Oracle Fusion Cloud Human Resources

Administering Civil Service Pension Scheme for the United Kingdom

25B

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Contents

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1 Get Started

Introduction to MyCSP

MyCSP is the organization responsible for the administration of the Principal Civil Service Pension Scheme (PCSPS) using the Compendia database.

This database uses pension-related information in the employer payroll to process PCSPS for civil servants. The payroll application enables you to provide pension-related information to the Compendia database via the MyCSP Standard Interface. The interface consists of a set of files, containing various information, for example, basic employee data, basic pay, allowances and bonuses, pension contributions information.

To support the MyCSP interface, you can define the following Principal Civil Service pension schemes:

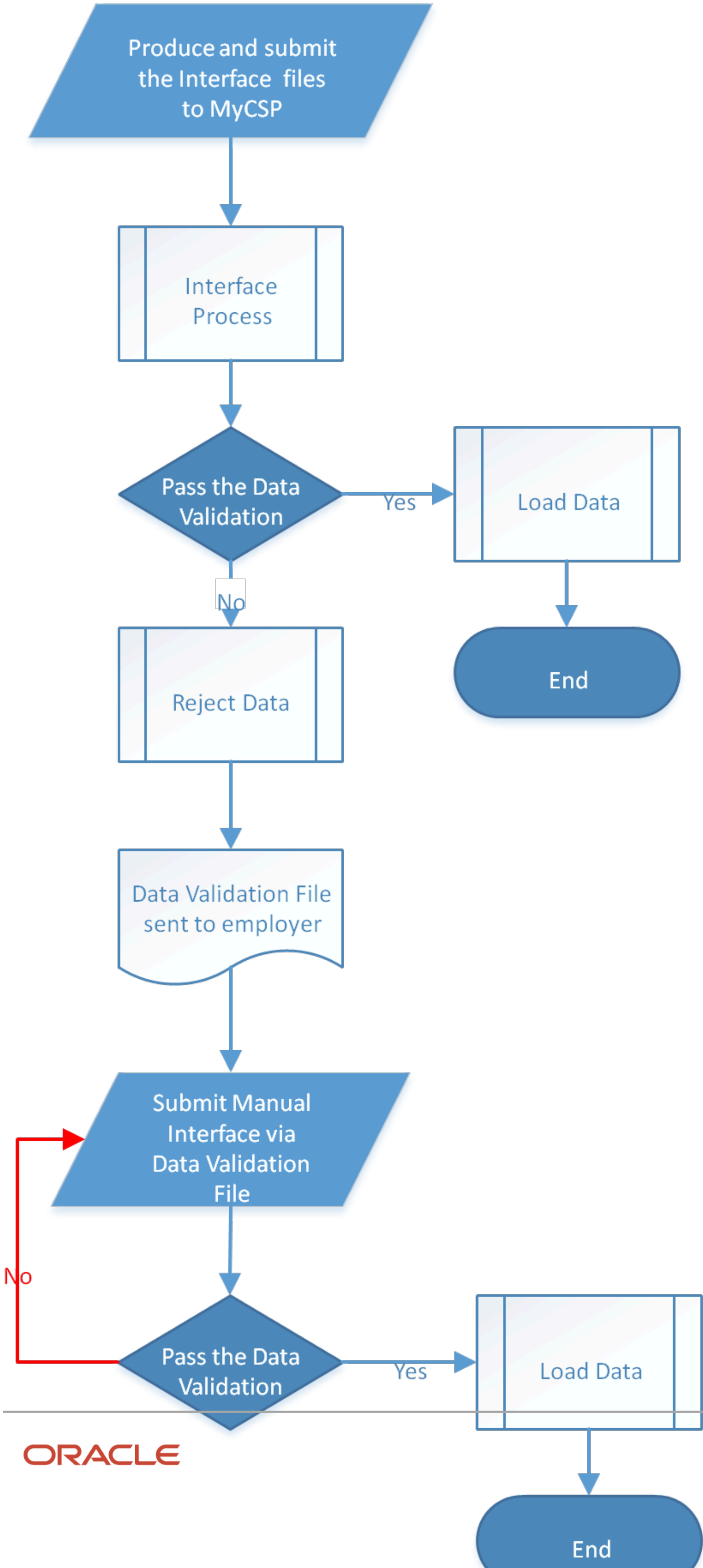
- Alpha
- Partnership

The rules for these schemes are predefined when you create each scheme. You can also use the predefined processes to produce the required MyCSP interface files.

The following PCSPS schemes ceased to accept new members from 1st April 2022. You can't create pension scheme elements for these schemes in the application:

- Classic
- Classic Plus
- Premium
- Nuvos

This graphic illustrates the data flow between the employer and MyCSP and how errors are handled:


Produce and submit the Interface files to MyCSP
Interface Process
Pass the Data Validation
Yes
Load Data
End
No
Reject Data
Data Validation File sent to employer
Submit Manual Interface via Data Validation File
No
Pass the Data Validation
Yes
Load Data
End

The Generate MyCSP Interface process creates files containing standard code interface files that you submit to MyCSP. Each file contains fixed-width records, as specified by MyCSP. This process enables you to produce either the cutover or monthly interface files (that is, changes only files).

Cutover Interface Files

Generate the cutover files when you change your payroll provider.

This is the first interface from the new payroll provider and the file contains all eligible employees and their data that is valid as of cutover.

Note:

- The data for inclusion in cutover must have a start date that is one or more days before the cutover date. Any end dates must be one or more days after the cutover date. This applies to all objects you create (For example: Employee records, elements, grades, and absence records). Any data with start dates (or changes) that are effective on the cutover date is reported, according to MyCSP rules, in the first monthly interface file that follows cutover.
- If you generate your cutover interface files with an incorrect cutover date, you must roll back the submission and regenerate it with the correct date before making further submissions. Do not make manual edits to the cutover date in your interface files to avoid mismatched data in your monthly interface files.

The Cutover interface contains these files:

- Basic
- Address
- Service History
- Salary History
- Allowance History
- Part-Time Hours History
- Control Totals

Monthly Interface Files

Use the monthly interface files to report any changes since your previous submission.

These files include data for any new members that have joined the pension scheme since the last time you submitted an extract. Existing members details are also included if you have made any changes to their data since the previous submission. The first monthly submission following cutover includes any data that became effective as of the cutover date.

Note: Interface submissions are supported for calendar month only.

You must run these interfaces on a monthly basis, and submit them to MyCSP at a date agreed upon with MyCSP. The monthly interface generates these files:

- Basic
- Address
- Service History
- Part-Time Hours History
- Short-Time Hours History (Single Records)
- Short-Time Hours History (Accumulated Records)
- Salary History
- Allowance History
- Bonus History
- Payment History
- Scheme Contribution Rate History
- Control Totals

Backdated Changes

For all files (excluding Service History), backdated changes that are a reportable event and that occurred within 2 financial years are reported in the appropriate period in which the event occurred. Older backdated changes are not reported.

For example, if the reportable event occurred in either financial year 2022/23 or 2023/24 but isn't entered until financial year 2024/25, the appropriate files will include the backdated change. However, if the reportable event occurred in a financial year before 2022/23 but isn't entered until financial year 2024/25, the appropriate files will not include the backdated change.

This is a rolling time period and has been done in order to improve the performance of the MyCSP reporting process.

The Service History file complies with EPN697 and the requirement for limiting reporting any backdated change to those that have occurred within the previous 12 calendar months.

Allowance, Bonus and Grade Code Files

The Generate MyCSP Interface Code Files process allows you to create these Code Interface files,

The Code Interface files must submit to the MyCSP database prior to submission of the cutover or monthly interface files:

- Allowance Codes
- Bonus Codes
- Grade Codes

Set Up MyCSP Interface Process

You need to set up the Generate MyCSP Interface process to enable you to manage employee records.

Generate MyCSP Interface Process

The Generate MyCSP Interface process will allow you to:

- Archive the set of data sent to MyCSP.
- Identify any employee records that have failed the validations, via the Errors and Warnings report.
- View errors and warnings for those records so that you can correct the data and regenerate the files prior to submission.
- Retry only the set of records that have errored.
- Generate the interface files.

Pension Schemes and Contributions

In addition, to calculate and report the pension contributions correctly, the Element task has been enhanced to support the rules and regulations specific to the Civil Service Pension Schemes. Using this task, you are now able to define pension elements for each of the PCSPS schemes.

Support the attribution required, setup, and calculation of public sector pension schemes:

- Identification of the pension scheme type, which is critical as it drives a lot of the content of the files
- Assumed pensionable pay, where employee's earnings are reduced below a certain level due to certain absence types, employer's contributions are based on the pensionable pay the employee would have received as if they were at work.
- Tiered contribution rates: contribution rates depend on the employee's salary band.
- Handling of multiple Additional Voluntary Contributions (AVC)

Member Inclusion Criteria for Reporting in the MyCSP Interface

The minimum criteria required for an employee to be considered for reporting in the MyCSP interface is either:

- They are enrolled in a MyCSP pension scheme – there is an active MyCSP scheme component on their Benefits and Pensions card and an assignment association to it as of the MyCSP interface process date.
- They have opted out of a MyCSP pension scheme – the Active Qualifying Scheme Name is a MyCSP pension scheme and the Reason for Leaving Qualifying Scheme is Contractual Opt-out or Left Scheme on their Pensions Automatic Enrolment card as of the MyCSP interface process date. They may or may not have a Benefits and Pensions card.

Employees with a termination date one or more days prior to the cutover date are excluded from cutover. If an employee is terminated retrospectively prior to the cutover date (and they've been reported in the cutover submission), they aren't included in subsequent monthly interface submissions.

Identify and Troubleshoot Issues with your Data

Two diagnostic reports are available in the Diagnostics Framework to help you identify and troubleshoot issues that will cause problems with your MyCSP reporting if not addressed:

- HCM UK MyCSP Generic Setup Diagnostics
- HCM UK MyCSP Interface and Assignment Diagnostics These reports identify issues with:
- Your initial setup
- A cutover or specific monthly interface submissions
- A specific assignment

2 Pension Scheme Setup

Overview of Civil Service Pension Schemes

The Civil Service Pension is made up several schemes, some of which are closed to new members of the Civil Service, but still open to existing members of the scheme.

These schemes offer different benefits to employees and have specific eligibility rules that you must obey when enrolling a new joiner into a scheme.

Scheme	Description
Alpha	A defined benefit scheme (Career Average - CARE). Pension builds up at 2.32% of actual pensionable earnings each scheme year. Introduced 1 April 2015. Most new entrants after that date will join this scheme.
Nuvos*	A defined benefit scheme (Career Average - CARE). Pension builds up at 2.3% of pensionable earnings each scheme year. Introduced 30 July 2007. Closed to new entrants from 31 March 2015 except those with a recent public sector pension.
Premium*	A defined benefit pension scheme based on final salary. Introduced 1 October 2002. Now closed to new entrants.
Partnership	A defined contribution ('money purchase') stakeholder pension.
The Civil Service Supplementary (Earnings Cap) Scheme	This provides benefits on pensionable earnings above the earnings cap. Closed to new members from 6 April 2006.
Designated stakeholder pension scheme	A defined contribution (money purchase) arrangement, offered as a way for staff to boost their retirement income, regardless of whether they already belong to one of the defined benefit schemes or Partnership.

This table is a copy of information on the Civil Service Pensions Schemes website.

