Oracle Fusion Cloud Human Resources

Administering Absences for the United Kingdom

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Author: shaybhat

Contents

ORACLE

ORACLE

ORACLE

16 Absence Migration   77

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1 Absence Management

Overview of Statutory Absences

Oracle Fusion HCM for the UK enables you to calculate statutory absences as prescribed by the UK legislation.

This guide covers the setup and administration of the UK Statutory Absences. This guide assumes that you are also familiar with the Oracle Fusion Cloud Absence Management product.

> **Note:** To implement Teacher's Pension, LGPS, or MyCSP, use the instructions provided here, with the appropriate pension documents on My Oracle Support (MOS).

Here are the main aspects of statutory absences:

- Statutory Maternity Pay and Leave
- Statutory Adoption Pay and Leave
- Statutory Paternity Pay and Leave
- Statutory Sick Pay and Leave
- Statutory Parental Pay and Leave

The application processes entitlements to statutory payments for absences based on configurations as prescribed by the UK legislation. Entitlements to statutory payments are calculated and processed using predefined code. The absences management process uses the certification feature to stop absence payments. You can generate certifications manually or as mandated as a result of processing the absence. To override a certification, you can void the certification.

You use Global Absence Management to record the employee absences. You need to record absences with the start and end date corresponding to the person's actual absence or incapacity to work (period of sickness). There should be no gaps in the absence record.

You should not record absences by individual absence records for each day's incapacity to work.

For example, to record a persons' absence for 01 to 07 June 2022, enter one record with the start date 01 June 2022 and end date 07 June 2022. You can't record the absence as individual records, that is, separately for the 01, 02, 03, 04, 05, 06, and 07 June.

If you create records with gaps, the application might incorrectly calculate any entitlement or payment for an absence.

You should not create the absence as two separate records either. For example, 01-04 June, 05-07 June. The application processes the absence incorrectly because the second record would not form a period of incapacity to work. The absences won't be linked, and hence the second absence record is not payable.

Ensure that you set up the required components in this order:

1. Create the rate definitions.
2. Create the required elements to be associated with the statutory absence plans.
3. Create the statutory absence plans.
4. Create the absence types, including assigning the appropriate certifications to the absence type.

> **Note:** Absence plans and types vary depending on the type of absence that you need to set up. If you have multiple types with different units of measure, you need to use a separate plan for each type. You might find these related guides on Oracle Help Center helpful:
>
> - Oracle Fusion Cloud Human Resources: Implementing Absence Management
>
> - Oracle Fusion Cloud Human Resources: Using Absence Management

Assignments Starting after Absence Start Date

Absences recorded at the person level might face an issue with assignments that have an assignment start date after the absence start date.

They will not be included when processing the absence. The application will not check that they are absent from the assignment or include them in the payment split. This might lead to incorrect payment and payment splitting for the absence.

Effect of the Legislative Grouping Code Field on the Transition Process

The Legislative Grouping Code field should only be populated for statutory plans. The field should remain blank for occupational plans.

If the legislative grouping code is set on occupational plans, then the transition process will consider occupational plans as a statutory plan. It will also remove the formulas and linkage rules. This will then make any associated processing and calculations incorrect.

Statutory Payment Split

The statutory payment will be split across the number of assignments which have been aggregated for the payment.

A DBI has been provided (ORA_HRX_GB_ABS_CASE_BD_TU_AMOUNT) that provides a single payment value for aggregated assignments on a Tax Reporting Unit. Customers can use this DBI to apportion payments to assignments as they wish using Fast Formula.

To use the new DBI the customer will need to modify the Entitlement Result formula, and specifically add their code after the call to ORA_HRX_GB_ABSENCE_PAYMENT. The figure in 'pay_value' that is returned by the seeded 'ORA_HRX_GB_ABSENCE_PAYMENT' formula, can be modified based on the case daily amount. The splitting of the amount can then be done as per the customers requirements. Please note, that any rounding after splitting of the amount, will need to handled by the customer.

Here is a sample snippet of code that splits the payment based on the earnings of each assignment.

Sample Custom Code for possible different scenarios:

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```
DEFAULT FOR ORA_HRX_GB_ABS_CASE_BD_TU_AMOUNT is -999
CHANGE_CONTEXTS(EFFECTIVE_DATE = l_abs_comp_date)
 (
  IF ORA_HRX_GB_ABS_CASE_BD_TU_AMOUNT WAS NOT DEFAULTED THEN
  (

  l_case_amount = ORA_HRX_GB_ABS_CASE_BD_TU_AMOUNT
  l_rel_earnings = ABS_UK_EARNING_NEW_REL_PTD
  l_asg_earnings = ABS_UK_EARNING_NEW_ASG_PTD
  IF pay_value <> 0 THEN
  (
  pay_value = l_case_amount * l_asg_earnings/l_rel_earnings
  )
  )
 )
```

> **Note:** The balance used in the above code ABS_UK_EARNING_NEW is a salary element. Customer should change it to whatever earnings they want to base their split upon.

Make Absences Payable after Termination

Employees maybe eligible or statutory absence pays even post termination, which needs to be enabled in the application.

There are certain Statutory Absences (Statutory Maternity Pay/Statutory Adoption Pay/Statutory Paternity Pay) that are still payable after the person's employment has been terminated, if the employee meets the eligibility criteria. The details to enable this functionality are described in the relevant sections of this document.

If you have already set up the absences as not payable after termination, you must perform the following tasks:

1. Create a new element following the instructions in Payroll Elements.
2. Create a new plan using the instructions for the relevant absence, and attach the element created in step 1. Ensure that you set the **Entitlement End Rule** to be 'After Termination'.
3. Create a new absence type using the instructions for the relevant absence type, and attach it to the plan created in step 2.

   > **Note:**
   > - New absence entries, made after the new setup, should be created using the new absence type.
   > - For existing absences entered before the new setup that need to be paid after termination, you must withdraw the old absence and re-enter the absence using the new absence type.
   > - New absence entries, created after the new setup, should use the new absence type.

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Manage Unavailable or Partially Available Average Weekly Earnings

To ensure that the eligibility and payment of a UK statutory absence is correct, the Average Weekly Earnings (AWE) need to be ascertained for employees.

The Average Weekly Earnings (AWE) is calculated using rules set out by HMRC, and includes a certain period of time called the Relevant Period.

If payroll information is not available for the relevant period, then the AWE calculation might not be performed; or for certain absences can be calculated in an alternative way. If the calculation cannot be performed this could imply that the employee does not have the requisite service and is not be eligible for the absence. To perform the calculation accurately, you must have all the payroll data for the relevant period.

The following UK absences are affected: SSP/SAP/SPP/ShPL/SMP.

Alternative AWE Values

You can store the AWE information in a different application and so require to be able to bring that value into the calculation. You can bring in an AWE value from an outside source by means of a hook, which has been provided. It is up to you what logic is used to calculate the AWE value used by the hook. It should be noted that Oracle Corporation cannot accept any responsibility for the AWE figure generated through the hook mechanism. If the AWE figure is not at par with HMRC rules, then you might be liable to action from HMRC.

To be able to use the hook for absences (except for Shared Parental Leave) you will need to:

Create a Fast Formula called UK_ABSENCES_AWE_MA_OVERRIDE_FORMULA and in it have the following text:

```
OP_AWE_OVERRIDE= <Value>
 RETURN OP_AWE_OVERRIDE
```

The variable <value> can be either coded or reference another source of information, this is up to you.

To be able to use the hook for all Shared Parental Leave absences you will need to:

Create a Fast Formula called UK_ABSENCES_AWE_OVERRIDE_FORMULA and in it have the following text:

```
OP_AWE_OVERRIDE= <Value>
 RETURN OP_AWE_OVERRIDE
```

The variable <value> can be either coded or reference another source of information, this is up to you.

You only need to create the formulas one time.

The hook can only be used in certain circumstances and this can be ascertained using the flow diagrams contained in the Appendix (HR only, Payroll Interface, and Payroll).

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AWE Recalculation for Pay Rises

AWE is only recalculated if the employee receives a backdated pay rise (only a pay rise) which covers the relevant period. In the case of SMP, the backdated pay rise can cover the relevant period and also the Maternity Pay Period. To recalculate the AWE when a person has received a backdated pay rise, do the following:

- **Statutory Paternity Pay** – Manually recalculate the AWE value and enter it in the Override Average Weekly Earnings field on the case record. You can then re-evaluate the absence manually.

  Note: If the absence was not payable earlier, but is now payable, it will push new records to payroll that can be processed.

- **Shared Parental Leave** – You can manually recalculate the AWE value and enter it in the Agreement Override Average Weekly Earnings field in the Legislative Information section. You need to select the value UK Shared Parental Leave from the Context Segment list of values to display Agreement Override Average Weekly Earnings field. You can then reevaluate the absence manually.

  Note: If any agreement associated with the absence has been authorized, it might need to be withdrawn to alter the eligibility.

- **SAP** - Manually recalculate the AWE value and enter it in the Override Average Weekly Earnings field on the case record. You can then re-evaluate the absence manually.

  If the absence was not payable earlier, but is now payable, it will push new records to payroll that can be processed.

  This statutory absence has an enhanced pay period. The enhanced pay rate is calculated by using the AWE value. If an AWE value is recorded in the AWE Override field, even if the statutory absence has been processed, it causes the enhanced pay to be recalculated using the new AWE Override value.

  For the next period, the overridden AWE is used. If a retroactive run is triggered by any event causing the previous payroll period to be recalculated, then the retro run should use the overridden value and re-compute the absence that has already been processed and paid in the previous period.

- **SMP** – For more information see the Support for Alabaster ruling topic.

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Statutory Absences AWE Calculation for HR Only or Payroll Interface
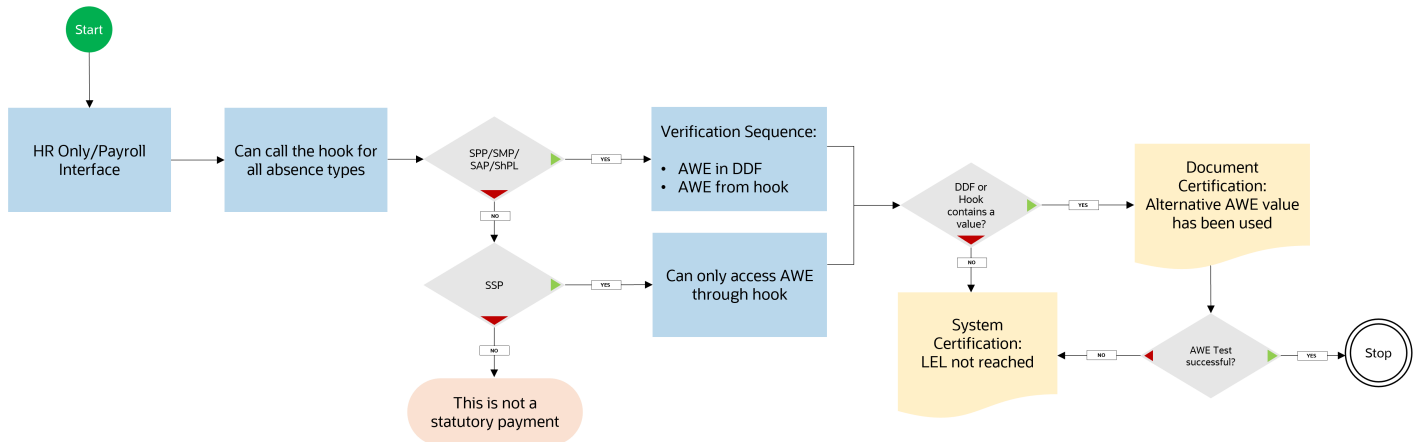
Multiple Assignments

The UK Statutory Absences solution supports multiple assignments for Statutory Sick Pay, Statutory Maternity Pay, Statutory Adoption Pay, Statutory Paternity Pay and Sickness During Maternity absences.

It does not currently support the payment processing for any other absences on multiple assignments, therefore payments for other absences, which have multiple assignments will need to be done by the customer.

If the application does detect an absence type that is associated with multiple assignments, a certification will be produced setting the payment value to zero. A user can void the certification, but they would then need to ensure that the payments and processing for the absences are correct.

> **Note:** If an assignment has a start date after the start date of the absence record, you will need to end date the current absence record and create a new one on the relevant assignment start date.

Customers wishing to process multiple assignment absences for Statutory Sick Pay and Sickness During Maternity are strongly recommended to enter absences at assignment level.

To enable multi-assignment processing the user must follow the setup steps in this document, existing customers that wish to enable multiassignment processing will also need to follow some of the setup steps in this document. After the move to multiassignment processing has been done customers will not be able to return to previous statutory absence processing. Careful consideration should be done by customers before moving to multiassignment processing.

Customers with Existing Setup

Customers who are already using the Oracle SMP/SDM/SAP/SPP/SSP solution and wish to move to the new processing need only do these:

- Enable processing for the relevant absence type (Enabling processing for SMP automatically enables processing for SDM).

- Ensure that the absence type display feature items have Deferred processing on subsequent absences and Deferred processing on initial entry are Unselected.

Customers Without Existing Setup

Customers without existing setup should follow these setup instructions. Ensure that you set up the required components in this order:

- Create the rate definitions.

- Create the required elements to be associated with the statutory absence plans.

- Create the statutory absence plans.

- Create the absence types, including assigning the appropriate certifications to the absence type.

- Enable processing.

Note: Absence plans and types vary depending on the type of absence being set up.

If you have multiple types with different units of measure, you need to use a separate plan for each type.

Transfer of TRU During an Absence Period

Assignments that are transferred to another TRU will need to be re-evaluated. The evaluation will happen within the new TRU and the absence will be processed only using absence information from the new TRU. This can cause non-payment due to not passing statutory checks and certificates will be produced for any checks that aren't meet. Any re-evaluation will also only use the start date of the assignment in the new TRU and so payment schedules might not be accurate for the absence.

User will need to manually work out the correct information and update the absence record accordingly, this might involve using the override fields. This is done at the user's discretion and own risk and they would then need to ensure that the payments and processing for the absences are correct.

In the case of Sickness During Maternity it will not be possible to enter the Sickness During Maternity absence record if no Statutory Maternity record exists in the new TRU. Customer will need to calculate the payments manually and also provide their own solution using core functionality to suit their organizational requirements.

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Assignments on Different TRUs

Statutory Maternity Pay, Statutory Adoption Pay, Statutory Paternity Pay and Sickness During Maternity absences are entered at a person level. (Core Functionality) This means that one absence record is used to provide information to all the assignments on the different TRUs. The start and end date of the absence will need to be the same for all assignments on all the TRUs.

Each TRU will have a case for the assignments that are aggregated for the TRU and any overrides or certificates entered at case level will only be applicable to the TRU which associated with the Case.

Enable Multiple Assignment Processing

To activate the new processing rules for SMP/SAP/SPP/SSP you will need to decide on a transition date.

The transition date will determine what date any new absences created will use the Case model to process the absences. For example if transition date is set to 1-AUG-2021, any new absences created with a start date on or after that date, will be created in the Case model. Any absences created before this date will be created in the existing Fast Formula solution.

After this date is set, it **cannot** be changed. The transition date will be stored in a new SYSTEM lookup type called ORA_HRX_GB_ABS_CONFIG, and the transition process will create a new lookup code called ORA_HRX_GB_<absence type>_TRANSITION_DATE with the start date of this record being the transition date. The end date will be end of time.

To enable the new processing procedure, you need to submit a flow from the **My Client Groups > Payroll > Submit a Flow** area.

To run the process, do the following:

1. Select the Legislative Data Group.
2. Select the flow pattern 'Run Feature Upgrade'.
3. Enter the following parameters:
   - **Payroll Flow** – Enter a name for the flow
   - **Feature** – This will depend on the absence type. Please refer to the table below:

Absence Types	Feature Name
Create Maternity Absence Types	Set transition date to process statutory maternity absences in case model.
Create Paternity Absence Types	Set transition date to process statutory paternity birth absences in case model.
Create Adoption Absence Types	Set transition date to process statutory paternity adoption absences in case model.
Create Sickness Absence Types	Set transition date to process statutory sick pay absences in case mode.

Additional information: Enter the transition date in the format DD-MON-YYYY, for the process to work correctly.

If you have existing absences, please set the transition date to a future date. Analysing any future absences and setting the date to after the last start date, is recommend.

If you have no exsiting statutory absences, then use 01-Jan-1951.

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> **Note:** Customers importing absences from previous application (1 year, 3 year, all, or last absence chain), are also recommended to set the transition date to a past date, for example 01-Jan-1951.

4. Submit the flow.

After the flow is completed successfully, you will be able to process absences with the new solution.

> **Note:** After the multiple assignment processing is enabled, you can't go back to the previous processing method.

Manage Overrides

If you have an absence that's been processed using fast formula, then you need to use the override fields within the absence record.

If you have an absence record that's being processed using the case solution, then you need to use the override fields in the case level. Overides take effect in the first absence, and this should be done even if the two absences are linked.

For example:

If you have an absence record on Jan 1 that's processed in the formula solution and another linked absence record on the Feb 1 absence that's processed in the case solution, any overrides required should be entered in the first absence, which is the formula solution in this scenario.

Overrides need to be entered in the first absence in a linked absence chain.

Common Considerations for Setting Up Statutory Absences

A few important points need to be considered before setting up statutory absences.

Effective Dates

When creating new components, ensure that you set an effective start date, which covers the time scale of the absences you need to enter, including any absence history that you might need to migrate.

> **Note:** The effective start date of the elements cannot be earlier than the 1 April 2012 for Statutory Sick Pay, Maternity Pay, Adoption Pay and Paternity Pay, and 6 April 2015 for Shared Parental Leave Pay. It should also be ensured that any employee's schedules are effective from at least the start date of any absences you need to record.

Seniority Date

The Statutory Absence Service Start Date field is used to record the date (different to the hire date) for calculating the period of service for entitlement and payment of UK statutory absences. The field is located on the employees work relationship record in the service dates, legal employer section of the work relationship record.

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If this field is populated, any Statutory Absences for the person will have the length of service eligibility calculated using the date that has been entered. If the field is not populated, then the hire date from the employees' employment record will be used to calculate length of service eligibility.

Absence Record Maintenance

Ensure that any absence types that you create have the appropriate absence record maintenance values populated, so that employees, managers, and administrators can update or maintain absence records appropriately.

Unit of Measure

For statutory payments to work, specify the correct unit of measure for each statutory plan, as described in subsequent sections of this document. Absence types can be in any unit of measure that is appropriate for your business needs.

For example, if your occupational plans are in hours, you will need to set up the absence type in hours to ensure that you capture absences correctly.

Payment Percentage Override

The payment of statutory absence payments is controlled by the use of certification, the payment percentage override functionality for a plan should not be used. Therefore, when setting up plans the 'Disable payment percentage override' field should be ticked.

Summary of Setup

A summary of all the elements, plans, and rate definitions required to implement the absences feature for the relevant absence type.

Summary of items to create to fully implement the Absences feature:

ABSENCE TYPES	ABSENCE PLANS	ABSENCE ELEMENTS	ABSENCE DEFINITION
Maternity Leave	One plan for Statutory Maternity Pay One or more plans for Occupational Maternity Pay schemes	One element for Statutory Maternity One element per occupational plan	Placeholder Rate Definition Average Weekly Earnings for "Birth" Rate Definition
Adoption Leave	One plan for Statutory Adoption Pay One or more plans for Occupational AdoptionPay schemes	One element for Statutory Adoption One element per occupational plans	Same Placeholder Rate Definition Average Weekly Earnings for "Adoption" Rate Definition
Paternity Leave – Birth	One plan for Statutory Paternity Pay Birth One or more plans for Occupational PaternityPay schemes	One element for Statutory Paternity Pay Birth One element per occupational plans	Same Placeholder Rate Definition Same Average Weekly Earnings for "Birth" Rate Definition

ABSENCE TYPES	ABSENCE PLANS	ABSENCE ELEMENTS	ABSENCE DEFINITION
Paternity Leave – Adoption	One plan for Statutory Paternity Pay Adoption Same Occupation Paternity Pay schemes as above	One element for Statutory Paternity Pay Adoption Same elements as above	Same Placeholder Rate Definition Same Average Weekly Earnings for "Adoption" Rate Definition
Sickness Leave	One plan for Statutory Sick Pay One or more plans for Occupational Sick Pay	One element for Statutory Sick Pay One element per occupational plans	Same Placeholder Rate Definition
Shared Parental Leave - Birth	One plan for Shared Parental Leave Birth One or more plans for Occupational Shared Parental Leave Pay	One element for Shared Parental Leave Birth One or more plans for Occupational Shared Parental Leave Pay	Same Placeholder Rate Definition Same Average Weekly Earnings for "Birth" Rate Definition
Shared Parental Leave – Adoption	One plan for Shared Parental Leave Adoption Same plans as above	One element for Shared Parental Leave Adoption Same elements as above	Same Placeholder Rate Definition Same Average Weekly Earnings for "Adoption" Rate Definition
Sickness During Maternity Pay Period	One plan for Sickness During Maternity Pay Period	One element for Sickness During Maternity pay Period. Note: Use Maternity, Paternity, Shared Parental Leave, or Adoption as secondary classification. One element per occupational plans	Same Placeholder Rate Definition

Create Absence Records

The dates and duration an employee is unable to report to work due to sickness needs to be added to the absence record.

The Global Absence Management is used to record the employee absences. Absence records should be recorded with the start and end date corresponding to the person's actual absence incapacity to work (period of sickness), there should be no gaps in the absence record. Absences should not be recorded by individual absence records for each day's incapacity to work.

If records are created with gaps, the application can incorrectly calculate any entitlement or payment for an absence.

Perform the following steps to create an absence record:

1. In the My Client Groups work area, select **Absences > Absence Records**.
2. From the list of direct reports, select the name of the person for whom you wish to create an absence record.
3. In the Manage Absences and Entitlements page, in the Existing Absences section, click **Add**.
4. Select the absence type from the list of values.
5. Enter the relevant details for the absence such as the start and end dates and times of the absence and upload any supporting document or relevant attachment if required.
6. Click **Submit**.

This page displays a summary of the absence entered including its duration. You can view the plan use details of the absence by selecting the absence record. To view details of linked absences to this absence record and action items (certifications), go to the case screen.

View Linked Absence Records

Linked absence records can be viewed from the absence record section of the application.

To view absences that are linked, navigate to the case screen. In the Absences section, you can see a list of absence records that are linked.

View Cases

Absence record details for SMP/SDM/SAP/SPL/SPBL/SSP are stored in an absence case.

Perform the following steps, to navigate to a case:

1. From the Absence Administration page, in the Administration mode, select the Plan Use tab from the appropriate record, and select the **View Case** link in the **Additional Information** column.
2. From the absence case link in the Absences work area, search for and select cases that have the category 'Statutory Sick Pay'. You will then see a list of cases from which you can select the appropriate case.

The case has a start date of the earliest linked absence and the end date of the latest linked absence that make the case. Here are the various sections:

- **Header**: Name, start, and end date of the case.

- **Absences**: Start and end dates of absence records linked in this case.

- **Certifications**: Certifications associated with the absence. You can view, void, or manually create the Certifications.

- **Plan Use**: All payable and nonpayable days associated with the case.

Absences Affected by Statutory Rate Increases

The UK government usually increases the statutory absence payment rates once a year in April.

This means that any absence records which end after new rates begin, can be affected.

If there are any absence records which have already been created and have an end date beyond the payment rate increase date, then you will need to run the core 'Evaluate Absences Process'. This is to ensure that the new rate is applied to the absence(s) affected.

Further information on the 'Evaluate Absences Process' can be found in the Using Absence Management User guide.

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2 Rate Definitions

Overview of Rate Definitions

Rate definitions need to be defined to calculate and process absence payments for Shared Parental Leaves only.

To enable the payment of the absence in payroll, you must define rate definitions. When creating an absence plan, you need to specify the payment rate that is applicable to this plan. This payment rate can either be derived by a formula or based on a rate definition.

A placeholder rate must be associated with the absence plan as well as the element, to trigger the calculation of the statutory rate. Use a single rate for all the statutory absence plans.

Additionally, you might also need to create one or more rates to calculate the deduction from salary. This is optional and depends on your policy regarding payment and deduction for absence.

Rate definitions **are required** if:

- A salary basis is not being used.
- If the deduction rate is based on various salary elements.

Rate definitions are **not required** if:

- A salary basis is being used such that it returns a non-zero value.
- If you reduce the regular earnings by the absence payment.

Create Placeholder Rate Definitions

A placeholder rate must be associated with the absence plan and the element, to trigger the calculation of the statutory rate.

Perform the following steps to create the placeholder rate definition:

1. In the My Client Groups work area, select **Absences > Formulas and Rates > Rate Definitions**.
2. In the Manage Rate Definitions page, click **Create**.
3. In the Create Rate Definition window, select 'Derived Rate' as the **Category**, an effective start date that covers any absences you wish to enter and the appropriate **Legislative Data Group**.
4. Click **OK**.
5. In the Basic Details section, enter the **Name Code** and **Short Name** for the definition.
6. Deselect the **Reporting Required** check box.
7. In the Calculation section, click **Create** to add a new rate contributor.
8. Select **Contributor Type** as **Balance**.
9. In the Create Rate Contributor window, select 'Balance' as the **Contributor Type**.
10. Click **OK**.
11. In the Rate Contributor section that appears, select a **Balance Name** and **Balance Dimension** from the LOV lists.

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> **Note:** You can select any balance as it is only a placeholder rate.

12. Click **Save** and **Continue**.

13. Click **Submit**.

Link Rate Definitions to Value Definitions

The Rate Definitions created for calculating the Average Weekly Earnings need to be associated with the Calculation Value Definitions.

After you've created the absence elements, you need to associate the Rate Definitions created for calculating the Average Weekly Earnings to the Calculation Value Definitions generated by the element template:

- Elements corresponding to Maternity, Paternity Leave - Birth, Shared Parental Leave – Birth: Use the predefined rate definition 'Childbirth absence 56 day' to link it with value definition that was created with the name.

- Elements corresponding to Adoption, Paternity - Adoption, Shared Parental Leave – Adoption: Use the predefined rate definition 'Normal absence 56 day' to link it with value definition that was created with the name.

To link the rate definitions to value definitions:

1. In the My Client Groups work area, select **Payroll > Common Configuration > Calculation Value Definitions.**

2. Search for 'Value Definitions' prefixed by the name of the element created earlier and the other search filters, such as **Name** and **Legislative Data Group**.

3. Click **Search**.

4. In the Search Results section, select the element '<Base Element Name>_MAT_56DAY_VD'.

5. In the Calculation Value Definitions: <Value Definition Name> page, click the **Edit** menu, and then **Correct**.

6. In the Calculation Values section, click **Add Row**.

7. Enter the **From** and **To** range (0 - 99999) and select 'Childbirth absence 56 day' from the Rate Definition list.

8. Click **Submit**.

What to do next

Repeat these steps for all elements that you've created such as Maternity, Paternity Leave - Birth, Shared Parental Leave - Birth.

Similarly, repeat the steps for Adoption, Paternity Leave - Adoption, Shared Parental Leave - Adoption. Ensure that you link the relevant Rate Definition. Select 'Normal absence 56 day' as the rate definition.

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3 **Recovery Rates**

Set Up Recovery Rates

Specific rates of recovery and compensation a person is entitled to, needs to be configured in the application, based on the company size.

There are different rates of recovery and compensation. The rate you are entitled to is based on the size of the company. There are two rates: Full (103%) and Partial (92%). By default, if the recovery type is blank, no recovery or compensation is calculated.

Perform the following steps to set up the recovery type:

1. In the My Enterprise work area, select **Setup and Maintenance > Manage Legal Entity for HCM Information**.
2. In the **Search Tasks** box, select **Legal Reporting Unit Calculation Card** and click **Search**.
3. Click **Legal Reporting Unit Calculation Card** from the list of tasks.
4. Click **Select and Add** to set the scope of the Legal Reporting Unit.
5. Click **Apply and Go to Task**.
6. In Calculation Card, click **Actions > Create**.
7. In the **Create Calculation Card** window, select the effective date and 'Statutory Payments' as the **Name**.
8. Click **Continue**.
9. In the Statutory Payments page, in the Calculation Component Details section, click **Statutory Payments Recovery**.
10. Select the relevant options from the **Statutory Payments Recovery Type** list. The available options are:
    - Full
    - None
    - Partial
11. Click **Save and Close**.

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4 Elements

Overview of Payroll Elements

Elements need to be created to enable the payroll application to process absences, which have been transferred from the Global Absence Management.

The absence element creation template has been extended to include the following:

- Automatic generation of required elements, including recovery and NIC compensation elements, where required.
- Automatic balance feeds for PAYE, NI, and other deductions as well as balance feeds required for RTI reporting.
- Creation of retroactive elements.
- Enable payment of absence after termination.

Create Absence Elements

Absence elements need to be created for each absence plan that transfers absence payment information for payroll processing.

Perform the following steps to create a new absence element:

1. In the My Client Groups work area, select **Payroll > Elements**.
2. Click **Create**.
3. In the Create Element window, select the appropriate Legislative Data Group, Absences as the Primary Classification. Select a Secondary Classification based on the type of absence you are creating. For the UK, the secondary classifications available are:
   - Holiday
   - Maternity, Paternity, Shared Parental Leave or Adoption
   - Other
   - Parental Bereavement
   - Sickness

   Note: The Category is auto populated when the secondary classification is entered.

4. Click **Continue**.
5. In the Create Element: Basic Information page, enter the element name, reporting name and the effective date.
6. In the Currency section, select the relevant **Input Currency**.
7. In the Absence Plan Details section, select the appropriate calculation units, work units conversion rule for the absence, and the type of absence information you want transferred to payroll.

   Note: The calculation units should be the same as the one specified in the absence plan. For example, if the calculation units for the plan is in days, select 'Days' here.

8. Click **Next**.
9. In the Create Element: Additional Details page, in the Absence Payments section select the appropriate absence payment options, as shown below:

FIELD	VALUE
How do you want to reduce earnings for employees not requiring a time card?	Select the relevant option
Which rate should the absence payment calculation use?	Select the relevant rate that you are using to determine the deduction amount or, provide an empty value to default the rate calculation based on the basic salary. **Note:** The rate to use for Absence Payment should be the placeholder rate defined in the previously pre-defined Manage Rate Definitions page.
Does this plan enable entitlement payments after termination?	Select Yes, to continue paying the absence after termination of the employee. Use this option for SPM, SAP, and SPL as these are still payable to employees who meet the eligibility criteria, even if they are terminated. Select No, to discontinue paying the absence after termination of the employee. Use this option for SSP and ShPL as these are no longer payable after an employee is terminated.

> **Note:** If you pay an absence after termination, use a rate to determine the absence deduction amount. If you are unable to do this, it might result in an error when paying.

10. In the Accrual Liability and Balance Payments section, select the relevant absence liability options.

> **Note:** You need to select the rate definitions created previously, if you select 'Yes' for any of the options in this section.

11. In the Absence Types section, select the appropriate absence type for the element you are creating.

> **Note:** The list of values may vary depending on the secondary classification selected.

12. Click **Next**.
13. Review the options you selected.
14. Click **Submit**.

Create Element Eligibility

Element eligibility for absences need to be created based on a number of criteria.

The template creates the following elements:

- Absence type name

- Absence type name Entitlement

- Absence type name Recovery Calculator

- Absence type name Entitlement Result

- Absence type name Entitlement Retro

- Absence type name Entitlement Calculator

You must create the eligibility for the following elements:

- <Base Element Name>

- <Base Element Name> Entitlement

- <Base Element Name> Recovery Calculator

- <Base Element Name> Entitlement Result

- <Base Element Name> Entitlement Retro

- <Base Element Name> Entitlement Calculator

Perform the following steps to create element eligibility:

1. In the My Client Groups work area, select **Payroll > Elements**.
2. In **Element Overview** of the Element Summary page, select **Element Eligibility**.
3. Select **Create Element Eligibility** from **Actions**.
4. In **Element Eligibility**, enter the **Element Eligibility Name**.

   Note: There are a number of criteria available to define eligibility. Make sure that the eligibility is defined in such a way that all employees on the absence plan are eligible. Otherwise, the calculation card will not be created.

5. Click **Submit**.
6. Click **Done**.
7. Search for the other elements prefixed with your absence element name.
8. Select each element in turn and repeat these steps on the Element Summary page to define eligibility for each element.

Edit Processing Priority of Elements

The elements required for an absence record might need to be modified in terms of sequence of processing.

After all the elements that are required for an absence are created, you may need to edit them to ensure they process in the correct sequence.
If you selected the option to reduce the regular earnings by absence payment, the priority of element can remain unchanged.

If the deduction is based on a Rate Definition, then you need to ensure that the Absence elements are processed after Regular Earnings elements. Modify the processing priority of all absence elements to 2600.

Perform the following steps using the Manage Elements task to edit these elements:

1. In the My Client Groups work area, select **Payroll > Elements**.

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2. Search for the relevant element using the search filters such as **Element or Reporting Name**, **Element Classification Name** or **Legislative Data Group**.

3. Click **Search**.

4. In the Search Results section, click the names of the elements created earlier.

5. Click **Edit**, then **Correct**.

6. Enter '2600' as the **Priority**.

7. Click **Submit**.

Add Balance Feeds

Based on relevant business practices, additional balance feeds may need to be created.

The Net Pay input value on the <Base Element Name> Result element stores the sum of the absence deduction and payment.

This input value feed the following balances:

Absence Type	NIable Earnings Regular	NIable Pay	Taxable Pay	Pension Auto Enrolment Assessable Earnings	Attachable Earnings	Total Pay	Balance Name to Feed
Statutory Maternity	Y	Y	Y	Y	N	Y	GB_STATUTORY_MATERNITY_ PAY
Sickness During Maternity Pay Period	Y	Y	Y	Y	N	Y	GB_STATUTORY_MATERNITY_ PAY
Statutory Adoption	Y	Y	Y	Y	N	Y	GB_STATUTORY_ADOPTION_ PAY
Statutory Paternity - Birth	Y	Y	Y	Y	N	Y	GB_ORDINARY_STATUTORY_ PATERNITY PAY
Statutory Paternity - Adoption	Y	Y	Y	Y	N	Y	GB_STATUTORY_PATERNITY_ PAY_ADOPTION
Statutory Shared Parental Leave - Birth	Y	Y	Y	Y	N	Y	GB_SHARED_PARENTAL_PAY_ BIRTH
Statutory Shared Parental Leave - Adoption	Y	Y	Y	Y	N	Y	GB_SHARED_PARENTAL_PAY_ ADOPTION
Statutory Sickness (Defaulted)	Y	Y	Y	Y	Y	Y	GB_STATUTORY_SICK_PAY

Depending on your business practices, you may need to create additional balance feeds such as Pensionable Earnings.

The recovery amount and NIC Compensation also feed the appropriate statutory balances; this ensures that they are reported automatically on the Full Payment Submission and Employer Payment Summary.

Absence Type	Recovery Balance to Feed	NIC Recovery to Feed
Statutory Maternity	GB_SMP_RECOVERY	GB_SMP_NIC_COMPENSATION
Sickness During Maternity Pay Period	GB_SMP_RECOVERY	GB_SMP_NIC_COMPENSATION
Statutory Adoption	GB_SAP_RECOVERY	GB_SAP_NIC_COMPENSATION
Statutory Paternity - Birth	GB_OSPP_BIRTH_RECOVERY	GB_OSPP_BIRTH_NIC_COMPENSATION
Statutory Paternity - Adoption	GB_OSPP_ADOPTION_RECOVERY	GB_OSPP_ADOPTION_NIC_COMPENSATION
Statutory Shared Parental Leave - Birth	GB_SHPP_BIRTH_RECOVERY	GB_SHPP_BIRTH_NIC_COMPENSATION
Statutory Shared Parental Leave - Adoption	GB_SHPP_ADOPTION_RECOVERY	GB_SHPP_ADOPTION_NIC_COMPENSATION

Manage Offsets

The occupational absence payments against statutory absence payments need to be offset.

By default, all the absence elements are processed and paid:

- If both statutory payment elements and occupational payment elements are setup as absence elements, they will both be paid out to the employee.

- If your policy is to pay statutory only when occupational is exhausted, or offset statutory from occupational, you must create Information elements, and modify the absence element processing rules to output the results to the Information element.

To offset occupational absence payments against statutory absence payments, set the occupational absence elements to a higher priority than the statutory absence elements. The default priority for the occupational payment elements is 1750. It is recommended you increase this by 10.

For further information, refer to Solution to Offset Statutory Absence Payments from Occupational Absence Payments (Doc ID 2258204.1) on My Oracle Support.

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5 Leave Agreements

Overview of Leave Agreements

Apart from an absence plan and absence type, the shared parental leave feature also uses the Leave Agreements and relevant templates.

The Shared Parental Leave functionality is governed by a leave agreement. This requires the user to set up a leave agreement template that specifies:

- The source plan (where the entitlement is converted from a maternity or adoption leave)

- The target plan (the plan associated to the Shared Parental Leave agreement)

Leave agreements functionality controls the amount of leave that is used when a person consumes the Shared Parental Leave. The mother or adopter must curtail their maternity or adoption leave or pay in order to allow a partner to consume their Shared Parental Leave.

The Leave agreement functionality converts the remaining leave from a maternity or adoption plan, if the plan is with the same employer. You can also manually enter the leave values that can be used for Shared Parental Leave. The Shared Parental Leave consists of payable and nonpayable leave. The amount of leave being entered by a person is validated against the amounts in the leave agreement.

You must create four leave agreement templates as follows:

- Shared Parental Leave for mother

- Shared Parental Leave for adopter

- Shared Parental Leave for the mother's partner

- Shared Parental Leave for the Adopter's partner

Leave Agreement Templates

A summary of all the leave agreement templates required to implement the absences feature.

The table below summarizes the leave agreement templates and their corresponding target and source plans and types that need to be used:

LEAVE AGREEMENT TEMPLATES	SOURCE PLAN	TARGET TYPE	TARGET PLAN
Shared Parental Leave for Mother	Statutory Maternity Pay	Shared Parental Leave - Birth	Shared Parental Leave Birth
Shared Parental Leave for Adopter	Statutory Adoption Pay	Shared Parental Leave – Adoption	Shared Parental Leave Adoption
Shared Parental Leave for Mother's Partner	N/A	Shared Parental Leave - Birth	Shared Parental Leave Birth

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LEAVE AGREEMENT TEMPLATES	SOURCE PLAN	TARGET TYPE	TARGET PLAN
Shared Parental Leave for Adopter's Partner	N/A	Shared Parental Leave – Adoption	Shared Parental Leave Adoption

Create Leave Agreements

Leave agreements need to be created for the shared parental leave functionality to work.

Perform the following steps to create leave agreements:

1. In the My Client Groups work area, select **Absences > Absence Definitions > Leave Agreements.**
2. In the Leave Agreements page, click **Create**.
3. In the Create Leave Agreement window, enter the effective date based on the required time period, 'United Kingdom' as the **Legislation** and the relevant **Pattern**. The available options are:
   - **Childbirth or placement conversion** - This is used when you have the details of the mother or adopter's absence that is being given up in favor of this one. The plan is either an adoption or maternity plan that is created earlier. A separate template must be created for the maternity conversion and adoption conversion.
   - **Childbirth or placement agreement** – This is used when the person taking the leave supplies all the details required, but you don't have a record of the leave for the person who is giving it up in favor of shared parental leave. A separate template must be created for maternity and adoption.
4. In the Create Leave Agreement page, enter the field values in the childbirth or placement conversion template as shown below:

FIELD	VALUE
Status	Active
Eligibility Rule	Formula
Formula	ORA_HRX_GB_SHPL_AGREEMENT_VALIDATION
Enable eligibility override	Selected
Validation Formula	ORA_HRX_GB_SHPL_AGREEMENT
Denial Reason	All
Withdrawal Reason	Agreement withdrawn
Partner Rule	Name and allocations
Source Absence Type	Select the relevant absence type created for Statutory Maternity leave.
Source Plan	Select relevant plan

5. In the Entitlements section, click **Add** to select the relevant target plan, select 'ORA_HRX_GB_SHPL_PAY_PERCENTAGE' as the **Payment Percentage Display Formula**, and select the **Override allowed** check box.

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6. In the Certifications section, click **Add** to select the name of the relevant certifications to be added to the leave agreement.

   > **Note:** To add multiple rows, click **Add** again.

7. Click **Save and Close**.

Create Shared Parental Leave and Pay Agreement for Mother or Main Adopter

Shared Parental leave agreements for absence records can be created for mother or the primary adopter.

Perform the following steps to create a shared parental leave agreement:

1. In the My client groups work area, select **Absences > Person Management > Absence Records**.
2. From the list of direct reports, select the name of the person for whom you wish to create a leave agreement record.
3. In the Manage Absences and Entitlements page, in the Entitlement Agreements section, click **Add**.
4. In the Entitlement Agreements page, enter the agreement name and select the appropriate template from the templates you created earlier.
5. Enter the relevant details and the source absence:

   Notice: The initial request for Shared Parental Leave. You can provide information such as the date the notice was provided and whether it was provided in timely manner.

   Event: In case of maternity or adoption leave being converted into Shared Parental Leave, you must specify the maternity or adoption record it relates to. Based on that, the remaining entitlement is automatically populated into the leave agreement, as the available entitlement for the agreement. All the relevant dates are also populated based on information stored on the source absence record.

   > **Note:** You must end date the source maternity or adoption leave before creating the leave agreement, else there will be no entitlement remaining.

6. You can also create and manage the status of various document types and attach copies of physical documents using the Certification section. Certifications (predefined or additional ones created during implementation) are available on the leave agreement.

7. You must provide the start and end date of the agreement. This represents the period of time during which the employee is entitled to use the shared parental leave.

   The **Agreement Eligibility** is assessed based on the predefined eligibility formula that has been attached to the agreement template. It verifies that the employee has the required length of service to qualify for Shared Parental Leave. If the employee doesn't qualify, it will return a status of Ineligible. Because there are other eligibility conditions that cannot be checked programmatically, you can override the eligibility status and specify a reason for override.

   The **Target Plan Entitlement** is derived based on the remaining entitlement from the source absence record. This represents the amount of leave that can be shared between the employee and the partner. It can be adjusted, should the need arise.

8. Click **Save and Close**.

9. The agreement is now created in the 'Initiated' status. You can take action directly from the Entitlement Agreement table. You can only delete or reject an agreement when it is still in Initiated status. After authorized, it can only be withdrawn.

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10. After all the conditions are satisfied and the shared parental leave is approved, you can either Authorize or Finalize the agreement.

Authorize: Enables administrates administrators and employees to record absence records against the agreement.

Finalize: Enables administrators to record absences against the agreement.

Create Shared Parental Leave and Pay Agreement for Partner

The Shared Parent Leave Agreement for the mother's or adopter's partner needs to be created.

The procedure for recording a ShPL (Shared Parent Leave Agreement) for the mother's or adopter's partner is very similar. Select the appropriate templates from the ones created above. The only difference is that there is no source record linked to the agreement. So you must enter the information about the event and entitlement manually, based on the details provided by the employee.

6 Alabaster Ruling

Support for Alabaster Ruling

The Alabaster ruling specifies the norms related to any pay rise awarded during the maternity leave.

The Alabaster ruling specifies that any pay rise awarded between the beginning of the period and the end of the maternity leave must be included in the elements of pay by calculating the amount of Statutory Maternity Pay. This requirement is not limited to cases where the pay rise is backdated to the period covered by the relevant period.

The 'relevant period' is the period between:

- Date 1 the last normal payday on, or before the Saturday of the Qualifying Week (QW), this is the 15th week before the week baby due. This payday will be Date 1 and is the end of the 'relevant period'.
- Date 2 the last normal pay day falling not less than 8 weeks before the payday at Date 1. Date 2 will be the day after this payday and is the start of the 'relevant period'.

Earnings include all payments on, or after, **Date 2,** up to and including those paid on **Date 1.**

The pay rise will affect the amount paid to the employee during the first 6 weeks of Statutory Maternity Pay, known as the enhanced pay period. This would mean that the person would be entitled to extra money. It could also be the case that a person might have not qualified for Statutory Maternity Pay but now does due to the increased pay.

Make an Adjustment for an Employee

The case record for the Statutory Maternity absence contains a two FlexFields. (Alabaster Adjustment Amount and Alabaster Adjustment Percentage) The user is required to enter in a value for one of the fields. This will then be used to re calculate the Statutory Maternity Pay for the employee. If both fields are populated, the amount value will be used.

1. Navigate to the employee's maternity absence case record and populate the relevant Alabaster field with the value required.
2. Create a retro event for the Payroll Relationship with the Process Date as of Absence Start Date. Status = 'Awaiting Processing' and 'Event Report Type = 'Retroactive Notification'.

Note: The event will be automatically created if the entitlement status changed from 'absence being paid' to 'absence being unpaid' or vice versa due to Alabaster Adjustment.

If the absence has already been paid with the amount before the uplift was added, it will be reprocessed. Also, the difference would get created as retro entries whenever the retro is processed. The difference will be paid in the subsequent payroll run.

Add Elements to Employees

The elements created need to be added to the record of the relevant employees.

Perform the following steps to add an element to an employee:

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1. In the Payroll Calculation work area search for the employee and then select **Elements** from the Earnings and Deductions section.

2. In the Elements Entry screen select the **Add Element** icon. Set the effective date to the date on which you wish the element to start.

3. Select 'Alabaster Adjustment' from the list.

4. Click **Continue**.

5. In the entry details screen in the Entry Values section enter the amount or the percentage as appropriate and click **Submit**.

6. In the elements entry screen set the effective date to be the end date of the relevant period and select the entry Alabaster Adjustment. This will take you into the entry details screen.

7. Click **Edit** and select the end date.

8. Click **Continue**.

Results:

You will be taken back to the element entry screen and see that the Alabaster Adjustment element has an effective start and end date. These dates will depend on when the payrise took effect and is described earlier. The Alabaster Adjustment element will now be included in the appropriate payroll runs and the employee will receive the payments after appropriate payroll processing.

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7 Statutory Sick Leave and Pay

Overview of Setting Up Plan and Type for Statutory Sick Pay

Employees are eligible for Statutory Sick Pay and leave based on certain criteria.

Overnight Shifts

When an employee is scheduled to work overnight (for example, shift starting at 10pm and ending at 6am), the day that counts for SSP purposes is the day the shift starts. This functionality is supported in the Cloud: the predefined entitlement formula looks at the start and end of the shift to determine which day qualifies for SSP, based on when the shift started.

> **Note:** The only prerequisite is that the employee's work schedule must be defined as Time and the absence type unit of measure cannot be Calendar Days.

Example: An employee works overnight shifts. The shift pattern is from 10pm until 6AM the next morning. The pattern starts on Monday and the last shift ends on the following Saturday at 6am. The employee has a sickness absence starting on the Monday and ending on the Friday (they return to work for the Friday shift starting at 10pm).

This absence will be processed as being absent from Monday (the beginning of the first shift) to Thursday (the beginning of the last shift the employee was absent for).

Statutory Sick Pay Schedule

