVIT	INFONAVIT
GN AR EMP INFO ADL	Array used to read Additional Information MEX
GN VR EMPL PENSION	Variable to store Employee pension

Delivered Social Security Process Lists

This table lists the delivered social security process lists for Mexico:

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Process List	Description
CALC SDI VARIAB	Variable SDI Process

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

Related Topics

- PeopleSoft Global Payroll: Understanding How to View Delivered Elements

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Managing Taxation

Understanding Tax Processing

This topic discusses about taxes, tax methods and tax processing in Mexico.

Taxes in Mexico

Employers are legally required to maintain and report a variety of tax data about their employees. Global Payroll for Mexico delivers much of the set up information needed to calculate taxes in the system.

Tax Methods

With Global Payroll for Mexico, you can define the method for calculating employees' taxes on the General Parameters page.

The tax methods are:

- For regular earnings where ISR Art. 113 is applicable, the following tax methods are available:
  - Annual projection method.
  - Semimonthly projected ISR.
  - Without adjustment.
  - Adjustment during the month.
  - Adjustment at the end of the month.
- Article 112 LISR (Severance pay method).
- Article 142 RISR (Vacation Premium, Profit Sharing, and Christmas Bonus method).
- Article 148 RISR (Multiple months payment method).

This topic discusses each tax method.

Annual Projection Method

This method projects the taxable base of the pay period as well as projecting the annual taxable base that will accrue for the employee in the annual form. This projection is calculated using annual tables. Once the annual tax is determined, a factor is calculated that divides the taxable base of the pay period by the annual projected taxable base. To determine the tax for the pay period, the projected annual tax is multiplied by the factor and this is equal to the period tax.

Semimonthly Projected ISR

For employees who are on a semimonthly projected ISR payroll, the system projects their salaries for the next period, taking into account that the projection will be made in every pay period and subtracting the tax retained in the previous periods.

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The semimonthly projected tax method applies to all types of employees (hourly and salaried) with a semimonthly pay frequency.

Without Adjustment

Depending on the pay frequency, the system will divide the taxable base by the number of worked days and the result will be multiplied by the Day Factor (defined on the General Parameters page). The result will be the monthly taxable base. Then, the system will calculate the taxes to this monthly taxable base. Immediately after calculating the taxes (Articles 113, 114, and 115), the system divides the resulting tax amounts by the Day Factor and multiply the result by the number of worked days. This result gives us the proportional taxes that correspond to the pay period taxable base.

See General Parameters Page.

Adjustment During the Month

This method works the same way as the Without Adjustment method, but takes into consideration all the accumulated taxable earnings for the month. For example, if your company is running a weekly payroll, and you are currently running payroll for the third week of the month, the system will consider the taxable earnings from the two previously paid periods of the month as well as the current pay period. The same consideration is applied to worked days.

Adjustment at the End of the Month

This method is the same as the Without Adjustment method for all pay periods that are not the final one in a single month. This method is also similar to the Adjustment During the Month method for the pay period that is the final one in a single month.

Article 112 LISR (Severance Pay Method)

The system calculates the tax of one month salary for the employee using the method from Article 113. Once calculated, this tax will be divided by the monthly salary in order to determine a Tax Factor. Then, the severance pay taxable base will be multiplied by this factor in order to determine the Article 112 LISR tax amount.

Article 142 RISR (Vacation Premium, Profit Sharing, and Christmas Bonus Method)

The Article 142 RISR method is calculated in this way:

1. The taxable base is divided by 365 and multiplied by 30.4 in order to determine a monthly taxable base.
2. The result of this calculation is added to the regular taxable base of the pay period (the one used for the Article 113 tax method). Then, the system calculates the tax to this new taxable base based on the Article 113 method.
3. The tax for one month salary for the employee is calculated using the Article 113 method.
4. The difference between the tax from Step 2 and Step 3 is calculated.
5. The result from Step 4 is divided by the result from Step 1. This results in the Tax Factor.
6. The taxable base for Article 142 RISR is multiplied by the Tax Factor calculated in Step 5 in order to determine the tax.

Article 148 RISR (Multiple Months Payment Method)

The Article 148 RISR method is calculated in this way:

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1. The taxable base is divided by the number of days that corresponds to the earnings. For example, a quarterly bonus payment is divided by the number of calendar days in the quarter. The result is multiplied by 30.4 in order to determine a monthly taxable base.
2. The result from Step 1 is added to the regular taxable base of the pay period (the one used for the Article 113 tax method). Then the system calculates the tax to this new taxable base based on the Article 113 method.
3. The tax for one monthly salary for the employee is calculated using the Article 113 method.
4. The difference between the tax in Step 2 and Step 3 is calculated.
5. The result from Step 4 is divided by the result from Step 1. This results in the Tax Factor.
6. The taxable base for Article 148 RISR is multiplied by the Tax Factor calculated in Step 5 in order to determine the tax.

Federal Tax Processing

To process federal taxes:

1. Define general tax parameters on the General Parameters page.
2. Process tax contributions during regular payroll runs.
3. Run the Federal Taxes report at the end of the tax year.

Related Topics

- General Parameters Page
  Use the General Parameters page (GPMX_TAX_PARM) to define general parameters for federal taxes and IMSS quotas.
- Defining Federal Taxes
  Federal tax definition begins on the General Parameters page, where you define the tax method for adjusting federal taxes.
- Running Tax Reports

Annual Tax Adjustments Processing

During a calendar year, there may be times when too much or too little tax is paid because of varying incomes or other circumstances. The annual income tax adjustment process corrects this problem.

You can identify employees who don't qualify for an annual tax adjustment. This includes employees who have:

- Terminated and were rehired and the company decides not to adjust taxes.
- Notified you in writing that they plan to present their tax adjustment themselves (self-presentation).

  This could be based on several reasons. One reason is when an employee has earned more than the government-allowed income limit and must self-present their tax adjustment data.

To process tax annual adjustments:

1. Define annual adjustment parameters on the Annual Adjustments page.
2. Define an annual period and create the calendar for the pay groups that you will run on the Calendar Definition page in the core application.

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3. Enter tax data from Form 37 on the Define Prior Employer Data MEX page.

   Form 37 details tax data for employees you hire mid-year who worked for another company earlier in the same tax year. The system processes this information during the annual tax adjustment and that's why it's important to have this information entered prior to the annual adjustment process.

4. Identify payees who don't qualify for an annual tax adjustment on the Payees Without Adjustment page.

5. Run the Form 37 report for employees who are going to present their own annual adjustment tax data.

   You can also run this report at other times of the year. For example, you may also want to provide this information to terminating employees.

6. Run the Annual Adjustment Tax process (PL AJUSTE ANNUAL) at the end of the year.

7. Run the Annual Tax Adjustment Results process (GPMXAA02) through the Annual Adjustment report to view annual tax adjustment results.

8. (optional) Run the Subsidio Acreditable process (GPMXAA04) through the Annual Adjustment report to display tax subsidy data and have the details of how the system calculated the Subsidio Acreditable for those employees who had multiple employers during the year.

9. Run the Minimum Wage Salary Level process (GPMXAA01) through the Annual Adjustment report to create an addendum to the annual tax adjustment process.

Related Topics

- Defining Annual Tax Adjustments
  To define annual adjustments, use the Pay Groups MEX (GPMX_PARM_PYGRP) component.
- Running Tax Reports
- PeopleSoft Global Payroll: Understanding Calendars

State Tax Processing

In Mexico, only employers pay state taxes. Each state defines which earning and deduction types are part of its taxable income and the applicable rates.

To process state taxes:

1. Define which earnings and deductions are eligible for state taxes on the State Taxes Earn/Ded page.
2. View and verify state tax rates on the State Taxes Rates page.
3. (optional) Define state and local tax rates at the company level for Chihuahua and Ciudad Juarez on the State Rates by Company MEX page.

   > **Note**
   >
   > You have to define these taxes only if you have operations in these states or cities.

4. Get the state tax base by company; this is the sum of the tax base per employee working for such company during the payroll period.

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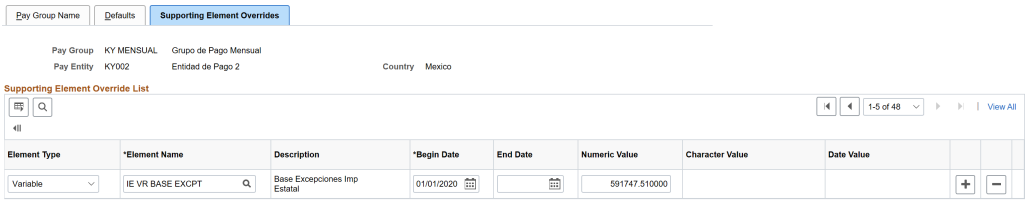
GP Mexico processes payroll by employee, therefore there's no way to get the State Tax base unless it is manually entered or calculated in a separate process after all payrolls are calculated. If your company goes with the second option then you'll need to recalculate the payroll in order to calculate State Taxes and store the information in the writable array IE WA REPORTE.

There are two options to get the Total Base State Tax:

a. Enter value for variable IE VR BASE EXCPT at Supporting Element Overrides by Pay Groups or any other level, the payroll will take this value as Total Base State Tax.

Supporting Element Overrides



b. Calculate all payrolls with employees in the given company and then run SQR process GPMXIE01 with the option Generate Positive Input checkbox turned on; the process will generate Positive input for employees in open payrolls working in the selected state and that belong to the company during the selected period.

> **Note**
>
> Step 4 is only applicable for Campeche, Hidalgo, Queretaro, Oaxaca and Durango states.

5. Process tax contributions during regular payroll runs.
6. Run the State Taxes by Location report every month after the last payroll process of that month.

> **Note**
>
> The State Taxes Earn/Ded page, the State Taxes Rates page, and the Spec. Taxes Rates page are described in other topics.

Related Topics

- Defining State Taxes
  To define earnings and deductions by state, use the Earn/Ded by State MEX (GPMX_STATE_TAXES) component. To define state and local taxes for a company, use the State Rates by Company MEX (GPMX_SP_ST_TAXES) component.
- Running Tax Reports

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Updating Annual Tax Adjustments

Pages Used to Update Annual Adjustments

Page Name	Definition Name	Usage
Define Prior Employer Data MEX Page	GPMX_OTH_ER_TBL	Enter all Form 37 information about a new employee hired in the middle of the year.
Specify No Year-End Adj MEX Page	GPMX_EE_NO_ADJ	Identify all payees who are not eligible for an annual tax adjustment.
Form 37 Additional Data MEX Page	GPMX_FORM37_ADD	Add information about share earnings and travel expenses for individual employees that will appear on Form 37.
Employees Without Subsidy MEX Page	GPMX_MAINT_SUB_EE	Enter the selection criteria that you want to generate a list of matching employees that have a non-subsidy period for the dates that you entered in the date fields.
Maintain Employee Subsidy MEX Page	GPMX_MAINT_SUB_EE	Enter the begin and end dates that indicate the non-subsidy periods for the employee.

Overview of Employee Subsidies

Employment subsidies are paid only once for multiple jobs. To indicate whether the employer will pay employment subsidies to employees in specific jobs, PeopleSoft has added new functionality to determine whether the payroll should calculate employment subsidies or not.

In addition, PeopleSoft has developed a set of rules to calculate employer subsidies. We have also added effective dating to existing elements to inactivate tax credits and new elements to corresponding sections. The limit for annual adjustment has been raised to 400,000 MXN. We also added new functionality to the General Parameters page for subsidy methods.

Users can now indicate by employee record if the subsidy should not be calculated because it's already being calculated somewhere else. The default, however, is to pay everyone the employment subsidy unless a manager or administrator has created a record on the Maintain Employee Subsidy MEX page for an employee. The page includes date parameters for when the employee may not receive a pay subsidy.

Define Prior Employer Data MEX Page

Use the Define Prior Employer Data MEX page (GPMX_OTH_ER_TBL) to enter all Form 37 information about a new employee hired in the middle of the year.

Navigation:

Global Payroll & Absence Mgmt, and then **Payee Data**, and then **Taxes**, and then **Define Prior Employer Data MEX**

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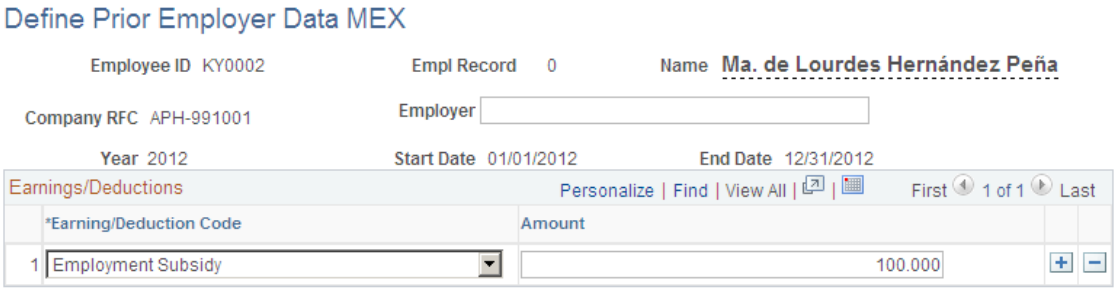
This example illustrates the fields and controls on the Define Prior Employer Data MEX page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Employer	Enter the name of the previous employer.
Earning/Deduction Code	Select the type of earning or deduction that appears on the Form 37.
Amount	Enter the amount of the specific earning or deduction.

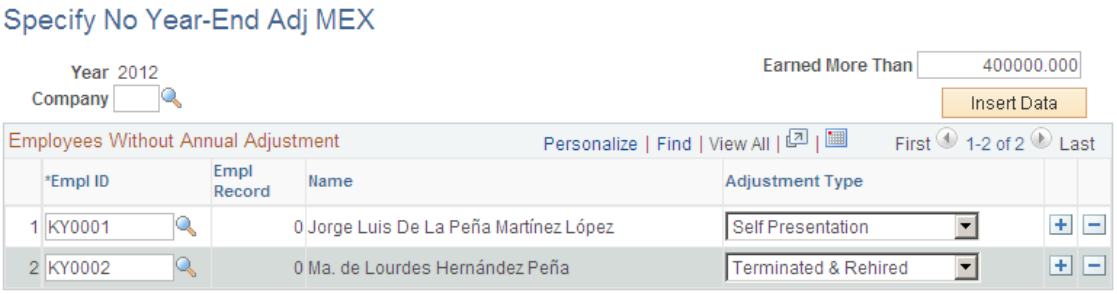
Specify No Year-End Adj MEX Page

Use the Specify No Year-End Adj MEX page (GPMX_EE_NO_ADJ) to identify all payees who are not eligible for an annual tax adjustment.

Navigation:

Global Payroll & Absence Mgmt, and then **Payee Data**, and then **Taxes**, and then **Specify No Year-End Adj MEX**

This example illustrates the fields and controls on the Specify No Year-End Adj MEX page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Insert Data	When you select **Insert Data,** the system will populate a list of employees who earned more than the government-allowed income limit that is indicated in the**Earned More Than** field.
Company	Select the company for which the payees work.
Earned More Than	Enter the government-allowed income limit.

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Field or Control	Description
EmplID	Select employees who will not be included in the annual tax adjustment process.
Adjustment Type	Define the adjustment type for the payee. Values are *Self Presentation* and *Terminated & Rehired.*

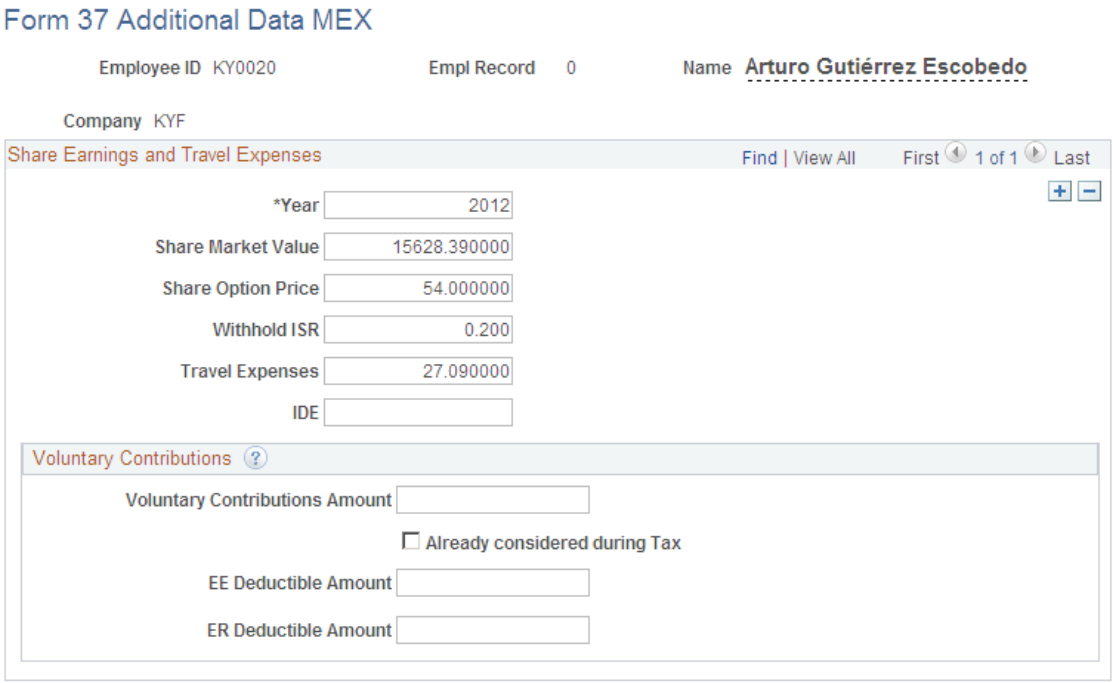
Form 37 Additional Data MEX Page

Use the Form 37 Additional Data MEX page (GPMX_FORM37_ADD) to add information about share earnings and travel expenses for individual employees that will appear on Form 37.

Navigation:

Global Payroll & Absence Mgmt, and then **Payee Data**, and then **Taxes**, and then **Form 37 Additional Data MEX**

This example illustrates the fields and controls on the Form 37 Additional Data MEX page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Employee ID, Name, Empl Rec Nbr, and**Company**	This information is display only. The system transfers this information from the previous page when you click **Add.**

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Share Earnings and Travel Expenses

Field or Control	Description
Year	Enter the year in which the employee incurred share earnings and travel expenses.
Share Market Value	Enter the market value of the shares that the employee owns.
Share Option Price	Enter the option price of the shares that the employee owns.
Retained ISR	Enter the tax rate that the state will retain when the options are exercised.
Travel Expenses	Enter the expenses the employee incurred when traveling.
IDE	Enter IDE information.

Voluntary Contributions

Field or Control	Description
Voluntary Contributions Amount	Enter the total voluntary contributions for the retirement of the payee
Already considered during Tax	Select to indicate that the employer already applied the voluntary contribution amount to the payee's tax calculation.
EE Deductible Amount (employee deductible amount)	Enter the payee's portion of the deductible amount of voluntary contributions.
ER Deductible Amount (employer deductible amount)	Enter the employer's portion of the deductible amount of voluntary contributions.

Employees Without Subsidy MEX Page

Use the Employees Without Subsidy MEX page (GPMX_MAINT_SUB_EE) to enter the selection criteria that you want to generate a list of matching employees that have a non-subsidy period for the dates that you entered in the date fields.

Navigation:

Global Payroll & Absence Mgmt, and then **Payee Data**, and then **Taxes**, and then **Employees Without Subsidy MEX**

This example illustrates the fields and controls on the Employees Without Subsidy MEX page. You can find definitions for the fields and controls later on this page.