* These Civil Service Pension Schemes have not been open to new members since 1 April 2022.

Pension Scheme Elements

Pension scheme elements need to be created in the system.

Create one element for each scheme that applies to members of your organization:

1. Use the Elements task to create a new element. Click **Create**.
2. In the Create Element window, complete the fields as shown here:

PRIMARY CLASSIFICATION	SECONDARY CLASSIFICATION	CATEGORY
Pre-Statutory Deductions	Pension Plan Pre-Statutory	Benefit
Voluntary Deductions	Pension Plan After Tax	Benefit

3. Select Percentage deduction for employee and employer contribution rules and enter a rate, although this will ignore the value definition and the CSP value definition will be applied.
4. No pension caps are predefined. You must define these where applicable.
5. Ignore the question on Additional Contribution Rules. Use the new secondary classifications specifically to setup additional voluntary contribution elements.
6. Select Yes to the proration question in the Special Rules section. The proration group is needed for terminated employees whose final close (that is, their calculation card end date) is mid-month. Without the proration group, the pension element entry would not be picked up in payroll processing that month.
7. Select No to the question, Is this element subject to retroactive changes? Corrective retroactive processing is not supported.
8. Select Yes to the question, Is this a Qualifying Pension Scheme? Several further questions are then displayed.
9. Select Civil Service to the employer type question.
10. Select the pension scheme category:
    - Alpha
    - Partnership – Legal & General (voluntary deductions only)
    - Partnership – Prudential (voluntary deductions only)
11. Specify what the retirement age for the scheme is based upon.

> **Note:** If you have eligible employees aged 75 or over, you must also create a Voluntary Deductions Alpha scheme element.

Create Eligibility:

This allows you enroll an employee into the scheme. It also allows the Pensions Automatic Enrolment process to create a Qualifying Pension Scheme component and associated element entries when the employee is eligible. It is not necessary to define eligibility for the Employee and Employer Contribution elements, as these are indirect elements.

After the questionnaire is submitted, various objects are generated depending on the answers to the questions and the scheme selected:

Summary of Changes Based on the Selected Scheme:

TYPE	NAME	ALPHA	PARTNERSHIP	NOT APPLICABLE
Rate Table Override	Civil Service Employee Pension Rates	Yes	N/A	N/A
	Civil Service Employer Pension ASLC Rates	Yes	N/A	N/A

TYPE	NAME	ALPHA	PARTNERSHIP	NOT APPLICABLE
	Civil Service Employer Pension Partnership Rates	N/A	Yes	N/A
	<Element name> Employer Mini ASLC Percentage	N/A	Yes	N/A
Pensionable Pay Override	Assumed Pensionable Pay	Yes	Yes	N/A
Additional Input Values	Assumed Pensionable Pay	Yes	Yes	N/A
	Permanent Pensionable Pay	Yes	N/A	N/A
	Employer Mini ASLC Amount	N/A	Yes	N/A
	Employer Matching Percentage	N/A	Yes	N/A
	Employer Matching Amount	N/A	Yes	N/A
Additional Balances	Assumed Pensionable Pay	Yes	N/A	N/A
	Permanent Pensionable Pay	Yes	N/A	N/A
	Employer Mini ASLC Amount	N/A	Yes	N/A
	Employer Pensionable Base	N/A	Yes	N/A
	Employer Matching Amount	N/A	Yes	N/A
	CSP Permanent Pensionable Pay	Yes	Yes	N/A
	APP Employer Eligible Compensation	Yes	Yes	N/A
	APP Adjustment	Yes	N/A	N/A
Additional Value Definition	Pension Scheme Category	Yes	Yes	N/A
	Normal Retirement Age	N/A	Yes	N/A
Additional Data Capture on Card	Normal Retirement Date Override	N/A	N/A	N/A
	Transition Date	N/A	N/A	N/A

TYPE	NAME	ALPHA	PARTNERSHIP	NOT APPLICABLE
Additional Component Detail Override	Employer Matching Percentage	N/A	Yes	N/A

Once the element is created, a formula is generated with the rules specific to the scheme being created.

The employee contribution rate for Alpha is calculated by annualizing the CSP Permanent Pensionable Pay for the current period and applying the rate applicable to the relevant salary band.

Whilst the CSP Permanent Pensionable Pay is the basis to determine the tier, the contribution is applied to the actual earnings for the period, including backdated pay awards (the Eligible Compensation balance).

The employer contribution rate is calculated by annualizing the Permanent Pensionable Pay, applying the employee's FTE that is in effect at the end of the month and applying the rate for the relevant salary band.

- Additional rate definition setup is required to determine the employee's annualized FTE salary (and therefore the applicable employer contribution rate) for cases where an employee has a mid-month FTE change. See: MidMonth FTE Changes and Employer ASLC Contributions in the appendix for setup information.
- Cases of assumed pensionable pay are automatically detected by looking at absence payment rates. Employer contributions are automatically switched to use assumed pensionable pay.

For Partnership schemes:

- No employee contribution is calculated unless a contribution rate is explicitly entered on the employee's calculation card.
- Employers can pay up to 3 separate contributions:
    - Employer Partnership contribution – rate based on employee's age as of 6th April ◦ Mini-ASLC – fixed contribution rate of 0.5%
    - Matching contribution – where the employee chooses to contribute into the Partnership scheme, the employer can also decide to match the employee's contribution, up to a maximum of 3%.

All three rates are calculated and displayed in separate input values.

Employer contributions are applied to a specific balance: Employer Pensionable Base.

The following tables summarize the base and rate that is used to calculate employee and employer contributions.

Principal Civil Service Pension Schemes (PCSPS) and Alpha – Employee Contributions

CALCULATION	DEFINITIONS	BALANCE	SUGGESTED FEED
Base	Actual pensionable earnings	<Element name> Eligible Compensation	(Automatic Feed) + Basic Salary + Retro + Pensionable allowances + Retro + Pensionable bonuses + Retro + Absences + Retro

CALCULATION	DEFINITIONS	BALANCE	SUGGESTED FEED
Rate*	Actual pensionable earnings excluding Retrospective changes	<Element name> CSP Permanent Pensionable Pay	(Manual feed) + Basic Salary + Pensionable allowances + Pensionable bonuses + Absences

*The CSP Permanent Pensionable Pay is annualized and rate determined based on salary band.

No proration required as earnings are already pro-rated.

Principal Civil Service Pension Schemes (PCSPS) and Alpha – Employer Contributions

CALCULATION	DEFINITIONS	BALANCE	SUGGESTED FEED
Base	Actual pensionable earnings	<Element name> Eligible Compensation	(Manual feed) + Basic Salary + Retro + Pensionable allowances + Retro + Pensionable bonuses + Retro + Absences + Retro
Rate	Permanent Pensionable Pay	<Element name> Permanent Pensionable Pay	(Manual feed) + Basic Salary + Pensionable allowances* + Pensionable bonuses* + Absences

* Permanent allowances and bonuses only. If in doubt, verify with MyCSP.

Calculation Value Definitions

The calculation value definitions are predefined to store the salary bands and corresponding rates.

However, users must create the values for each of those value definitions and maintain them as and when required.

Predefined Calculation Value Definitions

CALCULATION VALUE DEFINITION NAME	VALUE DEFINITION GROUP	FURTHER INFORMATION
Civil Service Employee Pension Rates	Public Sector Pension rates	N/A
Civil Service Employer Pension ASLC Rates	Public Sector Pension rates	N/A
Civil Service Employer Pension Partnership Rates	Public Sector Pension rates	N/A
<Element name> Pension Basic Tax Rate	Public Sector Pension rates	Generated on creation of a Partnership scheme
<Element name> Employer Mini ASLC Percentage	Contribution Rules	Generated on creation of a Partnership scheme

Update Calculation Value Definitions

To update the public sector pension rate calculation value definitions to reflect current values:

1. Use the Calculation Value Definitions task, and search for the three value definitions prefixed with Civil Service (or element name, for the contribution rules value definitions):
2. Select the Value Definition and enter the calculation values.
3. Enter the current rates for each of the predefined value definitions. (The following tables are examples from 2020.)

Civil Service Employee Pension Rates

START DATE	END DATE	LOW £	HIGH £	RATE	CALCULATION TYPE
01-Apr-2020	N/A	0	22600	4.6%	Flat Amount
01-Apr-2020	N/A	22601	54900	5.45%	Flat Amount
01-Apr-2020	N/A	54901	150000	7.35%	Flat Amount
01-Apr-2020	N/A	150001	N/A	8.05%	Flat Amount

Civil Service Employer Pension ASLC Rates

START DATE	END DATE	LOW £	HIGH £	RATE	CALCULATION TYPE
01-Apr-2020	N/A	0	23000	26.6%	Flat Amount
01-Apr-2020	N/A	23001	45500	27.1%	Flat Amount
01-Apr-2020	N/A	45501	77000	27.9%	Flat Amount

START DATE	END DATE	LOW £	HIGH £	RATE	CALCULATION TYPE
01-Apr-2020	N/A	77001	999999999	30.3%	Flat Amount

Civil Service Pension Partnership Rates

START DATE	END DATE	LOW £	HIGH £	RATE	CALCULATION TYPE
01-Apr-2015	N/A	0	30	8%	Flat Amount
01-Apr-2015	N/A	31	35	9%	Flat Amount
01-Apr-2015	N/A	36	40	11%	Flat Amount
01-Apr-2015	N/A	41	45	13.5%	Flat Amount
01-Apr-2015	N/A	46	99	14.75%	Flat Amount

<Element Name> Pension Basic Tax Rate

START DATE	END DATE	LOW £	HIGH £	RATE	CALCULATION TYPE
01-Apr-2015	N/A	0	9999999999	0.2	Flat Rate

<Element Name> Employer Mini ASLC Percentage

START DATE	END DATE	LOW £	HIGH £	RATE	CALCULATION TYPE
01-Apr-2015	N/A	0	9999999999	0.5	Flat Rate

> **Note:** The values are effective as of the dates shown. To recalculate pension contributions prior to the current year, you must enter the historical rates.

If required, update these tables every pension year to ensure the salary bands and percentages are in accordance with legislative changes. When entering the new pension year rows end date the old rows to 31 March YYYY, and the new rows should be effective from 01 April YYYY. This table holds the salary band and the corresponding pension percentage to be applied for the year of pension.

Additional Balance Feeds

Several balances are automatically generated by the element template.

Set Up Additional Balance Feeds

Some of those balances are fed by classifications or secondary classifications; others need to be fed manually.

> **Note:** The effective start date of all balance feeds must be the same as the effective start date of the associated pension scheme element.