To enable the accurate processing of absences, a schedule must be available for the employee being processed. If one hasn't been specified (or not found), the application uses the employee's work schedule (which again can be associated at different levels of the organization). Users can create an alternative work schedule to that which the employee normally uses for calculating SSP payments.

The SSP schedule is identified by a specific category, and can be associated at different levels of the organization (from Enterprise to Assignment).

Alternative SSP Schedule

If an SSP schedule category is specified on the SSP plan, then it will be used to process the absence instead of any other work schedule described above.

To create a schedule that can be used for SSP calculations, set up a work schedule category and ensure that the code value is SSP. You can specify a meaningful name.

To set up a work schedule category:

1. In the My Client Groups work area, select **Compensation > Lookups**.
2. Click on **Manage Common Lookups** page. Search for the lookup type 'ZMM%SCHE%' and click **Search**.
3. Select the lookup type 'Schedule Category'.

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4. Add a child row with the **Lookup Code** as 'SSP', **Effective Date** as '1/1/10', **Meaning** as 'UK SSP' and **Description** 'UK SSP'.
5. Click **Save**.

You will now be able to create a work schedule and use the category created.

> **Note:** After you have created the work schedule category, you can create schedules to reflect the SSP schedules used within your organization. Ensure that the category is SSP (as created above), the effective start date is a Sunday and the type is the same as the work schedule.

Based on your business requirements, the schedules can then be assigned to different levels of the organization this can be achieved by following the steps below:

1. Navigate to the Manage Work Schedule Assignment Administration page.
2. Search for the Work Schedule for Support schedule.
3. Click the schedule to open it on the Edit Work Schedule Assignment page.
4. In the Resource Assignments region, click **Add Row** from the **Actions** menu.
5. Select at what level that you need to add the resource schedule at and then select the appropriate name.
6. Ensure that the **Primary** field is blank and click **Submit**.

> **Note:** You can create as many SSP schedules as required by your organization, as long as they all have the SSP category.

SSP Processing

The SSP processing uses case functionality to group and view absences details associated with absence periods. The occupational schemes and all other statutory absences don't use case.

The entitlements to statutory sick payments are calculated and processed using predefined code and will be processed as follows for both single and multiple assignments:

- Multiple assignments are aggregated, if they are all on the same Statutory Deductions card.
- Calculate the average weekly earnings using the appropriate pay information for the aggregated assignments or single assignments.
- Check that the person is absent from all the aggregated assignments associated with the absence period.
- Include absence records that are entered at assignment or person level
- Ensure that a Period of Incapacity to work is formed
- Identify the waiting days
- End payment after 28 weeks of paying statutory sick pay
- Check whether the chain of linked absences is longer than 3 years.
- Identify whether the employee has a Job Center linking letter
- Check that the person has earned enough to meet or exceed the Lower Earnings Limit.
- If payment needs to be stopped, then the application will create the appropriate certification.
- UK Sickness Absence Validation: This checks if the absence is pregnancy-related, and generates a warning message for Statutory Maternity Leave or Pay, if the sick leave falls within 4 weeks of the due date of birth.

You can configure the absence type using the global feature to allow entry of an absence at assignment or person level. For more information, see Implementing Absence Management on Oracle Help Center.

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The absences management process uses the certification feature to stop absence payments. You can generate certifications manually, or as required by processing the absence. If you need to override a certification, you can void the certification.

When an absence is processed, it automatically creates a new case. Alternatively, if the absence is linked for Statutory Sick Pay purposes to a previous absence, it adds the absence to the already created case containing the linked absence.

Setup for SSP Processing

You must perform these setup steps to be able to use the SSP processing functionality.

It is recommended that you are familiar with these sections in the UK Statutory Absence Setup document:

- Average weekly earnings not available or available partially
- Effective dates
- Seniority dates
- Absence reason linkage
- Absence record maintenance
- Unit of measure
- Payroll elements
- Rate definitions
- SSP overnight shifts
- SSP schedules
- Alternative SSP schedules

SSP with Existing Setup

Customers who are already using the Oracle SSP solution and wish to move to the new processing need only do these:

- Enable processing.
- Ensure that the absence type display feature items **Deferred processing on subsequent absences** and **Deferred processing on initial entry** are unselected.

SSP without Existing Setup

Customers without existing setup should follow these setup instructions. Ensure that you set up the required components in this order:

- Create the rate definitions.
- Create the required elements to be associated with the statutory absence plans.
- Create the statutory absence plans.
- Create the absence types, including assigning the appropriate certifications to the absence type.
- Enable processing.

Note: Absence plans and types vary depending on the type of absence being set up. If you have multiple types with different units of measure, you need to use a separate plan for each type.

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Create Sickness Absence Plans

To record that a person is on a sickness absence, a sickness absence plan needs to be created.

Perform the following steps to create a sickness absence plan:

1. In the My Client Groups work area, select **Absences > Absence Definitions > Absence Plans.**
2. In the Absence Plans page, click **Create**.
3. In the Create Absence Plan window, enter the effective date, 'United Kingdom' as the **Legislation** and 'Qualification' as the **Plan Type**.
4. Click **Continue**.
5. In the Plan Attributes tab, enter the required details for the absence plan such as the plan name, Legislative Data Group, and others. Enter the other field values as shown below:

FIELD	VALUE
Status	Active
Enable concurrent entitlement	Selected
Plan UOM	Days
Legislative Grouping Code	UK Statutory Sickness
Type	Absence duration

> **Note:** If you are using a specific SSP schedule, make sure that you select the schedule category as Alternate Schedule Category. If you're using the employee's regular work schedule, you can leave this blank.

6. Click the Participation tab and enter the field values as shown below:

FIELD	VALUE
Qualification Date Rule	Absence start date
Entitlement End Rule	As of event

7. Click the Entitlements tab and select **Disable payment percentage override**.
8. Click the Entries and Balances tab and enter the field values as shown below:

FIELD	VALUE
Absence Payment Rate Rule	Rate definition
Rate Name	Select the placeholder rate definition created earlier
Transfer absence payment information for payroll processing	Selected
Element	Select the element that you created earlier

9. Click **Save and Close**.

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Create Sickness Absence Types

To record that a person is on a sick leave, a sickness absence plan needs to be created, where an absence type is required.

Perform the following steps to create a sickness absence type:

1. In the My Client Groups work area, select **Absences > Absence Definitions > Absence Types**.
2. In the Absence Types page, click **Create**.
3. In the Create Absence Type window, enter the effective date, 'United Kingdom' as the **Legislation** and 'Illness or injury' as the **Pattern**.
4. Click **Continue**.
5. In the Type Attributes tab, enter the required details for the absence type such as the name, Legislative Data Group, and others. Enter the other field values as shown below:

   Entries and Balances

FIELD	VALUE
UOM	Calendar days, Days or Hours
Validation Formula	ORA_HRX_GB_ABS_SSP_VALIDATION
Legislative grouping code	UK Sickness
Status	Active

6. In the Multiple Assignment Rules section, select the relevant check box to configure Absence types to restrict the way the user enters absences:
   - **Allow assignment selection at absence entry** – If you select this check box, the user can enter the absence at assignment level.
   - **Allow only one assignment per absence** – If you select this check box, the user can only enter the absence at the assignment level.

     Note: If you don't select any of the check boxes, you will see the option All, when you enter the absence. This means that the absence belongs to all the assignments. For further information, see Implementing Absence Management.

7. Click the Plan and Reasons tab.
8. In the Absence Plans section, click **Select and Add**.
9. In the Select and Add Plan to Type window, select the plan that you created for the absence type. Ensure that the **Status** is 'Active' and the **Priority** is '1'.

   Note: Occupational plans can be added to the same absence type. Ensure that the priority number of the occupational plans is higher than that of the statutory plan. This ensures that the entitlement in the statutory plan is always calculated, irrespective of whether employees are eligible for Occupational plans or not.

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10. Click **OK**.

> **Note:** If the Absence type Schedule Hierarchy Start is set to Assignment level, the start time and end time of the absence is automatically defaulted to the time from the normal schedule. If you are using Published Schedule, then you will need to set the field schedule hierarchy start to Published Schedule. If this is not done, then you could get a discrepancy between the start and end times on the published schedule versus the assignment schedule. The person might be marked down as late even though the published schedule says that they aren't.

11. Click the Display Features tab, and enter the field values as shown here:

FIELD	VALUE
Reason	Display and edit > **Note:** You must define the absence reasons on the Manage Reasons page.
Deferred processing on subsequent absences	Not Enabled > **Note:** When changing an existing absence record, it can have an impact on future-dated absences. You must Submit the Evaluate Absences process to reprocess the future-dated absences.
Deferred processing on initial entry	Not Enabled > **Note:** This allows the processing of entitlement on absence entry. If you choose to defer the processing, you can process absences in a batch by running the Evaluate Absences process.
Schedule nonworking days	Enabled > **Note:** If the unit of measure on the type is either 'Hours' or 'Days', and you want to allow recording of absences on nonworking days, ensure that this field is set to 'Enabled'. Any other unit of measure allows it by default, and therefore the displayed feature can remain unchanged.
Absence end date	Display and edit
Advanced absence entry	Not enabled
Condition start date	Display and edit
Open-ended	Display and edit
Special conditions	Display and edit

12. Click the Action Items tab and click **Select and Add** to add the certifications for the Statutory Sick Pay scheme.

13. In the Absence Certifications window, select the names of the relevant certifications for the Statutory Sick Pay
scheme from the list of values, and their corresponding status. The available options are:

- Entitled to SMP

- Absence less than 4 days

- Linking letter

- Maximum 28 weeks paid

- Maximum 3 years paid

- SSP not payable within 18 weeks of child birth

- Linked absence not payable

- On strike

- Pregnancy-related illness

- Waiting days

- Taken into legal custody

- Incorrect notice

- LEL not reached

- Insufficient or incomplete documents

- Absence has Multiple Assignments

- Payroll Changed during the Relevant Period

Note: Repeat this step to allocate multiple certifications to the absence type.

14. Click **Save and Close**.

Linking Letters

A Linking Letter is critical for Statutory Sick Pay entitlements, for which a document record needs to be created.

At the start of their employment, an employee could present a linking letter, which indicates that the employee has been
receiving allowances directly from the Job Center. This impacts their entitlement to SSP. The employer does not have to
pay SSP for sickness absences within 12 weeks of the date specified on the letter. After 12 weeks, the employer is obliged
to pay the SSP again.

You can create a document record for linking letters. Use the predefined document type Job Center Linking Letter to do
this.

Ensure that:

- The From Date is the date indicated on the linking letter

- The end date corresponds to the end of the 12-week period during which the employee is not entitled to SSP.

For any sickness record starting within that period, a certificate is automatically generated to indicate that SSP is not
payable for this absence.

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Enable New Statutory Sick Pay Processing

To process Statutory Sick Pay (SSP) absences with a new rule, recognition of a transition date and flow submission need to be completed.

To activate the new SSP processing rules, that you will need to decide on a transition date. The transition date will determine what date any new absences created will use the Case model to process SSP absences. For example, if transition date is set to 1-AUG-2021, any new absences created on or after that date, will be created in the Case model. Any absences created before this date will be created in the existing Fast Formula solution.

Customers who are importing absences from previous application (be it 1 year, 3 year, all, or last absence chain), then we recommend they set the transition date to a date in the past, say 01-Jan-1951.

After this date is set, it cannot be changed. The transition date will be stored in a new SYSTEM lookup type called ORA_HRX_GB_ABS_CONFIG, and the transition process will create a new lookup code called ORA_HRX_GB_SSP_TRANSITION_DATE with the start date of this record being the transition date. The end date will be end of time.

If customers have existing SSP set up, the transition date will be used to make a date effective update to the absence plan, and absence type as shown here:

- Remove the conversion formula and entitlement definition formula from the absence plan.

- Remove the linkage formula from the absence type.

Note: These formulas are no longer required for the new SSP solution.

To enable the new processing procedure that you will need to submit a flow. Perform the following steps to run the process:

1. In the My Client Groups work area, select **Payroll > Flow Submission and Results > Submit a Flow area**.
2. Select the relevant **Legislative Data Group**.
3. Click the **Run Feature Upgrade** flow pattern.
4. In the Submit a Payroll Flow page, enter the parameters as shown below:

FIELD	VALUE
Payroll Flow	Enter a name for the flow
Feature	Set transition date to process statutory sick pay absences in case mode
Additional information	Enter the transition date in the format DD-MON-YYYY, for example 01-Jan-1951. The date must be in this format or the process will not work correctly.

5. Click **Submit**.

Once the flow has completed successfully, you will be able to process SSP absences with the new solution.

Note: Once the multiple assignment processing is enabled, you can't go back to previous SSP processing.

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Create Non-Statutory Sick Pay Absences

Non-Statutory Sick Pay absences can be created when the setup has been completed.

After the setup is completed, you can create absence records for a person. The absence is processed by the Absence Management application.

Perform the following steps to create a non-SSP absence record:

1. In the My Client Groups work area, select **Absences > Absence Records**.
2. From the list of direct reports, select the name of the person for whom you wish to create an absence record.
3. In the Manage Absences and Entitlements page, in the Existing Absences section, click **Add**.
4. Select the relevant absence type from the list of values.
5. Enter relevant details for the absence such as the start and end dates and times of the absence and upload any supporting document, if required.
6. Click **Submit**.

Results:

For non-SSP absences, the page displays a summary of the absence, including its duration. You can view the details of the absence by selecting the absence record.

In the Absence Administration Details page, you can view any absences that are linked to this absence, planned use, and any action items. Click the relevant tabs to view the information.

- The **Plan Use** tab displays the plans and their relevant details.

- The **Action Items** tab displays details of certifications that have been used to stop payment on the absence.

- The **Voided** column displays any certification that has been voided with its relevant date.

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8 Maternity Leave and Pay

Overview of Setting up a Plan and Type for Maternity Leave

An employee is eligible for Statutory Maternity Pay and leaves based on certain criteria.

Statutory Maternity Pay (SMP) and Leave is payable to an employee who meets the eligibility rules.

The following predefined formulas are used:

1. UK Maternity Absence Entitlement (ORA_HRX_GB_MAT_ENTITLEMENT) – This formula performs the following checks:
   - The leave is in blocks of 7 days. If a week is not taken in full, no payment is made for that week, and the relevant certification is generated.
   - The employee is employed in the qualifying week.
   - The employee has been employed for more than 26 weeks.
   - The maximum weeks have not been paid.
   - The employee has reached or exceeded the Lower Earnings Limit (LEL).

   If any of these checks fail, the application creates the appropriate certification. Otherwise, it calculates the employee's entitlement to SMP.
2. UK Maternity Absence Validation (ORA_HRX_GB_MAT_VALIDATION) – This formula validates the maternity leave start date. This date must not be earlier than 11 weeks before the baby is due, unless the baby is born earlier.

Create Maternity Absence Plans

To determine employee's entitlement to Statutory Maternity Pay, you must create an absence plan that stores the criteria for processing these absences.

Perform the following steps to create maternity absence plans:

1. In the My Client Groups work area, select **Absences > Absence Definitions > Absence Plans**.
2. In the Absence Plans page, click **Create**.
3. In the Create Absence Plan window, enter the effective date, 'United Kingdom' as the **Legislation** and 'Qualification' as the **Plan Type**.
4. Click **Continue**.
5. In the Plan Attributes tab, enter the required details for the absence plan such as the plan name, Legislative Data Group, and others. Enter the other field values as shown below:

FIELD	VALUE
Plan UOM	Calendar Days

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FIELD	VALUE
Type	Absence duration
Enable concurrent entitlement	Selected
Legislative Grouping Code	UK Statutory Maternity

6. Click the Participation tab to continue paying SMP after employee termination. Update the **Entitlement End rule** to 'After Termination'.
7. Click the Entitlements tab and enter the field values as shown below:

FIELD	VALUE
Entitlement Definition Type	Formula
Disable payment percentage override	Selected **Note:** This option needs to be selected, as the payment of statutory maternity pay is controlled by the use of certification. This option will prevent users from being able to update the percentage manually.
Entitlement Formula	ORA_HRX_GB_MAT_ENITITLEMENT
Entitlement Start Date	Absence start date

8. Click the Entries and Balances tab, and enter the field values as shown below:

FIELD	VALUE
Absence Payment Rate Rule	Rate Definition
Rate Name	Select the placeholder rate definition created
Transfer absence payment information for payroll processing	Selected
Element	Select the element that you created earlier for the plan.

9. Click **Save and Close**.

Create Maternity Absence Types

The maternity absence type enables you to enter and store information associated with a maternity absence occurrence.

Perform the following steps to create maternity absence types:

1. In the My Client Groups work area, select **Absences > Absence Definitions > Absence Types**.
2. In the Absence Types page, click **Create**.
3. In the Create Absence Type window enter the effective date, the **Legislation** as 'United Kingdom' and 'Childbirth or placement' as the **Pattern**.
4. Click **Continue**.

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5. In the Type Attributes tab, enter the required details for the absence type such as the name, Legislative Data Group, and others. Enter the other field values as shown below:

FIELD	VALUE
Validation Formula	ORA_HRX_GB_MAT_VALIDATION
UOM	Calendar Days
Event Type	Childbirth
Legislative Grouping Code	UK Maternity
Partial day rule	Not Allowed

Note: Ensure that you have set the absence record maintenance values for enabling employees, manager, and administrator updates as appropriate.

6. Click the Plans and Reasons tab.
7. Click **Select and Add** to attach the plan you created in the previous steps to the absence type.
8. In the Select and Add Plan to Type window, ensure that the **Status** is 'Active' and the **Priority** is '1'.

Note: Occupational plans can be added to the same absence type. Ensure that the priority number of the occupational plans is higher than that of the statutory plan. This ensures that the entitlement in the statutory plan is always calculated, irrespective of whether employees are eligible for Occupational plans or not.

9. Click **OK**.
10. In the Display Features tab, and ensure that the appropriate features are enabled, as shown below:

FIELD	VALUE
Open-ended	Do Not Display
Expected date of event	Display and edit
Expected week of event	Display and edit
Payable after termination	Enabled **Note:** Enable this feature to pay the absence after the employee has been terminated.

11. Click the Action Items tab.
12. Click **Select** and **Add** to add the certifications for stopping payment of the absence to the absence type.

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13. In the Absence Certifications window, select the names of the relevant certifications for the Statutory Maternity scheme from the list of values, and their corresponding status. The available options are:

- Not Employed in Qualifying Week
- Insufficient Proof of Pregnancy
- Curtailment Notice
- Death of Parent
- Exceeded Number of KIT Days
- KIT Days
- Taken into Legal Custody
- Leave Block Less Than 7 Days
- Maximum Weeks Paid
- Employed Less Than 26 Weeks
- Absence has Multiple Assignments
- Incorrect Notice
- Payroll Changed During the Relevant Period
- LEL Not Reached

14. Click **OK**.

> **Note:** Repeat this step to allocate multiple certifications to the absence type.

15. Click **Save and Close**.

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9 Sickness during Maternity Leave Entitlements