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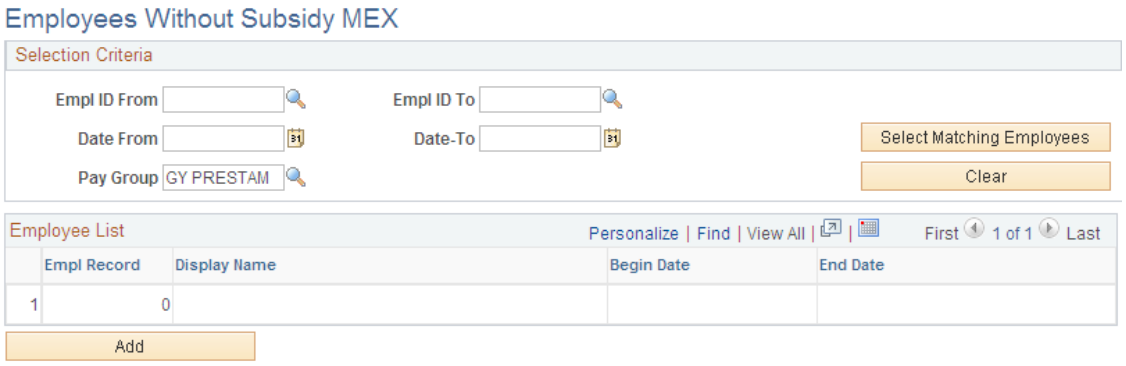

Selection Criteria

Field or Control	Description
EmplID From (employee ID from) and**EmplID To** (employee ID to)	You can use these fields together or separately to generate a list of employees that do not qualify for a subsidy. Click **Select Matching Employees.**
Date From and**Date To**	Enter the period in which you want to view employee that do not qualify for a subsidy. Click **Select Matching Employees.**
Pay Group	Select a pay group and then click **Select Matching Employees** to generate a list of employees that do not qualify for a subsidy.
Select Matching Employees	Click to generate a list of employees that match the selection criteria you entered.
Clear	Click to clear the fields in the **Selection Criteria** group box.

Employee List

This section displays the employees that match the selection criteria that you entered in the top portion of the page. They appear after you click **Select Matching Employees.** You can also add employees to the list by clicking the**Add** button. If you use this method, the Add Employee Subsidy Information page appears and you can use the**Employee ID** field to select employee that you want to add to the list.

Maintain Employee Subsidy MEX Page

Use the Maintain Employee Subsidy MEX page (GPMX_MAINT_SUB_EE) to enter the begin and end dates that indicate the non-subsidy periods for the employee.

Navigation:

Global Payroll & Absence Mgmt, and then **Payee Data**, and then **Taxes**, and then **Maintain Employee Subsidy MEX**

This example illustrates the fields and controls on the Maintain Employee Subsidy MEX page. You can find definitions for the fields and controls later on this page.

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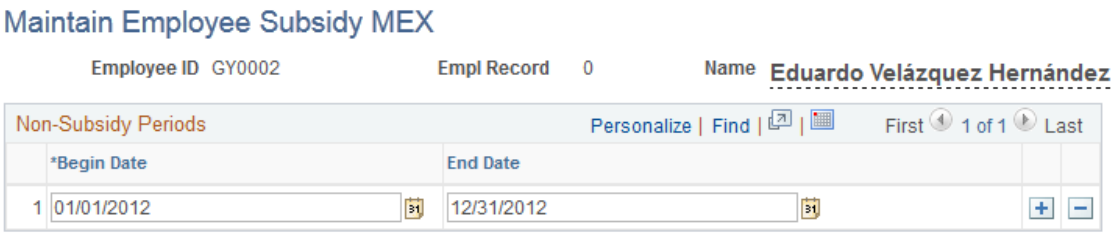

After you select the employee from the search page, the system displays the page shown above. You can also access this page by clicking the **Add** button from the Employees Without Subsidy MEX page.

Field or Control	Description
Begin Date and**End Date**	Enter the begin and end dates in which the employee does not qualify for a subsidy. Click **Save.** **Note:** You can add or delete periods by clicking the **Add a new row** or**Delete row** buttons.

Processing Inter-Company Transfers

Pages Used to Process Inter-Company Transfers

Page Name	Definition Name	Usage
Inter-company Payee Detail MEX Page	GPMX_INTERCOM_PYE	View employees with inter-company transfers data.
Inter-Company Transfer MEX Page	GPMX_RC_INTERCOM	Run the Inter-Company Transfer process to adjust accumulator balances for employees having transfer between internal companies.

Related Topics

- Setting Up Inter-Company Transfer Processing

Inter-company Payee Detail MEX Page

Use the Inter-Company Payee Detail MEX page (GPMX_INTERCOM_PYE) to view employees with inter-company transfers data.

Navigation:

Global Payroll & Absence Mgmt, and then **Payee Data**, and then **Taxes**, and then **Inter-company Payee Detail MEX**, and then **Inter-Company Payee Detail MEX**

The system loads data from HR into this table for employees with new job data rows where the specified action and reason code combination qualifies for processing of inter-company transfers. The system also updates the data on this page after a user runs the Inter-Company Transfer process by displaying the ID of the user who ran the process and a reason value.

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Payee Transfer Detail

The system displays details of the employee's job data record related to inter-company transfers. Details include the effective data of the job data record that qualified for internal transfer processing, the old company of the employee, the qualifying action reason for the inter-company transfer, the user ID of the person who made the change, and the reason. The system displays the user ID and reason values only after a user runs the Inter-Company Transfer process to indicate that the processing is complete.

Calendar Detail

The system displays the calendar group ID, pay group, and calendar of the payee. Use these values when running the Inter-Company Transfer process.

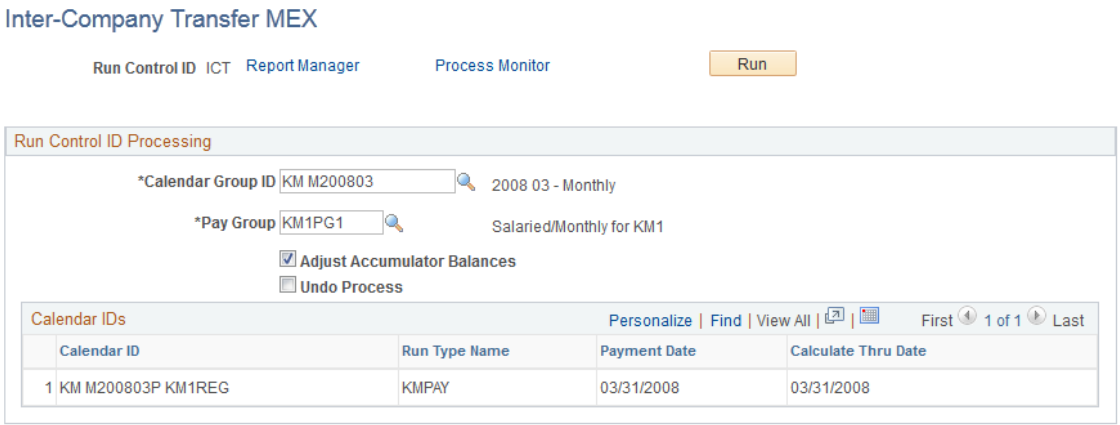
Inter-Company Transfer MEX Page

Use the Inter-Company Transfer MEX page (GPMX_RC_INTERCOM) to run the Inter-Company Transfer process to adjust accumulator balances for employees having transfer between internal companies.

Navigation:

Global Payroll & Absence Mgmt, and then **Taxes**, and then **Inter-Company Transfer MEX**, and then **Inter-Company Transfer MEX**

This example illustrates the fields and controls on the Inter-Company Transfer MEX page. You can find definitions for the fields and controls later on this page.



Run Control ID Processing

Field or Control	Description
Calendar Group ID	Select the calendar group for which you want to process data for employees with inter-company transfers.
Pay Group	Select the pay group for which you want to process data for employees with inter-company transfers.

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Field or Control	Description
Adjust Accumulator Balances	Select this check box to have the Inter-Company Transfer process adjust accumulator balances when processing employees with inter-company transfers. The process sets the accumulators values of the old company to zero and moves these accumulator values to the prior employer data record according to the values set on the Inter-Company Parameters MEX page.
Undo Process	Select this check box to have the Inter-Company Transfer process reverse the changes that it made to accumulator values for employees with inter-company transfers. The process readjusts the accumulators to their original value and removes the prior employer data from the Define Prior Employer Data MEX page.

Calendar IDs

The system displays the calendars and their associated run type, payment date, and calculate thru date.

Calculating the Subsidy Factor

Understanding the Subsidy Factor

Every year, companies in Mexico need to calculate their subsidy factor based on the earnings and deductions of a single year. This subsidy factor is used to determine the creditable and non-creditable portions of taxes that are going to be calculated during the federal tax calculation process.

Due to recent tax laws, all employees will have their subsidy calculated using the following formula:

Subsidy Proportion = Total taxable base / Total earnings in the last year.

Here is an example of the subsidy factor calculation, using an employee's data for the year 2001. The amounts shown are in Mexican pesos.

Earnings	Taxable Base	Non Taxable Base	Total Earnings
Salary	152,000.00		152,000.00
Vacation Premium	8720.00	1018.00	9738.00
Christmas Bonus	9700.00	2115.00	11,815.00
Overtime	21,510.00	3820.00	25,330.00
Other Earnings	8540.00	35,660.00	44,200.00
TOTAL	200,470.00	42,613.00	243,083.00

Subsidy Proportion = Total Taxable Base 2001 / Total Earnings in 2001

Subsidy Proportion = 200,470.00 / 243,083.00 = .82

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You will use this subsidy proportion to calculate the non-creditable subsidy and creditable subsidy for all employees in the company.

For example:

1 - .82 = .18 x 2 = .36

.36 = Non-creditable subsidy

The subsidy proportion (.82) is subtracted from 1 (which is 100 percent of the subsidy proportion) and then multiplied by 2 (formula provided by law) to find the non-creditable subsidy.

1 - .36 = .64

.64 = creditable subsidy

The non-creditable subsidy (.36) is subtracted from 1 (which is 100 percent of the subsidy proportion) to find the creditable subsidy (.64) that will be accredited to an employee's taxes.

Running Tax Reports

Pages Used to Run Tax Reports

Page Name	Definition Name	Usage
ANN - Tax Adj Report MEX Page	GPMX_RC_SUBSACRED	• Run the Minimum Wage Salary Level report (GPMXAA01), which displays a list of the minimum wage salary levels in your company to present to the government. • Run the Annual Tax Adjustment Results report (GPMXAA02), which displays the annual tax adjustment results. • Run the Creditable Subsidy report (GPMXAA04), which displays tax subsidy data.
Form 37 Report MEX ANN - Tax Adj Report MEX Page	GPMX_RC_FORMAT37	Form 37 has two purposes. It can provide information about employees who are going to present their own annual adjustment tax data or it can provide tax information to employees who are terminated. If you want to run a report on employees who want to present their own annual adjustment tax data, select the Only Payees without Adjustment field.
Multiple Information MEX ANN - Tax Adj Report MEX Page	GPMX_RC_ANNL	Generate a flat file as required by the government.

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Page Name	Definition Name	Usage
Federal Taxes Report MEX ANN - Tax Adj Report MEX Page	GPMX_RC_FEDTAX	Details the federal taxes paid by a company and its employees.
State Taxes by Loc Report MEX ANN - Tax Adj Report MEX Page	GPMX_RC_ST_TAXES	Provides a monthly report on state taxes paid by your company. Specify state information in the State To and State From fields when you only want information about specific states. If you want to provide the state tax base by company and state (Campeche or Hidalgo), select the option Generate Positive Input.

Viewing Delivered Tax Elements

Delivered Federal Tax Earnings

This table lists the delivered federal tax earnings element:

Earning	Description
CRE SAL EFEC	Salary Credit Paid in Excess Cash

Delivered Federal Tax Deductions

This table lists delivered federal tax deductions:

Deduction	Description
CRED ART 115	Salary Credit Art 115
EXCE CRE SAL	Salary Credit Paid in Excess Cash
ISR ART 113	ISR Art 113
ISR NETO 112	Net ISR Art 112
ISR NETO 113	Net ISR Art 113
RISR NETO 142	Net RISR Art 142
RISR NETO 148	Net RISR Art 148
SUB ACRED	Creditable Subsidy Art 114
SUB NO ACRED	Non Creditable Subsidy 114

Delivered Annual Adjustments Deductions

This table lists delivered annual adjustments deductions:

Deduction	Description
CRED ART 116	Annual Salary Credit Art. 116

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Deduction	Description
CRED SAL 1991	Credit Salary 1991
ISR A CARGO	Annual Tax Debit
ISR A FAVOR	Annual Tax Credit
ISR ANUAL	ISR Annual
ISR ART 177	ISR Art 177
ISR MET 1991	ISR Method 1991
SUB ART 178	ISR Subsidy Art. 178
SUB ISR 1991	ISR Subsidy Method 1991

Delivered Annual Adjustment Process List

This table lists the delivered annual adjustment process list element:

Process List	Description
PL AJUSTE ANUAL	Annual Adjustment

Delivered State Tax Deductions

This table lists delivered state tax deductions:

Deduction	Description
AYU DEFUNC	Death Allowance
AYU EMPR CHI	Managerial Aid (CHI)
AYU INF CDJU	Infrastructure Aid (CDJU)
AYU UNIV CHI	University Aid (CHI)
CONS CAR HGO	Highways Construction (HGO)
FOM ECOL GRO	Ecology Promotion (GRO)
FOM EDUC BCN	Education Promotion (BCN)
FOM EDUC GRO	Education Promotion (GRO)
FOM TURI GRO	Tourism Promotion (GRO)
IMPUESTO EST	Payroll State Taxes
OBRA PUB SON	Public Works Agreement (SON)
SOST UNI SON	Unison Fund (SON)

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

Related Topics

- PeopleSoft Global Payroll: Understanding How to View Delivered Elements

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16

Updating Absences

Understanding Absences in Mexico

Prerequisites

This topic supplements the absence documentation provided in the core Global Payroll documentation. Before you begin reading about Mexican absence functionality, PeopleSoft HCM recommends that you read the absence topics of the *PeopleSoft Global Payroll* documentation to develop a basic understanding of the concepts behind absence processing in Global Payroll.

> **Note**
>
> In Global Payroll for Mexico, before you can update absences, you must define absence parameters on the Absences page. The Absences page is discussed in another topic. See Absences Page.

Absences

An absence is any event for which an employee fails to comply with scheduled work time. Absences must be recorded in the system so that appropriate discounts are deducted from an employee's salary. Absences are also recorded to keep track of an employee's absence history. In Mexico, absences are also tracked for specific calculations such as profit sharing and social security contributions.

In Global Payroll, there are two types of absence elements:

- Absence entitlements.
- Absence takes.

An absence entitlement is the amount of paid time off that a payee is entitled to take for each category of absence. For example, payees may be entitled to receive 20 vacation days per year.

An absence take is the amount of time off that a payee takes.

Global Payroll for Mexico delivers predefined rules for processing absences due to vacation, illness, maternity, work accidents, and other reasons. PeopleSoft designed these rules in accordance with Mexican statutory requirements. You can modify many of these rules to reflect absence policies that are specific to your organization.

Absence Takes

In Global Payroll for Mexico, there are three categories for absence takes:

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- Disabilities
- Vacations
- Other

Disabilities

Disabilities are treated differently from other absences because IMSS pays and administers them. Disabilities include:

- Maternity leave.
- General illness.
- Work related illness leave.
- Work risk leave.
- In transit work risk leave.

Vacations

Vacations include vacation takes.

Other

Other absences include:

- General absences
- Tardiness - hours
- Paid permitted absences
- Unpaid permitted absences
- Missing employee leave
- Care leave for child with Cancer
- Paternity leave

Absence Types

Global Payroll for Mexico delivers these absence types, each having their own absence reasons:

Absence Type	Description	Absence Take Associated
ABS	Unpaid Absence	General absence
ENF	Sickness	General sickness
MAT	Maternity	Maternity leave
OPA	Other paid absences	Paid permitted absence
RET	Tardiness	Tardiness - hours
RSG	Work accident	Work risk leave
ENT	Work related illness	Work related illness leave
RST	Accident on the way to work	In transit work risk leave
VAC	Vacations	Vacation takes
APD	Missing employee leave	Missing employee leave

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Absence Type	Description	Absence Take Associated
LEN	Care leave for child with Cancer	Care leave for child with Cancer
PAT	Paternity leave	Paternity leave

These sections describe each delivered absence take in detail.

Maternity Leave

This absence take generates a deduction called INCAP MATERN. This element contains the number of days in the Unit component. All the absence take days are considered units of the deduction. The Day Formula adds only 1 to the deduction units for each day of this disability.

This absence take also generates an earning called SUB MATERN. It is generated in the same way that the deduction is generated in terms of the units. The only condition here is that this element is generated when the daily rate of the employee is greater than the SDI (capped up to 25 times minimum wages) and the rate will be only the difference between these two rates. If your company has an agreement with the social security agency (defined on the General Parameters page), this earning is paid with the daily rate.

If the employee's absence is for eight days or more, the employer is exempt from paying quotas for that pay period frequency (monthly, semimonthly, and so on.)

General Illness

This absence take generates a deduction called INCAP ENFERM. This element contains the number of days in the Unit component. All the absence take days are considered units of the deduction. The Day Formula adds only 1 to the deduction units for each day of this disability.

This absence take can generate three earnings: SUB ENF 100%, SUB ENF 40%, and SUB ENF CONV. Select only one earning when defining General Illness.

The system generates SUB ENF 100% for the first absence event but only for the first three days. If there's another absence event in the following seven days after the end date of the original take, then the system considers this absence take as linked and won't pay the first three days again with the earning SUB ENF 100%.

The system generates SUB ENF 40% beginning on the fourth day until the end of the absence take. Once again, if the system links two absence events and has already paid the first three days at 100 percent, then it will pay all the days at 40 percent.

The system generates SUB ENF CONV if the **IMSS Agreement** parameter is selected on the Absences page. Selecting this parameter ensures that the other two earnings (SUB ENF 40% and SUB ENF 100%) won't appear in the pay process. In other words, the SUB ENF CONV earning substitutes for the other two.

Work Related Disabilities

There are three types of work related leaves:

- Work related illness leave.
- Work risk leave.
- In transit work risk leave.

Work related illness can occur if an employee becomes ill as a result of work conditions, such as inhaling toxins in the workplace. Work risk can occur if an employee works in a risky work environment, for example, if he cuts a finger on a machine. In transit work risk can occur if an

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employee gets hurt on the way to and from work, for example, if he gets in an automobile accident on the way to work.

> **Note**
>
> For all work related disability types, you can create a report that lists all the workers who were on disability due to work related illnesses or accidents during the year that considers only these three absence takes. The Risk Factor report contains information such as disability type (accident or illness), disability begin and end dates, percentage of permanent illness, and subsidized days for each employee who is on disability due to work related accidents or illnesses.

Work Related Illness Leave

The work related illness leave is very similar to the General Illness absence type, except that it generates a different deduction. The deduction for the work related illness leave is INCAP ENF TR.

Global Payroll for Mexico delivers an earning for Work Illness Leave called INCAP_ENF_TR and an absence take called INC_ENF_TR.

Work Risk Leave

This absence take generates a deduction called INCAP RIESGO. This element contains the number of days in the Unit component. All the absence take days are considered to be units of the deduction. The Day Formula adds only 1 to the deduction units for each day of this disability.

This absence take also generates an earning called SUB RIESGO. It is generated in the same way that the deduction is generated, in terms of the generated units. The only condition here is that this element is generated when the daily rate of the employee is greater than the SDI (capped up to 25 times minimum wages) and the rate will be only the difference between these two rates. If your company has an agreement with the social security agency (defined on the General Parameters page), this earning is paid with the daily rate.

In Transit Work Risk Leave

This absence take is almost the same as the absence take in Work Risk Leave. The only difference is that this disability is caused by an accident or event on the way to work. It generates a deduction called INCAP TRAYEC. This element contains the number of days in the Unit component. All the days of the absence take are considered to be units of the deduction. In other words, the Day Formula adds only 1 to the deduction units for each day of this disability.