User-Defined Balance Feeds

BALANCE	USAGE	SUGGESTED FEED
<Element Name> Permanent Pensionable Pay	Used to calculate the employer ASLC rate. Only permanent pensionable pay should be considered.	Regular earnings For Partnership schemes only: Regular Earnings Subject to Pension (balance classification)
<Element Name> Assumed Pensionable Pay	Used to calculate the employer ASLC rate, as well as the base on which employer contributions are calculated in cases of Assumed Pensionable Pay.	Regular earnings Note: should not include Absences
<Element Name> CSP Employer Partnership Contributions	Used for Partnership scheme reporting of employer contribution and employer matching amount.	Partnership scheme <Element Name> Employer Contributions (input values: Contribution Amount and Employer Matching Amount).
		Note: we do not advise that you add the Employer Mini ASLC Amount input value from < Element Name> Employer Contributions.
<Element Name> Employer Pensionable Base	Used for Partnership scheme where the employee and employer pensionable pay is different.	Subset of regular & irregular earnings
<Element Name> CSP Permanent Pensionable Pay	Used to determine the employee contribution band.	Regular earnings, excluding any backdated pay awards.
<Element Name> APP Employer Eligible Compensation	Used as the base on which employer contributions are calculated for the portion of the pay period where Assumed Pensionable Pay does not apply.	Regular Earnings Subject to Pension (balance classification) Irregular Earnings Subject to Pension (balance classification) One of the following two element feeds from the statutory and occupational entitlement results formula:

BALANCE	USAGE	SUGGESTED FEED
		If you created an absence rate that excludes non-pensionable allowances (see Reduced Pensionable Pay Rate Setup), use the Reduced Pensionable Pay All Factors input value. Otherwise, use the Deduction input value.
<Element Name> Eligible Compensation	Used as the base on which employee and employer contributions are calculated.	In addition to automatic feeds, add the Net Pay input value of any absence Entitlement Result elements.

3 Additional Voluntary Contributions (AVCs) Setup

Set Up Additional Voluntary Contributions (AVCs)

Additional pension contributions allow members of pension schemes to pay extra contributions to build up additional benefits.

This can be by a percentage of salary contribution, a flat amount or a lump sum. The type of contribution is by an agreement between the employer and the employee, subject to their regulations.

The sector-specific schemes for the Civil Service are:

- Effective Pension Age
- Enhanced Effective Pension Age
- Money Purchase Top-Up
- Supplementary Scheme - Earnings Cap

There are several additional voluntary contributions that a member can select. Two secondary classifications offer the ability to define those additional contributions, with the rules and regulations applicable to each of them. To report the appropriate details, it is recommended that you create elements for these scenarios:

- Additional Voluntary Contributions for each parent scheme
    - And one of each of those for Member, or Member and Partner
- Additional Pension Contributions for each parent scheme
    - And one of each of those for Member, Member and Partner
- Added Years for parent scheme of Alpha
    - And one of each of those for Member or Family
- CSP Effective Pension Age for parent scheme of Alpha
- CSP Enhanced Effective Pension Age for parent scheme of Alpha
    - And one of each of those for age 60 or 65
- Stakeholder Pension
- Supplementary Scheme - Earnings Cap

The number of elements required may increase if both flat amount or percentage deductions are required.

Note: If the employee pays by lump sum this is outside the payroll process, and is an agreement between the employee and CSP. There are no reporting requirements.

To create the elements:

1. Use the Elements task in the Payroll Calculation work area.

2. In the Create Element window, complete the fields as show here:

    Additional Voluntary Contributions Pension Scheme Element

PRIMARY CLASSIFICATION	SECONDARY CLASSIFICATION	CATEGORY
Pre-Statutory Deductions	Additional Pension Contributions Pre-Statutory	Benefit
Voluntary Deductions	Additional Pension Contributions After Tax	Benefit

    Additional questions are available on the questionnaire to identify the type of additional pension contribution you are creating:
3. Select Alpha as the parent pension scheme.
4. Select the type of additional contribution:
    - Additional Pension Contribution (APC) ◦ Additional Voluntary Contribution (AVC) ◦ Added Years
    - CSP Enhanced Effective Pension Age ◦ CSP Effective Pension Age ◦ CSP Money Purchase Top Up
5. Depending on the type selected, you can also specify who the beneficiaries are:
    - For AVC or APC, beneficiaries can be either Member or Member and Partner ◦ For Added Years, beneficiaries can be either Member or Family
6. If the response to "What type of additional pension is this deduction?" is CSP Enhanced Effective Pension Age, an additional question is displayed: Which pension age option applies? Select either 60 or 65.
7. Enter the pension provider.
    - Once the element is created, you must define eligibility.

4 Pension Scheme Enrollment and Benefits and Pensions Card Setup

Interaction with Pension Automatic Enrollment (PAE) Processes

You need to set up and create components and associations for using the pensions automatic enrollment feature.

For detailed information about setting up and using pensions automatic enrollment, please refer to*Administering Payroll for the United Kingdom* on the Oracle Help Center.

Please note the following when using it with MyCSP:

- You specify that a pension scheme is a qualifying Civil Service pension scheme during element creation. You can then select it as the default scheme for pension automatic enrollment.
- The Pension Automatic Enrollment process generates the Pension Payroll ID that is added to the Benefits and Pension calculation card for eligible members.
- The Qualifying Scheme Joining Date on the Pensions Automatic Enrollment calculation card is their hire date as they are eligible to join the MyCSP scheme from that date.
- The Pensions Automatic Enrollment calculation card must contain an association detail for the employee's assignment. Without this, their Benefits and Pensions calculation card is created, but without the association. If your TRU-level Pensions Automatic Enrollment calculation card is configured for automatic assignment association, the association detail is automatically created on the Pensions Automatic Enrollment calculation card. This automatic association option can be enabled at any time, but it will only apply to new calculation cards created thereafter.
- If you have multiple assignments, you must create a separate Pensions Automatic Enrollment component for each assignment. You must create a separate association for each assignment.

Enroll an Employee in a Civil Service Pension Scheme

You can manually enroll an employee into a pension scheme.

You can creating a calculation component for the particular scheme in the Benefits and Pensions Calculation Card:

1. Create a new Benefits and Pensions card effective as of the member's hire date.
2. Enter the relevant information such as Pension Payroll ID, and rate overrides if applicable, as described in subsequent sections.
3. Once the component is created, you must associate an assignment to it.

   Note: Without this association, the employee will not be reported.

Pension Payroll ID

You record a scheme member's eight-digit Pension Payroll ID as a reference on the main pension scheme component on their Benefits and Pensions calculation card.

It's automatically generated (based on the internal component ID on the calculation card and a one character suffix), but you can override it.

If multiple assignments exist, you must create multiple pension scheme components (each with its own Pension Payroll ID) and associate each assignment with the correct component. You must not associate multiple assignments with the same pension scheme component (and thus same Pension Payroll ID).

The Pension Payroll ID, together with the Paypoint Code, is used to generate the Alt Key (ALTKEY). Therefore, if a person is rehired and enrolled back into the same pension scheme and the same Paypoint Code (that is, the same Alt Key applies), MyCSP requires the existing Pension Payroll ID to be reused.

If a member transfers from one civil service scheme to another (and within the same Paypoint Code), MyCSP requires the same Pension Payroll ID to be used. The Pensions Automatic Enrolment process handles this for transfers and opt-outs. For more information, see the section on Interaction with Pension Automatic Enrolment Processes.

If you aren't using the Pensions Automatic Enrolment process, you must end date the existing pension scheme component and the association detail on the day before the transfer date on the employee's Benefits and Pensions calculation card. After you save the calculation card, you can reuse the same calculation card to create the new pension scheme and association detail as of the transfer date while reusing the existing Pension Payroll ID from the previous civil service scheme. If a new Pension Payroll ID is created, the employee record will be duplicated on MyCSP interface. This is incorrect.

> **Note:** Assignments aggregated for NI and tax purposes can have only a pre-statutory pension deduction. If one assignment contributes to both a pre-statutory deduction (for example, Alpha) and a voluntary deduction (Partnership), these should be associated with separate statutory calculation cards. This is because it isn't possible to calculate net pay at assignment level for assignments that are aggregated for tax and NI purposes.

Additional Benefits and Pensions Card Data Capture

Pension Scheme Additional Data Capture

For all pension schemes except Alpha and Partnership, you can enter additional data on the pension calculation card.

Pension Scheme Additional Data Capture

FIELD	DESCRIPTION
Normal Retirement Date Override	Allows you to override the employee's normal retirement date. This is reported in the Basic file.

FIELD	DESCRIPTION
Transition Date	Allows you to record the employee's date of transition to Alpha

Pension Rates Override

Partnership – Employee Contribution Rate

For the Partnership scheme, members do not have to contribute but may decide to do so; if they do, they also decide on the level of contribution.

To record the employee's contribution to the Partnership scheme, follow the steps mentioned above, selecting Percentage for Employee Contribution and the percentage rate.

Partnership – Employer Matching Contribution Rate

You can record the employer matching contribution rate using the Calculation Values on the Calculation Card.

To record the employer's rate, follow the steps mentioned above, selecting Employer Matching Percentage and the percentage rate.

Use of Other Calculation Value Overrides

You can override other calculation values using overrides on the member's calculation card.

This table summarizes which of those values can be used for Civil Service Pension Schemes:

CALCULATION VALUE	SCHEME AVAILABLE	DESCRIPTION
Employer Matching Percentage	Partnership scheme	Allows you to enter the Employer Matching percentage in cases where the employer decides to match the employee's contribution.
Normal Retirement Age	All	Not used for Civil Service Pension schemes.
Partial Deduction Allowed	All	Do not use this for any Civil Service Pension Schemes.
Payee	All	Not used for MyCSP reporting, but you can enter a third-party payee to make a payment using Oracle Cloud Payroll.
Percentage for Employee Contribution	All	Use the Partnership scheme to record the employee's chosen contribution rate. Note: Do not use this for any other Civil Service Pension Schemes.
Percentage for Employer Contribution	All	Do not use this for any Civil Service Pension Schemes

CALCULATION VALUE	SCHEME AVAILABLE	DESCRIPTION
Reference Number	All	Allows you to record a reference number that may be provided by the third-party pension provider. Note: It is different to the Pension Payroll ID used to report the member's assignment to MyCSP.

Record an Employee's Additional Voluntary Contribution

For employees who choose to contribute additional voluntary deductions, add the corresponding calculation card component on their Benefits and Pension Calculation Card.

For example, if the employee has an EPA, add that component.

> **Note:** Although some types of additional voluntary contribution do not apply to all schemes, a member may be permitted under certain circumstances to continue to contribute to an existing contract, even though they have transferred to another scheme. There is no validation based on the parent scheme defined for the addition contribution and the scheme into which the employee is enrolled.

If an Additional Voluntary Contribution type is EPA or EEPA, this additional information is available on the calculation card using the Effective Pension Age Reporting Details component detail.

EPA and EEPA Additional Data Capture

FIELDS	DESCRIPTION
EPA Type	Select either EPA or EEPA.
Suspension Code	Select from these values: EPA suspended - assumed pay • EEPA 60 only suspended - assumed pay • EEPA fully suspended - assumed pay • EEPA suspended – ineligible This results in the EPA or EEPA contribution being suspended. **Note:** If the employee is on an assumed pensionable pay absence and you do not suspend contributions, the calculation complies with EPN697: • Added Pension, EPA and EEPA contributions on family leave absences are based on actual pensionable pay. • For all other assumed pay absences, Added Pension, EPA and EEPA contributions are based on assumed pensionable pay.

FIELDS	DESCRIPTION
Restart Indicator	EPA/EEPA contributions are automatically restarted for an employee whose previous pensionable service ended but who has now returned to pensionable service (as a rehire) within the permitted five-year period.
Restart Date	Date of automatic restart of EPA or EEPA contributions for an employee who has returned to pensionable service.
Cabinet Office approval to restart EEPA	Cabinet Office approval indicator for the restart of an EEPA.