Overview of Setting up a Plan and Type for Sickness During Maternity Leave Entitlements

An employee might be entitled to Statutory Maternity Pay if they fall ill while still in the Statutory Maternity Pay Period. They would not be entitled to Statutory Sick Pay. If a person has returned to work (ended their Statutory Maternity Pay/Leave) from Statutory Maternity Pay/Leave and falls ill within the Maternity Pay Period, then the person will be entitled to Statutory Maternity Pay for each full week of sickness providing they meet the relevant criteria, part weeks of sickness will not be paid, and the normal Statutory Sickness payment rules don't apply.

If the person is not entitled to Statutory Maternity Pay, then the absence will be recorded as non-payable. If the absence is payable the rate at which the person is paid would be in line with the Statutory Maternity Pay rates. If there is any part of the enhanced (90% of average weekly earnings) pay for the first 6 weeks unused, then this will be paid until it has been used up, and any of the unused remaining 33 weeks at the statutory rate.

The Statutory Maternity Pay will be paid in weeks and continue to be paid in the rolling week cycle that was started with the original Statutory maternity pay period.

For example, if the Statutory Maternity Pay period started on a Tuesday then the rolling week for payments would be Tuesday to Monday. If a person feels ill on Thursday, then they would not be entitled to payment until they had completed a full week starting on the following Tuesday.

The maternity pay period is not reset, and ends at the original date set by the original maternity absence.

When the sickness absence passes out of the maternity pay period normal statutory sick pay rules will apply. The absence will be non-payable if it is linked to the sickness absence during the maternity period that was non-payable under Statutory Sick Pay. For the person to be entitled to Statutory Sick Pay after the maternity pay period there must be a break of 56 days between the new sickness absence and any sickness absence recorded in the maternity pay period.

The application will:

- Check that the Statutory Maternity Pay/Leave has been ended.
- Check that the employee is still in the Statutory Maternity Pay Period.
- Pay any entitlements according to the original rolling week's payment schedule.

Employees who have curtailed their maternity leave/pay in favor of shared parental leave will not be entitled to Sickness During Maternity after the curtailment date. The Statutory Maternity Pay/Leave can be curtailed by creating a document certificate 'Notice of Curtailment' against the Statutory Maternity absence record.

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Create Absence Plans for Sickness During Maternity Leave Entitlements

An absence plan needs to be created to determine and calculate a person's entitlement to Sickness During Maternity.

Perform the following steps to create an absence plan for Sickness During Maternity Entitlements:

1. In the My Client Groups work area, select **Absences > Absence Definitions > Absence Plans**
2. In the Absence Plans page, click **Create**.
3. In the Create Absence Plan window, enter the effective date, 'United Kingdom' as the **Legislation** and 'Qualification' as the **Plan Type**.
4. Click **Continue**.
5. In the Plan Attributes tab, enter the required details for the absence plan such as the plan name, Legislative Data Group and others. Enter the other field values as shown below:

FIELD	VALUE
Plan UOM	Calendar Days
Legislative Grouping Code	UK Sickness During Maternity
Type	Absence duration
Enable concurrent entitlement	Selected

6. In the Entitlements tab, select 'Formula' as the **Entitlement Definition Type**. In the Entitlement Attributes section that appears, select 'ORA_HRX_GB_ABS_SDM_ENTITLEMENTS' as the **Entitlement Formula** and select **Disable payment percentage override** check box.
7. In the Entries and Balances tab, enter the field values as shown below:

FIELD	VALUE
Absence Payment Rate Rule	Rate Definition
Rate name	Select the placeholder rate definition created earlier
Transfer absence payment information for payroll processing	Selected
Element	Select the element that you created earlier for the plan.

8. Click **Save** and **Close**.

Create Absence Types for Sickness During Maternity Leave Entitlements

An absence type needs to be created to enter the absences for the sickness during maternity leaves.

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Perform the following steps to create an absence type for sickness during maternity leaves:

1. In the My Client Groups work area, select **Absences > Absence Definitions > Absence Types**.

2. In the Absence Types page, click **Create**.

3. In the Create Absence Type window, enter the effective date, 'United Kingdom' as the **Legislation** and 'Illness or injury' as the **Pattern**.

4. Click **Continue**.

5. In the Type Attributes tab of the Create Absence Type page, enter the required details for the absence type such as the name, Legislative Data Group, and others. Enter the field values as shown below:

FIELD	VALUE
Validation Formula	ORA_HRX_GB_ABS_SDM_VALIDATION
UOM	Calendar Days
Legislative Grouping Code	UK Sickness During Maternity Pay Period
Status	Active
Partial Day Rule	Not allowed
Absence Record Maintenance	Update as required

6. In the Plan and Reasons tab, click **Select and Add**.

7. In the Select and Add Plan to Type window, select the plan that you created for the absence type. Ensure that the **Status** is 'Active' and the **Priority** is '1'.

> **Note:** Occupational plans can be added to the same absence type. Ensure that the priority number of the occupational plans is higher than that of the statutory plan. This ensures that the entitlement in the statutory plan is always calculated, irrespective of whether employees are eligible for Occupational plans or not.

8. In the Display Features tab, enter the field values as shown below:

FIELD	VALUE
Deferred processing on subsequent absences	Enabled
Absence end date	Display and edit
Advanced absence entry	Enabled
Condition start date	Display and edit
Special Conditions	Display and edit
Absence Maintenance Record	Required
Absence Reasons	Display and edit > **Note:** You must have the reasons defined in the Manage Reasons page.
Deferred processing on initial entry	Disabled > **Note:** This allows the processing of entitlement to be done on absence entry. If you choose to defer the processing, you can process absences in batch by running the Evaluate Absences process.

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FIELD	VALUE
Deferred processing on subsequent absences	Enabled **Note:** When changing an existing absence record, it can have an impact on future-dated absences.
Schedule Nonworking Days	Enabled **Note:** This should be enabled only if the unit of measure on the type is either Hours or Days, and you want to allow recording of absences on non-working days. Any other unit of measure allows for that by default, and therefore the displayed feature can remain unchanged.

9. In the Action Items tab, click **Select and Add**.

> **Note:** If the unit of measure on the type is either Hours or Days, and you want to allow recording of absences on nonworking days, make sure that the display feature Schedule Nonworking Days is set to Enabled. Any other unit of measure allows for that by default, and therefore the displayed feature can remain unchanged.

10. In the Absence Certifications window, select the names of the relevant certifications from the list of values, and their corresponding status.

11. Click **OK**.

> **Note:** Repeat this step to allocate multiple certifications to the absence type.

12. Click **Save and Close**.

10 Paternity Leave and Pay

Overview of Setting Up a Plan and Type for Paternity Leave

An employee is eligible for Statutory Paternity Pay and leaves based on certain criteria set by the legislation.

An employee is entitled to Statutory Paternity Leave and Pay (SPP) if they meet the eligibility criteria set by the legislation. The rate of pay that the employee receives is also set by the legislation.

The system will perform the following checks:

- The employee must have been employed for 26 weeks continuously into the qualifying week to receive Statutory Paternity Pay.
- The employee's average earnings (during the relevant period) must be at or above the Lower Earnings Limit.
- The leave cannot exceed two weeks.
- The leave blocks must be for 7 days.
- For births where the expected week of childbirth begins before Sunday, April 7, 2024 and for adoption where the actual date of placement is before April 6, 2024:
    - Statutory Paternity Pay is not payable after the 56th day, after the child's birth date or placement date.
- For birth where the expected week of childbirth begins on or after Sunday, April 7, 2024 and for adoption where the actual date of placement is April 6, 2024 or later:
    - Fathers or partners may split their leave into two blocks of one week.
    - Fathers or partners may take their leave and pay at any point in the first year after the birth or adoption of their child.

If any of these checks fail, the application creates the appropriate certification. Otherwise, it calculates the employee's entitlement to SPP.

Recording Paternity Leave

The first period of leave must be recorded against the main paternity leave absence type.

If the person is taking a single two week leave block then this should be recorded against the main paternity leave absence type.

Recording of the second part of a leave must be done using the absence type for the second period of the leave. The second period of leave must be linked to the first period of leave by selecting the main period of leave from the drop-down list on the field 'Linked Paternity Adoption/Birth'.

Payment Calculation for Paternity Leave

The statutory rules require the payment calculation for paternity leave to use the actual birth/placement date. For absences recorded after April 7, 2024 you can enter a Paternity absence without the actual birth/placement date but the payment will not be calculated, a certification will be produced to stop payment.

The actual birth or placement date must be entered to calculate any payments for paternity absences being recorded after the April 7, 2024.

Create Paternity Absence Plans

An absence plan needs to be created to determine and calculate a person's entitlement to Paternity leaves and pay.

You must create two plans for paternity absences to determine an employee's entitlement to SPP; this enables the absence to be recorded and evaluated for payment:

- Paternity Pay - Birth
- Paternity Pay - Adoption

Perform the following steps to create the paternity absence plans:

1. In the My Client Groups work area, select **Absences > Absence Definitions > Absence Plans**.
2. In the Absence Plans page, click **Create**.
3. In the Create Absence Plan window, enter the effective date, 'United Kingdom' as the **Legislation** and 'Qualification' as the **Plan Type**.
4. Click **Continue**.
5. In the Plan Attributes tab, enter the required details for the absence plan such as the plan name, Legislative Data Group, and others. Enter the other field values as shown below:

FIELD	VALUE
Status	Active
Enable concurrent entitlement	Selected
Plan UOM	Calendar Days
Legislative Grouping Code	UK Statutory Paternity
Type	Absence duration

6. Click the Participation tab to continue paying SMP after termination of the employee. Update the Entitlement End Rule on the participation tab, to After Termination.
7. Click the Entitlements tab, and enter the field values as shown below:

FIELD	VALUE
Entitlement Definition Type	Formula
Disable payment percentage override	Selected
Entitlement Formula	ORA_HRX_GB_PAT_ENTITLEMENT
Entitlement Start Date	Absence start date

8. Click the Entries and Balances tab enter the field values as shown below:

FIELD	VALUE
Absence Payment Rate Rule	Rate definition
Rate Name	Select the rate definition created for the absence plans for the rate name
Transfer absence payment information for payroll processing	Select the check box
Element	Select the element that you created earlier

9. Select **Save and Close**.

Create Paternity Absence Types

An absence type needs to be created to enter the absences for the statutory paternity leaves.

For Statutory Paternity Leave, create four absence types, that is, adoption, childbirth, linked (Birth) and linked (Adoption). The adoption and childbirth absence types are used to record the first (main) period of leave and the linked (Birth) and linked (Adoption) are used to record the second period of leave (if required).

Perform the following steps to create paternity absence types:

1. In the My Client Groups area, select **Absences > Absence Definitions > Absence Types**

2. In the Absence Types page, click **Create**.

3. In the Create Absence Type window, enter the effective date, 'United Kingdom' as the **Legislation** and 'Childbirth or placement' as the **Pattern**.

4. Click **Continue**.

5. In the Type Attributes tab, enter the field values as shown below:

FIELD	VALUE
Status	Active
UOM	Calendar Days
Legislative Grouping Code	**Main Absence Types:** UK Paternity Birth UK Paternity Adoption **Extension Absence Types:** UK Paternity Adoption Extension UK Paternity Birth Extension
Validation Formula	ORA_HRX_GB_PAT_VALIDATION
Event Type	Placement for Paternity-Adoption and its extension

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FIELD	VALUE
	Childbirth for Paternity-Birth and its extension

6. Click the Plans and Reasons tab and click **Select and Add** to attach the plan you created earlier to the absence type. Ensure that the Status is Active and the Priority is 1.

> **Note:** Occupational plans can be added to the same absence type. Ensure that the priority number of the occupational plans is higher than that of the statutory plan. This ensures that the entitlement in the statutory plan is always calculated, irrespective of whether employees are eligible for Occupational plans or not.

7. For the adoption and birth absence types, click the Display Features tab, and enter the field values as shown here **for the first period of leave**:

FIELD	VALUE
Matching Date	Enabled
Open-ended	Do Not Display

8. For the adoption and birth absence types, enter the field values as shown here, **for the second period of leave**:

FIELD	VALUE
Expected date of event	Do Not Display or Not Enabled
Planned absence start date	Do Not Display or Not Enabled
Planned absence end date	Do Not Display or Not Enabled
Late notification evaluation	Do Not Display or Not Enabled
Open-ended	Do Not Display or Not Enabled
Planned absence start date validation	Do Not Display or Not Enabled
Matching date	Do Not Display or Not Enabled
Intend not to return to work	Do Not Display or Not Enabled
Authorization status updated	Do Not Display or Not Enabled
Late notification waived	Do Not Display or Not Enabled
Late notification waived date	Do Not Display or Not Enabled
Authorized absence	Do Not Display or Not Enabled
Block leave status	Do Not Display or Not Enabled
Notification date	Do Not Display or Not Enabled
Late notification	Do Not Display or Not Enabled
Special conditions	Do Not Display or Not Enabled

9. For the linked (birth and adoption) absence types, click the Display Features tab.

   o Only the absence start date and end date should be enabled in the Dates and Duration section.

   o All items in the Supplemental Absence Detail section should be set to 'Do not display'.

10. Click the Action Items tab and click **Select and Add** to add the certifications for Statutory Paternity scheme.

11. In the Absence Certifications window, select the names of the relevant certifications for the Statutory Paternity scheme, from list of values and their corresponding status. The available options are:

    o Insufficient or Incomplete Documents

    o Sick Entitled to SSP

    o Leave Block Less Than 7 Days

    o Maximum Weeks Paid

    o Employed Less Than 26 Weeks

    o Incorrect Notice

    o LEL Not Reached

    o Not Payable After 56th Day

    o Absence has Multiple Assignments

    o Payroll Changed During the Relevant Period

12. Click **OK**.

   Note: Repeat this step to allocate multiple certifications to the absence type.

13. Click **Save and Close**.

14. Repeat the steps until all four elements have been created.

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11 Adoption Leave and Pay

Overview of Setting up a Plan and Type for Adoption Leave

An employee is eligible for Statutory Adoption Pay and leaves based on certain criteria set by the legislation.

An employee can be entitled to Statutory Adoption Pay (SAP) and Leave if they meet the legislation criteria. The rate at which it is paid is also set by the legislation.

The following formulas are used:

1. UK Adoption Absence Entitlement (ORA_HRX_GB_ADO_ENTITLEMENT) – This formula checks the following:
   - The employee has been employed for 26 weeks continuously into the matching week.
   - The employee's average weekly earnings (during the relevant period) must be at or above the Lower Earnings Limit.
   - The leave exceeded 39 weeks of Statutory Adoption Pay.
   - Leave blocks are for 7 days.

     If any of these checks fails, the application creates the appropriate certification. Otherwise, it calculates the employee's entitlement to SAP. If the checks fail, then the application will raise the appropriate certification to stop payment of the leave. Otherwise it will calculate the employee's entitlement to SAP.
2. UK Adoption Absence Validation (ORA_HRX_GB_ADO_VALIDATION) – This formula checks the following:
   - The start date of the absence cannot be more than 14 before the expected placement date or later than the placement date.
   - If the child reaches the age of 18 before the leave end date, you can only enter the absence up to the child's 18th birthday.

Create Adoption Absence Plans

An absence plan needs to be created to determine and calculate a person's entitlement to adoption leaves.

Perform the following steps to create adoption absence plans:

1. Click the My Client Groups work area and select **Absences > Absence Definitions > Absence Plans**.
2. In the Absence Plans page, click **Create**.
3. In the Create Absence Plan window, enter the effective date, 'United Kingdom' as the **Legislation** and 'Qualification' as the **Plan Type**.
4. Click **Continue**.

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5. In the Plan Attributes tab, enter the required details for the absence plan such as the plan name, Legislative Data Group, and others. Enter the other field values as shown below:

FIELD	VALUE
Plan UOM	Calendar Days
Type	Absence duration
Enable concurrent entitlement	Selected

6. Click the Participation tab to continue paying SAP after employee termination. Update the **Entitlement End rule** on the Participation tab, to 'After Termination'.

7. Click the Entitlements tab and enter the field values as shown below:

FIELD	VALUE
Entitlement Definition Type	Formula
Disable payment percentage override	Selected
Entitlement Formula	ORA_HRX_GB_ADO_ENTITLEMENT
Entitlement Start Date	Absence start date

8. Click the Entries and Balances tab enter the field values as shown below:

FIELD	VALUE
Absence Payment Rate Rule	Rate definition
Rate Name	Select the placeholder rate definition created earlier
Transfer absence payment information for payroll processing	Selected
Element	Select the element that you created earlier for the plan, from the list

9. Click **Save and Close**.

Create Adoption Absence Types

An absence type needs to be created to enter the absences for the statutory adoption leaves.

The absence type enables you to enter and store information associated with an absence occurrence. Ensure that the open-ended functionality is turned off when creating the absence type.

Perform the following steps to create adoption absence types:

1. In the My Client Groups work area **Absences > Absence Definitions > Absence Types**.
2. In the Absence Types page, click **Create**.
3. In the Create Absence Type window, enter the effective date, 'United Kingdom' as the **Legislation** and 'Childbirth or placement' as the **Pattern**.
4. Click **Continue**.

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5. In the Type Attributes tab, enter the field values as shown below:

FIELD	LABEL
UOM	Calendar Days
Legislative Grouping Code	UK Adoption
Validation Formula	ORA_HRX_GB_ADO_VALIDATION
Event Type	Placement

6. Click the Plans and Reasons tab and click **Select and Add** to attach the plan you created earlier to the absence type, ensure that the **Status** is 'Active' and the **Priority** is '1'.

> **Note:** Occupational plans can be added to the same absence type. Ensure that the priority number of the occupational plans is higher than that of the statutory plan. This ensures that the entitlement in the statutory plan is always calculated, irrespective of whether employees are eligible for Occupational plans or not.

7. Click the Display Features tab, and enter the field values as shown below:

FIELD	VALUE
Matching Date	Enabled
Open ended	Do Not Display
Payable after termination	Enabled > **Note:** Enable to pay the absence after the employee is terminated.

8. Click the Action Items tab, and click **Select and Add** to add the certifications for Statutory Adoption Pay scheme.

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9. In the Absence Certifications window, select the names of the relevant certifications for the Statutory Adoption Pay scheme from the list of values, and their corresponding status. The available options are:

- Incorrect Notice
- Insufficient Proof of Adoption
- Child No Longer Placed with Adopter
- Curtailment Notice
- Death of Child
- Death of Parent
- Exceeded Number of KIT Days
- KIT Days
- Sick Entitled to SSP
- Taken into Legal Custody
- Leave Block Less Than 7 Days
- Maximum Weeks Paid
- Employed Less Than 26 Weeks
- LEL Not Reached
- Absence has Multiple Assignments
- Payroll Changed During the Relevant Period

10. Click **OK**.

> **Note:** Repeat this step to allocate multiple certifications to the absence type.

11. Click **Save and Close**.

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12 Shared Parental Leave and Pay

Overview of Shared Parental Leave and Pay

Employees are eligible for shared parental pay and leave based on certain criteria.

An employee can curtail their maternity or adoption leave in favor of sharing it with their partner. The shared parental leave can be paid or unpaid. The amount of leaves that can be taken as paid or unpaid will depend on how much leave the person curtailing the maternity or adoption leave has remaining.

Apart from using an absence plan and absence type, this functionality also uses the Leave Agreements. You must create the absence agreement templates to cater for different cases of shared parental leave. The details about leave agreement functionality and how to create a template are described in the Leave Agreements section.

The following predefined formulas are used:

1. UK Shared Parental Agreement Eligibility (ORA_HRX_GB_SHPL_AGREEMENT_ELIGIBILITY): This formula must be attached to all Shared Parental Leave templates. It checks that the employee satisfies the eligibility conditions for ShPL entitlements, that is, they have the required length of service.
2. UK Shared Parental Agreement Validation (ORA_HRX_GB_SHPL_AGREEMENT_VALIDATION): This formula must be attached to all templates to ensure that the maximum entitlement does not exceed.

> **Note:** The core bidding functionality is not supported for the generic absence type used for shared parental leaves.

Create Shared Parental Leave Absence Records