This absence take also generates an earning called SUB RIESGO. It is generated in the same way that the deduction is generated, in terms of the generated units. The only condition here is that this element will be generated when the daily rate of the employee is greater than the SDI (capped up to 25 times minimum wages) and the rate will be only the difference between these two rates. If your company has an agreement with the social security agency (defined on the General Parameters page), this earnings is paid with the daily rate.

Vacation Takes

This absence take generates an earning called VAC DISFRUT. This element contains the number of days in the Unit component. The system won't consider the Day Off and Holidays as

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Vacation Days. This means that if the Absence Take duration contains Non Worked or Holidays, the system will reduce them from the duration of the take.

It also generates an earning called PMA VAC PROP when the **Proportional** parameter is selected on the Absences page. This parameter means that for each day of vacation take, the employee will receive a day of vacation premium.

This absence take also generates an absence entitlement. This is only generated on the employee's anniversary with the company. This entitlement serves as the limit to accept or not accept a vacation take. For example, if you have a new hire who requests a vacation in the month following his hire, it will be rejected because he does not have any vacation entitlements accrued. On the other hand, if you have an employee with two years of seniority, his request will be accepted because he already has two entitlement occurrences of vacation: one for the first year and the other for the second year. The vacation entitlement is called VAC ANIV. The negative balance for this absence take could be accepted if the **Negative Balance Option** parameter is selected on the Absences page.

General Absences

This absence take generates a deduction called FALTAS. This element contains the number of days in the Unit component. All the absence take days are considered to be units of the deduction. The Day Formula adds only 1 to the deduction units for each day of this leave.

The generated deduction is calculated using the percentage from the **Factor** parameter (defined on the Absences page). This means that the units will be multiplied by this factor.

Tardiness − Hours

This absence take generates a deduction called RETARDO. This element contains the number of hours in the Unit component. All the absence take hours are considered to be units of the deduction. The Day Formula adds only 1 to the deduction units for each hour of this disability.

Paid Permitted Absence

This absence take generates a deduction called PERMI C/GOCE. This element contains the number of days in the Unit component. All the absence take days are considered to be units of the deduction. The Day Formula adds only 1 to the deduction units for each day of this leave. This deduction is informational only, because this is a paid permission so, it won't deduct from the net pay.

Unpaid Permitted Absence

This absence take generates a deduction called PERMI S/GOCE. This element contains the number of days in the Unit component. All the absence take days are considered to be units of the deduction. The Day Formula adds only 1 to the deduction units for each day of this leave. The only difference between this deduction and the PERMI C/GOCE deduction is that this one is reduced from the net pay of the employee.

> **Note**
>
> The General Parameters page and the Absences page are documented in other topics. See Setting Up Country Data and Setting Up Absences.

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Care Leave for Child with Cancer Absence

This absence take generates a deduction called LIC ENF CANC. This element contains the number of days in the Unit component. All the absence take days are considered to be units of the deduction. The Day Formula adds only 1 to the deduction units for each hour of this disability. This absence validate that the employee has a dependent under 16 years old, this information is taken from the Dependents page. The relationship valid of the beneficiary are: Child, Foster Child, Other Child, Recognized Child or Stepchild.

Missing Employee Leave Absence

This absence take generates a deduction called PER PERS DES. This element contains the number of days in the Unit component. All the absence take days are considered to be units of the deduction. The Day Formula adds only 1 to the deduction units for each hour of this disability.

Paternity Leave Absence

This absence take generates a deduction called PERMI PATERN. This element contains the number of days in the Unit component. All the absence take days are considered to be units of the deduction. The Day Formula adds only 1 to the deduction units for each hour of this disability. The system generates the deduction PERMI S/GOCE. It is generated in the same way that the deduction is generated in terms of the units. Here, the only condition is that this element is generated when the days taken by the employee is greater than 5 days (the maximum days defined by the Law) and the units will be only the difference between these two units.

Absence Processing

To prepare Global Payroll for Mexico for absence processing:

1. Define absence parameters for a pay group on the Absences page.
2. Define absence details for an employee in the Absence Entry component.

   This includes entering the absence event and running the forecast process for an absence. Additionally, you can view the Absence Forecast results and Accumulator results.
3. Define mass absence event entries, such as holidays, on the Mass Absence Event Entry page.
4. Modify the delivered absence take and absence entitlement elements, and create new absence elements.

   A list of the absence take and absence entitlement elements delivered with Global Payroll for Mexico appears in another topic. PeopleSoft delivers sample values for many of these elements. You might want to replace some of the values with data that is specific to your company.
5. Assign absence elements to payees and process lists.

   As with all primary elements, you must assign absence entitlement and absence take elements to payees and include the elements in the process lists that you use when you run the absence process. PeopleSoft delivers predefined sections and process lists for absence processing. You can use these, modify them, or create your own.
6. Generate an absence report for selected employees.
7. At the end of the year, generate the Risk Factor report.

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> **Note**
>
> The Absences page is documented in another topic. See Absences Page

Vacation Processing

While it's ideal that employees record their vacation takes before taking their vacations, this is not often the case. Usually, vacation takes are recorded after the events occur or after payroll has been processed or finalized.

If an employee records a vacation take after the payroll for that pay period has been finalized, there must be a retroactive (retro) calculation for that employee to reflect those days of vacation on the payslip. In this case, a retro trigger should be recorded.

If a vacation take occurs partially in a processed payroll period and partially in the future, the part of it that belongs to the processed period should be calculated with a retro event. The part of the vacation take that occurs in a current open or future payroll period is handled as follows:

For each pay period, the system will apply the number of days of that vacation take that belongs to the pay period begin and end date.

Processing Vacation Premiums Using the Annual Method

If you select the Annual method for calculating vacation premiums, the following processing rules apply:

The vacation premium will be paid when the vacation premium payment date is between the period begin date and the period end date.

When the processing year is the same as the service date and payment date, the vacation is calculated as follows:

- Worked Days = Duration between the service date and the vacation premium payment date.
- Vacation Premium Days = Worked days/365 * Vacation days.
- Vacation Premium = Vacation premium days * Vacation premium percentage.

Updating Absences for Employees

Pages Used to Update Absences

Page Name	Definition Name	Usage
Absence Entry Page	GPMX_ABSENCE_ENTRY	Define absence event details for an employee and run the Absence Forecast process. Use the forecast process to evaluate the impact of a vacations take event.

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Page Name	Definition Name	Usage
Absence Parameters MEX Page	GPMX_ABS_PARAM_SS	Define additional IMSS fields that should be displayed while requesting for an absence through the Absence Event MEX page.
Absence Forecast Results Page	GP_ABS_EVT_FCS_SEC	Review the results of the forecast process for a specific vacations take event and any take elements that are mapped to it.
Forecast Messages Page	GP_ABS_FCST_MSG	Review the messages that are generated during the forecast process.
Create Mass Absence Rqst MEX Page	GPMX_RC_MASSABS	Define the details for a mass absence event entry.

Absence Entry Page

Use the Absence Entry page (GPMX_ABSENCE_ENTRY) to define absence event details for an employee and run the Absence Forecast process.

Use the forecast process to evaluate the impact of a vacations take event.

Navigation:

Global Payroll & Absence Mgmt, and then **Payee Data**, and then **Maintain Absences**, and then **Absence Event MEX**, and then **Absence Entry**

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

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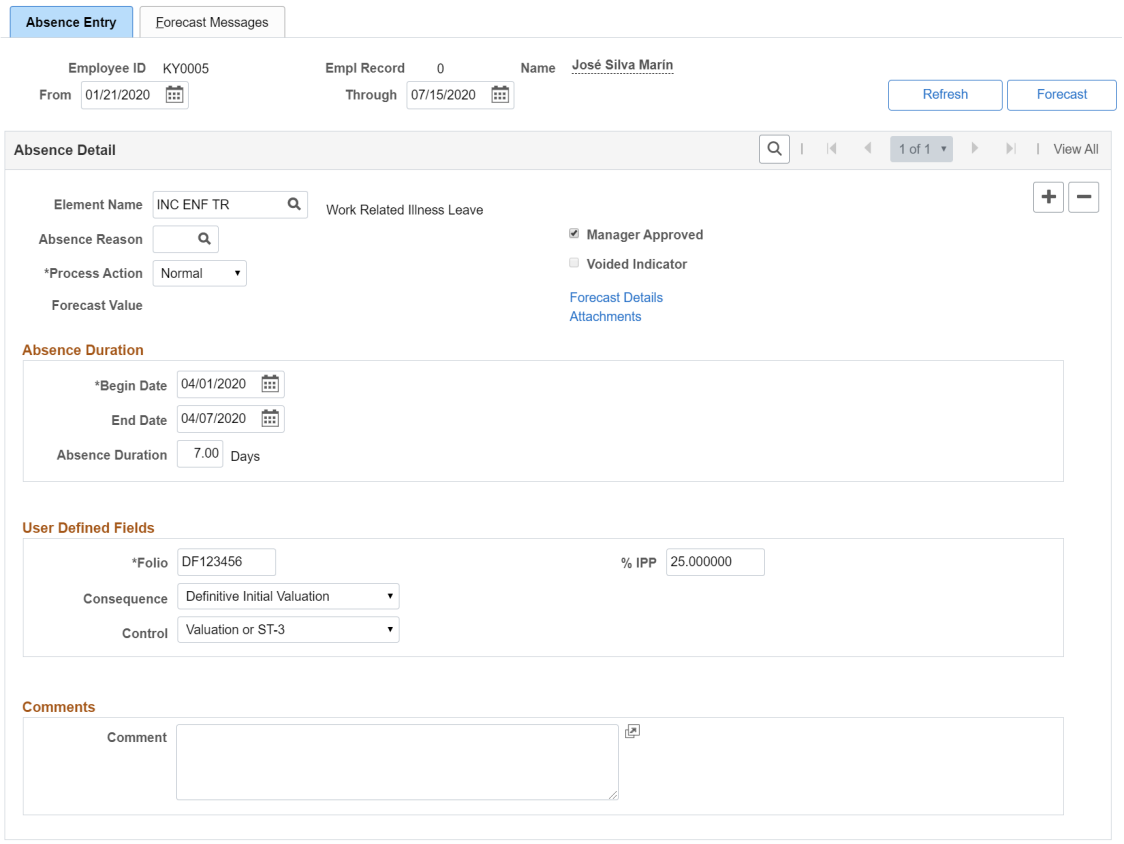

Field or Control	Description
From and **Through**	Specify the date range for which you want to retrieve and display absence event data on the page.
Refresh	Click this button to refresh the page with data based on the **From** and**Through** dates that you specify.
Forecast	Click this button to run the Forecast process when entering vacation takes. You'll get a message indicating the results of the Forecast process. If necessary, correct the errors and rerun the process.

Absence Detail

Field or Control	Description
Element Name	Select the absence take element that corresponds to the employee's absence type.
Type	Displays the absence type that corresponds to the absence take element. When you define an absence take element, you assign an absence type that describes the category of the absence.
Absence Reason	Select the code that corresponds to the absence reason. The **Absence Reason** field is optional and further describes the absence take.

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Field or Control	Description
Manager Approved	Select to have the absence processed when you run the absence take process. This check box is automatically selected if you defined the absence take element as not requiring manager approval on the Absence Take - Calculation page in the core application.
Voided Indicator	This check box is automatically selected if you voided the event and ran the Take process. This check box can also be selected if you use the automatic priority processing feature and have assigned a priority number to your absence take elements. If you save absence entries with overlapping dates, the system voids the event with the lower priority and creates a new event for the days that do not overlap.
Process Action	Select the process action. For a new absence event, the default is *Normal.* Select *Void* to void an absence that has already gone through the absence take process. The event is not processed in subsequent runs. Instead, the Process Action is reset to *Normal* and the Voided Indicator check box is automatically selected during the absence take process. During retroactive processing, the system calculates a new version of the results without the voided event. Positive input is not generated from the voided event, and the results for earnings or deductions have deltas.
Forecast Value	Appears after running the Forecast process. **Forecast Value** is the alphanumeric value resolved by the forecasting element. You associate a forecasting formula with a take element on the Take - Forecasting page in the core application. For example, your forecast element might return a value of *Eligible* or *Not Eligible.*
Forecast Details	Click this link to access the Absence Forecast Results page.
Attachments	Click this link to add any attachments.

Absence Duration

Field or Control	Description
Begin Date and **End Date**	Enter the begin and end dates for the absence. Depending on the values entered for the **Begin Date** and**End Date,** the system will calculate different values. If you enter a**Begin Date,** the system automatically enters the same value for the**End Date**and a value of *1* for the**Absence Duration.** Then, if a value is entered for the **End Date,** the system will calculate the**Absence Duration**value. If a value is entered for the**Absence Duration,** then the system will calculate a value for the**End Date.**

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Field or Control	Description
Absence Duration	Enter the number of days for the absence.
Partial Hours	If a *FALTA* absence event is selected and the**Allow Partial Days** option is selected on the core Global Payroll Absences page, the**Partial Hours** field appears.
Begin Half Day and **End Half Day**	If you select the **Allow Partial Days** option on the Absences page in core Global Payroll, this field appears. Select a check box if the employee was absent exactly half a day. Select the top check box if the employee worked half a day on the first day or every day of an absence. Select the bottom check box if the employee worked half a day on the last day of the absence.

> **Note**
>
> The **Allow Partial Days** option can be found on the Absences page in the core Global Payroll core application. The navigation path to the Absences page is**Set Up HCM**, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Absence Self Service**, and then **Country Take.** This page is documented in the core Global Payroll documentation.

User Defined Fields

Enter data and comments on additional fields pertaining to your business processes.

> **Note**
>
> If you select a work-related disability absence type, the system displays one or more of the following fields as applicable: **Folio, % IPP, Consequence,** and**Control.** Enter additional information related to a work-related disability in these fields.

Field or Control	Description
Folio	This field applies only for disability absences and refers to the Certificate number. This is a required field for all the disabilities.
% IPP (Permanent Illness Percentage)	Enter the percentage of permanent illness for the employee. Values are 0–100 percent. This field is only available if you selected a work-related illness absence type.
Consequence	Select the consequence for the absence take for SUA reporting purposes. This field is applicable to the following work related disability elements: INC RIESGO TR, INC TRAYECTO, and INC ENF TR. Valid consequence values depend on the selected element for the absence take, and indicates the final result of the work related disability.

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Field or Control	Description
Control	Select the control value of the absence take for SUA reporting purposes. This field is applicable to the following disability elements: INC RIESGO TR, INC TRAYECTO, INC ENF TR, ENC ENF GENERA and INC MATERN. Valid Control values depend on the selected element for the absence take and the selected **Consequence** value when available. Indicates the kind of document issued by the IMSS for the disability entered.

If you select missing leave absence type, the system displays a Missing Leave field, wherein you can enter the date on which the employee is declared as Missing Leave.

If you select care leave absence type, the system displays a Permission Sick Cancer field, wherein you can enter the official date of registration of absence determined by the IMSS (Social Security).

> **Note**
>
> : You need to ensure the accuracy of data entered in these fields with the official documents. Global Payroll for Mexico will not validate these information.

To identify the employees under Missing Leave of Absence and Care Leave for Child with Cancer, you need to pre-configure the following:

- Absence Entitlements:
- Absence Take Types
- Absence Takes
- Country Take
- Deduction
- Sections
- Element Groups

The Absence Entry page in Global Payroll for Mexico is similar to the Absence Event Entry page in the core application. The main differences are that the Absence Entry page in Global Payroll for Mexico:

- Includes validations for Mexican absence rules.
- Uses an end date calculation based on the begin date plus the duration days, according to the absence take setup.

If you select an absence take of INC RIESGO TR and enter data on the User Fields page, you can generate a report listing the employees who had work risk related disabilities.

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> **Note**
>
> You can find the User Fields page through **Set Up HCM**, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Absence Self Service**, and then **Country Take.**

Related Topics

- PeopleSoft Global Payroll: Entering Maintaining and Approving Absence Events
- PeopleSoft Global Payroll: Understanding Absence Element Setup
- PeopleSoft Global Payroll: Understanding Absence Setup and Management Tasks

Absence Parameters MEX Page

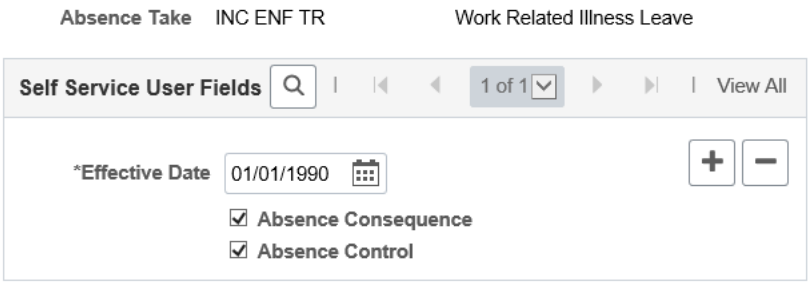
Use the Absence Parameters MEX page (GPMX_ABS_PARAM_SS) to define additional IMSS fields that should be displayed while requesting for an absence through the Absence Event MEX page.

Navigation:

Setup HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Elements**, and then **Absence Elements**, and then **Absence Parameters MEX**

This example illustrates the fields and controls on the Absence Parameters MEX page.

Absence Parameters MEX



Field or Control	Description
Absence Consequence	Select if Consequence field needs to be displayed in Absence Entry MEX page.
Absence Control	Select if Control field needs to be displayed in Absence Entry MEX page.

Absence Forecast Results Page

Use the Absence Forecast Results page (GP_ABS_EVT_FCS_SEC) to review the results of the forecast process for a specific vacations take event and any take elements that are mapped to it.

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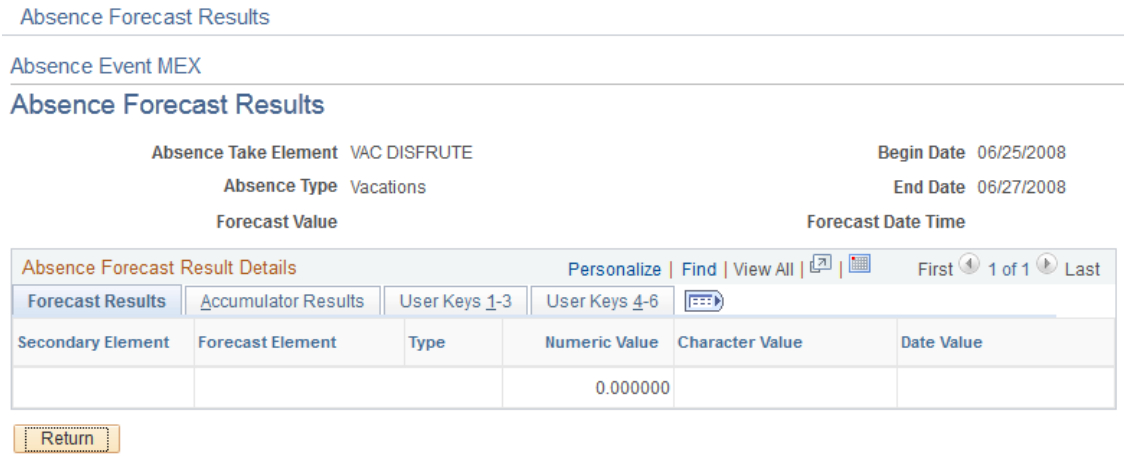
Navigation:

Click the Forecast Details link on the Absence Entry page.

This example illustrates the fields and controls on the Absence Forecast Results page: Forecast Results tab. You can find definitions for the fields and controls later on this page.