Calculation Value Override Used for Additional Voluntary Contributions

CALCULATION VALUE	ADDITIONAL CONTRIBUTION TYPE	USAGE
Partial Deduction Allowed	All	Specify whether partial deduction is allowed or not for this employee.
Payee	All	Not used for MyCSP reporting, but you can enter a third-party payee to make a payment using Oracle Cloud Payroll.
Additional Pension Employee Contribution	All	Enter a percent or flat amount as per element template setup.
Additional Pension Employer Contribution	All	Enter a percent or flat amount as per element template setup (if requested).
Reference Number	All	Allows you to record a reference number that may be provided by the third-party pension provider. **Note:** It is different to the Pension Payroll ID used to report the member's assignment to MyCSP.

Late Joiners, Opt Outs, Backdated Transfers and Rehires

Late joiners, opt outs, backdated transfers and rehires need to be included in the MyCSP interface files in the following ways.

Late Notification of a Joiner

If you receive late notification of a new member who started in a previous payroll period, you must enroll them manually as of their hire date. The Qualifying Scheme Joining Date on their Pensions Automatic Enrollment calculation card must be their hire date and you must create a Benefits and Pensions calculation card manually as of that date.

If you don't enrol them manually and they are processed by Pensions Automatic Enrollment in a later payroll period, their start date will be the first day of that payroll period. In this case, you must delete the automatically created Benefits and Pensions calculation card and create a new calculation card manually as of the person's hire date.

Opt Outs

If an employee opts out of a pension scheme and has no Benefits and Pensions calculation card, the association detail on the Pensions Automatic Enrollment calculation card is required for the employee to be included in the MyCSP interface files.

If an employee has a Benefits and Pensions calculation card, but they opt out of a Civil Service pension scheme prior to completion of the first payroll run, the qualifying pension scheme component on the Benefits and Pensions calculation card is deleted (together with their Pension Payroll ID). When this occurs, the employee's Pension Payroll ID is automatically transferred to the Historic Pension Payroll ID field on their Pensions Automatic Enrollment calculation card > Enrollment Details.

If they opt back into a qualifying scheme later, their existing (historic) Pension Payroll ID is moved from the Pension Automatic Enrollment calculation card back onto their Benefits and Pensions calculation card, where it can be reselected or overridden on the new qualifying pension scheme component.

> **Note:** For Partnership scheme opt outs, you must report the main qualifying pension scheme the person was eligible for (and may or may not have enrolled in) prior to joining Partnership.

You record this in the Scheme Eligible to Join field on the Pensions Automatic Enrollment calculation card under Pensions Automatic Enrollment Details. (If you try and perform a Partnership optout without that information, an error message will be raised.) The "scheme eligible to join" and its associated scheme logic will be used for all Service History records for the person as long as they are opted out (for example, if they go on a 50% paid sickness absence or unpaid absence).

See the Service History section on Opt Outs for information on recording an opt out.

Backdated Transfers

You can perform a backdated transfer for a member within 3 months of joining the original scheme. The Pensions Automatic Enrollment process will automatically end date the existing pension component and create a new one.

A mid-period backdated transfer may result in the contributions being calculated for both the original scheme and the new scheme. This is because the pension element is still active at the end of the period, due to the proration group rule for leavers. (The proration group is needed for terminated employees whose final close - that is, their calculation card end date - is mid-month. Without the proration group, the pension element entry would not be picked up in payroll processing that month.)

As noted in the Backdated Transfer from Qualifying Scheme to Another Scheme in Administering Payroll for the United Kingdom in the Oracle Help Center, you must manually handle any refunds from deductions in the original scheme. You will need to make balance adjustments to transfer the contributions from the original scheme to the new scheme.

Rehires

In the case of a rehire where the same Alt Key applies and is expected by MyCSP, you must reuse the Pension Payroll ID from the previous employment:

1. Check the Pension Payroll ID from the previous employment by referring to the previous employment's Benefits and Pensions card. The calculation card is active until the final close date so you must use an effective date that is earlier than that.
2. Create the new Pensions Automatic Enrollment calculation card and component for the new employment, recording the previously used Pension Payroll ID in the Historic Pension Payroll ID field.
3. When the PAE process runs, the Historic Pension Payroll ID is moved to the new Benefits and Pensions calculation card.

If you do not record the Historic Pension Payroll ID, you can still override the automatically generated ID on the Benefits and Pensions calculation card.

Government Department Mergers

In the case of cross-departmental government mergers the employee's MyCSP records should reflect the start date on which they were first eligible to join the MyCSP scheme and not the cutover date of their new employer.

Your HR data may be set up like this:

- Employee HR data has an earlier start date than the new department's cutover date and their PAE calculation card qualifying scheme joining date.
- Employee HR data has a later start date than the new department's cutover date but earlier than their PAE calculation card qualifying scheme joining date.

In both cases, the employee's MyCSP records for their new employer (excluding Payment History) use the start date of their existing Benefits and Pensions calculation card scheme component. Or, if that doesn't exist, the Qualifying Scheme Joining Date is used.

If the HR data start date precedes the new employer's cutover date, these MyCSP files are generated:

- Basic
- Address
- Part-time History (if applicable)
- Payment History
- Service History
- Allowance History (if applicable)
- Salary History
- Scheme Contribution Rate History.

If it's after the cutover date, these files are generated:

- Basic
- Address
- Part-time History (if applicable)
- Short-time Hours (Single) or Short-time Hours (Accumulated) (if applicable)
- Payment History
- Service History
- Allowance History (if applicable)
- Salary History
- Scheme Contribution Rate History

Payment History File

The Payment History file has a start date of 01/04 of the scheme year and includes the contributions and earnings accrued after they've been merged to the new employer.

Service History File

Active members of the scheme are reported as New Joiners (Start Code N) in the Service History file. If any of the following applies, the associated start code is reported:

- Full pay, statutory pay or unpaid maternity absence
- Half pay or unpaid sick absence
- Any other non-reckonable (non-pensionable) absence, for example, career break, special unpaid leave
- Opted out

Allowance History and Salary History Files

You can report allowances that the employee is in receipt of when they transfer to the new department by using one element entry for the MyCSP Allowance History Cutover element for each allowance.

If, as of transfer date, an employee is on reduced pay because of an assumed pay absence, report their actual reduced pay using an element entry for the MyCSP Salary History Cutover information element.

Element entries for either of these elements must have a start date of 1 or more days prior to the transfer/merger date.

5 MyCSP Alpha Pension Enrolments for Employees Aged 75 and Over

Set Up MyCSP Alpha Pension Enrollments

When an Alpha member is 75 or over, they can continue to make pension contributions but they are no longer eligible for tax relief on those contributions. Follow the steps described here to set up their contributions to the Alpha scheme.

Create a Pension Plan After Tax Element

You must create a Pension Plan After Tax element for the Alpha scheme.

1. Use the Elements task to create your element and element eligibility. Click Create.
2. Enter the details as shown:

FIELD	VALUE
Primary Classification	Voluntary
Secondary Classification	Pension Plan After Tax
Category	Benefit

3. Complete the template questions with the same responses as given when creating the pre-statutory deduction, including responding to the question “Is this a Qualifying Pension Scheme?” as yes, selecting the pension category Alpha.
4. Review the information and submit.

The elements and balances created are the same as those created for the pre-statutory deduction element, although there may be an additional balance that is not required to calculate Alpha pension.

The equivalent calculation value definitions are also created for a voluntary deduction as for the pre-statutory deduction, however it is possible <Base name> Employer Type for Pension may be missing, so may need to be created manually.

FIELD	VALUE
Value Definition Group	Contribution Rules
Calculation Type	Text
Use existing value definition group	Select this option
Value Definition Group	Contribution Rules
Calculation Type	Text

FIELD	VALUE
Calculation Values: From Value	0
Calculation Values: To Value	99,999,999,999
Calculation Values: Text	CS

Transfer Elements

Ensure that the pre-statutory pension scheme component on the Benefits and Pensions calculation card is end-dated and add the new voluntary scheme component. This can be done using the preferred method of pension automatic enrolment process as a transfer, or manually. If you perform this manually, you must set your effective date on the Benefits and Pensions card to the start date of the new voluntary deductions component prior to adding that component. You must reuse the existing Pension Payroll ID on the new component.

> **Note:** Proration of pension elements is not supported, therefore whether a period's pension contributions attract tax relief or not will only be for complete periods.

Balance Feeds

See: Setting Up Additional Balance Feeds to create the balance feeds needed for the voluntary Alpha scheme.

We recommend that your balance feeds to the following elements are the same as the balance feeds for the equivalent prestatutory Alpha scheme balances:

- <Element Name> Permanent Pensionable Pay
- <Element Name> CSP Permanent Pensionable Pay
- <Element Name> Assumed Pensionable Pay
- <Element Name> Eligible Compensation

You can compare your pre-statutory and voluntary Alpha scheme balances using the HCM UK MyCSP Generic Setup Diagnostics report.

Pension Calculations

The pension calculation including eligible compensation, permanent pensionable pay tier calculation and assumed pensionable pay will be the same for a voluntary Alpha element as for a pre-statutory Alpha element, except there is no tax relief for voluntary deduction.

Note: The Civil Service specific calculations for EPA, EEPA, AVC are not currently supported for voluntary deductions.

MyCSP Pension Reporting

There is no difference between reporting a pre-statutory Alpha scheme details and voluntary Alpha scheme details in most files, including Pay History. However, care should be taken in Service History that an unwanted line hasn't been created in the period of transfer, it is not expected to be there, but in the exceptional case where it is, it should be removed.

MyCSP Alpha Pension Enrolments for Employees Aged 75 and Over

When an Alpha member is 75 or over, they can continue to make pension contributions but they are no longer eligible for tax relief on those contributions. Follow the steps described here to set up their contributions to the Alpha scheme.

Identify Affected Employees

The UK Payroll Validation Archive Report (PVAR) raises the following message in the period before a member's 75th birthday if they have any (not only MyCSP) pension scheme enrolment; "The employee is nearing the age of 75 and is enrolled in a pension scheme. Check their eligibility for the scheme.

If the scheme member is going to remain a member of the scheme, then they should be transferred from the default element for the pension scheme created as a pre-statutory deduction, pension plan pre-statutory, which attracts tax relief, to a pension element that doesn't, pension plan after tax.

Create a Pension Plan After Tax Element

You must create a Pension Plan After Tax element for the Alpha scheme.

1. Use the Elements task to create your element and element eligibility. Click Create.
2. Enter the details as shown:

FIELD	VALUE
Primary Classification	Voluntary
Secondary Classification	Pension Plan After Tax
Category	Benefit

3. Complete the template questions with the same responses as given when creating the pre-statutory deduction, including responding to the question "Is this a Qualifying Pension Scheme?" as yes, selecting the pension category Alpha.
4. Review the information and submit.

The elements and balances created are the same as those created for the pre-statutory deduction element, although there may be an additional balance that is not required to calculate Alpha pension.

The equivalent calculation value definitions are also created for a voluntary deduction as for the pre-statutory deduction, however it is possible <Base name> Employer Type for Pension may be missing, so may need to be created manually.

Field	Value
Value Definition Group	Contribution Rules
Calculation Type	Text
Use existing value definition group	Select this option
Value Definition Group	Contribution Rules
Calculation Type	Text

Field	Value
Calculation Values: From Value	0
Calculation Values: To Value	99,999,999,999
Calculation Values: Text	CS

6 Payroll Statutory Unit (PSU) and Legal Employer Information Setup

Set Up of Payroll Statutory Unit (PSU) and Legal Employer Information

You must specify additional information at PSU, and optionally, legal employer level, to set default values for MyCSP reporting.