Shared Parental absence records can be created after the leave notice is approved.

As the employee sends their period of leave notices, you can record them on the leave agreement in the Certifications section and track the status. After approval, the absence records can be created.
Perform the following steps to create ShPL absence records:

1. In the My client groups work area, select **Absences > Person Management > Absence Records**.
2. From the list of direct reports, select the name of the person for whom you wish to update the absence record.
3. In the Manage Absences and Entitlements page, in the Existing Absences section, click **Add**.
4. Select the relevant absence type from the list of values.
5. Enter the relevant details for the absence such as the start and end dates and times of the absence and upload any supporting document or relevant attachment, if required.
6. In the **Agreement Name** field, specify the agreement name to record the leave against. The validations ensure that the entitlement specified on that agreement is not exceeded.

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7. In the **Payment Detail** field, you can also specify whether the absence should be taken against the 'Paid' or 'Unpaid' entitlement. By default, if this field is blank, it will first be a paid entitlement, then unpaid.

   The employee's entitlement (both paid and unpaid) is validated against the agreement; all absences recorded against the agreement cannot exceed the entitlement specified on the agreement.

   The absence start and end dates are also validated. They must fall within the agreement term dates.

   > **Note:** Unlike for other types of statutory payments, it is not possible to use certification to stop payment of ShPL. If the employee is not entitled to pay for all or part of the absence, the payment detail must be set to Unpaid.

8. Click **Submit**.

Create Absence Plans for Shared Parental Leave and Pay

An absence plan needs to be created to determine and calculate a person's entitlement to shared parental leaves and pay.

You need to create two absence plans for Shared Parental Leave (ShPL) absence plans:

- ShPL for childbirth
- ShPL for adoption

Perform the following steps to create the absence plan for ShPL:

1. In the My Client Groups work area, select **Absences > Absence Definitions > Absence Plan**.
2. In the Absence Plans page click **Create**.
3. In the Create Absence Plan window, enter the effective date, 'United Kingdom' as the **Legislation** and 'Agreement' as the **Plan Type**.
4. In the Plan Attributes tab, enter the required details for the absence plan such as the plan name, Legislative Data Group, and others. Enter the other field values as shown below:

FIELD	VALUE
Status	Active
Plan UOM	Calendar Days
Enable concurrent entitlement	Selected
Legislative Grouping Code	UK Statutory Shared Parental Leave

5. In the Entitlements tab, click **Add** to add two bands: **Band1Pay** and **Band2Pay**. For Band1Pay set to '100 payment percentage', for Band2Pay set '0 payment Percentage'. Then, select the **Disable payment percentage override** checkbox.
6. In the Entries and Balances tab, enter the field values as shown below:

FIELD	VALUE
Absence Payment Rate Rule	Rate Definition

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FIELD	VALUE
Rate Name	Select the placeholder rate definition created earlier
Transfer absence payment information for payroll processing	Selected
Element	Select the element that you created earlier for the plan. **Note:** Link each plan to a separate element.

7. Click **Save and Close**.

Create Absence Types for Shared Parental Leave and Pay

Absence types need to be created to enter the absences for the shared parental pay and leaves.

You must create two absence types for ShPL absences:

- ShPL for childbirth
- ShPL for adoption

Perform the following steps to create shared parental leave and pay absence types:

1. In the My Client Groups work area, select **Absences > Absence Definitions > Absence Types**.
2. In the Absence Types page, click **Create**.
3. In the Create Absence Type window, enter the effective date, 'United Kingdom' as the **Legislation** and 'Generic Absence' as the **Pattern**.
4. Click **Continue**.
5. In the Type Attributes tab, enter the required details for the absence type such as the name, Legislative Data Group, and others. Enter the other field values as shown below:

FIELD	VALUE
UOM	Calendar Days
Validation Formula	ORA_HRX_GB_ABS_SHPL_ABS_VALIDATION
Legislative Grouping Code	UK Shared Parental Leave Birth
Status	Active
Partial Day Rule	Not allowed
Agreement selection	Required

6. Click the Plan and Reasons tab and click **Select and Add**.

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7. In the Select and Add Plan to Type window, select the plan that you created for the absence type. Ensure that the **Status** is 'Active' and the **Priority** is set to '1'.

> **Note:** Occupational plans can be added to the same absence type. Ensure that the priority number of the occupational plans is higher than that of the statutory plan. This ensures that the entitlement in the statutory plan is always calculated, irrespective of whether employees are eligible for Occupational plans or not.

8. Click the Display Features tab, and ensure that the **Open-ended** feature, in the Dates and Duration section, is set to **Do not display**.
9. Click **Save and Close**.

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13   Parental Bereavement Leave and Pay

Overview of Setting Up Plan and Type for Parental Bereavement Leave

An employee is entitled to Statutory Parental Bereavement Leave and Pay if they meet the eligibility criteria set by the legislation.

The rate of pay that the employee receives is also set by the legislation. Statutory Parental Bereavement Leave (SPBL) entry is currently only supported at Person level. The application will perform the following checks:

- The employee must have been employed for 26 weeks continuously into the qualifying week to receive Statutory Parental Bereavement Leave.

- The employee's average earnings (during the relevant period) must be at or above the Lower Earnings Limit.

- Statutory Parental Bereavement pay is not payable after the 56th week after the date of death or stillbirth of child. The date of death or stillbirth of the child is recorded on the absence entry.

- The leave exceeded 2 weeks of Statutory Paternity Pay.

- The leave blocks are for 7 days.

- The employee does not have an overlapping Statutory Sick Pay absence.

    Note: If a Statutory Sick Pay absence is entered after the Statutory Parental Bereavement Leave, then the Statutory Parental Bereavement Leave will need to be re-evaluated.

If any of these checks fails, the application creates the appropriate certification. Otherwise, it calculates the employee's entitlement to SPBL.

Enable Processing for SPBL

There is no requirement to perform a transition process for Statutory Parental Bereavement Leave.

Note: The core bidding functionality is not supported for the generic absence type used for parental bereavement leaves.

Create Parental Bereavement Leave Absence Plans

To determine employee's entitlement to Statutory Parental Bereavement Pay, you must create an absence plan that stores the criteria for processing these absences.

Perform the following steps to create parental bereavement absence plans:

1. In the My Client Groups work area, select **Absences > Absence Definitions > Absence Plans**.
2. In the Absence Plans page, click **Create**.

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3. In the Create Absence Plan window, enter the effective date, 'United Kingdom' as the **Legislation** and 'Qualification' as the **Plan Type**.

4. Click **Continue**.

5. In the Plan Attributes tab, enter the required details for the absence plan such as the plan name, Legislative Data Group, and Term Duration. Enter the other field values as shown below:

FIELD	VALUE
Status	Active
Enable concurrent entitlement	Selected
Plan UOM	Calendar Days
Legislative Grouping Code	UK Statutory Parental Bereavement Leave

6. Click the Participation tab to continue paying SMP after employee termination. Update the **Entitlement End rule** to 'After Termination'.

7. Click the Entitlements tab and enter the field values as shown below:

FIELD	VALUE
Disable payment percentage override	Selected
Entitlement Start Date	Absence start date

8. Click the Entries and Balances tab, and enter the field values as shown below:

FIELD	VALUE
Absence Payment Rate Rule	Rate definition
Rate Name	Select the placeholder rate definition created earlier for the absence plan
Transfer absence payment information for payroll processing	Selected
Element	Select the element created earlier for the plan.

9. Click **Save and Close**.

Create Parental Bereavement Leave Absence Types

The bereavement absence type enables you to enter and store information associated with an absence occurrence.

Perform the following steps to create parental bereavement absence types:

1. In the My Client Groups work area, select **Absences > Absence Definitions > Absence Types**.

2. In the Absence Types page, click **Create**.

3. In the Create Absence Type window enter the effective date, the **Legislation** as 'United Kingdom' and 'Generic absence' as the **Pattern**.

4. Click **Continue**.

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5. In the Type Attributes tab, enter the required details for the absence type such as the name, Legislative Data Group, and others. Enter the other field values as shown below:

FIELD	VALUE
UOM	Calendar Days
Legislative Grouping Code	UK Parental Bereavement Leave
Status	Active

6. Click the Plans and Reasons tab.
7. Click **Select and Add** to attach the plan you created in the previous steps to the absence type.

   Note: Occupational plans can be added to the same absence type. Ensure that the priority number of the occupational plans is higher than that of the statutory plan. This ensures that the entitlement in the statutory plan is always calculated, irrespective of whether employees are eligible for Occupational plans or not.

8. In the **Select and Add Plan to Type** window, select the relevant absence plan, the **Status** and the **Priority**.
9. Click **OK**.
10. In the Display Features tab, and ensure that the appropriate features are enabled, as shown below:

FIELD	VALUE
Payable after termination	Enabled **Note:** Enable this feature to pay the absence after the employee has been terminated.

11. Click the Action Items tab, and click **Select and Add** to add the certifications for the Statutory Bereavement Pay scheme.
12. In the Absence Certifications window, select the names of the relevant certifications for the Statutory Parental Bereavement Leave scheme from the list, and their corresponding status. The relevant options are:
    - Leave Block Less Than 7 Days
    - Maximum Weeks Paid
    - Employed Less Than 26 Weeks
    - Incorrect Notice
    - LEL Not Reached
    - Not Payable After 56th week
    - Employee Not Absent from all Assignments
    - Payroll Changed During the Relevant Period
    - Insufficient information to perform LEL check
    - Not payable as dates overlap with an SSP absence

13. Click **OK**.

   Note: Repeat this step to allocate multiple certifications to the absence type.

14. Click **Save and Close**.

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14 Certifications

Overview of Certifications

The certification feature is used to stop absence payments, and can be generated as required for processing the absence.

The absence management process uses the certification feature to stop absence payments. You can generate certifications manually or as mandated as a result of processing the absence. Certifications are stored in the case and used to stop payments from being processed, as required. You can view, void, or add certifications to absence records.

View Certifications

To view certifications, navigate to the case screen. In the certifications section of the case screen you can see a list of certifications.

Void Certifications

You might need to void a certification that has been automatically generated or override an existing certification. This can be done by voiding the certification. To void a certification, navigate to the case screen, and void the certification based on the date.

Create Certifications

Certifications can be generated manually or as mandated, as a result of absence processing.

To manage other types of documentation on the employee's leave agreement (such as Curtailment Notice, Declaration of entitlement and Intention to take leave, Period of Leave notices), you must create certifications and associate them with leave agreement template, where applicable.

Perform the following steps to create Certifications:

1. In the My Client Groups work area, select **Absences > Absence Definitions > Absence Certifications**.
2. Click **Create**.
3. In the Create Absence Certification, enter the attribute values as shown below:

FIELD	VALUE
Classification	Documentation
Legislation	United Kingdom
Name	As appropriate
Absence Record Update	None
Status	Active
Trigger	On demand

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FIELD	VALUE
Entitlement	Not applicable
Mark as confirmed when created	Selected

> **Note:** None of the other sections are relevant to Documentation certification; default values can be applied.

4. Click **Save and Close**.

Results:

After the certifications are created, they can be linked to the relevant leave agreement templates.

Add Manual Certifications

Certifications need to be added and linked to leave agreement templates, to process absences, wherever applicable.

To add a manual certification, navigate to the case screen. In the certifications section:

1. In the Action Items tab, in the Documentation section, click **Add**.
2. In the Create Absence Certification window, select the appropriate certification from the **Name** list.
3. Click **Save and Close**.

Results:

The certification now displays the certificates section as confirmed. This certification would be used in the processing of the absence and prevent payment for the period specified.

Add SPLIT Days Certificate to Existing Leave Agreement Records

To record the dates that an employee comes to work during an ongoing absence, the predefined SPLIT (Shared Parental Leave in Touch) Days certification needs to be added to the absence record.

An employee on ShPL is allowed to come to work during their leave for a total of 20 days in order to keep in touch with work. You can record the dates an employee comes to work, in a leave agreement record by using the predefined Shared Parental Leave in Touch or SPLIT Days certification.

Perform the following steps to add a SPLIT Days certificate to an existing leave agreement record:

1. In the My Client Groups work area, click **Absences > Person Management > Absence Records**.
2. From the list of direct reports, select the name of the person for whom you want to update the absence record.
3. In the Manage Absences and Entitlements page, in the Existing Absences section, click the Actions list against the relevant absence record.
4. Select **Administer** from the list.
5. In the Absence Administration page, select the Action Items tab.
6. In the Documentation section, select **Add**.
7. In the Create Absence Certification window, select SPLIT Days as the **Name**.

8. In the **Comments** box, enter the dates for the **SPLIT Days**.

9. Click **Actions** and select **Confirm** from the list.

10. Click **Save and Close**.

> **Note:** If an employee exceeds the permitted number of SPLIT days, the week during which additional SPLIT days are used, become ineligible for statutory payment. You can make it week non-payable by creating a separate absence record for that week and selecting the payment detail as Unpaid.

Add KIT Days Certificate to Absence Records

To record the dates that an employee comes to work during an ongoing absence, the predefined KIT (Keeping in Touch) Days certification needs to be added to the absence record.

Employees on maternity or adoption leave are allowed to come to work during their leave for a total of 10 days in order to 'keep in touch' with the work. Use the predefined KIT Days certification, to record the dates an employee comes to work, on the absence record.

Perform the following steps to add a KIT Days certificate to an existing absence record:

1. In the **My Client Groups** work area, select **Absences > Absence Records.**

2. From the list of direct reports, select the name of the person for whom you want to update the absence record.

3. In the Manage Absences and Entitlements page, in the Existing Absences section, click the **Actions** list against the relevant absence record.

4. Select **Administer** from the list.

5. In the Absence Administration page, select the Action Items tab.

6. In the Documentation Updates section, select **Add**.

7. In the Create Absence Certification window, select **KIT Days certification** as the **Name**, and enter the dates for the KIT days in the **Comments**.

8. Click **Actions** and select **Confirm** from the list.

9. Click **Save and Close**.

> **Note:** If an employee exceeds the number of permitted KIT days, the week during which additional KIT days are used, become ineligible for statutory payment. You can create a manual certification to stop the payment for that week.

Add Certificates to Stop Payment of Existing Absence Records

You need to add certificates to existing absence records for the processing of the absence and stop payment of an existing absence record for the specified time period.

Perform the following steps to add a certificate:

1. In the **My Client Groups** work area, select **Absences > Person Management > Absence Records**.

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2. From the list of direct reports, select the name of the person for whom you want to update the absence record.

3. In the Manage Absences and Entitlements page, in the Existing Absences section, click the **Actions** list against the relevant absence record.

4. Select **Administer** from the list.

5. In the Absence Administration page, select the Action Items tab.

6. In the Payment Percentage Updates section, select **Add**.

7. In the Create Absence Certification window, select **Exceeded Number of KIT Days** certification as the **Name**.

8. Enter the revised payment start and end dates for which you need to stop the statutory payment.

9. Click **Actions** and select **Confirm** from the list.

10. Click **Save and Close**.

Results:

This results in the days for that week being unpaid.

Add Curtailment Certificate for Statutory Maternity and Statutory Adoption Leave

Employees on maternity or adoption leave are allowed to curtail their leave and then use the remaining leave to be shared in Shared Parental Leave.

To record the dates an employee has curtailed their leave, you can use the curtailment notice certificate.

Perform the following steps to add a Curtailment Notice certificate to an existing absence record:

1. In the **My Client Groups** work area, select **Absences > Absence Records.**

2. From the list of direct reports, select the name of the person for whom you want to update the absence record.

3. In the Manage Absences and Entitlements page, in the Existing Absences section, click the **Actions** list against the relevant absence record.

4. Select **Administer** from the list.

5. In the Absence Administration page, select the Action Items tab.

6. In the Documentation Updates section, select **Add**.

7. In the Create Absence Certification window, select **Curtailment Notice certification** as the **Name**, and enter the dates in the **Comments** box.

8. Click **Actions** and select **Confirm** from the list.

9. Click **Save and Close**.

Void Absence Certifications

Automatically generated certifications might need to be voided at times, so that the application does not process it.

Perform the following steps to void a certification:

1. In the My Client Groups work area, select **Absences > Absence Records**.

2. From the list of direct reports, select the name of the relevant person.

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3. In the Manage Absences and Entitlements page, in the Existing Absences section, click the **Actions** list against the relevant absence record.

4. Select **Administer**.

5. In the Absence Administration page, select the Action Items tab. This displays a list of certifications for that absence, if available.

6. Select the certification, click **Edit**.

7. Select **Void** from the list of actions.

8. Click **Save and Close**.

Results:

The certification now displays the date in the voided column of the administration section. This certification is no longer relevant and will be ignored while processing.

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15 Using Global Absence Management to Administer Statutory Absences

Overview of Implementing Statutory Absences

For existing customers using the Global Absence Management who need to migrate the Statutory Absences feature for the UK, the setup is different.

Some of the completed steps (such as creating absence types, occupational plans) and the absence records already exist. To enable statutory absence calculations in addition to your current implementation, you need to perform a different set of steps.

Set up Statutory Absences

To enable statutory absence calculations with your current implementation, perform the following steps:

1. Identify the period for which the statutory payment history needs to be created.

   For sickness absences, it is advisable to create at least 6 weeks of history before the Absence Processing Start Date, that is, the date when you want to start processing absences in Fusion. This is because sickness absences are linked if they fall within 6 weeks of any previous absences. You can create more statutory payments history, if required. For maternity, paternity, adoption absences, you can evaluate only those absences that are ongoing on the Absence Processing Start Date. Hence, at the most it would be 52 weeks before the Absence Processing Start Date.

   You must create all the setup objects on or before that date.
2. *Create Placeholder Rate Definitions*
3. *Create Absence Elements*
4. Edit the Entitlement result formula to add the **Absence Processing Start Date**.

   To stop calculation cards being processed in payroll for the portion of absence that has already been paid, set the Absence Processing Start Date to the date you want to start processing absences in Oracle Global Payroll. No absences will be processed before this date.

   > **Note:** The Absence Processing Start Date is stored in the payroll formula attached to your absence element. Copy and edit this formula to enter the Absence Processing Start Date.

   To edit the payroll formula:
   a. Select the **Manage Fast Formula** task from Payroll Calculation work area.
   b. Search for Formula name <Element Name> Entitlement Result.
   c. Select **Edit**, and **Correct** from the **Edit** menu.
   d. In line 84, update the code as shown here:
   ```
   l_migration_date = '2018/01/01 00:00:00' (date)
   ```

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```
In line 97, insert the following lines:
IF (l_abs_comp_date < l_migration_date) THEN
 (
 l_stop ='Y'
 l_log = PAY_INTERNAL_LOG_WRITE('$$$%%%% - Migration Date is greater than absence date ::::' ||
 to_char(l_migration_date) )
 pay_value = 0
 unit = 0
 deduction = 0
 net_pay = 0
 RETURN unit ,reduce_type , pay_value ,deduction , net_pay , dir_comp_id,dir_card_id ,
 rate,ded_amount_rate,factor
 )
```