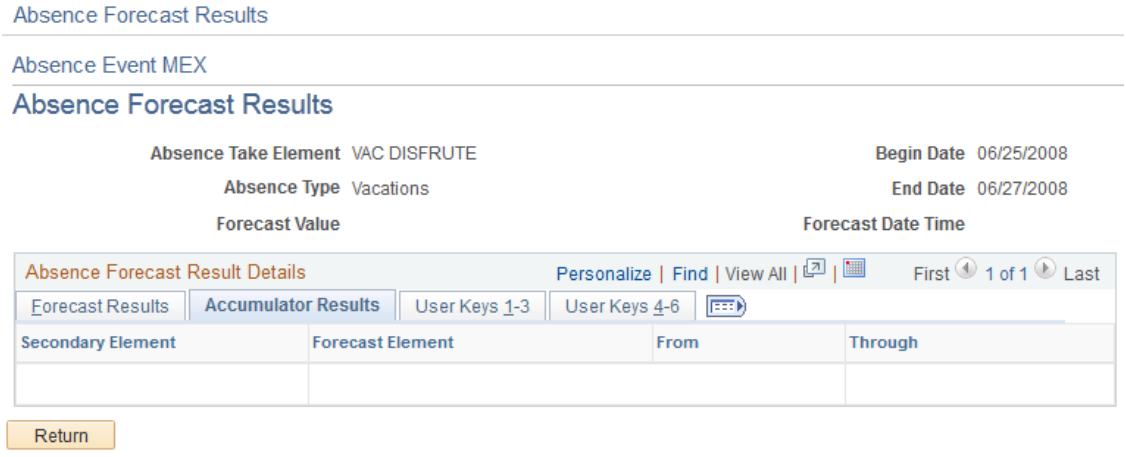


> **Note**
>
> The Absence Forecast Results page: Forecast Results tab in Global Payroll for Mexico is the same as the Absence Forecast Results page in the core application.

See PeopleSoft Global Payroll: Forecasting Absence Entitlement Balance During Absence Entry.

Accumulator Results Tab

This example illustrates the fields and controls on the Absence Forecast Results page: Accumulator Results tab. You can find definitions for the fields and controls later on this page.



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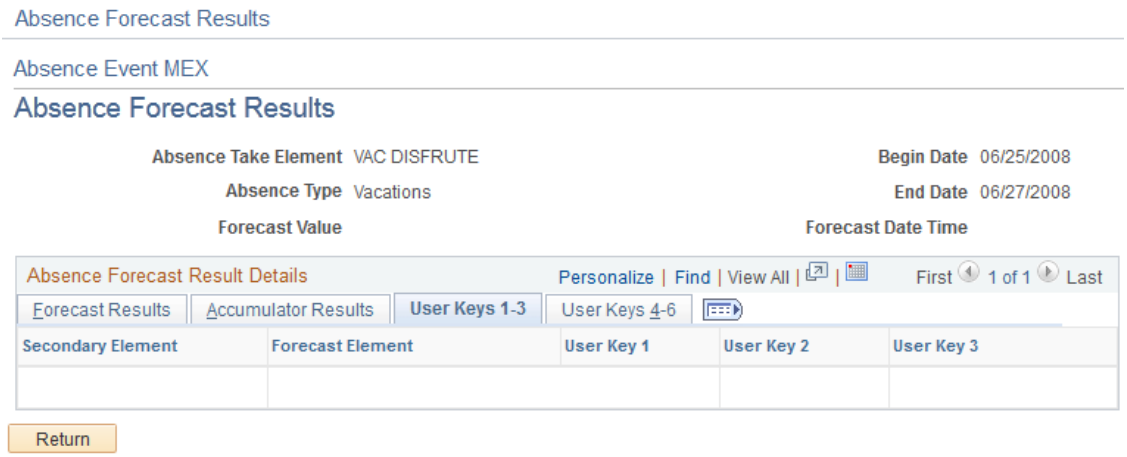
> **Note**
>
> The Absence Forecast Results page: Accumulator Results tab in Global Payroll for Mexico is the same as the Absence Forecast Results page in the core application.

Viewing User Keys 1-3 Tab

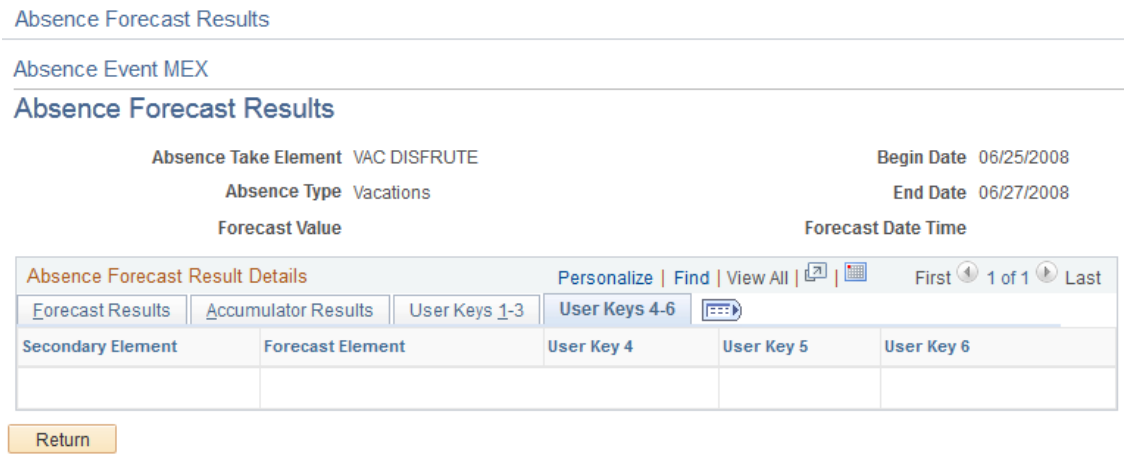
This example illustrates the fields and controls on the Absence Forecast Results page: User Keys 1 - 3 tab. You can find definitions for the fields and controls later on this page.



> **Note**
>
> The Absence Forecast Results page: User Keys 1-3 tab in Global Payroll for Mexico is the same as the Absence Forecast Results page in the core application.

Viewing User Keys 4-6 Tab

This example illustrates the fields and controls on the Absence Forecast Results page: User Keys 4 - 6 tab. You can find definitions for the fields and controls later on this page.



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> **Note**
>
> The Absence Forecast Results page: User Keys 4-6 tab in Global Payroll for Mexico is the same as the Absence Forecast Results page in the core application.

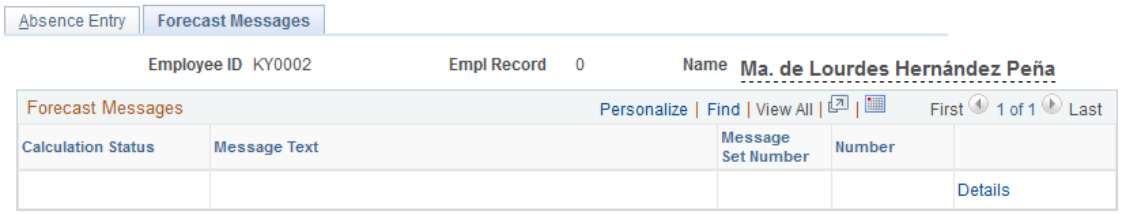
Forecast Messages Page

Use the Forecast Messages page (GP_ABS_FCST_MSG) to review the messages that are generated during the forecast process.

Navigation:

Global Payroll & Absence Mgmt, and then **Payee Data**, and then **Maintain Absences**, and then **Absence Event MEX**, and then **Forecast Messages**

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



> **Note**
>
> The Forecast Messages page in Global Payroll for Mexico is the same as the Forecast Messages page in the core application.

Create Mass Absence Rqst MEX Page

Use the Create Mass Absence Rqst MEX page (GPMX_RC_MASSABS) to define the details for a mass absence event entry.

Navigation:

Global Payroll & Absence Mgmt, and then **Absence and Payroll Processing**, and then **Prepare Payroll**, and then **Mass Absence Rqst MEX**

This example illustrates the fields and controls on the Create Mass Absence Rqst MEX page. You can find definitions for the fields and controls later on this page.

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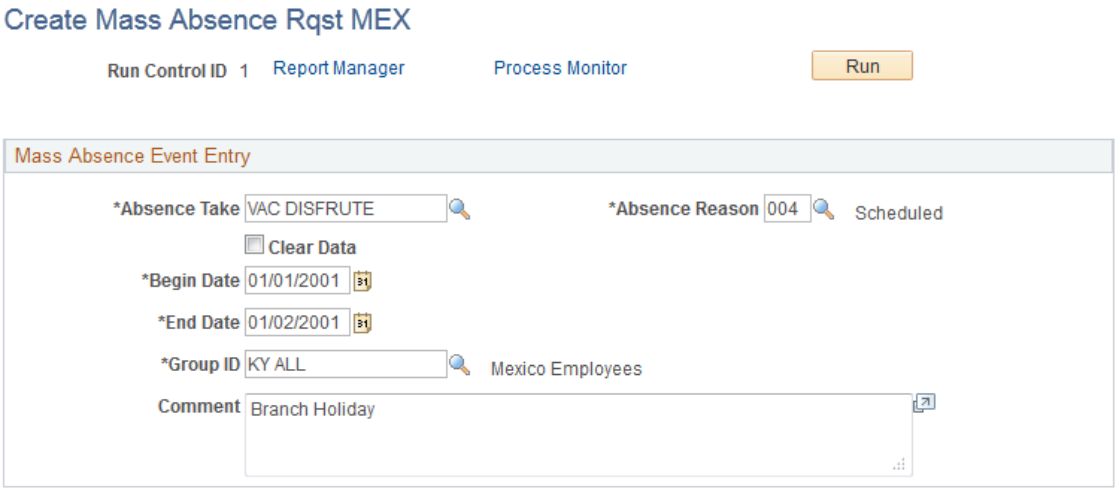

Field or Control	Description
Absence Take	Select the absence take element for the mass absence event.
Absence Reason	Select the absence reason for the mass absence event. Typical absence reasons include *Regular*, *Forced*, *Scheduled*, and *Other*.
Clear Data	Select to clear the data after you process a mass absence event entry.
Begin Date and **End Date**	Enter the begin date and end date for the mass absence event.
Group ID	Select the group ID to which the mass absence event applies.
Comment	Enter descriptive details of the mass absence event.

Viewing Vacation Summaries

Pages Used to View Vacation Summaries

Page Name	Definition Name	Usage
Vacations Summary Page	GPMX_VAC_AC	View a summary of vacation information for an employee. For each row of vacation data, the system displays applicable dates, entitlements, adjustments, absences taken, and balance.
Vacations Detail Page	GPMX_VAC_EVT	View details about vacations that an employee has already taken. For each vacation event, the system displays the begin date, end date, absence duration, and absence description.

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Page Name	Definition Name	Usage
Vacations Earnings Page	GPMX_VAC_ERN	View details about earnings that an employee has received for vacations already taken. For each vacation earning, the system displays the slice begin date, slice end date, unit delta, and amount earned.

Understanding Vacation Summary Inquiries

Use the Vacations Summary component to review vacation summaries for an employee. You can also view vacation summary information in report format by generating the Vacations Report (GPMXVA01). This report details vacation entitlements and balances for selected employees. A related report, the Absences Report (GPMXIM11), details absences for selected employees.

Related Topics

- Global Payroll for Mexico Reports: A to Z
  The table in this topic lists the PeopleSoft Global Payroll for Mexico reports, sorted by report ID.

Vacations Summary Page

Use the Vacations Summary page (GPMX_VAC_AC) to view a summary of vacation information for an employee.

For each row of vacation data, the system displays applicable dates, entitlements, adjustments, absences taken, and balance.

Navigation:

Global Payroll & Absence Mgmt, and then **Payee Data**, and then **Maintain Absences**, and then **Vacations Summary MEX**, and then **Vacations Summary**

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

Vacations Detail Page

Use the Vacations Detail page (GPMX_VAC_EVT) to view details about vacations that an employee has already taken.

For each vacation event, the system displays the begin date, end date, absence duration, and absence description.

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Navigation:

Global Payroll & Absence Mgmt, and then **Payee Data**, and then **Maintain Absences**, and then **Vacations Summary MEX**, and then **Vacations Description**

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

Vacations Earnings Page

Use the Vacations Earnings page (GPMX_VAC_ERN) to view details about earnings that an employee has received for vacations already taken.

For each vacation earning, the system displays the slice begin date, slice end date, unit delta, and amount earned.

Navigation:

Global Payroll & Absence Mgmt, and then **Payee Data**, and then **Maintain Absences**, and then **Vacations Summary MEX**, and then **Vacations Earnings**

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

Running Absence and Vacation Reports

Pages Used to Run Absence and Vacation Reports

Page Name	Definition Name	Usage
Absence History MEX Page	GPMX_RC_WRKRISK	Produces report that details absences for selected employees.

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Page Name	Definition Name	Usage
Vacations MEX Page	GPMX_RC_VACATN	Produces report that details vacation entitlements and balances for selected employees.

Viewing Delivered Absence Elements

Delivered Absence Earnings

This table lists delivered absence earnings for Mexico:

Earning	Description
SUB ANT 100P	General illness subsidy 100% from previous periods
SUB ANT 40P	General illness subsidy 40% from previous periods
SUB ENFER 40P	General illness subsidy 40%
SUB ENFER 100P	General illness subsidy 100%
SUB ENF CONV	General illness subsidy agreement
SUB MAT ANT	Maternity leave subsidy from previous periods
SUB MATERN	Maternity leave subsidy
SUB RIESGO	Work risk subsidy

Delivered Absence Deductions

This table lists the delivered absence deductions for Mexico:

Deduction	Description
AUS ANT RETR	Retro for previous unpaid absence not taken
FALTAS	Unpaid absence
FALTAS ANT	Previous unpaid absence not taken
FALTAS RETRO	Unpaid absences delta
INCAP ENF TR	Work related illness leave
INCAP ENFERM	General illness
INC MAT ANT	Maternity leave — previous
INCAP MATERN	Maternity leave
INC ENF ANT	General illness from previous periods
INCAP RETRO	Leaves delta
INC RSGO ANT	Work risk leave from previous periods
INCAP RIESGO	Work risk leave
INCAP TRAYEC	In transit work risk leave
RETARDO	Tardiness - hours

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Deduction	Description
RETARDO RTRO	Tardiness delta
PERMI C/GOCE	Paid time off
PERMI S/GOCE	Unpaid time off

Delivered Absence Takes

This table lists the delivered absence takes for Mexico:

Absence Take	Description
FALTA	General absences
INC ENF GENERA	General illness
INC ENF TR	Work related illness leave
INC MATERN	Maternity leave
INC RIESGO TR	Work risk leave
INC TRAYECTO	In transit work risk leave
PERM CON GOCE	Paid permitted absence
PERM SIN GOCE	Unpaid permitted absence
RETARDO EN HORAS	Tardiness - hours
VAC DISFRUTE	Vacations take

Delivered Absence Process Lists

This table lists the delivered absence process list element for Mexico:

Process List	Description
AUSENTISMOS	Absence process

Viewing Delivered Vacation Elements

Delivered Vacation Earnings

This table lists the delivered vacation earnings for Mexico:

Earning	Description
PMA VAC ANIV	Vacation premium in anniversary
PMA VAC ANU	Annual vacation premium
PMA VAC PROP	Vacation premium proportional
PMA VAC RTRO	Vacation premium retro
PRIMA VAC	Vacation premium
PRIMA VAC EX	Non-taxable vacation premium
PRIMA VAC GR	Taxable vacation premium

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Earning	Description
VAC DIS RETR	Vacations retro
VAC DISFRUT	Vacations
VAC PAG RTRO	Paid vacations retro
VAC PAGADAS	Paid vacations

Delivered Vacation Deductions

This table lists the delivered vacation deductions for Mexico:

Deduction	Description
PROV PMA VAC	Vacation premium provision
PROV VACAC	Vacation provision

Delivered Vacation Entitlements

This table lists the delivered vacation entitlements element for Mexico:

Vacation Entitlement	Description
VAC ANIV	Vacations anniversary

Delivered Vacations Take

This table lists the delivered vacation takes element for Mexico:

Vacations Take	Description
VAC DISFRUTE	Vacations take

Delivered Vacation Process Lists

This table lists the delivered vacation process lists element for Mexico:

Process List	Description
AUSENTISMOS	Absence process

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

Related Topics

- PeopleSoft Global Payroll: Understanding How to View Delivered Elements

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17

Tracking Overtime

Understanding Overtime

In Mexico, employees are paid overtime for:

- Regular overtime
- Holidays worked
- Days off worked

To define overtime:

1. Define the overtime calendar for your pay group on the Pay Group OVT Calendars MEX page.
2. Define the overtime parameters for your pay group on the Pay Group OVT Parameters MEX page.

   This includes information such as the maximum overtime that is going to be paid double. For example, let's say that the maximum number of double hours of overtime per week is 9. If an employee works 12 hours of overtime in one week, then the first 9 hours will be calculated at a double rate, and the remaining 3 hours will be calculated at a triple rate.
3. Record overtime hours worked for employees either daily or weekly on the Enter Overtime MEX page.

   When capturing the total number of overtime hours for a day, the system automatically splits the hours into double and triple rates, as defined by the maximum limits on double and triple hours, taking into consideration all the weekly and daily overtime parameters.

   The system captures the total number of overtime hours for a week in the same way as for a day, but splits the hours for the week, instead of for the day. For example, if an employee works 12 hours of overtime in one week, then the first 9 hours will be calculated at a double rate, and the remaining 3 hours will be calculated at a triple rate. Only the weekly parameters are considered for weekly overtime.
4. Generate a report that details overtime for an employee on the Overtime MEX page.

   You can specify to generate the report daily (with detail) or weekly (without detail).

Related Topics

- Pay Group OVT Calendars MEX Page
  Use the Pay Group OVT Calendars MEX page (GPMX_OVR_CAL) to define the weekly overtime calendar for a pay group.
- Pay Group OVT Parameters MEX Page
  Use the Pay Group OVT Parameters MEX page (GPMX_OVR_PARMS) to define the overtime parameters for a pay group.
- Entering Overtime
- Overtime MEX Page
  Use the Overtime MEX page (GPMX_RC_OVR001) to provide overtime details for employees.

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Entering Overtime

Page Used to Enter Overtime

Page Name	Definition Name	Usage
Enter Overtime MEX Page	GPMX_OVR_DAILY	Enter daily or weekly overtime for an employee.

Recording Overtime

Some companies prefer to record overtime on a daily basis and other companies prefer to record it on a weekly basis. Depending on what your business process is, you can record overtime for your employees either daily or weekly. Each employee's overtime record is keyed by pay group, year, week, calendar ID, and the employee's ID and record number.

The formula for calculating overtime is the number of overtime hours worked times the hourly rate times 2 or 3 depending on the overtime parameters you've defined on the Overtime Parameters page.

The system automatically updates positive input records for the employee to synchronize with daily and weekly overtime entries. Also, when you make changes to previously entered overtime and save, the system updates the positive input accordingly.

> **Note**
>
> For each overtime record that you create for an employee, you must select whether to create daily or weekly overtime entries. If you save overtime details and later change between daily and weekly overtime for the employee's specific overtime record, the system deletes the previously saved data.

Enter Overtime MEX Page

Use the Enter Overtime MEX page (GPMX_OVR_DAILY) to enter daily or weekly overtime for an employee.

Navigation:

Global Payroll & Absence Mgmt, and then **Absence and Payroll Processing**, and then **Prepare Payroll**, and then **Enter Overtime MEX**

This example illustrates the fields and controls on the Enter Overtime MEX page: Hours Detail tab (daily overtime). You can find definitions for the fields and controls later on this page.