This includes Paypoint Code and Employer Code. If your organization is both a PSU and a legal employer, enter the information on the PSU only.

To provide HCM information for MyCSP reporting:

1. In the Legal Entity HCM Information task, in the Payroll Statutory Unit tab, select UK Public Sector Payroll Statutory Unit Details, context MyCSP Information. Complete the information as shown below:

   Additional PSU Information (Context: MyCSP Information)

FIELD	DESCRIPTION
Employer Code	As provided by MyCSP.
Paypoint Code	As provided by MyCSP.
Short-Time Hours File Type	Accumulated or Single depending on which file type you intend to use.
Start of Week	Start date of week for reporting accumulated short-time hours.
Working Hours Type	Gross - including breaks or Net – excluding breaks depending on how you report your hours for part-time hours. If left blank, default is Net.

2. Select the Legal Employer tab and the UK Public Sector Legal Employer Details context to enter an override. You must enter a value in all fields or none of them. If you do not enter information on the legal employer, the values stored on the PSU are used for your MyCSP reporting:

   Additional Legal Employer Information (Context: Legal Employer MyCSP Information)

FIELD	DESCRIPTION
Employer Code	As provided by MyCSP. Use this if you want to override the code specified at PSU level.
Paypoint Code	As provided by MyCSP. Use this if you want to override the code specified at PSU level.
Short-Time Hours File Type	Accumulated or Single depending on which file type you intend to use. Use this if you want to override the file type specified at PSU level.

FIELD	DESCRIPTION
Start of Week	Start date of week for reporting accumulated short-time hours.

Note: : If other fields are completed at either PSU or legal employer level but Start of Week is left blank, the start of week for the accumulated short-time hours defaults to Sunday.

7 Additional Personal and Assignment Information

Additional Personal and Assignment Information

8 Multiple Assignments

Multiple Assignments and Scheme Enrolment

To create an additional assignment in an existing work relationship, you must do the following:

- Manually create a new component and association for the assignment on the existing Pensions Automatic Enrolment card. Each assignment must have its own component and association.

  > **Note:** You cannot create multiple Pensions Automatic Enrolment cards for the same payroll relationship.

- Manually create a new pension scheme component and association for the new assignment on the existing Benefits and Pensions card.
- You must not associate more than one assignment to one pension scheme component.
- Each assignment must have a one-to-one association with a pension scheme component and a unique Pension Payroll ID associated with it.

Multiple Assignments and Absence Setup

Follow these steps for the setup that is required for the correct calculation and reporting of absences if you use multiple assignments, each of which may or may not have the same absence payment factor associated with it.

The formula changes described will ensure that the payment factor specific to each assignment is used to determine the contribution base and tier for each assignment. For example, if the member has 2 assignments, and assignment 1 is still paid at a rate of 50% and assignment 2 has dropped to zero pay, each assignment will be assessed according to its own factor.

Prerequisites

Configure your absence elements as described in the help topic: Define Payroll Elements to Process Absences in the Implementing Payroll for the United Kingdom guide. Statutory absence setup must conform to the configuration described in Setting Up and Migrating UK Statutory Absences (Doc ID 2235239.1).

> **Note:** Only one occupational sickness or family-related absence plan can be effective for an assignment at any given point in time. If multiple occupational plans apply, for example, as a means of offsetting maternity absence payments, it's not possible to determine which plan to use in the pension calculation; the calculation and MyCSP xx records may therefore be incorrect.

This restriction applies whether the employee has one or multiple assignments. When multiple assignments exist, each assignment can have its own occupational plan, or multiple assignments can share the same occupational plan.

Before making the changes described below, make a copy of your statutory and occupational sickness and family-related leave formulas and pension scheme formulas:

- Entitlement Result formulas (<Absence Element Name> Entitlement Result) for both statutory and occupational family-related and sickness absences
- MyCSP pension calculator formulas (<MyCSP Scheme Name> Calculator)

Once you've backed up your existing formulas, edit the absence entitlement and pension scheme formulas as shown in this document, commenting lines as described, removing any code that is shown here as strikethrough text and inserting the code that's highlighted in the position shown in the formula. Then recompile your formula.

The formula changes are also listed in a text file attached to this document. (Note that the text file includes both the lines to remove and the lines to insert.)

Statutory and Occupational Absence Entitlement Result Formula Changes

These formula changes are required for your statutory and occupational family-related and absence Entitlement Result formulas.

1. Search for this text:

```
IF IS_EXECUTABLE('ORA_HRX_GB_ABS_PEN') THEN
```

   And **replace** with this:

```
IF IS_EXECUTABLE('ORA_HRX_GB_ABS_ASG_PEN') THEN
```

2. Search for this text:

```
EXECUTE('ORA_HRX_GB_ABS_PEN')
```

   And **replace** with this:

```
EXECUTE('ORA_HRX_GB_ABS_ASG_PEN')
```

Pension Scheme Calculator Formula

MyCSP pension scheme calculator formula changes are needed to support absences for multiple assignments if your pension scheme elements were created before release 23A. These changes are described below.

The changes are included in the pension scheme element template from 23A onwards, so you don't need to make those changes manually for pension scheme elements created on release 23A or later.

> **Note:** Your MyCSP pension scheme calculator formula is named <User-defined MyCSP pension scheme element name> Calculator.

1. Search for this text and comment it out:

```
CALL_FORMULA('ORA_HRX_GB_ABS_PEN_DTL',
 l_csp_app_day_count < 'l_csp_app_day_count' default 0, l_csp_non_app_day_count <
 'l_csp_non_app_day_count' default 0, l_csp_unpaid_day_count < 'l_csp_unpaid_day_count' default 0,
 l_csp_reg_day_count < 'l_csp_reg_day_count' default 0)
```

2. Then, add the following lines after the commented out text:

```
change_contexts(DIR_CARD_COMP_ID = DEDUCTION_COMPONENT_BY_EE)
(z = ALL_ASGS_LINK_TO_DEDUCTION_COMPONENT.first(-1) while ALL_ASGS_LINK_TO_DEDUCTION_COMPONENT.exists(z)
 loop
( change_contexts(PAYROLL_ASSIGNMENT_ID = ALL_ASGS_LINK_TO_DEDUCTION_COMPONENT[z])
```

```
    ( CALL_FORMULA('ORA_HRX_GB_CSP_ABS_ASG_PEN_DTL', l_csp_app_day_count < 'l_csp_app_day_count'
    default 0, l_csp_non_app_day_count < 'l_csp_non_app_day_count' default 0, l_csp_unpaid_day_count <
    'l_csp_unpaid_day_count' default 0, l_csp_reg_day_count < 'l_csp_reg_day_count' default 0)
    ) z = ALL_ASGS_LINK_TO_DEDUCTION_COMPONENT.next(z, -1) )

   )
```

Ending Assignments and Terminating Work Relationships

To end all assignments in the same work relationship, terminate the work relationship in the usual way.

To end an assignment (when other assignments continue to exist in the same work relationship) use an action based on either of these two predefined action types:

- End Assignment
- End Employment Terms

You must map the action that you use to end the assignment or employment terms to a valid Service History Leaving Reason using Extended Lookup Codes. For example, if you want the Service History to report action name End Assignment and action reason Worker Request with leaving reason 5 – Resignation, you must create a row for this combination using the CSP Action and Reason Mapping lookup type in the Extended Lookups table and create the mapping for it.

To stop the contributions for the ended assignment(s), you must manually end date the appropriate component on both the Benefits and Pension card and PAE card.

9 Code, Cutover and Monthly File Setup

Set Up Address Files

You can report a member's primary address as either HM (home) or OF (office) in the Address Code (ADDCDE) data item in the MyCSP Address file (ADDxxxx.nnn).

You do this using extended lookup codes to map lookup values for the user extensible lookup type Address Type (ADDRESS_TYPE) to determine which address code to report for the member.

If no extended lookups mapping exists for an Address Type lookup value, it is defaulted to HM in the report. Therefore, both existing and new users only need to configure a mapping for an address type that is office-based and that should be reported as OF. No predefined mappings are provided. A replacement address file is triggered only if the member's primary address is associated with an address type that's mapped to OF, as described below.

To map an office-based address to address code OF, perform these steps in the Extended Lookups task:

1. Select the Address Type lookup type.
2. Create a new row in the Extended Lookups table if no row exists for the lookup value for the UK.
3. Enter the values as shown here:

COUNTRY	LOOKUP CODE	EXTENDED CODE	EXTENDED NAME	ALL ENTERPRISES	ADDITIONAL INFORMATION
United Kingdom	Address type lookup value meaning, for example, user-defined lookup value Office	User-defined code. Not reported; you can use the lookup value name, for example, Office	User-defined name. Not reported; you can use the lookup value name, for example, Office	Yes	Select MyCSP Address Type Mapping in Additional Information. Then choose how this address type should be reported. (Only the code OF or HM is reported in the ADDCDE data item.)

Note: You must select a value in the MyCSP Address Type field in MyCSP Address Type Mapping to complete your mapping. A code that is mapped in the main Extended Lookups page (but without the additional information in the MyCSP Address Type Mapping flexfield context) is ignored. You can map an address type to Home, but it's not a requirement to do so.

Set Up Basic Files

You can set up basic information files with name, title and marital status details.

Name Style Configuration

You can report previous surname and decoration (honours), but they are optional report fields and are not in the predefined UK name style. You can configure the UK name style to include these additional name components:

- Use the Person Name Styles task to search for your name style.
- Configure your name style as follows to report these name attributes:
- Previous Surname – use the Previous Last Name component
- Decoration – use the Honors component. Optionally, add values to the HONORS lookup type to associate with this field.

Title and Marital Status Mapping

MyCSP accepts only valid title codes and marital statuses. An invalid code will raise an error in the Basics file. Codes are mapped in the application using the Extended Lookup Codes task. Do not delete any predefined mappings to MyCSP codes.

See Appendix for a list of marital statuses and titles that have predefined mappings to MyCSP codes.

Note: The Extended Code column displays the reported code.

If your lookup type includes additional values that are not mapped, you must map them using the Extended Lookups task:

- To map a title, use the Title (TITLE) lookup type.
- To map a marital status that is in:
- Both the system lookup type Marital status for person (System Lookup) (PER_MAR_STATUS) and the user lookup type Marital Status (MAR_STATUS), map to the reported MyCSP code from either lookup type.
- The user lookup type Marital Status (MAR_STATUS) only, that is, a new user-defined value, map to the reported MyCSP code from that user lookup type.

Note: If no marital status exists for an employee, the application reports U (unknown). A warning is displayed in the Errors and Warnings report.

Set Up Grade Code Files

Set up grades using grade steps and grade ladders according to pay scale requirements.

For more information, see the topic Setting Up Grade Ladders for Pay Scale Requirements: Worked Example under Workforce Structures in the Implementing Global Human Resources guide on the Oracle Help Center.