5. Click **Save**.
6. Compile the formula.
7. Repeat for all the Entitlement Result formulas.

Optionally, if the Qualifying Days for Statutory Sick Pay purposes are based on a work schedule different from the employee work schedule, ensure that you set up an alternate statutory sick pay schedule, as shown in the topic:*Overview of Setting Up Plan and Type for Statutory Sick Pay*.

1. Create the absence statutory plans. Refer to these sections:
    o *Create Maternity Absence Plans*

    o *Create Adoption Absence Plans*

    o *Create Paternity Absence Plans*

    o *Create Sickness Absence Plans*

2. Modify the existing absence types (as of the date identified) using these steps:
    a. Add the validation formula
    b. Select the legislative grouping code
    c. Attach the newly created statutory plan to the absence type
    d. For Sickness absence type, add the linking rule (SSP only)
    e. Associate the certifications

    For further information on how to set up the absence type, refer to these sections:
    o *Create Maternity Absence Types*

    o *Create Adoption Absence Types*

    o *Create Paternity Absence Types*

    o *Create Sickness Absence Types*

Prepare the Data

After the setup is complete, ensure that the Statutory Payment history is created for existing absence records. You can do that by running the Evaluate Absence process that automatically processes statutory payment for existing absences.

Based on the statutory plans created, it identifies that a new plan was added to the absence type, and generates entitlement to that plan.

If the employee is found ineligible for payment, a certification is automatically created. It results in the same SSP entitlement calculation that the employee received for SSP in your legacy application.

> **Note:** The process also generates the absence calculation cards. Only those calculation cards with an effective date after the absence processing start sate will be processed in payroll. Hence, the date prevents any previously paid absences to be paid again in the Oracle Fusion application.

Add Additional Data for Sickness Absences

It is possible that an absence that needs to be migrated is linked to one or more previous absences.

In such a case, there are two possibilities:

You can migrate all the absence records for the entire chain.

Migrate only the last absence in the chain. In this case, additional information is required for that absence (see below). When using this migration option, you should bear in mind:

If the start date of the first absence record is changed the override information will be lost.

You should ensure that the transition date is before the start date of the earliest absence being loaded. It is suggested that a date of 1-Jan-1951 is used.

For customer currently using SSP solution the transition date will be when you want to start processing in the new way.

You must set up absences including type, plan, and elements with an effective date earlier than the date of the first absence to be migrated.

Additional data entry is available specifically for data migration and is located on the Absence Case page in the legislative information area.