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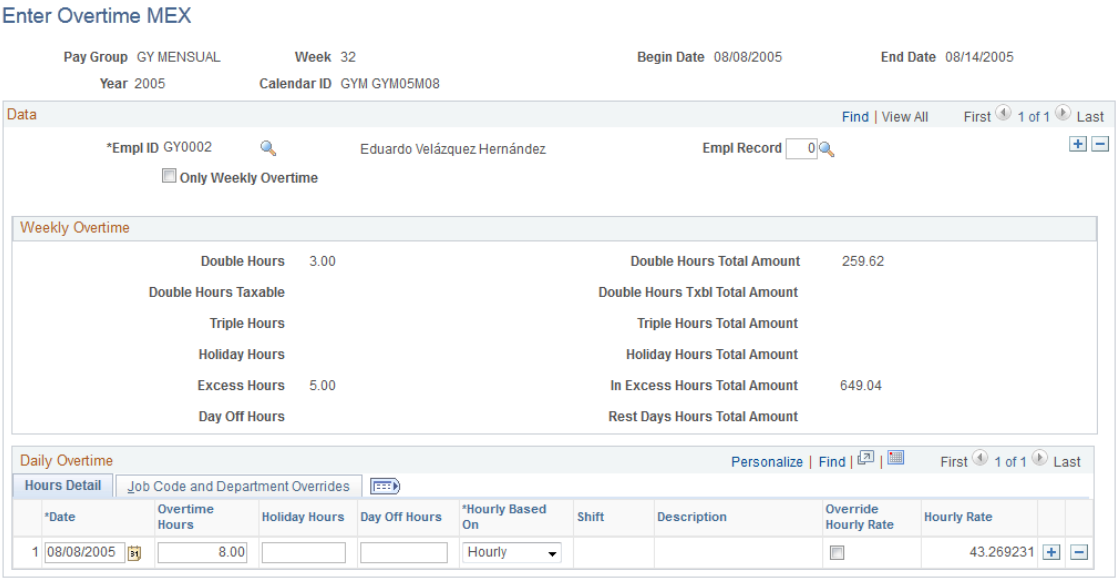
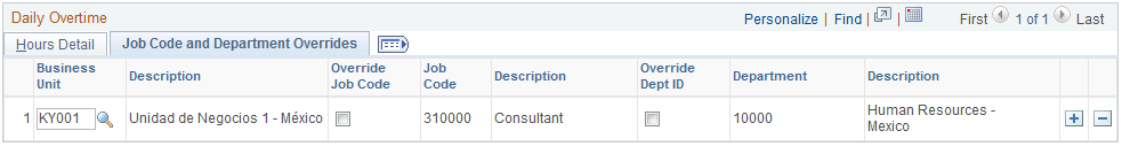


This example illustrates the fields and controls on the Enter Overtime MEX page: Job Code and Department Overrides tab (daily overtime). You can find definitions for the fields and controls later on this page.



Data

Field or Control	Description
Empl ID (employee ID)	Enter the employee ID of the employee for whom the overtime is being recorded.
Empl Rcd# (employee record number)	Enter the employee record number of the employee for whom the overtime is being recorded.
Only Weekly Overtime	Select to enter weekly overtime only on this page. Deselect to enter daily overtime and have the system automatically calculate the weekly overtime values. Depending on your selection, the system displays on the page only the fields that are specific for entering daily or weekly overtime.

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Weekly Overtime

Field or Control	Description
Double Hours, Double Hours Txbl (double hours taxable),**Triple Hours, Holiday Hours, Exc Hours** (excess hours), and**Day Off Hours**	Based on the information that you enter in the **Daily Overtime** grid, the system automatically calculates the rates for these hours and displays the result to the right of the corresponding field.

Daily Overtime – Hours Detail

Field or Control	Description
Date	Enter the date when the overtime occurred.
Overtime Hours	Enter the number of overtime hours the employee worked.
Holiday Hours	Enter the number of overtime hours the employee worked on a holiday.
Day Off Hours	Enter the number of overtime hours the employee worked on a scheduled day off.
Override Hourly Rate	Select for a specific overtime entry to override the hourly rate value for that overtime entry. The **Hourly Rate** field becomes available for edit.
Hourly Rate	The system displays the employee's hourly rate. If you selected to override the hourly rate for the overtime entry, enter the new hourly rate. **Note:** The system splits the double and triple overtime hours, based on the values you defined on the Overtime Parameters page.

Daily Overtime – Job Code and Department Overrides

Field or Control	Description
Business Unit and**Description**	Enter the employee's business unit.
Override Job Code	Select for a specific overtime entry to override the job code value for that overtime entry. The **Job Code** field becomes available for edit.
Job Code and**Description**	The system displays the employee's job code. If you selected to override the job code for the overtime entry, enter the new job code.
Override Department	Select for a specific overtime entry to override the department value for that overtime entry. The **Department** field becomes available for edit.
Department and**Description**	The system displays the employee's department. If you selected to override the department for the overtime entry, enter the new department.

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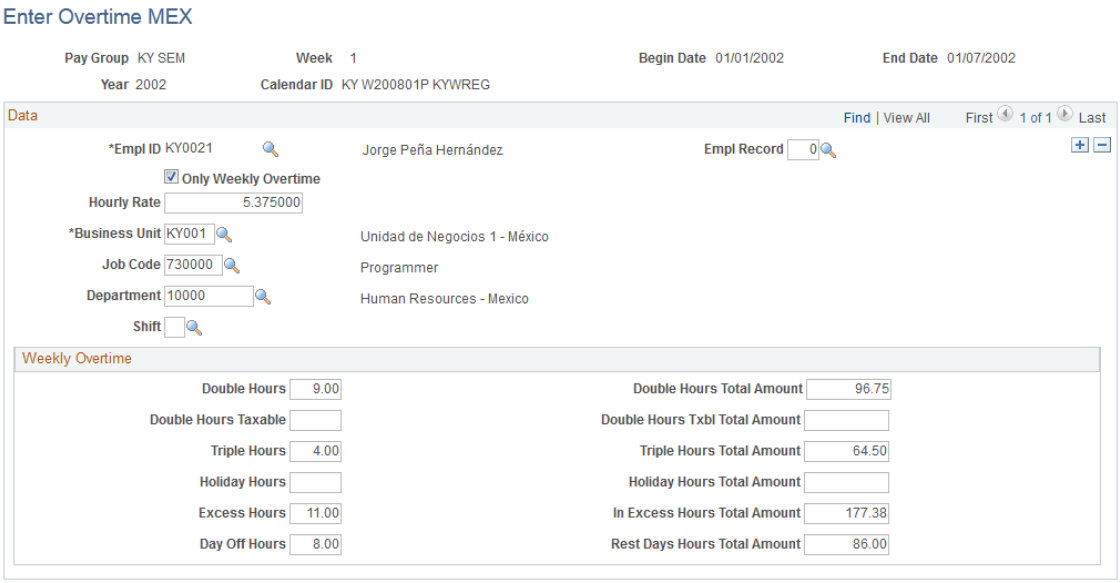
Example 17-1 Example of Enter Overtime MEX Page with Only Weekly Overtime Selected

This example illustrates the fields and controls on the Enter Overtime MEX page when the Only Weekly Overtime check box is selected. You can find definitions for the fields and controls later on this page.



Data

Field or Control	Description
Empl ID (employee ID)	Enter the employee ID of the employee for whom the overtime is being recorded.
Empl Rcd# (employee record number)	Enter the employee record number of the employee for whom the overtime is being recorded.
Only Weekly Overtime	Select to enter weekly overtime only on this page. Deselect to enter daily overtime and have the system automatically calculate the weekly overtime values. Depending on your selection, the system displays on the page only the fields that are specific for entering daily or weekly overtime.
Hourly Rate	Enter the hourly rate for the weekly overtime. You'll use an hourly rate to calculate overtime.
Business Unit	Enter the employee's business unit.
Job Code	Enter the employee's job code.
Department	Enter the employee's department.

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Weekly Overtime

Field or Control	Description
Double Hours	Enter the total of overtime hours per week that are calculated at a double rate. Once you've entered the **Double Hours Total,** the system automatically calculates the overtime amount by multiplying the number of hours times the hourly rate for an employee times 2. The result displays to the right of the corresponding field.
Triple Hours	Enter the total of overtime hours per week that are calculated at a triple rate. Once you've entered the **Triple Hours Total,** the system automatically calculates the overtime amount by multiplying the number of hours times the hourly rate for an employee times 3. The result displays to the right of the field.
In Excess Hours	Enter the total in excess hours worked per week. Excess hours are those that are above the first 3 hours a day and on the first three days with overtime in a week, and are beyond the first 9 hours in a week. You can decide if these excess hours will be paid a double or triple rate on the Overtime Parameters page. The system automatically calculates the total overtime amount by multiplying the number of hours times the hourly rate for an employee and displays the result to the right of the field.
Double Hours Taxable	Enter the total of overtime hours per week that are calculated at a double rate and taxable. Once you've entered the **Double Hours Taxable Total,** the system automatically calculates the overtime amount by multiplying the number of hours times the hourly rate for an employee times 2. The result displays to the right of the corresponding field.
Holiday Hours	Enter the total amount of holiday hours worked per week. When you enter a holiday, the system checks the parameters defined in the Holiday Schedule to see if the date corresponds to a holiday. The system automatically calculates the overtime amount by multiplying the number of hours times the hourly rate for an employee times 2. The result displays to the right of the field. **Note:** Holiday Schedule parameters are defined on the Pay Group Name page. See PeopleSoft Global Payroll: Defining Pay Groups.

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Field or Control	Description
Day Off Hours	Enter the total amount of hours worked on a scheduled day off per week. The system checks if the entered Day Off effectively corresponds to the parameters of the Day Off that were previously defined in the work schedule for each employee. The system automatically calculates the overtime amount by multiplying the number of hours times the hourly rate for an employee times 2. The result displays to the right of the field.

Integrating Overtime Pay to the Variable SDI Base

For social security base purposes, overtime is divided into three categories:

- Non-integrating overtime.

  This is the total of overtime hours per week that are calculated as double. This overtime has a limit of no more than 3 hours a day and 3 times a week according to the parameters defined on the Overtime Parameters page.
- Integrating overtime beyond three hours a day.

  These hours are paid as double and will integrate 100 percent to the variable SDI base.
- Integrating overtime beyond nine hours a week.

  These hours are paid as triple and will integrate 100 percent to the variable SDI base.

The system calculates overtime in this way:

1. Determines all the number of hours that fall in each of these categories.
2. Calculates the amount per hour according to the daily salary.
3. Multiplies the rate per hour that results for the hours in each category.

Taxing Overtime

Part of overtime pay is taxable and part of it is non-taxable. This depends on the type of worker:

- Minimum salary workers.
- Above minimum salary workers.

For minimum salary workers, all double hours below three hours daily and up to three times a week is non-taxable. The remainder of overtime is taxed at 100 percent.

For above minimum salary workers, 50 percent of the overtime is non-taxable up to 5 times the minimum wage. This means that while 50 percent is not greater than 5 times the minimum wage for each overtime week, everything above this limit should be taxable.

Example of Non-Taxable Overtime for Minimum Salary Workers

Hourly rate = 5.65 MXN

Overtime hours worked in one week (9 hours double and 2 hours triple) = 11 hours

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Double overtime hours earned = 9 hours x 5.65 = 50.85 x 2 (double) = 101.70 MXN (non-taxable)

Triple overtime hours earned = 2 hours x 5.65 = 11.30 x 3 (triple) =33.90 MXN (100 percent taxable)

Non-taxable overtime = 101.70 MXN

Taxable overtime = 33.90 MXN

Examples of Taxable and Non-Taxable Overtime for Above Minimum Salary Workers

Example 1:

Minimum wage = 45.24 MXN

5 times minimum wage = 226.20 MXN

Overtime in Week 1 = 150.00 MXN

Taxable overtime = 75.00 MXN

Non-taxable overtime = 75.00 MXN

> **Note**
>
> The non-taxable portion of overtime is 75.00 MXN, because 75.00 MXN is not greater than 5 times minimum wage (which would be 226.20 MXN).

Example 2:

Minimum wage = 45.24 MXN

5 times minimum wage = 226.20 MXN

Overtime in Week 2 = 550.00 MXN

Taxable overtime = 323.80 MXN

Non-taxable overtime = 226.20 MXN

> **Note**
>
> The non-taxable portion of overtime is 226.20 MXN, because 275.00 MXN (50 percent of the overtime) is greater than 5 times minimum wage (226.20 MXN). Therefore, the non-taxable portion of the overtime is capped at 5 times minimum wage.

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Running the Overtime Report

Page Used to Run the Overtime Report

Page Name	Definition Name	Usage
Overtime MEX Page	GPMX_RC_OVR001	Provide overtime details for employees.

Overtime MEX Page

Use the Overtime MEX page (GPMX_RC_OVR001) to provide overtime details for employees.

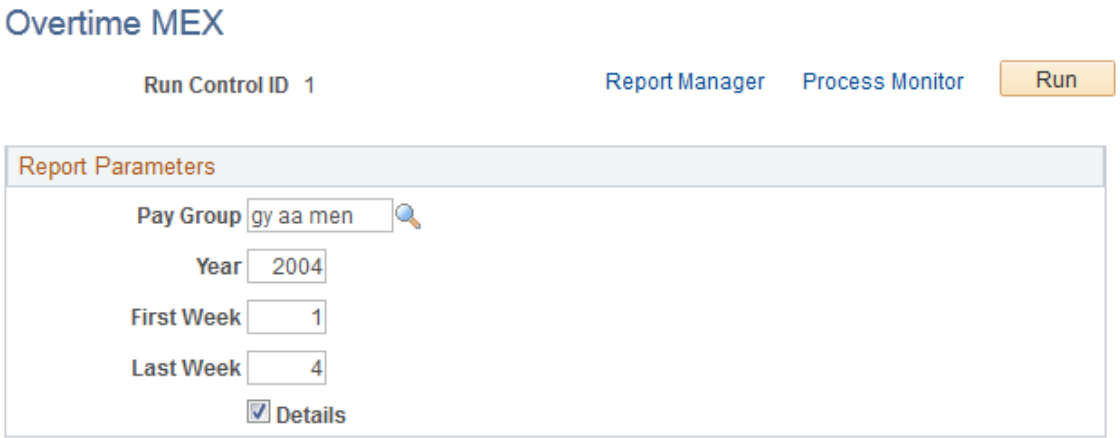
With this report, you have two options:

- From week to week with daily details.
- From week to week without daily details.

Navigation:

Global Payroll & Absence Mgmt, and then **Absence and Payroll Processing**, and then **Reports**, and then **Overtime MEX**

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



Field or Control	Description
Pay Group	Select the pay group for which the overtime report will be run.
Year	Enter the year for which the overtime report will be run.
First Week and**Last Week**	Enter the first week and last week parameters for the overtime report.
Details	Select if you want to have daily details in the overtime report.

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Viewing Delivered Overtime Earnings

Global Payroll for Mexico delivers these earnings to calculate overtime:

Earning	Description
D TRA DIA RE	Daily Worked Day Off Ret
DES TRAB DIA	Daily Worked Day Off
DES TRAB SEM	Weekly Worked Day Off
DESCAN TRAB	Worked Day Off
F TRA DIA RE	Daily Worked Holiday Ret
FES TRAB DIA	Daily Worked Holiday
FES TRAB SEM	Weekly Worked Holiday
FESTIVO TRAB	Worked Holiday
T EX D G D R	Daily Double Overtime Tax Ret
T EX D G DIA	Daily Taxable Double Overtime
T EX D G SEM	Weekly Taxable Double Overtime
T EX DOB D R	Daily Double Overtime Ret
T EX DOB DIA	Daily Double Overtime
T EX DOB SEM	Weekly Double Overtime
T EX EXE SEM	Weekly Non Taxable Overtime
T EX TRI D R	Daily Triple Overtime Ret
T EX TRI DIA	Daily Triple Overtime
T EX TRI SEM	Weekly Triple Overtime
T EXTRA D GR	Taxable Double Overtime
T EXTRA DOBL	Double Overtime
T EXTRA DT	Double-Triple Overtime
T EXTRA EXEN	Non Taxable Overtime
T EXTRA GRAV	Taxable Overtime
T EXTRA TRIP	Triple Overtime
TOT TMPO EXT	Overtime Total

All the earnings named SEM are elements you should use. These earnings are intended to serve as a bridge between the input pages for overtime and the positive input they generate. For example, if you enter 3 double overtime hours, it will be stored in the T EX DOB SEM earning as positive input, and later, it will be processed in the T EXTRA DOBL earning and other earnings (taxable and non-taxable).

TE FM EXENTO is a PeopleSoft-delivered formula. It calculates the taxable and non-taxable portion for all the overtime earnings (double, holiday, days off worked). This calculation is executed separately every week.

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

Related Topics

- PeopleSoft Global Payroll: Understanding How to View Delivered Elements

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18

Processing Terminations

Understanding Termination Payments

Prerequisites

Because it is common for some payments to be made only upon termination and some standard earnings might not be processed as part of termination pay, you must define exactly which earnings should be paid in response to a termination.

Before termination earnings or deductions can be processed, you must:

- Define your termination versions.

  Termination versions are the set of reasons for termination, layoff, or completion of contract that are considered sufficient to trigger a set of termination payments and deductions.
- Define the earnings and deductions to process upon termination (or layoff and completion) by associating each element with one or more termination versions.
- Use the delivered generation control element LF GC VER FINIQ to trigger the processing of each termination earning and deduction only when the action and reason for a payee's termination match the termination version associated with the earning or deduction.
- Identify the terminated payees and enter the appropriate action/reason for termination on the Job Data pages in HR.
- Define whether the Salary Credit will be considered for tax calculation, either at the payee level or calendar ID level, by using the delivered Salary Credit in Terminations variable (LF VR CRED SAL). The Salary Credit in Terminations variable has a default value of *Y* to include the salary credit in the termination tax calculation. The Salary Credit in Terminations variable should be changed to *N* if the salary credit is not considered for termination tax calculation.

Related Topics

- Understanding Termination Setup
  In Global Payroll for Mexico, the process used to trigger termination payments is based in a termination version. A termination version is a collection of actions and reasons that can trigger specific termination earnings and deductions.

Termination Payments

In Mexico, when you terminate a payee, you might need to make the following payments:

- Regular earnings and deductions that are due for the termination period.
- Compensation for unused paid vacation days and the vacation premium.

  The system multiplies the DAILY RT (system element) by the proportional worked days in the year times the number of vacation days, as of the termination day or anniversary date.

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If the payee's seniority anniversary occurs during the termination pay period, the system calculates the corresponding days in an array using the new seniority years.

To calculate the vacation premium, the system multiplies this result by the premium percentage.

- Compensation for the Christmas bonus.

  The system prorates worked days in the year to calculate the corresponding Christmas bonus pay.

- Severance pay or other compensation due to special termination earnings, according to the termination version selected for the payee.
- Amount owed for all unpaid loans, independent of each other.

  This amount is automatically deducted from the last payslip.

> **Note**
>
> Termination payments can be calculated in either a regular payroll or an off-cycle payroll.

For Global Payroll for Mexico, the payroll process generates termination payments based on the last day that an employee works, which is one day prior to the termination date. The termination date is equal to the effective date of the TER (termination) action on the employee's JOB_DATA record (Job Data component).

When you enter a TER action, the system invokes the JOB retro trigger for processing of the employee's termination pay. To ensure that the payroll process uses the date one day prior to the termination date for termination payment processing, the delivered JOB retro trigger for terminations offsets the termination date by -1 for actions that equal TER. This is set by the Offset Days field value on the Trigger Definitions – Field Values page.

Running the Termination/Layoff Letters Report

Page Used to Run the Termination/Layoff Letters Report

Page Name	Definition Name	Usage
Create Term/Layoff Letters MEX Page	GPMX_RC_TERMREP	Generates either a termination letter or a layoff letter, depending on the option you select.

Create Term/Layoff Letters MEX Page

Use the Create Term/Layoff Letters MEX page (GPMX_RC_TERMREP) to generates either a termination letter or a layoff letter, depending on the option you select.