Optionally, you can record additional grade information for reporting in the grade codes and salary history files:

1. Use the Grades task to create or update an existing grade. Select the UK MyCSP information EFF context to record additional information.
2. Optionally, enter the details as shown:

Additional Grade Information (Context: UK MyCSP Information)

FIELD	DESCRIPTION
Grade Code Description	Reported in the GRDESC field in the grade codes file. This is not required information but is desirable as it helps MyCSP establish the salary grade in the payment.
Industrial Grade	Reported in the INDFLG field in the grade codes file.
Uniformed Grade	Reported in the UNIGRD field in the grade codes file. You can override this at assignment level; the override is reported in the UNIGRD field in the Salary History file.
Paypoint Code	If left null, the grade is reported against every Paypoint Code in the enterprise. Otherwise, it is reported for the Paypoint Code you select here.

If no information is entered into the Grade EFF, the grade is included in the Grade Codes file for every Paypoint Code in the enterprise and only the grade code is reported. If you are setting up grades for workers who are paid at an hourly rate, for example, workers on zero hour contracts, see the example in the appendix of this document.

Set Up Service History Files

You can set up service history files with employment, assignment, legislative groups and service history end reason details.

Employment Information

An employee's assignment category is used to determine their scheme status in the Service History file. It also indicates if they are part-time (and therefore liable for reporting in the Part-Time History file). These predefined values are stored in the Assignment Category (EMP_CAT) lookup type:

- Part-time regular
- Part-time temporary
- Full-time regular
- Full-time temporary
- Part-time casual
- Full-time casual
- Partial retirement

Do not delete these values (unless you have user-defined values that map to them) because this will result in incorrect reporting in the MyCSP interface files.

Mapping User-Defined Assignment Categories

If you have user-defined assignment categories, you must map them to a predefined assignment category.

1. Use the Extended Lookup Codes task to create the mapping.
2. Search for Assignment Category in the Lookup Types list.
3. Complete one row for each or your user-defined assignment categories.

User-Defined Assignment Category Mapping

FIELD	DESCRIPTION
Country	United Kingdom
Lookup Code	Your user-defined assignment category.
Extended Code	User-defined code. Not reported in the Service History file. You could use your user-defined assignment category.
Extended Name	User-defined name. Not reported in the Service History file. You could use your user-defined assignment category.
All Enterprises	No

4. Select UK MyCSP Assignment Category Mapping in Additional Information.
5. Select the MyCSP assignment category that the user-defined assignment category maps to.
6. Repeat the steps to map each of your user-defined assignment categories.
    - You do not need to map the predefined assignment categories (Part-time regular, Part-time temporary, etc.).

Absence Setup – Legislative Grouping Codes and Absence Plans

You must associate absence types with one of the legislative grouping codes shown in order to trigger absence-related service history records and to report the correct service history start reason. These legislative grouping codes are used in MyCSP reporting:

- UK Adoption
- UK Break in Service
- UK Maternity
- UK Paternity Adoption
- UK Paternity Birth
- UK Shared Parental Leave Adoption
- UK Shared Parental Leave Birth
- UK Sickness
- UK Special Unpaid Leave
- UK Unauthorised Unpaid Absence

- UK Unpaid Industrial Action
- UK Unpaid Leave

If an absence requires a service history record, it must be associated with one of the above legislative grouping codes. The qualifying and/or reckonable status of an absence (that contributes to a pension category) is determined by its legislative grouping code. Address Codes

These codes are reported in the Address File. No predefined mappings exist. If no mapping is created, an address code is defaulted to HM.

ADDRESS CODE	ADDRESS CODE DESCRIPTION
HM	Home
OF	Office

Service History End Reasons

These codes are reported in the SVRSN field in the monthly service history files. No predefined mappings exist; you must map your termination actions (or action reasons) to them yourself.

END REASON CODE	END REASON DESCRIPTION
3	Retirement with pension
4	End of fixed-term contract
5	Resignation
6	Secondment
7	Death
9	Redundancy
10	Dismissal
14	Transfer out of pay centre
15	Transfer to other government department
18	Approved early retirement
19	Actuarially reduced retirement
20	Premature retirement for inefficiency
21	Retirement on grounds of ill health
24	Dismissal with compensation
25	Dismissal with compensation

END REASON CODE	END REASON DESCRIPTION
46	Transition to Alpha

Overview of Service History Event Triggers

This section includes information about the Service History triggers, including:

- New joiners, rehires, and leavers
- Changes in employment information (assignment category) for example, employee goes on partial retirement
- Reportable absences
- Returns from break
- Suspension without pay
- Opt Outs

If a change is detected with an effective date that is in the month being reported, or was unreported from the previous month, a Service History record is triggered for the employee.

New Hire, Rehire, or Employee Becomes Eligible to Join a Civil Service Pension Scheme

A Service History record (Start Code: N) is created for the hire or rehire of an employee who is considered eligible to join a qualifying pension scheme or they have been assessed as now eligible to join a pension scheme. The employee must either:

- Be enrolled into a qualifying pension scheme (there is a qualifying pension scheme component on Benefits and Pensions card).
- Have opted out of a qualifying pension scheme (Reason for Leaving Qualifying Scheme is Opt-out on Pensions Automatic Enrolment card) since joining.

If an employee has decided to opt out prior to hire, follow the steps for an opt out.

Note: A new assignment triggers a new Service History record (Start Code: N).

Assignment Category Changes

A change in the employee's assignment category, for example, full-time casual to full-time permanent, or part-time permanent to partial retirement, triggers a Service History record (Start Code: C).

For further information on the assignment categories used in MyCSP reporting, see: Service History File Setup.

Note: In accordance with MyCSP rules, an assignment category that changes during a break in service is reported only when the employee returns from the break.

Leavers and Transfers to Other Civil Service Organizations

The Service History record triggered as a result of an employee termination or the ending of an assignment uses the employee's current Service History record, reporting the termination date (or assignment end date) as the record end date together with their leaving reason. The start date and start code from the current Service History record is reported in the leaver's record.

For example, Sarah is in the Alpha scheme and on maternity leave. Her statutory maternity pay has ended and she went on to unpaid maternity leave as of 11 April. Sarah decides not to return to work and her employment is terminated on 10 July. Her termination Service History record includes:

Leaver's Termination Service History Example

REPORT TAG	REPORTED VALUE	DESCRIPTION
STARTDTE	11/04/19	The start date of Sarah's current Service History record before her termination. (The date on which her maternity pay dropped to zero pay.)
STARTCDE	MN	The start code of Sarah's current Service History record before her termination. (The code for unpaid maternity leave.)
SVRSN	5	Sarah was terminated with action End Assignment and action reason Worker Request. This action reason was mapped to MyCSP end reason 5 – Resignation.
ENDDTE	10/07/19	Termination date

For more information on mapping termination, end assignment, and end employment terms actions and reasons to MyCSP leaving reason codes, see Termination Action and Reason Mapping to Service History End Reasons

Absences

An absence only triggers a service record if the absence type is associated with a valid legislative grouping code. If the absence is child-related or sick leave (such as maternity or shared parental leave), the rate of pay is an additional factor that determines if a service record is required and under which codes the absence is reported. See How Child-Related and Sickness Absences Impact the Service History File for further examples.

If consecutive reportable absences share the same Service History start code, for example, an employee goes from maternity leave (statutory maternity pay, start code MS) to shared parental leave (also statutory maternity pay, also start code MS), then one Service History record is generated to cover the entire period when they were paid statutory maternity pay. If the consecutive absences were associated with different Service History start codes, for example, the employee went from unpaid leave (start code VN) to maternity leave at full pay (start code MF), then a Service History is generated for each absence with the respective start codes.

An absence record must be approved in order to be reported correctly in the Service History file. If an absence record has changes that are pending approval, that absence will not be reported, and in certain cases, could even cause a deletion file to be generated. The absence will be reported when it's approved, even if it's in the following month's interface.

Return from Break

Return from break absences (Start Code: RB) are triggered when an end date is entered on a reportable absence and another reportable absence doesn't start the day after the previous absence ended.

According to MyCSP rules, a service history change that occurs the calendar day after the end of the absence supersedes the return from break. For example, if an employee returning from unpaid maternity leave transfers to a Partnership scheme the day after their leave ends, a Transfer to Partnership record is required, not a Return from Break record.

Suspension without Pay

An assignment status that changes to Suspended - No Payroll triggers a service record (Start Code: XN).

Opt Outs

Manage your MyCSP pension opt outs using pensions automatic enrolment. See the Oracle Fusion HRMS (UK): Pensions Automatic Enrolment and Functional Considerations (*Doc ID 2006584.1)* for information.

Here's a summary of different opt out scenarios and their impact on the Service History file:

Opt Out Business Scenarios

BUSINESS SCENARIO	PENSIONS AUTOMATIC ENROLMENT CARD	WHAT NEXT	MYCSP PROCESS RESULTS
Employee is automatically enrolled and opts out within one month of joining scheme. Employer permitted to refund pension contributions taken (if any).	Reason for Leaving Qualifying Scheme – Contractual opt-out Opt-Out Refund Due – Yes Qualifying Scheme Leaving Date – Same as Qualifying Scheme Joining Date	PAE process records opt out date as at Qualifying Scheme Joining Date. Benefits and Pensions card component is end dated as at Qualifying Scheme Joining Date	Employee reported as opt out as at Qualifying Scheme Joining Date
Employee is automatically enrolled and opts out after one month but before 3 months of joining scheme. Employer requests permission from MyCSP to refund any contributions taken. Employer ceases contributions but does not	Reason for Leaving Qualifying Scheme - Contractual opt-out Opt-Out Refund Due – Pending Decision Qualifying Scheme Leaving Date	Benefits and Pensions card component is end dated as at Qualifying Scheme Leaving Date to stop any further pension calculations.	See below.

BUSINESS SCENARIO	PENSIONS AUTOMATIC ENROLMENT CARD	WHAT NEXT	MYCSP PROCESS RESULTS
report employee as opt out until decision received from MyCSP. Then see below:	– Actual date of leaving		
Decision is received from MyCSP: Refund is due.	Opt-Out Refund Due – in correction mode, change this from Pending Decision to Yes. Qualifying Scheme Leaving Date – in correction mode, change this to the same as the Qualifying Scheme Joining Date.	In correction mode, remove end date of card component on Benefits and Pensions card and end date this as at Qualifying Scheme Joining Date.	Employee reported as opt out as at Qualifying Scheme Joining Date
Decision is received from MyCSP: No refund is due.	Opt-Out Refund Due – change this from Pending Decision to No.	Benefits and Pensions card component already dated as at Qualifying Scheme Leaving Date; no further action required.	Employee reported as opt out as at Qualifying Scheme Leaving Date

Note: Opting in and out of a qualified Civil Service pension scheme uses the “contractual opt-in” and “contractual opt-out” reasons; the non-specific “opt-out” and “opt-in” reasons are not used in MyCSP.

Scheme members who opt out after the permitted opt-out period has ended are considered to have left the scheme (not opted out) and the Reason for Leaving Qualifying Scheme should be “Left Scheme” .

Note: When a person opts out of a Partnership scheme, the Service History file reports the details of the scheme they were eligible to join (and may or may not have enrolled in) prior to enrolling in Partnership. You record that in the scheme Eligible to Join field on the PAE card. See Interaction with Pension Automatic Enrolment (PAE) Processes for more information.

Pensions Automatic Enrolment Left Scheme Report

An opt out within a month is reported in the Pensions Automatic Enrolment Left Scheme report as having left as at Qualifying Scheme Joining Date. An opt out after 1 month is considered, from a PAE perspective, as leaving the scheme (without refund) and is therefore reported as at Qualifying Scheme Leaving Date.