If you don't wish to enter the overrides for each individual entry through the UI you can use the HDL functionality, you will need to:

1. Load the absences into the application. This will then automatically create any SSP cases that are required.
2. Next, identify the case reference that requires the override fields updated and use the case reference for an HDL upload to the override fields in the associated cases.

Additional Data Fields:

Field Name	Description
Disable earnings check	Set this to yes if you require no earnings check to be done.
Consumed Waiting days	When you use a single absence for migration then this field describes the number of waiting days that have already been used by previous absences. The days will be processed in this migrated absence.
Consumed SSP Weeks	If the employee has consumed SSP entitlement before the migrated absence record, then it is specified here. It is used to calculate the 28 weeks limit.
Original Start Date	If the sickness has a long history of linked absences that aren't migrated, provide the start date of the first linked absence. It is used to calculate the 3 years limit and overrides the application determined value.
Disqualified Reason	If the employee was not entitled to SSP for the absence being migrated, enter the certificate name that indicates the reason for disqualification. For example, LEL not reached or On Strike.

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Field Name	Description
Number of Normal Scheduled Days for First Week	If the employee has an absence during the first week of hire the application is unable to ensure the normal schedule. The user can enter here the number of days for the employees normal schedule.
Disable Earnings Check	If you select this check box, the application does not check against the lower earnings limit (LEL), and assumes that the LEL is exceeded. Use this to bypass the LEL check for periods where payment data is not available.

It is possible that some of the existing absence payments were manually stopped in your legacy application by manual intervention from an administrative user. If the reason for nonpayment cannot be automatically detected by the process, the reason needs to be indicated in the Disqualifying Reason field. You can do this in mass using the HCM Data Loader (HDL). The following examples show how you can handle these scenarios:

An absence record was found ineligible for SSP payment because the employee's average weekly earnings did not reach the LEL. Later, the administrative user found that a mistake was made in the employee's salary and updated the absence to be paid. In this example, select the check box Disable Earnings Check.

An employee was taken into legal custody while on sick leave. For this reason, the absence payment was stopped. The Disqualified Reason needs to be set to "Taken into Legal Custody".

For further information on how to use those additional fields, see Setting Up and Migrating UK Statutory Absences (Document ID 2234239.1), **UK Statutory Absences Migration Document**.

Add Additional Data for Maternity, Paternity, and Adoption Absences

The eligibility to statutory payments is based on the employee's Average Weekly Earnings being above the Lower Earnings Limit.

There might be cases where the employee's Average Weekly Earnings cannot be automatically determined. In this case, you can enter the value in this field:

Field Name	Description
Average Weekly Earnings	Override to provide the value for average weekly earnings for maternity, adoption, and ShPL. This override is used to: • Check the employee's entitlement to statutory payment • Determine the rate of pay

Generate Historical Entitlement

After identifying the additional data requirement and entering it on the absence record, you can run the Evaluation Absence process to generate the entitlement to statutory payment on historical absence records.

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Run Evaluation Absence Process

1. Select **Schedule and Monitor Absence Processes** task from the Absence Administration work area.
2. Run **Evaluate Absences process from list**.
3. Enter the parameters as required:

Field	Description
Effective Date	This should be the same date as identified in Step 1. Any absence records with a start date before the effective date will not be processed.
Run as test	This field should remain unselected as this is not currently supported for the UK. This is because the SSP calculations rely on the availability of entitlement from previous absences. If they aren't available, the calculations will be incorrect.
Increment effective date	This field should remain selected.
Person Selection Rule	To filter based on additional criteria, you can write a Fast Formula for the type **Person Selection**.

4. In the Population Filters section, you can select various criteria to restrict the number of employees for whom the process will run.
5. Verify the entitlement results for the processed absences against the results in your legacy application.

   If there are any discrepancies, you can update the data and rerun the process.

Note: If you have other plans attached to your absence types, those plans will also be re-evaluated by the process. Based on the assumption that there has been no change in the absence records, there should be no change in entitlement to those plans as a result of running the process.

Shared Parental Leave and Pay

The Leave Agreement functionality manages the shared parental leave and pay section from Release 12 onward.

Due to this, the existing absences cannot be automatically converted.

Follow the steps described in the section *Create Absence Plans for Shared Parental Leave and Pay*. After you set this up, you can use it for new cases of Shared Parental Leave (ShPL).

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16 Absence Migration

Overview of Migrating Statutory Absences

Oracle Fusion HCM for the UK enables you to calculate statutory absences as prescribed by the UK legislation.

In order to use this feature, you might need to migrate certain historical data from your legacy application. Although you can minimize the data load, depending on your requirements for statistical reporting, you can migrate more historical data than is required for calculation.

Points to note:

- Oracle Fusion Absence Management Product: For more information, see the Implementing Absence Management guide on Oracle Help Center

- UK Statutory Absences solution: For more information, see UK Statutory Absence Implementation and Functional Considerations on My Oracle Support.

This document covers the following aspects of absence migration:

- Minimum data to be migrated to Oracle Fusion HCM for the UK

- Specific data capture

- Balances to be initialized

Common Considerations for Migrating Absences

A few important points need to be considered before migrating statutory absences.

Prerequisites

You can load absence records using the HCM Data Loaders (HDL). For further information, refer to the Oracle Help Center, Integrating with HCM Loading Absence Topics section.

When loading absence records using HDL, the application processes absences in the same way as when they are entered using the Absence Management user interface: the entitlement is calculated based on the plans associated to the absence type, and the corresponding calculation card generated in Global Payroll. It is therefore important that, before the migration of any absence records, you must have completed the absence setup. This includes:

- Creating the absence types

- Associating the predefined certifications to the absence types

- Creating the statutory and occupational absence plans

- Creating payroll elements and associating them with the corresponding absence plan

Otherwise, the application might not create the migrated absence records accurately.

> **Note:** Ensure that the effective date is before any absence records you want to create. Any employee's schedules should be effective from at least 2 weeks before the start date of any absences you wish to record.

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Absence Processing Start Date

To stop calculation cards being processed in payroll for the portion of absence that has already been paid in your legacy application, you need to set the Absence Processing Start Date to the date you want to start processing absences in Oracle Global Payroll. No payment will be made before this date.

> **Note:** Absence Processing Start Date is stored in the payroll formula attached to your absence element. Copy and edit this formula to enter the Absence Processing Start Date.

To edit the payroll formula:

1. Select the **Fast Formula** task from Payroll Calculation work area.
2. Search for formula name <Element Name> Entitlement Result,
3. Select **Edit** to edit the formula.
4. In line 84, update the following: l_migration_date = '2018/01/01 00:00:00' (date) with the date payments should start.
5. Click **Save**.
6. Compile the formula.
7. Repeat for all the Entitlement Result formula.

Migrate Maternity, Paternity, and Adoption Absences

For the purpose of statutory payments, only ongoing absences need to be brought forward to Oracle Fusion HCM.

You can load more historical absence data for reporting purposes or for the purpose of processing occupational schemes, if required. They will not have any impact on statutory payments for ongoing or future absence records.

The ongoing maternity, paternity, adoption records are loaded using HCM Data Loaders.

Average Weekly Earnings

To check eligibility to Statutory Maternity Pay (SMP), the employee's Average Weekly Earnings (AWE) in the relevant period is compared to the Lower Earnings Limit (LEL). The Average Weekly Earnings is determined based on payroll balances. However, unless those balances were initialized, they will not be available in the payroll application. So, you need to enter the employee's average weekly earnings in the **Override Average Weekly Earnings** field on the Absence Case page in the Legislative Information area.

> **Note:** For absences starting after the Absence Processing Start Date, it is also possible that an insufficient number of pay periods have been processed in payroll. So, the average weekly earnings cannot be calculated correctly. Use the Override Average Weekly Earnings field to provide the employee's average weekly earnings data.

You can enter the average weekly earnings on the Absence Case page in the legislative information area. This field is specifically provided for migration purposes:

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AWE Additional Data Fields

Field Name	Description
Average Weekly Earnings	Override to provide the value for average weekly earnings for maternity, adoption, and shared parental leave. This override is used to: • Check the employee's entitlement to statutory payment • Determine the rate of pay

Migrate Statutory Sickness Absences

For Statutory Sick Pay (SSP), only absences that end within 56 days of the Absence Processing Start Date need to be migrated.

Although you can load more history, for reporting requirements or to process occupational schemes, it doesn't impact the calculation of SSP for future absences.

It is possible that an absence that needs to be migrated is linked to one or more previous absences. In that case, there are two possibilities:

- You can migrate all the absence records for the entire chain.
- Migrate only the last absence in the chain. In this case, additional information is required for that absence. When using this migration option, please note:
  - If the start date of the first absence record is changed, the override information will be lost.
  - You should ensure that the transition date is before the start date of the earliest absence being loaded. It is suggested that a date of 1-Jan-1951 is used.
  - For customer currently using the SSP solution the transition date will be when you want to start processing in the new way.
  - You must set up absences including type, plan, and elements with an effective date earlier than the date of the first absence to be migrated.

Additional data entry is available specifically for data migration and is located on the Absence Case page in the legislative information area.

If you don't wish to enter the overrides for each individual entry through the UI, you can use the HDL functionality. You need to:

1. Load the absences into the application. This will automatically create any required SSP cases.
2. Identify the case reference that requires the override fields updated and use it to do an HDL upload to the override fields in the associated cases.

SSP Additional Data Fields

Field Name	Description
Consumed Waiting Days	When you use a single absence for migration then this field describes the number of waiting days that have already been used by previous absences. The days will be processed in this migrated absence. **Note:** This field will be evaluated only on the first absence if it is part of a chain of linked absences.

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Field Name	Description
Consumed SSP Weeks	If the employee has consumed SSP entitlement before the migrated absence record, then it is specified here. It is used to calculate the 28 weeks limit.
Original Start Date	If the sickness has a long history of linked absences, which aren't migrated, provide the start date of the first linked absence. It is used to calculate the 3 years limit and overrides the application determined value. **Note:** It can be entered on any linked absences, but the one entered on the last absence record in the chain is the one that is taken into account.
Disqualified Reason	If the employee was not entitled to SSP for the absence being migrated, enter the certificate name that indicates the reason for disqualification. For example, LEL not reached or On Strike. **Note:** The certificate applies to the full absence chain.
Number of Normal Scheduled Days for First Week	If the employee has an absence during the first week of hire the application is unable to determine the normal schedule. The user can enter here the number of days for the employee's normal schedule.
Disable Earnings Check	If you select this check box, the application does not check against the lower earnings limit (LEL), and assumes that the LEL is exceeded. Use this to bypass the LEL check for periods where payment data is not available.

When you load absences using the HDL, the application processes them by checking the eligibility to SSP. If the employee is found eligible, it calculates the entitlement and generates the relevant calculation card. The processing takes into account the additional fields on the absence case. If a disqualification reason is entered, the application generates a non-payment certificate on the absence case.

Note: When the migrated absences are processed, the entitlement is calculated as if they were created using the UI. Also since the SSP calculation is based on a schedule, you need to ensure that either a normal or an SSP-specific work schedule exists for the employee. If it doesn't, the employee's working hours stored on the assignment are used instead.

SSP Examples

In these examples, it is assumed that the Absence Processing Start Date is the 01 January 2017.

Scenario	Dates	Additional fields required	Result
Sick Leave before 56 days from the Absence Processing Start Date	3/10/16 to 12/10/16	Not required as calculation of entitlement is irrelevant for subsequent SSP processing.	SSP Entitlement is calculated based on work schedule Calculation card is created
Sick Leave within 56 days from Absence Processing Start Date No link to any previous absence All SSP eligibility conditions are met	5/12/16 to 17/12/16	If the NIable Pay is initialized (see below), select the Disable Earnings Check to 'No'. Otherwise, select 'Yes'.	SSP Eligibility conditions are met SSP Entitlement is calculated based on work schedule (Mon-Fri) Waiting days = 3 SSP days = 7 (1.2 SSP weeks) Calculation card is created

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Scenario	Dates	Additional fields required	Result
Sick Leave within 56 days from Absence Processing Start Date No link to any previous absence Failed LEL check	5/12/16 to 17/12/16	Disqualified Reason: 'LEL not reached'	Certificate "LEL not reached" is generated SSP Entitlement is set to 0 Calculation card is created
Sick Leave within 56 days from Absence Processing Start Date Absence linked to a previous one Only last absence is migrated	21/11/16 to 30/11/16 5/12/16 to 17/12/16	Only the last absence is created using HDL. Consumed SSP weeks: '1' Original Start Date: '21/11/16' Consumed Waiting days: '3' Disable Earnings Check: 'Yes'	SSP Eligibility conditions are met SSP Entitlement is calculated taking into account information entered. SSP days = 10 (2 SSP weeks) **Note:** No waiting days as they have already been taken. Calculation card is created
Sick Leave within 56 days from Absence Processing Start Date Absence linked to a previous one. Only last absence is migrated Maximum of 28 weeks has been exhausted	14/3/16 to 30/11/16 5/12/16 to 17/12/16	Only the last absence is created using HDL. Consumed SSP weeks: '28' Original Start Date: '14/3/16' Consumed Waiting days: '3' Disable Earnings Check: 'Yes'	Certificate "Maximum 28 weeks paid" SSP Entitlement is set to 0 Calculation card is created
Ongoing sick leave	5/12/16 – open-ended	Disable Earnings Check: 'Yes'	SSP Eligibility conditions are met SSP Entitlement is calculated: Waiting days = 3 SSP days = 140 (or 28 weeks) Unpaid days = 120 (or 24 weeks) Calculation card is created **Note:** No calculation in payroll will take place before Absence Processing Start Date. The portion of absence before that date is ignored.

Initialize Balances

Balances must be initialized to ensure authentic LEL checks on absences.

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To ensure that the LEL check is performed correctly on absences created after the Absence Processing Start Date, you need to initialize the NIable Pay balance for all employees.

Balance to initialize: NIable by Category

Dimension: Assignment Tax Unit, Deduction Card, Insurance Type, Statutory Report Code Period to Date

As the Average Weekly Earnings is calculated over a period of 8 weeks, ensure that you initialize the number of periods, depending on the payroll frequency:

- For weekly payroll, initialize the NIable Pay for 8 payroll periods before the absence processing start date using the dimension specified
- For monthly payroll, initialize the NIable Pay for 2 payroll periods before the absence processing start date, also using the period-to-date (PTD) balance dimension

Migrate Shared Parental Leave

You can migrate historical absences for information only, or for the purpose of calculating occupational schemes.

For ongoing Shared Parental Leave (ShPL), you must create both the leave agreement and the period of leave already taken. If you convert the entitlement from an existing maternity or adoption leave, you must also migrate the original maternity, or adoption leave.

You need to set up the absence type, plan, and elements. You also need to define the agreement templates with an effective date earlier than the date of the first absence that you need migrated.

Leave Agreements

You need to migrate only ongoing ShPL agreements to Fusion. You must create these manually as the HDL does not currently support Leave Agreements.

Unless relevant balances have been initialized, LEL check will fail, but it can be overridden manually.

Shared Parental Leave Absences

Additional data entry is available on the Agreement:

Field Name	Description
Agreement Average Weekly Earnings	Override to provide the value for average weekly earnings for maternity, adoption, and ShPL. This override: • Checks the employee's entitlement to statutory payment • Determines the rate of pay

You need to provide this information on all the ShPL agreements because payroll uses it to determine the payment rate.

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Whether you create absences manually or upload them using the HDL, the relevant calculation card is created automatically. If the absence starts before the Absence Processing Start Date, payroll ignores the portion of absence that falls before that date.

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