Navigation:

Global Payroll & Absence Mgmt, and then **Termination Processing**, and then **Terminated/ Layoff Letters MEX**

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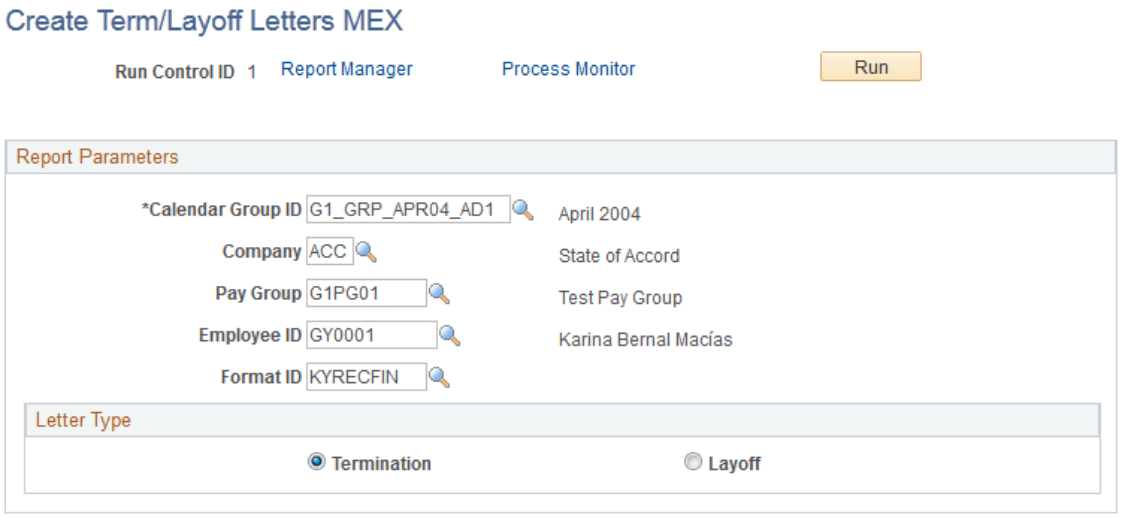
This example illustrates the fields and controls on the Create Term/Layoff Letters MEX page. You can find definitions for the fields and controls later on this page.



Letter Type

Select **Termination** or**Layoff** depending on the type of letter being generated.

Viewing Delivered Termination Elements

This topic discusses:

- Delivered termination earnings.
- Delivered termination process lists and sections.

Delivered Termination Earnings

PeopleSoft delivers these delivered earnings that you can create to process termination pay.

> **Note**
>
> The delivered termination earnings for Mexico are defined as PeopleSoft Delivered/Not Maintained. This enables you to modify them to fit your needs. You can also create new termination elements using the delivered elements as your guide.

Earnings	Description
20 DIAS X AÑO	20 days per year severance
3 MESES	3 months salary severance
AGUINALDO	Christmas bonus
LIQUIDAC EX	Nontaxable severance
LIQUIDAC GR	Taxable severance
LIQUIDACION	Severance total

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Earnings	Description
PMA VAC PACT	Current year proportional vacation premium (Corresponding portion based on January 1 of the year and the termination date divided by 365.)
PMA VAC PANV	Anniversary proportional vacation premium (Corresponding portion based on the most recent anniversary date and the termination date divided by 365.)
PRIMA ANTIG	Seniority premium severance
SALDO PMAVAC	Unpaid vacation premium balance
SALDO VACAC	Unpaid vacations balance
VAC PROP ACT	Actual year proportional vacations (Corresponding portion based on January 1 of the year and the termination date divided by 365.)
VAC PROP ANV	Anniversary proportional vacations (Corresponding portion based on the most recent anniversary date and the termination date divided by 365.)

Delivered Termination Process Lists and Sections

The preceding list of termination earnings can be found in the sections LIQ Y FINIQUITOS and SALDO VACACIONES.

The process list containing termination elements for Mexico is NOMINA.

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

Related Topics

- PeopleSoft Global Payroll: Understanding How to View Delivered Elements

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19

Understanding Garnishments

Garnishment Types

Garnishments are typically defined in one of these ways:

- As a percent of total of gross earnings.
- As a fixed quantity.
- As a percentage of net pay.
- As the total amount or percentage of a fixed set of earnings or deductions.
- As a percentage of the payee's compensation.

Global Payroll for Mexico delivers five sample garnishment elements. You can modify these elements to fit your needs, or use them as models for creating your own garnishments.

> **Note**
>
> These garnishment types apply to all kinds of payroll processes: regular payroll, special payrolls, Christmas bonuses, termination pay, and so forth.

Calculation of Garnishments

Global Payroll for Mexico delivers the deduction element PENSION ALIM to calculate garnishments. To trigger this garnishment, you must assign the garnishment to a payee using the Earning/Deduction Assignment page, because the definition of the garnishment element is *By Payee* in the garnishment element group KY DED GRALES.

Creation of New Garnishments

If you need to create your own garnishment, use the delivered garnishment PENSION ALIM as the model. To create a new garnishment:

1. Create a deduction defined as Base times Percent on the Calculation page in the Deduction component.
2. To calculate the base, first create an accumulator (for example, the delivered accumulator PERC PENSION ALIM) containing all of the earnings on which the garnishment is based minus all pretax deductions (for example, the delivered accumulator DED PENSION AI).
3. This accumulator is the base for the garnishment tax, so you should then create a formula to apply tax formulas to this base (for example, the delivered formula PA FM IMP PERC).

   The garnishment base is then the earnings accumulator (PERC PENSION ALIM) minus the taxes generated by this accumulator (PA FM IMP PERC), minus the accumulator that contains the deductions after taxes (for example, the delivered accumulator DED PENSION DI).

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4. Assign this deduction to a recipient using the Recipients page in the Deductions component.

Related Topics

- PeopleSoft Global Payroll: Earnings - Calculation Page
- PeopleSoft Global Payroll: Deductions - Recipient Page
- PeopleSoft Global Payroll: Element Assignment By Payee Page

Delivered Garnishment Elements

> **Note**
>
> The delivered garnishments for Mexico are defined as PeopleSoft Delivered/Not Maintained. Therefore, you can modify the elements to fit your needs. You can also create new garnishment elements using the delivered elements as your guide.

Delivered Garnishment Deductions

Global Payroll for Mexico delivers five garnishment elements:

Deduction	Description
PENSION ALIM	This element is used to calculate a garnishment (deduction) defined as a percentage of a base (Base times Percent). The base is returned by the formula PA FM BASE PENSION, and the percentage is contained in the variable PA VR % PENSION 1. The formula PA FM BASE PENSION returns the value of the garnishable base. It is calculated by subtracting the formula PA FM IMP PERC and the accumulator DED PENSION DI from the accumulator element PERC PENSION ALIM (PA FM BASE PENSION = PERC PENSION ALIM − PA FM IMP PERC − DED PENSION DI). PERC PENSION ALIM: Accumulator storing garnishable earnings minus pretax deductions. (Pretax deductions are contained in the accumulator DED PENSION AI.) PA FM IMP PERC: Formula that calculates the garnishment tax (a tax on the garnishment base stored in the accumulator PERC PENSION ALIM). DED PENSION DI: Accumulator containing after tax deductions. **Note:** In the delivered garnishment element PENSION ALIM, the percentage is a variable that can be changed as required, or it can be overridden at the payee level.

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Deduction	Description
	Note: You must select the elements that form the base of this garnishment by adding them to the accumulator PERC PENSION ALIM. In addition, add the taxable part of these elements to the accumulator BASE IMP PEN ALIM, which is used in the formula PA FM IMP PERC. **Note:** To trigger this garnishment, you must define the garnishment (deduction) recipients. To define deduction recipients, define a recipient ID on the Deduction Recipients page in **Set Up HCM**, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Banking**, and then **Deduction Recipients.** Then, assign the recipient ID to individual payees on the Assign Deduction Recipients page in Global Payroll & Absence Mgmt, Payee Data, Net Pay/Recipient Elections, Assign Deduction Recipients.
PENSION C FI	This element is used to calculate a garnishment with a calculation rule of Amount. The amount is assigned at the payee level.
PENSION NETO	This element is used to calculate a garnishment defined as a percentage of net pay—that is, a garnishment with a calculation rule of Base times Percent, in which the base is the net pay accumulator NETO. The percentage is contained in the variable PA VR % PENSION 2.
PENSION T – I	This element is used to calculate a garnishment defined as a percentage of Total Earnings – Taxes (that is, a garnishment with a calculation rule of Base times Percent). The base is calculated by the formula PA FM PENSION T-I (Total Earnings minus ISR Taxes minus IMSS Taxes, or TOTAL PERCEPCIONES – ISR RETENIDO – CUOTAS CYV – CUOTAS EYM). The percentage is contained in the variable PA VR % PENSION 3.
PENSION TOT	This element is used to calculated a garnishment defined as a percentage of total earnings—that is, a garnishment with a calculation rule of Base times Percent, in which the base is the total earnings accumulator TOTAL PERCEPCIONES. The percentage is contained in the variable PA VR % PENSION 4.

Delivered Garnishment Process Lists and Sections

The section containing garnishments for Mexico is DESPUES IMPUESTOS. This section is encountered in these process lists:

Process List	Description
NOMINA	Main process list for payroll elements
NOMINA ESPECIAL	Special payroll process list

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

Related Topics

- PeopleSoft Global Payroll: Understanding How to View Delivered Elements

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Understanding Net-To-Gross Payments

Net-to-Gross Processing

Net-To-Gross Earnings Elements

Gross-ups are required when you want to pay a payee a specific net amount. Starting from the net amount, the system determines the gross amount to process so that after tax deductions have been made, the required net amount remains.

As part of this feature, Global Payroll for Mexico provides two earnings elements:

- PIRAMIDADO
- EXC PIRAMID

PIRAMIDADO is used for paying the net amount. The PIRAMIDADO earning contributes to the PIRAMIDADOS accumulator, which is the element used in formulas to arrive at the required net.

You enter the PIRAMIDADO earnings amount using positive input or with the Earning/Deduction Assignment page. The system calculates the amount by which it must gross-up earnings to have the required net after deducting taxes. It then assigns that amount, discounting the PIRAMIDADOS accumulator, to the EXC PIRAMID earning. The two earnings make up the gross pay. The PIRAMIDADO earnings element is assigned to the PIRAMID PERC/DED section of the NOMINA process list before the gross-to-net sub-process begins. This is where the EXC PIRAMID earnings element is calculated.

To summarize:

- PIRAMIDADO + EXC PIRAMID = Gross Pay
- PIRAMIDADO = Net Pay
- EXC PIRAMID = Additional amount needed to reach net pay

Determining Whether a Net-to-Gross Calculation is Required

When PIRAMIDADO earnings are resolved, these earnings add to the gross-up accumulator PIRAMIDADOS, which contains the resolved value of the PIRAMIDADO earnings element after taxes and other deductions. In the PIRAMIDADO SEC section, a conditional formula determines that grossing-up is required if the gross-up accumulator has a value.

Actual Net Pay and Target Net Pay

To determine when the gross-up process is complete, the system compares the current net pay amount (the net pay element defined in the process list) against the target net amount. The target net is the sum of the net pay element before processing the PIRAMIDADO SEC section and the PIRAMIDADOS accumulator (NET + PIRAMIDADOS).

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In each iteration of the gross-up, the process produces a new net based on the new gross amount.

When the current and target net are the same, the process of calculating the gross pay is complete.

Upper and Lower Limits

Global Payroll for Mexico calculates *upper* and *lower* limits as part of the gross-up process. These limits are the values between which earnings PIRAMIDADO + EXC PIRAMID falls. In each iteration of the gross-up, the earning EXC PIRAMID takes a value between the Lower Limit − PIRAMIDADO and the Upper Limit − PIRAMIDADO.

For example:

Suppose that you want to pay a PIRAMIDADO amount of 1,000.00.

The first time that limits are calculated, the upper and lower limits are:

- Upper Limit: 1,000 × 1.6 = 1,600.00
- Lower Limit: 1,000

Therefore, in the first iteration, the EXC PIRAMID values are between 0 and 600.

In each iteration, the gross amount varies, depending on the PIRAMIDADO and EXC PIRAMID values.

PIRAMIDADO Earning Calculation

After the system determines that a gross-up is required, it starts the calculation by treating the PIRAMIDADOS accumulator as if it is the *lower* value that PIRAMIDADO + EXC PIRAMID can take, and the 160 percent PIRAMIDADOS accumulator as the *upper* value that earnings PIRAMIDADO + EXC PIRAMID can take.

The system processes the limits that are being changed to ensure that they enclose the target value for the EXC PIRAMID earnings element. It validates the upper amount, deducting taxes, to get a new net amount—the upper net—and verifies that the target net is between the lower net and upper net. The same validation is made if the lower limit is the one that is changing.

If the validation returns a value of *false,* the system is searching in the wrong range, and the lower and upper limit values must be redefined.

EXC PIRAMID takes its value during each iteration of the formula:

((Lower Limit) + (Upper Limit)) / 2 − PIRAMIDADOS

Because of the tax deduction, the actual net doesn't match the target net. Using the difference between actual and target net in a formula, the system calculates a new upper or lower limit, deducts the taxes from it, and arrives at a new actual net, which it compares to the target net. The iterations—or loops—continue, with the actual net coming closer to the target net with each loop, until the actual and target net are the same.

The Net-to-Gross Process Sequence

The net-to-gross process sequence is:

1. You enter the bonus amount by positive input as the earnings PIRAMIDADO.

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2. The PIRAMIDADO earnings are resolved in the PIRAMID PERC/DED section and added to the accumulator PIRAMIDADOS.
3. The PIRAMIDADO SEC subprocess section in the NOMINA process list contains the conditional formula PI FM EJECUTAR.

   If the formula finds that the PIRAMIDADOS accumulator is not zero and, therefore, a gross-up must be done on this accumulator, it invokes the PIRAMIDADO SEC subprocess section.
4. The formula PI FM LIM INICIAL, the first element in the PIRAMIDADO SEC section, sets the variable PI VR NETO PIRAMID to the value of the current net plus the PIRAMIDADOS accumulator.

   This value remains constant during subsequent processing. The formula PI FM LIM INICIAL also sets the values of the upper and lower limits (upper and lower values for the earnings PIRAMIDADO + EXC PIRAMID).
5. The earnings element EXC PIRAMID is the second element of the PIRAMIDADO SEC section.

   With this element, the PIRAMIDADO SEC section initiates the gross-to-net subprocess governed by the conditional formula PI FM CONTINUAR.
6. The conditional formula PI FM CONTINUAR in the PIRAMIDADO SEC section compares the constant value of PI VR NETO PIRAMID (set in Step 4) with the value of the new net (which has the new calculated taxes subtracted from it).
7. If the formula PI FM CONTINUAR returns FALSE (0), meaning that there is no difference is a minimum difference of -1 or +1 between PI VR NETO PIRAMID and the new calculated net, the process stops. The formula returns TRUE (1) if it runs and determines new upper or lower limit values depending on positive or negative differences. The value of PI VR EXC PIRAMID is the amount by which the net is increased to produce the taxable gross.

   > **Note**
   >
   > You can vary +1 or -1 range depending on the precision required on your gross to net calculation.
8. The section element IMPUESTOS FED is the third element of the PIRAMIDADO SEC section.

   The tax deductions are calculated in the IMPUESTOS FED section to produce a new actual net.
9. The conditional formula PI FM EXC PIRAM in the IMPUESTOS FED section compares the constant value of PI VR NETO PIRAMID (set in Step 4) with the value of the upper and the lower limits.

   This determines whether the target net is still between the limits. If the target net is not between these limits, the formula recalculates the limits.
10. The tax deductions are calculated in the IMPUESTOS FED section to produce a new actual net.
11. The loop process of calculating a new gross, deducting taxes to produce a new net balance, and comparing the balance to the constant PI VR NETO PIRAMID continues until the actual net is closer to the target net ($-1 \leq x \leq 1$).
12. When the looping stops, the formula PI FM CONTINUAR checks to see that there is no difference between PI VR NETO PIRAMID and the new net.

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If there is no difference, the formula resolves to FALSE, indicating that the system has calculated the correct gross-up figure. The system goes through the loop a maximum of fifteen times. If it fails to calculate the gross amount correctly within that limit, you must remove the PIRAMIDADO earning amount, calculate the gross manually, and pay it using the earnings element of your choice.

Example: Calculating the PIRAMIDADO Earnings and Gross Pay

This example is based on a positive input entry of 500 to the PIRAMIDADO earnings. The value of the PIRAMIDADOS accumulator becomes 500.

The PIRAMIDADO SEC section is run because the PIRAMIDADOS accumulator is greater than zero.

Suppose that the net result before the PIRAMIDADO earning resolves to 5,000.00, so the new target net is 5,500.00 (net before PIRAMIDADO + 500.00 [PIRAMIDADO]).

New upper and lower limits must be set:

- Lower Limit: PIRAMIDADOS = 500 MXN
- Upper Limit: 160 percent PIRAMIDADOS = 500 × 1.6 = 800

These two earnings are used to calculate the new net:

- PIRAMIDADO, which is entered through positive input or earnings and deduction assignment.
- EXC PIRAMID, which is used to find the target net.

To ensure that you reach the target net, PIRAMIDADO should be between 500 and 800. Therefore, EXC PIRAMID has a value between 0 and 300.

Delivered Net-to-Gross Elements

Delivered Gross-to-Net Earnings

PeopleSoft delivers these gross-to-net earnings.

Earning	Description
PIRAMIDADO	This element is used to pay the net amount through positive input.
EXC PIRAMID	This element contains the amount by which the system must gross-up pay to have the required net after deducting taxes.

Delivered Net-to-Gross Process Lists and Sections

The NOMINA process list contains these net-to-gross sections.

Section	Description
PIRAMID PERC/DED	This section includes the earnings element PIRAMIDADO.

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Section	Description
PIRAMIDADO SEC	This section includes the earnings element EXC PIRAMID. This is a Payroll Process Only section of the subprocess type. As a subprocess section, it enables iterative processing to occur within it (that is, recursive calling of the IMPUESTOS FED section can take place).
IMPUESTOS FED	This section calculates the tax on the gross pay (the sum of previous gross plus PIRAMIDADO and EXC PIRAMID earnings).

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

Related Topics

- PeopleSoft Global Payroll: Understanding How to View Delivered Elements

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Defining Results Adjustments and Reversals

Understanding Results Adjustments

In Global Payroll, you can adjust an employee's pay results with the retro feature. With result adjustment, you can make changes to an employee's pay after finalization. For example, if a special deduction has to be applied to an employee's results right before calculation, you can do so by adding this deduction in the Positive Input page in the core application.

> **Note**
>
> There is no special setup required for results adjustments. It is done through regular retro processing.

There are two types of adjustments:

- Positive adjustment − when additional pay needs to be made to the employee.
- Negative adjustment − when an employee's pay needs to be deducted.

Both positive and negative adjustments are handled with retro triggers that are defined in the core application. If it's a payroll adjustment, you can make the adjustment through positive input. If it's an absence adjustment, you can make the adjustment through the Absence Entry page.

Related Topics

- PeopleSoft Global Payroll: Understanding Positive Input
- PeopleSoft Global Payroll: Understanding Triggers
- PeopleSoft Global Payroll: Adjusting and Overriding Entitlement Balances

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22

Processing Banking

Understanding the Banking Process

In Global Payroll, banking setup starts in the core application and continues with processing in Global Payroll for Mexico. Before reading this documentation, it is strongly recommended that you read the banking feature in the Global Payroll core documentation.

Before running the banking process for Mexico, you must set up basic banking information in the core application, such as:

- Defining bank information, such as bank name, address, and ID.
- Defining EFT formats.
- Identifying source banks and linking source banks to pay entities.
- Defining deposit schedules.
- Defining recipients.

See PeopleSoft Global Payroll: Understanding Banking.

After running a payroll, funds are sent to the bank, along with instructions for payment. The bank needs to know who is going to be paid, how much they are to be paid, and which bank the wages are paid to. This information is extracted from the core application and stored in the Mexican payroll files, based on a list of payees corresponding to those in the last payroll run. A file is created with a line for each payee, containing a name, bank account number and amount of money. This file must be sent to the bank that then distributes the funds.

> **Note**
>
> Global Payroll for Mexico supports six major Mexican banks: Banamex, Bancomer, Bancrecer, Banorte, Bital, and Scotiabank.