If it is later confirmed that the member was entitled to a refund and therefore, from a MyCSP perspective, opted out as at Qualifying Scheme Joining Date, the fact that they are listed as having left the scheme as at Qualifying Scheme Leaving Date conforms with PAE regulations; the MyCSP refund process is outside of the legislative requirements of pensions automatic enrolment.

Association of MyCSP Termination Action Reasons with Termination Actions

This task applies to monthly interface reporting only; it does not affect cutover.

Additional MyCSP action reasons are available. You can use them if they meet the needs of your enterprise, but it is not mandatory to use them. They are not associated with any actions so they are not automatically available. You must associate these action reasons to actions and then map them to MyCSP End Reasons if you want to use them.

1. From Setup and Maintenance, select **Action Reasons**.
2. Search for the action reason and associate it with a new or existing action.

Predefined Action Reasons

ACTION REASON CODE	ACTION REASON
DISMISS_WITH_COMP	Dismissal with compensation
DISMISS_WITHOUT_COMP	Dismissal without compensation
RETIRE_ACTUARY_REDUCED	Actuarially reduced retirement
RETIRE_EARLY_APPROVED	Approved early retirement
RETIRE_ILL_HEALTH	Retirement on grounds of ill health
RETIRE_PREM_INEFFICIENCY	Premature retirement for inefficiency
RETIRE_WITH_PENSION	Retirement with pension
TRANSFER_OTHER_GOV_DEPT	Transfer to other government department

Then, perform the termination action and grade code file setup tasks to map these actions to MyCSP end reasons.

Termination Action and Reason Mapping to Service History End Reasons

This task applies to monthly interface reporting only; it does not affect cutover.

Whether you use only actions, or a combination of actions and reasons for terminations or the ending of an assignment or employment terms, you must map them to service history end reasons to trigger the appropriate ended service history records and report the correct MyCSP code.

There must be a one-to-one relationship between the action (or action and action reason combination) and a MyCSP End Reason, otherwise the service history record will not contain an end reason code.

Note: Action reasons are not mandatory in the UI. If you decide to use action reasons, you must ensure you select a reason when you terminate an employee.

1. Use the Extended Lookup Codes task to create the mapping.
2. Click **Add** and select the CSP Action and Reason Mapping in the Lookup Types list.
3. Complete one row for each action (or action and reason combination).

Action and Reason Extended Lookup Mapping

FIELD	DESCRIPTION
Country	United Kingdom
Lookup Code	CSP action and reason mapping (the only value available)
Extended Code	User-defined code. Not reported in the Service History file. You could use the leaving reason code to identify which row maps to the leaving reason selected in the flexfield context. For example, if you are mapping to leaving reason 25 in the DDF, you could enter 25 here.
Extended Name	User-defined name. Not reported in the Service History file. You could use the action or action reason to identify which row maps to the leaving reason selected in the flexfield context. For example, if you are mapping action reason “Dismissed for Gross Misconduct”, you could enter something similar here.
All Enterprises	No

4. Select the UK MyCSP Action and Reason Reporting Mapping context in Additional Information.
5. Select a termination or end assignment/end employment terms action (or an action and action reason combination) and the MyCSP code against which it should be reported:
6. If you use an action without a reason when terminating employees or ending assignments or employment terms, select only the action and CSP End Reason. If you use action reasons, you must select both the action and the reason with which it is associated in your setup.

Note: The Action and Action Reason fields list all available actions and reasons, not just those that you have configured. You must use the Action Reasons task to associate an action with a reason in addition to selecting it here.

In the above example, the user has configured termination and end assignment/employment term actions to use action reasons. Their action reason **Dismissal for gross misconduct** will be reported with code 25, as shown in the CSP End Reason field.

Note: The code description in the field is provided for information only; it is not reported.

You can map multiple actions (or action reasons) by creating one row for each and selecting the appropriate MyCSP end reason code in Additional Information.

Additional Personal and Assignment Information

Additional Personal and Assignment Details

This section includes information about individual fields that may not require additional setup but indicate the source of the information reported.

The information is not an exhaustive list of all reported fields.

Document Type – Ill-Health Retirement Assessment

The document type Ill-Health Retirement Assessment enables you to record information about an ill-health retirement assessment. Select the Ill-health retirement application rejected checkbox to report that indicator in the Basics file.

Additional Personal Details

Enter additional person information in the legislative region of the person record as shown:

Additional Person Attributes

Field	Description
Last Marital Status Change Date Prior to Hire Date	Date member marriage ceased. Reported if Marital Status Change Date is null and the employee's marital status that indicates a marriage has ceased.
Employee Age Verified	Age verified checkbox indicator.
Civil Service Joining Date	Enter the date if there was a previous employment with another Civil Service employer. If no date is entered, the enterprise hire date is reported (this reflects previous periods of employment with the current employer).
Multiple Civil Service Assignments	Enables you to specify if there are multiple assignments either with the current`Civil Service employer or others.

Additional Employment Information

Enter additional employment information on the assignment as shown:

Additional Assignment Attributes

Field	Description
Standard Working Hours Override	Overrides the standard working hours (defaulted from the legal employer, department, or position) for part-time hours reporting.
Uniformed Grade	Leave blank unless necessary to override the indicator specified on the grade.

Note: Working hours must be stated as a Weekly frequency. Other frequencies are not supported.

Set Up Allowance Earnings Elements

Set up your allowance earnings elements for reporting allowance codes prior to the submission of the cutover and monthly employee files.

See: MyCSP Bonus and Allowance Setup for Monthly Reporting for more detailed setup steps.

Use the Elements task to create your Regular Earnings allowance element.

Most allowances will be flat amount, but a salary-based allowance whose rate can vary between employees must be a factor element.

Complete the information on the Basic Details page and record additional information in the MyCSP context of the Element Information EFF to ensure the element is reported in the correct files.

You do not need to enter additional information in the EFF of an allowance retro element, although doing so has no adverse effect on the reporting of the element in MyCSP.

Enter the details as shown:

Allowance Element: Additional Information

FIELD	DESCRIPTION
Element Type	Select “Allowance” to identify this element as an allowance that is liable for MyCSP reporting. If you leave this blank, the allowance will not be reported.
Element Code	Allowance code. This is required information.
Code Description	Allowance code description. This is not required information but is desirable as it helps MyCSP establish the allowance in the payment.
Spread Bonus	This is not currently supported in the application.
Industrial Grade	Optional industrial indicator.
Included in Basic Pensionable Salary	Optional basic pay reckonable indicator (industrial grades only.
Included in Pre-75 Pensionable Salary	Optional pre-75 pensionable salary indicator (industrial grades only) indicator.
Paypoint Code	The allowance is reported against every Paypoint Code in the enterprise unless you specify its Paypoint Code here.

Allowance History File Setup (Cutover)

You must set up user-defined allowance elements as described in Allowance Code File Setup and the MyCSP Allowance Rate Setup product paper for the Allowance Code and monthly Allowance History files.

However, the configuration of the rate definitions for the user-defined allowance elements is not a prerequisite for running the Allowance History file for cutover.

Follow the steps below for reporting allowances in the Allowance History cutover file only.

Use of Element Entries for Cutover

The Allowance History cutover file must report all allowances an employee is receiving as at cutover date. Information reported in the file includes Allowance code, Notional Allowance Rate, Actual Allowance Rate and Actual Reduced Rate of Allowance. You must provide these values by creating an element entry for those employees, using the predefined MyCSP Allowance History Cutover element. If an employee receives multiple allowances as at the cutover date, you must create one element entry for each of the allowances they receive.

Only the cutover Allowance History file reports from the element entries on the MyCSP Allowance History Cutover element. Monthly files report changes in user-defined allowance element entries.

Note: The element entry is reported in cutover only if:

- Its effective start date is one or more days before the cutover date.
- Its effective end date is after the cutover date.

Before you create any element entries, remember to create element eligibility for the predefined element.

Use the Element Entries task to create the element entry for the MyCSP Allowance History Cutover Information element. Create it for each employee in receipt of an allowance as of the cutover date.

Enter the details as shown:

MyCSP Allowance History Cutover Information Element Input Values

INPUT VALUE	VALUE TO PROVIDE
Start Date	This field is not used.
Allowance Code	Select the allowance code that was recorded in the Element Code field on the user-defined allowance element EFF. There is a one-to-one relationship between each element entry and allowance code.
Notional Allowance Rate	Enter the employee's Annual FTE Allowance rate.
Actual Reduced Rate of Allowance	Provide this only when the employee is on a reduced pay absence as of cutover: Payment at 100%: the actual reduced rate of allowance is the same as actual pay (an annual amount) and can be derived from that amount. Payment is at statutory rate: the actual reduced rate of allowance is zero. Note: No negative values are allowed.

Allowance History File Setup (Monthly)

The configuration of your rate-based allowance depends on the payment rules of the allowance

For example, whether the allowance is the same amount for all employees, or a salary percentage that varies from one employee to the next, or it varies by some other criteria. All allowances, even those that are a flat amount that are payable at the same rate to all eligible employees, require a rate definition for accurate reporting to MyCSP.

The steps described below support mid-period changes, for example, a salary or allowance rate change during the month, including the following scenarios:

- Salary remains fixed for the whole period. Allowance percentage changes mid-period.
- Salary changes mid-period. Allowance percentage remains fixed for the whole period.
- Salary changes mid-period. Allowance percentage changes mid-period

Note: Rate definition setup is required prior to the submission of monthly interface files but not the Allowance Code or cutover Allowance History files.

Allowance Rate Definition Options

Here's a summary to help you identify the setup required for your allowance:

PAYMENT RULE	EXAMPLE	SETUP REQUIRED
Same flat amount rate applies to all eligible employees.	All employees are eligible for a monthly uniform allowance of £100.	Setup for Flat Amount Allowances
Same rate applies to all eligible employees – salary based.	All employees are eligible for a car allowance that is based on 8% of their regular earnings.	Setup for Single-Rate Allowances
Rate can vary at employee level.	An employee is eligible for a travel allowance that is 3% of their salary but another employee is eligible for the same allowance at a rate of 4%.	Setup for Variable Rate Allowances
Rate can vary by multiple criteria.	Allowance is payable to employees using criteria that includes their grade, their location, and whether they are eligible for the lower or higher rate of payment.	Setup for Value by Criteria Allowances
Mark time allowances	Employee transfers to a new department after a promotion and their basic pay is above the maximum of the new department's pay range. They receive the	Setup for Mark Time Allowances
	maximum basic pay for their new grade and the amount above that is paid on a mark time basis.	

Common Setup

Complete the one-time setup tasks in this section before setting up your allowances.

- Create or Edit Proration Event Group – Salary Basis Element
- Create Proration Event Group – Allowance Element
- Create or Edit Retro Event Group
- Create a Salary Element
- Create a Salary Basis
- Create a Salary Basis Rate Definition

Create or Edit Proration Event Group – Salary Basis Element

To create or edit a proration event group to associate with an employee's salary:

1. Use the Event Groups task and search for the Entry Changes for Proration event group or click Create to create a new event group with a type of Proration.
2. Edit the events table as shown:

Salary Element Proration Group:

ENTITY	UPDATE TYPE	VALUE
Element Entry	Update	EFFECTIVE_START_DATE
Element Entry	Update	EFFECTIVE_END _DATE
Element Entry	Update	DATE_EARNED
Element Entry Value	Update	SCREEN_ENTRY_VALUE

> **Note:** If you use the predefined Entry Changes for Proration event group, you need only to add the Element Entry Value entity row.