To process banking in Global Payroll for Mexico:

1. Launch the banking process on the Run Payment Prep Process MEX page.

   The banking process includes launching PS_JOB which groups two different Application Engines: the core Global Payroll application and the Global Payroll for Mexico application. The GP_PAYMENT and GPMX_PAYMENT output tables are populated.

2. Launch the process to build the EFT file and generate the banking report on the Create EFT Payment File MEX page.

   An SQR, called GPMXBA01, is run. An EFT file is generated, containing the details of each payment from the payroll run. The EFT file must be sent to the bank so that the funds can be transferred to payees' bank accounts. This SQR also generates a report with payment details for validation purposes. You can review and store the payment details.

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> **Note**
>
> Each bank in Mexico has a different flat file format. Global Payroll for Mexico has the flexibility to generate these different formats for six of the major banks in Mexico; .Banamex, Bancomer, Bancrecer, Banorte, Bital, and Scotiabank.

Defining the Banking Process

Page Used to Define Banking in Mexico

Page Name	Definition Name	Usage
Run Payment Prep Process MEX Page	GPMX_BANK_POPULATE	Launch the processes that populate the GP_PAYMENT and GPMX_PAYMENT records.

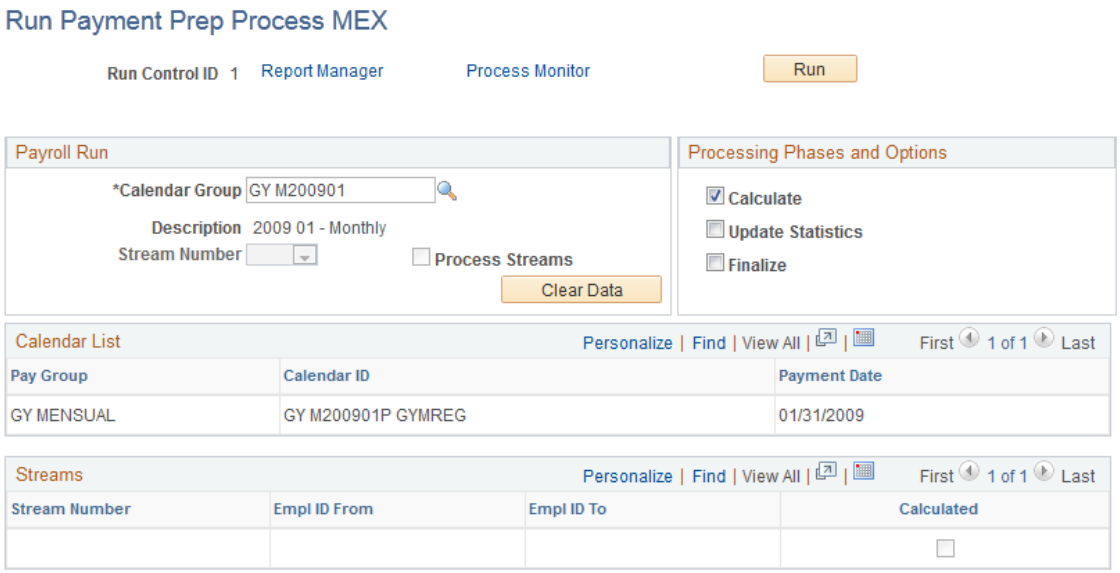
Run Payment Prep Process MEX Page

Use the Run Payment Prep Process MEX page (GPMX_BANK_POPULATE) to launch the processes that populate the GP_PAYMENT and GPMX_PAYMENT records.

Navigation:

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

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



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> **Note**
>
> The fields on the Payment Preparation MEX page are the same as the Run Payment Prep Process page in the core application, except that there is an additional button **(Clear Data)** on the Payment Preparation MEX page. For more information about the Run Payment Prep Process page in the core application, refer to thePeopleSoft Global Payroll: Run Payment Prep Process Page topic.

Field or Control	Description
Clear Data	Select when you want to recalculate the Mexican banking process. If you select **Clear Data,** you can clear the GPMX_PAYMENT output table and fill it again if there are any changes to the calculation.

Generating the EFT Payment File and Banking Report

Page Used to Generate the EFT Payment File and Banking Report

Page Name	Definition Name	Usage
Create EFT Payment File MEX Page	GPMX_BANK_EFT	Create an electronic flat file to be transferred (EFT) to the bank and generate a printed report.

Create EFT Payment File MEX Page

Use the Create EFT Payment File MEX page (GPMX_BANK_EFT) to create an electronic flat file to be transferred (EFT) to the bank and generate a printed report.

Navigation:

Global Payroll & Absence Mgmt, and then **Payment Processing**, and then **EFT Payment File MEX**, and then **Create EFT Payment File MEX**

This example illustrates the fields and controls on the Create EFT Payment File MEX page. You can find definitions for the fields and controls later on this page.

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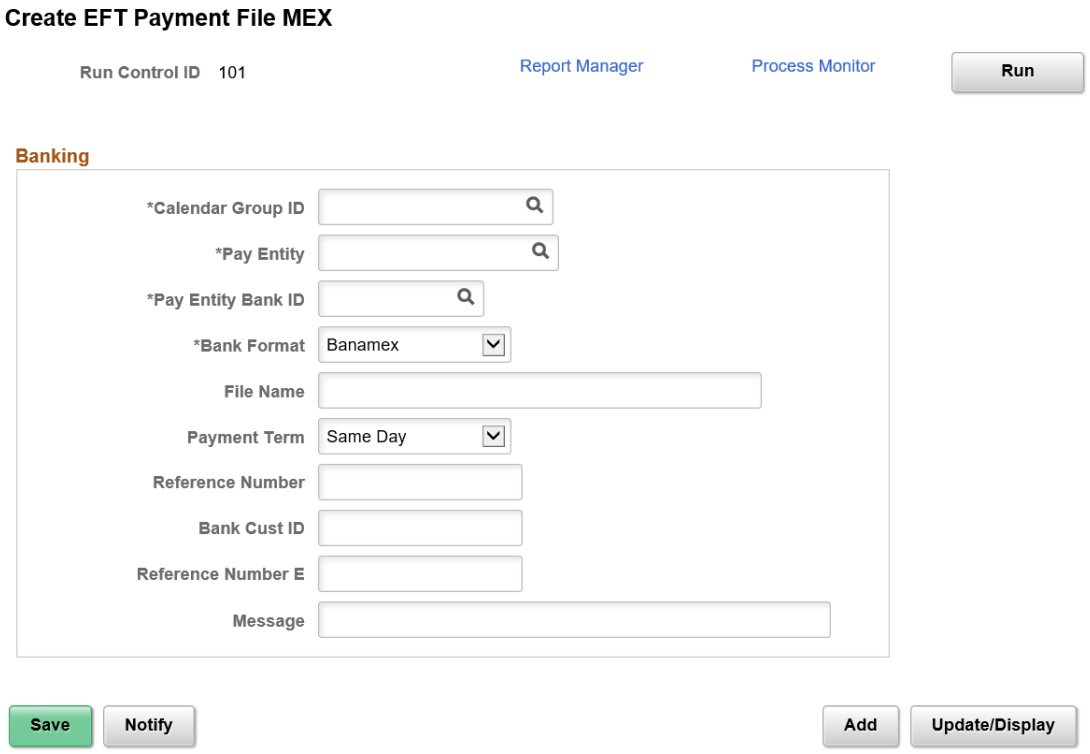

Field or Control	Description
Calendar Group ID	Select the Calendar Group ID for which you want to generate a payment file.
Pay Entity	Select the pay entity for which you want to generate a payment file.
Pay Entity Bank Id	Select the bank by Pay Entity. Option list displays the available banks populated after running the Payment Prep Process MEX.
Bank Format	Select the bank. Values are *Banamex*, *BBVA Bancomer*, *Banorte*, *HSBC*, *Scotiabank*, and *Santander*. Depending on which bank you select, additional fields may appear on this page. Each bank may require different information about the bank file transfer. The following table lists the additional fields that appear depending on the bank format you select.

Bank Format	Additional Fields that Appear
Banamex	File Name, Payment Term, Reference Number, Bank Cust ID, Reference Number E, Message
Bancomer	File Name, Secondary Reference, Bank Cust ID, Reference Number, Operation Date
Banorte	File Name, Bank Cust ID

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Bank Format	Additional Fields that Appear
HSBC	File Name, Transfer Type, Batch Reference, Beneficiary Account Reference, Reference Number **Note:** The **Reference Number** field is displayed only when **Interbank**is selected in the Transfer Type field.
Scotiabank	File Name, Bank Cust ID, Reference Number C, Reference Number D, Message
Santander	File Name, Transfer Type, Reference Number **Note:** The **Reference Number**field is displayed only when **Interbank**is selected in the Transfer Type field.

> **Note**
>
> Once the GP_PAYMENT table and the GPMX_PAYMENT table are populated, you can launch an SQR that generates the flat file for banking along with a printed report of payment details.

Related Topics

- Global Payroll for Mexico Reports: A to Z
  The table in this topic lists the PeopleSoft Global Payroll for Mexico reports, sorted by report ID.

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Managing Off-Cycle Payments

Understanding Off-Cycle Processing

The Off-Cycle Process

Off-cycle processing refers to processing payments and making corrections to payroll results outside of the normal payroll schedule. Off-cycle transactions are usually made to correct prior payments, enter manual payments, or to make early termination payments that can't wait until the next scheduled payroll.

Types of Off-Cycle Transactions

The four types of off-cycle transactions are:

1. Manual payments.

   Manual payments enable you to enter payments that you have calculated and paid outside of the payroll system. Examples include paying a new hire with a manual check, because their pay details were not entered in time for the normal pay run.

2. Corrections.

   Corrections enable you to correct results of any finalized payroll. Examples include reversing a sick leave payment when workers compensation should have been paid.

3. Additional payments.

   Unscheduled payments enable you to enter one-time payments that fall outside the normal payroll process. Examples include one time bonuses or expense reimbursement.

4. Advances.

   Advances enables you to pay payees before their normally scheduled pay run. Examples include salary due on termination.

Recording Manual Payments

Manual Payments are payments that you record for items that you calculate and pay outside of the system, such cash or check payments. When entering manual payments for Mexican payees, it is recommended that all calculations be manually calculated outside the system and then entered. The following areas need to be considered when entering manual payments:

- Selecting the Target Period ID when adding a new off-cycle request.

  It is recommended that you select the target period that coincides with a previous finalized calendar or the current open calendar.

- Selecting the **Calendar Controls**on the Manual Payment Detail page.

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The selection of the **Payment Date** directly affects how elements are accumulated. For example, if you have an accumulator that accrues based on period end date, the payment date may not update the accumulator balances at the right time.

The **Period Begin Date** and**Period End Date** default from the**Target Period ID.** It is recommended that these dates not be changed as the delivered Mexican rules have been designed to calculate using whole periods, and may not automatically segment if a partial period is entered.

- Selecting Processing Controls on the Manual Payment Detail page.

  The **Run Type** defaults from the calendar paid and it is recommended that the default be used. To ensure that the payee's manual payment is processed by the system, the *Allow Duplicates* check box must be selected on the run type; otherwise, the payee may not be processed again if the system detects that they have already been processed in the period.

  The option that you select in the **Element Selection** group box indicate the elements to process with the off cycle transaction. If using the *Limited Element Set* option, you need to ensure that all elements calculate independently of pre- or post-processing formulas, as these do not resolve during off-cycle processing.

Global Payroll for Spain delivers an off-cycle configuration for manual payment off-cycle requests that you can use for new hires that are not paid. Define configurations for off-cycle requests on the Off-Cycle Configuration page. See PeopleSoft Global Payroll: Configuring Off Cycle Requests.

> **Note**
>
> Manual payments are used to record monetary values only, absence accumulators will not be updated using this method.

Entering Corrections

The payroll corrections functionality of off-cycle payroll processing enables you to change finalized results for specific employee and calendar combinations due to such things as user error or missing information. This method uses period-to-date logic built into the Mexican delivered statutory rules.

The following areas need to be considered when entering corrections:

- All earnings and deductions need to have period-to-date logic applied.
- This method is used to correct pay accumulators only. Absence accumulators will not be corrected.

Global Payroll for Mexico delivers an off-cycle configuration for correction payment off-cycle requests that you can use for missed overtime. Define configurations for off-cycle requests on the Off-Cycle Configuration page. See PeopleSoft Global Payroll: Configuring Off Cycle Requests.

Making Additional Payments

Use the additional payments functionality that is part of off-cycle processing to make one-time unscheduled payments that are processed outside of the normal on-cycle payroll. Examples include one-time bonuses, awards, and expense reimbursements. These transactions are

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similar to manual payments in many respects; however, the system calculates the amount for additional payments. This method uses period-to-date logic built into the Mexican delivered statutory rules when calculating.

The following areas need to be considered when entering additional payments:

- All earnings and deductions need to have period-to-date logic applied.
- When selecting the period paid, it is recommended that you select the previous finalized calendar or the current open calendar.
- This method is used to record monetary values only. Absence accumulators will not be updated.

Global Payroll for Mexico delivers an off-cycle configuration for additional payment off-cycle requests that you can use for bonuses not paid out. Define configurations for off-cycle requests on the Off-Cycle Configuration page. See PeopleSoft Global Payroll: Configuring Off Cycle Requests.

Issuing Advance Payments

Advance processing is the processing of on-cycle calendars ahead of their regular schedule. Use the advances functionality of off-cycle processing when you would like to pay an employee before their normal on-cycle pay run. Examples include payments for early terminations (where the termination payment needs to be paid immediately and not in the next on-cycle pay run), full periods advances, and partial period advances.

- Always select the next open calendar, as skipping calendars may update accumulators incorrectly.
- Absence accumulators will calculate automatically for the calendar group selected.

Global Payroll for Mexico delivers an off-cycle configuration for advance payment off-cycle requests that you can use for advance terminations. Define configurations for off-cycle requests on the Off-Cycle Configuration page. See PeopleSoft Global Payroll: Configuring Off Cycle Requests.

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Using the General Ledger Interface

Running the General Ledger Interface Process

Pages Used to Run the General Ledger Interface Process

Page Name	Definition Name	Usage
Send Costs to GL MEX Page	GPMX_GL_PREPARE	Initiate the processes for calculation of GL data, remapping of GL ChartFields, finalization of the GLI, and statistical data updating.
Review GL costing info MEX Page	GPMX_GL_INQUIRY	View the GL costing information.

Understanding GLI Process

The Calculate phase of GLI processing populates the GP_GL_DATA table.

You can also run The GL Mapping Application Engine process (GPMX_GL_RC) that updates ChartFields in GP_GL_DATA. The process selects and updates the necessary GP_GL_DATA records with specified ChartField overrides. When you run the finalize phase of the GL Interface process, the data is summarized by using your selected (remapped) ChartFields for correct account mapping.

After you have updated the GP_GL_DATA table, you can complete the standard core GLI process by running the Finalize process.

Running the ChartField Remapping Process

The ChartField remapping process:

- Uses specified ChartField overrides and updates the GP_GL_DATA records.
- Enables the finalize phase of the GL Interface process to correctly summarize transactions by using your selected combination of ChartFields, grouping codes, and account values.

You run the new Application Engine process as part of the standard General Ledger Interface process in the following sequence:

1. Ensure that the GL Calculate phase is complete.
2. Run the new Application Engine process to perform ChartField remapping.

   If you alter the remap, you must always rerun the calculate process. You can't rerun the remap process until you have run the calculation process.
3. Run the GL Finalize process.

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> **Note**
>
> This process runs as a separate process and is not integrated into existing Application Engines. In this way, it does not affect the existing GLI.

Process or Phase	PeopleSoft GL	QSP GL
Calculate	Y (yes)	Y
Leave Entitlement	Y	Y
Finalize	Y	N
Update Statistics	Y	Y

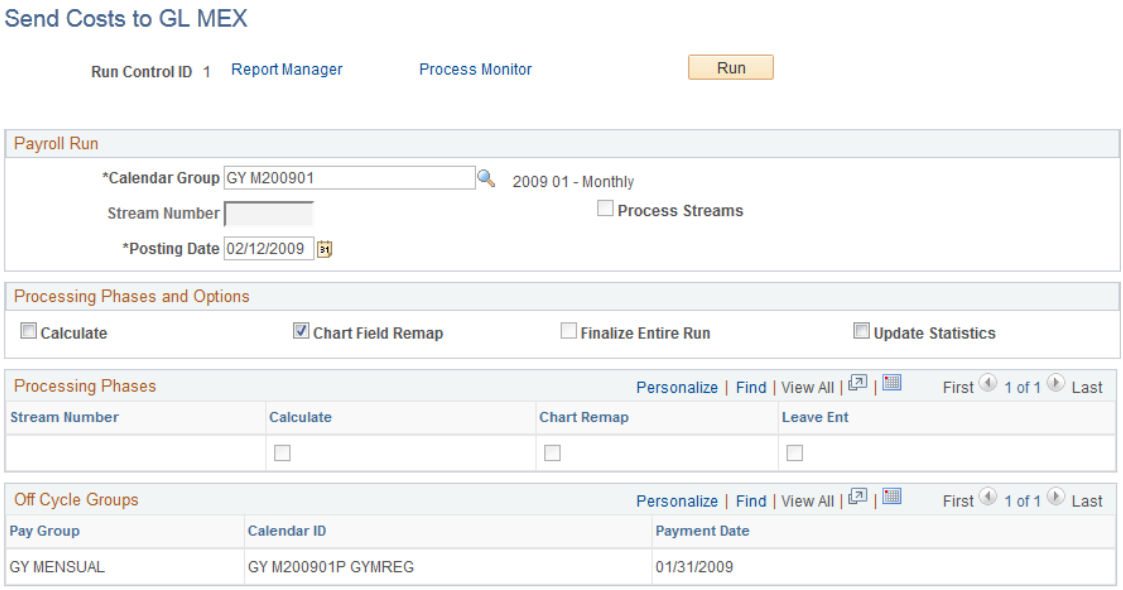
Send Costs to GL MEX Page

Use the Send Costs to GL MEX page (GPMX_GL_PREPARE) to initiate the processes for calculation of GL data, remapping of GL ChartFields, finalization of the GLI, and statistical data updating.

Navigation:

Global Payroll & Absence Mgmt, and then **Time and Labor / GL Costs**, and then **Send Costs to GL MEX**

This example illustrates the fields and controls on the Send Costs to GL MEX page. You can find definitions for the fields and controls later on this page.



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Payroll Run

Field or Control	Description
Calendar Group	Select a calendar group to run the process. Only calendar groups for which payroll is finalized but not yet sent to General Ledger are available.
Stream Number and**Process Streams**	**Process Streams** is selected if stream processing was used during the payroll process and must be used with the Calculate option. Select the stream number to process.
Posting Date	Enter the date on which the entries are posted to General Ledger. Even if you run your process on the fifteenth of the month, you can indicate that you want the entries posted on the thirtieth of the month. **Note:** The posting date that you select must abide by the closing date of Journal Generator. Posting dates must be coordinated with General Ledger. If Time and Labor is installed and costing has been sent, the posting date defaults to the day the costing was sent. You can change this day in this field to reflect the day that the general ledger is actually sent to General Ledger.

Processing Phases and Options

Select a processing option. You can run Calculate and Finalize together if the Payroll process is finalized.

Field or Control	Description
Calculate	Select to generate General Ledger transactions for the earnings, deduction, and accumulators that were calculated by the Payroll process for this calendar group and that belong to a General Ledger group. The Payroll process must have identified at least one payee before you can run the Calculate process. If you're using stream processing, run the Calculate phase for one stream at a time. You can run the Calculate phase more than once for each stream. During subsequent iterations, the system deletes existing data before creating new results. It stores final results in the Global Payroll Transaction Interface record (GP_GL_DATA) and inserts an entry in the Completed GL Stream table (GP_GL_PREP_STRM) to indicate that calculation is complete.

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Field or Control	Description
Chart Field Remap	Select to enable the ChartField Remap Application Engine process (GPMX_GL_RC) when running the General Ledger process. This run control page enables you to run an Application Engine process that updates ChartFields in GP_GL_DATA. The program selects and updates the necessary GP_GL_DATA records with specified ChartField overrides. When you run the GL Interface Finalize process, the data is summarized by using your selected (remapped) ChartFields for correct account mapping.
Finalize Entire Run	This check box is available for selection after the Payroll process has been finalized and you have run the Calculate phase for the entire calendar group. (If you are using stream processing, all streams must be calculated.) Select this check box when you are ready to finalize the run. (Stream processing is not available for the Finalize phase.) **Note:** The Finalize check box is hidden if PPS is installed.
Update Statistics	This check box is for the database administrator to help with fine-tuning system performance. If selected, the system generates statistics during batch processing that provide information about how worktables are being used.

Processing Phases

This group box displays all streams associated with the calendar group that have been processed and the status of the processing phases for each stream.

Field or Control	Description
Stream Number	Displays the streams that are associated with the calendar group.
Calculate	If selected, then you have already run the GLI process (GLI_GPMX_GL) to calculate the stream.
Chart Remap	If selected, then you have already run the GLI process (GLI_GPMX_GL) to remap ChartFields in the stream.

Calendar List

The system displays information about each calendar in the calendar group.

Off Cycle Groups

The system displays off-cycle groups that were processed within the calendar group.

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Remapping ChartFields After Initial Calculation

To remap General Ledger (GL) ChartFields for Global Payroll for Mexico, use the GL Chartfield Remapping MEX (GPMX_GL_MAP) component.

Page Used to Remap ChartFields After Initial Calculation

Page Name	Definition Name	Usage
GL Chartfield Remapping MEX Page	GPMX_GL_MAP	Set up GL ChartField parameters that enable you to remap ChartFields after you run the initial Calculate process. You can configure and maintain GL remapping data. Enables you to set up different levels of ChartFields based on GL groupings codes or accounts.

Understanding ChartField Remapping

Global Payroll for Mexico enables you to define ChartField remapping data used during the General Ledger (GL) interface process and post payroll costs to differing levels of ChartFields based on GL groupings codes or accounts. You set up GL ChartField parameters that enable you to remap default ChartFields after you run the initial Calculate process. For example, you might require that a higher level of ChartFields be attached to each of your cost centers. Instead of using multiple departments for each cost center, you may require one department at a global ChartField level, which covers all departments. By remapping the departments to the one global department you are able to roll costs from the various cost centers into this one department. For instance, perhaps you want to charge parking to facilities independently of an employee's department.

GL Chartfield Remapping MEX Page

Use the GL Chartfield Remapping MEX page (GPMX_GL_MAP) to set up GL ChartField parameters that enable you to remap ChartFields after you run the initial Calculate process.

You can configure and maintain GL remapping data. Enables you to set up different levels of ChartFields based on GL groupings codes or accounts.

Navigation:

Set Up HCM, and then **Product Related**, and then **Global Payroll & Absence Mgmt**, and then **Integration**, and then **GL Chartfield Remapping MEX**

This example illustrates the fields and controls on the GL Chartfield Remapping MEX page. You can find definitions for the fields and controls later on this page.

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Chartfields

ChartFields represent attributes of a payee, such as department, pay group, company, employee ID, etcetera. When you send a payee's earnings, deductions, or accumulator amounts to General Ledger, you can also transmit the values that are associated with your specific combination of ChartFields for the payee.

Field or Control	Description
Chartfields to be passed to GL	A field appears for each ChartField that you set up on the Mapping page in Global Payroll. Use the specific ChartFields check boxes to prevent the system from sending particular ChartFields to the GL. During mapping, ChartFields can be used to cost to different account codes. You can then elect not to send the ChartFields to the GL and only send the values to the accounts. When integrating Global Payroll with General Ledger, you can remap ChartField values to a business unit's GL account numbers. To enter the new, remapped ChartField value, use the Transformed Values tab.

Chartfield Transformations

The default ChartFields values appear in the fields on the ChartFields tab. To remap the default settings, select the new values on the Transformed Values tab.

Chartfields and Transformed Values

Field or Control	Description
Account	Displays the GL account number to which your ChartFields and grouping codes will map.

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Field or Control	Description
Grouping Code	Select the code to map to the GL account. This is the grouping code for the elements that are included in the GL transfer. A grouping comprises entry types of earnings, deductions, or segment accumulators. Elements must be in groups before they can be processed by General Ledger. Instead of entering earnings individually, you bundle them into one accumulator and create a grouping code for that accumulator.

Related Topics

- PeopleSoft Global Payroll: Understanding the General Ledger Interface

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Global Payroll for Mexico Reports

Global Payroll for Mexico Reports: A to Z

The table in this topic lists the PeopleSoft Global Payroll for Mexico reports, sorted by report ID.

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.

Report ID and Report Name	Description	Navigation	Run Control Page
GPMXAA01 Minimum Wage Salary Level	Displays a list of the minimum wage salary levels in your company to present to the government.	**Global Payroll & Absence Mgmt**, and then **Taxes**, and then **ANN – Tax Adj Report MEX**, and then **Annual Adjustment**	GPMX_RC_SUBSACRED
GPMXAA02 Annual Tax Adjustment Results	Displays the annual tax adjustment results.	**Global Payroll & Absence Mgmt**, and then **Taxes**, and then **ANN – Tax Adj Report MEX**, and then **Annual Adjustment**	GPMX_RC_SUBSACRED
GPMXAA03 Form 37	Form 37 has two purposes. Either it provides information about employees who are going to present their own annual adjustment tax data or it provides tax information to employees who terminate.	**Global Payroll & Absence Mgmt**, and then **Taxes**, and then **Form 37 Report MEX**, and then **Form 37 Report MEX**	GPMX_RC_FORMAT37
GPMXAA04 Creditable Subsidy	Displays tax subsidy data.	**Global Payroll & Absence Mgmt**, and then **Taxes**, and then **ANN – Tax Adj Report MEX**, and then **Annual Adjustment**	GPMX_RC_SUBSACRED

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Report ID and Report Name	Description	Navigation	Run Control Page
GPMXAA05 Multiple Information MEX	Creates a flat file that will be loaded up to the SAT (Servicio de Administración Tributaria) system.	**Global Payroll & Absence Mgmt**, and then **Taxes**, and then **Multiple Information MEX**, and then **Multiple Information MEX**	GPMX_RC_ANNL
GPMXAA06 Employee Subsidy	Displays employee subsidy data.	**Global Payroll & Absence Mgmt**, and then **Taxes**, and then **ANN – Tax Adj Report MEX**, and then **Annual Adjustment**	GPMX_RC_SUBSACRED
GPMXAG01 Christmas Bonus	Details the Christmas bonus amounts and taxes.	**Global Payroll & Absence Mgmt**, and then **Absence and Payroll Processing**, and then **Reports**, and then **ANN – Christmas Bonus MEX**, and then **Christmas Bonus**	GPMX_RC_XMAS01
GPMXBA01 Payment File Generation	Creates an electronic flat file to be transferred to the bank and a printed report.	**Global Payroll & Absence Mgmt**, and then **Payment Processing**, and then **EFT Payment File MEX**, and then **Create EFT Payment File MEX**	GPMX_BANK_EFT
GPMXCF01	Provides a report's reconcile of the XML generated in the process of printing in XML/ CFDI sent to SAT. This report has two running options: with or without detail.	**Global Payroll & Absence Mgmt**, and then **Payslips**, and then **Review Absence/ Payroll**, and then **Create/Print Payslips MEX**	GPMX_RC_PAYSLIP
GPMX_PMT Payment Preparation	Populates the GP_PAYMENT and GPMX_PAYMENT records for banking payments review. The Payment Preparation process is a prerequisite for the Payment File Generation process.	**Global Payroll & Absence Mgmt**, and then **Payment Processing**, and then **Run Payment Prep Process MEX**, and then **Run Payment Prep Process MEX**	GPMX_BANK_POPULATE
GPMXIE01 State Taxes by Location	Provides a monthly report on state taxes paid by your company.	**Global Payroll & Absence Mgmt**, and then **Taxes**, and then **State Taxes by Loc Report MEX**, and then **State Taxes by Loc Report MEX**	GPMX_RC_ST_TAXES

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Report ID and Report Name	Description	Navigation	Run Control Page
GPMXIF01 Federal Taxes Summary	An end of the tax year report that details the federal taxes paid by your company and your employees.	**Global Payroll & Absence Mgmt**, and then **Taxes**, and then **Federal Taxes Report MEX**, and then **Federal Taxes Report MEX**	GPMX_RC_FEDTAX
GPMXIF02 Subsidy Factor Report	Lists the earnings that are the base for the subsidy factor.	**Global Payroll & Absence Mgmt**, and then **Taxes**, and then **ANN – Subsidy Factor Rpt MEX**, and then **Subsidy Factor Report**	GPMX_RC_SUBS_FACT
GPMXIM01 Variable SDI Report	Lists the variable SDI earnings for the previous month by pay group.	**Global Payroll & Absence Mgmt**, and then **Social Security/ Insurance**, and then **Variable SDI Report MEX**, and then **Variable SDI Report**	GPMX_RC_VARIABI
GPMXIM02 IMSS Printed Notices – Hire	Provides hiring details for selected employees. This report is submitted to IMSS in printed format.	**Global Payroll & Absence Mgmt**, and then **Social Security/ Insurance**, and then **IMSS Report Notices MEX**, and then **IMSS Report Notices MEX**	GPMX_RC_IMSS_PRN
GPMXIM03 IMSS Magnetic Media Notices - Hire	Provides hiring details for selected employees. This report is submitted to IMSS in magnetic media format.	**Global Payroll & Absence Mgmt**, and then **Social Security/ Insurance**, and then **IMSS Mag. Notices MEX**, and then **IMSS Mag Notices MEX**	GPMX_RC_IMSS_MMD
GPMXIM04 IMSS EDI Notices – Hire	Provides hiring details for selected employees. This report is submitted to IMSS in EDI format.	**Global Payroll & Absence Mgmt**, and then **Social Security/ Insurance**, and then **IMSS IDSE Notices MEX**, and then **IMSS EDI Notices**	GPMX_RC_IMSS_EDI
GPMXIM05 IMSS Printed Notices – Termination	Provides termination details for selected employees. This report is submitted to IMSS in printed format.	**Global Payroll & Absence Mgmt**, and then **Social Security/ Insurance**, and then **IMSS Report Notices MEX**, and then **IMSS Report Notices MEX**	GPMX_RC_IMSS_PRN

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Report ID and Report Name	Description	Navigation	Run Control Page
GPMXIM06 IMSS Magnetic Media Notices - Termination	Provides termination details for selected employees. This report is submitted to IMSS in magnetic media format.	**Global Payroll & Absence Mgmt**, and then **Social Security/ Insurance**, and then **IMSS Mag. Notices MEX**, and then **IMSS Mag Notices MEX**	GPMX_RC_IMSS_MMD
GPMXIM07 IMSS EDI Notices – Termination	Provides termination details for selected employees. This report is submitted to IMSS in EDI format.	**Global Payroll & Absence Mgmt**, and then **Social Security/ Insurance**, and then **IMSS EDI Notices MEX**, and then **IMSS EDI Notices**	GPMX_RC_IMSS_EDI
GPMXIM08 IMSS Printed Notices – Salary Change	Provides salary change details for selected employees. This report is submitted to IMSS in printed format.	**Global Payroll & Absence Mgmt**, and then **Social Security/ Insurance**, and then **IMSS Report Notices MEX**, and then **IMSS Report Notices MEX**	GPMX_RC_IMSS_PRN
GPMXIM09 IMSS Magnetic Media Notices – Salary Change	Provides salary change details for selected employees. This report is submitted to IMSS in magnetic media format.	**Global Payroll & Absence Mgmt**, and then **Social Security/ Insurance**, and then **IMSS Mag. Notices MEX**, and then **IMSS Mag Notices MEX**	GPMX_RC_IMSS_MMD
GPMXIM10 IMSS EDI Notices – Salary Change	Provides salary change details for selected employees. This report is submitted to IMSS in EDI format.	**Global Payroll & Absence Mgmt**, and then **Social Security/ Insurance**, and then **IMSS EDI Notices MEX**, and then **IMSS EDI Notices**	GPMX_RC_IMSS_EDI
GPMXIM11 Absences Report	Details absences for selected employees.	**Global Payroll & Absence Mgmt**, and then **Absence and Payroll Processing**, and then **Reports**, and then **Absence History MEX**, and then **Absence History MEX**	GPMX_RC_WRKRISK
GPMXIM12 IMSS Base Over Cap	Lists the employees who have a surplus over the cap on 3, 18, and 25 minimum wages.	**Global Payroll & Absence Mgmt**, and then **Social Security/ Insurance**, and then **IMSS Base Over Cap Report MEX**, and then **IMSS Base Over Cap Report MEX**	GPMX_RC_CAP_BSE

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Report ID and Report Name	Description	Navigation	Run Control Page
GPMXIM13 SUA- Load Employees	Generate a flat file and printed report for SUA with payee data such as name, hire date, and so on. The system includes only employees hired or rehired in a given period.	**Global Payroll & Absence Mgmt**, and then **Social Security/ Insurance**, and then **SUA – Payee File MEX**, and then **SUA - Payee File MEX**	GPMX_RC_SUA001
GPMXIM14 SUA – Employee Transactions	Generates a flat file and a printed report for SUA with transactions of each payee for a given period. This report includes payee transactions data for terminations, pay rate changes, rehires, absences, and disabilities that should be reported to SUA.	**Global Payroll & Absence Mgmt**, and then **Social Security/ Insurance**, and then **SUA – Transact File MEX**, and then **SUA - Employee Transactions**	GPMX_RC_SUA002
GPMXIM16 Risk Factor Report	Lists all workers with work risk disability in a given year.	**Global Payroll & Absence Mgmt**, and then **Social Security/ Insurance**, and then **ANN – Risk Factor Report MEX**, and then **ANN- Risk Factor Report MEX**	GPMX_RC_ABSENCE
GPMXIM17 Fixed SDI Report MEX	Lists the fixed SDI by employee, as well as earning elements that are included in the fixed SDI integrable base, depending on the selected parameters.	**Global Payroll & Absence Mgmt**, and then **Social Security/ Insurance**, and then **Fixed SDI Report MEX**, and then **Fixed SDI Report MEX**	GPMX_RC_FIX_SDI
GPMXIM19 SUA - Payees Affiliation Data	Generate the SUA flat file and a printed report with employee affiliation data, for employees hired or rehired in a given period.	**Global Payroll & Absence Mgmt**, and then **Social Security/ Insurance**, and then **SUA – Affiliation File MEX**, and then **SUA - Affiliation File MEX**	GPMX_RC_SUA001
GPMXIM20 SUA - INFONAVIT Loans Data	Generate the SUA flat file and a printed report with employee INFONAVIT loans data.	**Global Payroll & Absence Mgmt**, and then **Social Security/ Insurance**, and then **SUA – Loans File MEX**, and then **SUA - Loans File MEX**	GPMX_RC_SUA001

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Report ID and Report Name	Description	Navigation	Run Control Page
GPMXIM21 SUA - Disabilities Data	Generates the SUA flat file and a printed report with employee disabilities data.	**Global Payroll & Absence Mgmt**, and then **Social Security/ Insurance**, and then **SUA - Disabilities File MEX**, and then **SUA - Disabilities File MEX**	GPMX_RC_SUA001
GPMXLF01 Termination/Layoff Letters	Generates either a termination letter or a layoff letter, depending on the option you select.	**Global Payroll & Absence Mgmt**, and then **Termination Processing**, and then **Terminated/Layoff Letters MEX**, and then **Create Term/Layoff Letters MEX**	GPMX_RC_TERMREP
GPMXPE01 Payroll Results Register	Summarizes the payroll results.	**Global Payroll & Absence Mgmt**, and then **Absence and Payroll Processing**, and then **Reports**, and then **Payroll Results Register MEX**, and then **Payroll Results Register MEX**	GPMX_RC_PAYRSL
GPMXPE02 Balances MEX	Provides a monthly summary of all the accumulator members of the earnings total accumulator and the deductions total accumulator.	**Global Payroll & Absence Mgmt**, and then **Absence and Payroll Processing**, and then **Reports**, and then **Balances MEX**, and then **Balances MEX**	GPMX_RC_ACCUM
GPMXPR01 Loans by Calendar	Lists all loans by calendar group ID.	**Global Payroll & Absence Mgmt**, and then **Absence and Payroll Processing**, and then **Reports**, and then **Loans by Calendar MEX**, and then **Loans by Calendar MEX**	GPMX_RC_LOANS_CAL
GPMXPR02 Loans Payee	Lists all loans by payee.	**Global Payroll & Absence Mgmt**, and then **Absence and Payroll Processing**, and then **Reports**, and then **Loans MEX**, and then **Loans MEX**	GPMX_RC_LOANS_PYE
GPMXPYSL Create/Print Payslips MEX	Generates the payslip.	**Global Payroll & Absence Mgmt**, and then **Payslips**, and then **Print Payslips MEX**, and then **Create/ Print Payslips MEX**	GPMX_RC_PAYSLIP

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Report ID and Report Name	Description	Navigation	Run Control Page
GPMXPV01 Provisions Report	Summarizes all provisions, including vacation, vacation premium, and Christmas bonus. This report has two running options: with or without detail.	**Global Payroll & Absence Mgmt**, and then **Absence and Payroll Processing**, and then **Reports**, and then **Provisions MEX**, and then **Provisions MEX**	GPMX_RC_PROV
GPMXRU01 PTU – Eligible Payees	Lists all payees who are eligible for profit-sharing.	**Global Payroll & Absence Mgmt**, and then **Absence and Payroll Processing**, and then **Reports**, and then **ANN – PTU Profit Share MEX**, and then **ANN - PTU-Profit-Share MEX**	GPMX_PTU
GPMXRU02 PTU – Non-Eligible Payees	Lists all payees who are not eligible for profit-sharing.	**Global Payroll & Absence Mgmt**, and then **Absence and Payroll Processing**, and then **Reports**, and then **ANN – PTU Profit Share MEX**, and then **ANN - PTU-Profit-Share MEX**	GPMX_PTU
GPMXRU03 PTU – Unpaid Payees	Lists all payees who have profit-sharing but have not been paid yet.	**Global Payroll & Absence Mgmt**, and then **Absence and Payroll Processing**, and then **Reports**, and then **ANN – PTU Profit Share MEX**, and then **ANN - PTU-Profit-Share MEX**	GPMX_PTU
GPMXRU04 PTU - Project	Lists all the details of profit-sharing at employee level.	**Global Payroll & Absence Mgmt**, and then **Absence and Payroll Processing**, and then **Reports**, and then **ANN – PTU Profit Share MEX**, and then **ANN - PTU-Profit-Share MEX**	GPMX_PTU
GPMXTE01 Overtime Report	Provides overtime details for employees. With this report, you have two options: • From week to week with daily details. • From week to week without detail.	**Global Payroll & Absence Mgmt**, and then **Absence and Payroll Processing**, and then **Reports**, and then **Overtime MEX**, and then **Overtime Report**	GPMX_RC_OVR001

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Report ID and Report Name	Description	Navigation	Run Control Page
GPMXVA01 Vacations Report	Details vacation entitlements and balances for selected employees.	**Global Payroll & Absence Mgmt**, and then **Absence and Payroll Processing**, and then **Reports**, and then **Vacations MEX**, and then **Vacations MEX**	GPMX_RC_VACATN
GPMXVL01 Create Coupons Interface MEX	Creates a flat file and a printed report of coupons. The flat file is transferred to the provider, which could be either Accor or SODEXHO.	**Global Payroll & Absence Mgmt**, and then **Absence and Payroll Processing**, and then **Coupons Interface MEX**, and then **Create Coupons Interface MEX**	GPMX_COUPONS_INT

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