Create Proration Event Group – Allowance Element

Create a proration event group for an allowance element using these steps.

Perform the following steps to create a new proration event group to associate with your allowance elements:

1. Use the Event Groups task and click **Create** to create a new proration group. The event group type is Proration.
2. Click **Continue**.

3. Enter the details of the proration group as shown:

Allowance Element Proration Event Group:

ENTITY	UPDATE TYPE	VALUE
Element Entry	Update	EFFECTIVE_START_DATE
Element Entry	Update	EFFECTIVE_END _DATE
Element Entry	Update	DATE_EARNED
Element Entry Value	Update	SCREEN_ENTRY_VALUE
Pay Rate Values	Update	VALUE

Create or Edit a Retro Event Group

Create or modify an existing retro event group using the following steps.

To create or edit a retroactive changes event group to associate with your salary and allowance elements:

1. Use the Event Groups task and search for the Entry Changes for Retro event group or click Create to create a new event group with a type of Retroactive.
2. Edit the events table as shown:

Salary and Allowance Elements Retro Event Group:

ENTITY	UPDATE TYPE	VALUE
Element Entry	Update	EFFECTIVE_START_DATE
Element Entry	Update	EFFECTIVE_END _DATE
Element Entry	Update	DATE_EARNED
Element Entry	Insert	N/A
Element Entry	End Date	N/A
Element Entry	Remove Logical Row	N/A
Element Entry Value	Correction	SCREEN_ENTRY_VALUE
Element Entry Value	Update	SCREEN_ENTRY_VALUE
Pay Rate Values	Update	VALUE

ENTITY	UPDATE TYPE	VALUE
Pay Rate Values	Correction	VALUE

> **Note:** If you use the predefined Entry Changes for Retro event group, you need only to add the two PAY_RATE_VALUES entity rows.

Create a Salary Element

Recording salaries using salary bases is a prerequisite for MyCSP reporting and allowance setup.

This requires the setup of a flat amount salary element (used to create salary element entries to send the salary information to payroll):

1. Use the Elements task to create your salary basis element. Click **Create**.
2. Enter the details as shown:

Salary Element

FIELD OR QUESTION	VALUE
Primary Classification	Regular Earnings
Category	Standard
Should every person eligible for the element automatically receive it?	No
Does this element recur each payroll period, or does it require explicit entry?	Recurring
What is the calculation rule?	Flat Amount
Is this element subject to proration?	Yes, then select the salary proration group.
Is this element subject to retroactive changes?	Yes, then select the salary retro group.

For more information on salary basis elements, see the topic LDG and Payroll Element for Base Pay: Points to Consider under Base Pay in the Implementing Workforce Compensation guide on the Oracle Help Center and the product paper: Configuring Payroll Elements for Use in Oracle Fusion Compensation (Doc ID 1589502.1)

Create a Salary Basis and Rate Definition

A salary basis determines the period in which base pay is expressed.

It specifies whether salaries can be itemized with components, and identifies any associated grade rate for salary validation. For further information on salary bases, see the chapter Base Pay in the Implementing Workforce Compensation guide on the Oracle Help Center.

Create a Salary Basis Rate Definition

Create a rate definition for the salary element:

1. Use the Rate Definition task to create a new rate definition. Click Create.
2. Enter the details as shown:

Salary Basis Rate Definition

FIELD	VALUE
Category	Element
Storage Type	Amount
Element Name	The salary basis element you created previously
Reporting Required	Must be selected.
Calculate Live Rates	Selected by default.
Returned Rate Details	Do not change.
Contributor Type	Automatically created as Input Value.

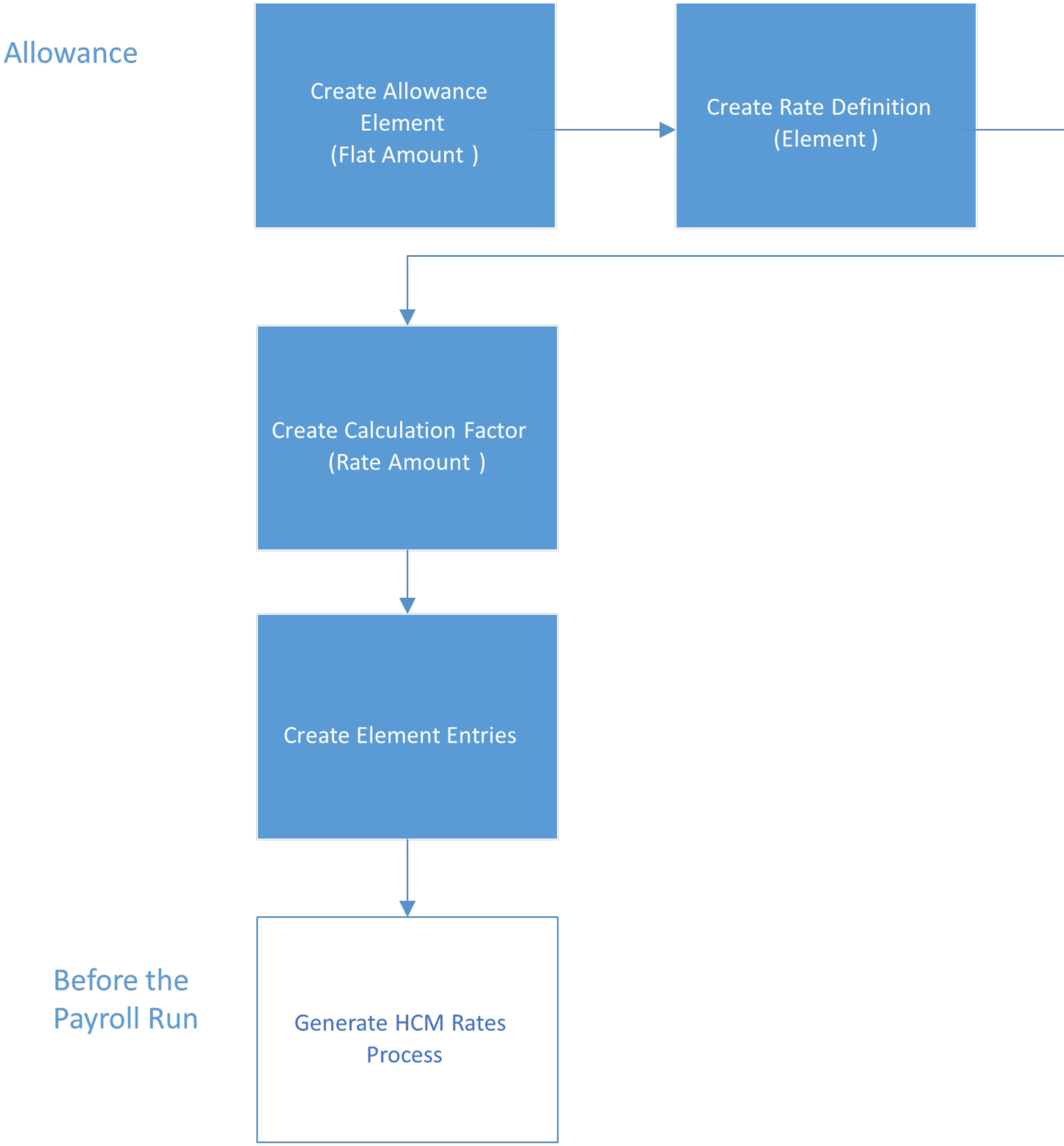
Once before each payroll run, you must run the Generate HCM Rates Process in 'Full' mode to create entries in the Rates Values table for allowances that use rate definitions. The process interprets events such as salary increase or changes in allowance rates and calculates the new allowance amount for each proration period so that the payroll run uses the amounts stored in the Rates Values table.

For more information see the topic Generating HCM Rates: Procedure under Setting Up Pay Calculation Components in the Implementing United Kingdom Payroll guide on the Oracle Help Center.

Overview of Flat Amount Allowance

Follow the steps described here to create an allowance that is payable to eligible employees in the organization as a flat amount, where there is no dependency on salary, although proration is possible.

For example, all employees receive a uniform allowance of £50 each month.



It is a prerequisite that you create the retro and allowance proration groups as described in the *Common Setup* section of this document.

Flat Amount Allowance Setup Summary:

TASK	ATTRIBUTE	VALUE
Create Allowance Element	Calculation rule	Flat amount
	Periodicity	Annual
Create Rate Definition – Element	Category	Element
	Storage Type	Amount
	Contributor Type	Input Value
	Contributor Name	Amount
Create Calculation Value Definition	Calculation Type	Rate Definition
	Calculation Values - Rate Definition	User-defined rate definition created for element
Create Calculation Factor for Allowance Element	Calculation Step	Rate Amount
	Calculation Value Definition	User-defined calculation value definition
Create Element Entries	N/A	N/A
Run Generate HCM Rates Process	Process Mode	Full

Set Up Flat Amount Allowances

Follow these steps to set up flat amount allowances in MyCSP.

Create a new Regular Earnings Element

1. Using the Elements task, click **Create** to create a new Regular Earnings element. The Category is Standard.
2. Select Flat Amount as **Calculation rule** and Annually as **Periodicity**.
3. In the Special Rules section, select the user-defined allowance proration event group and the default Entry Changes for Retro event group.
4. Review the element details and enter further information in the UK Element Information region (MyCSP Information), including the element type (allowance), element code and code description. You must select Allowance in the Element Type field. Otherwise, the allowance is not identifiable as liable for reporting.

Create Rate Definition – Element

Create a new element rate definition that will be associated with the flat amount element:

1. Using the Rate Definitions task, click **Create** to create a new rate definition.

2. Enter the details as shown:

FIELD	VALUE
Category	Element
Storage Type	Amount
Element Name	Flat amount allowance element

3. Ensure that **Reporting Required field** is selected and deselect **Calculate Live Rates**.
4. You do not need to make changes to the Returned Rate Details and Calculation regions. The contributor type for the rate definition is created automatically as Input Value.

Create Calculation Value Definition

Create a calculation value definition for the element rate definition:

1. Using the Calculation Values Definition task, click **Create** to create a new calculation value definition. The calculation type is Rate Definition.
2. Select Date Earned in the **Retrieval Date** field.
3. Create a range of values and link the calculation value definition to the element rate definition created previously.

Create Calculation Factor

Create a calculation factor for the flat amount allowance element and link it to the calculation value definition created previously:

1. Using the Elements task, search for the flat amount allowance element.
2. Select Calculation Factors and click **Create** to create a new calculation factor.
3. Enter the details as shown:

FIELD	VALUE
Calculation Step	Rate Amount
Calculation Value Definition	User-defined value definition created previously.

Create Element Entries

Once the above setup steps are completed, you can create element entries for employees who are in receipt of this type of allowance:

1. Using the Element Entries task, select the flat amount allowance element.
2. Record the pay value for the flat amount allowance in the **Amount** field.

Run Generate HCM Rates Process

Run the Generate HCM Rates process prior to a payroll to create entries in the Rates Values table. This process interprets the events such as salary increase, changes in allowance rates, etc., and calculates the new allowance amount for each of the proration periods. During the payroll run, amounts stored in the Rates Values table is used.

1. Using the Submit a Process or Report task, select Generate HCM Rates.

2. Enter the parameters as shown:

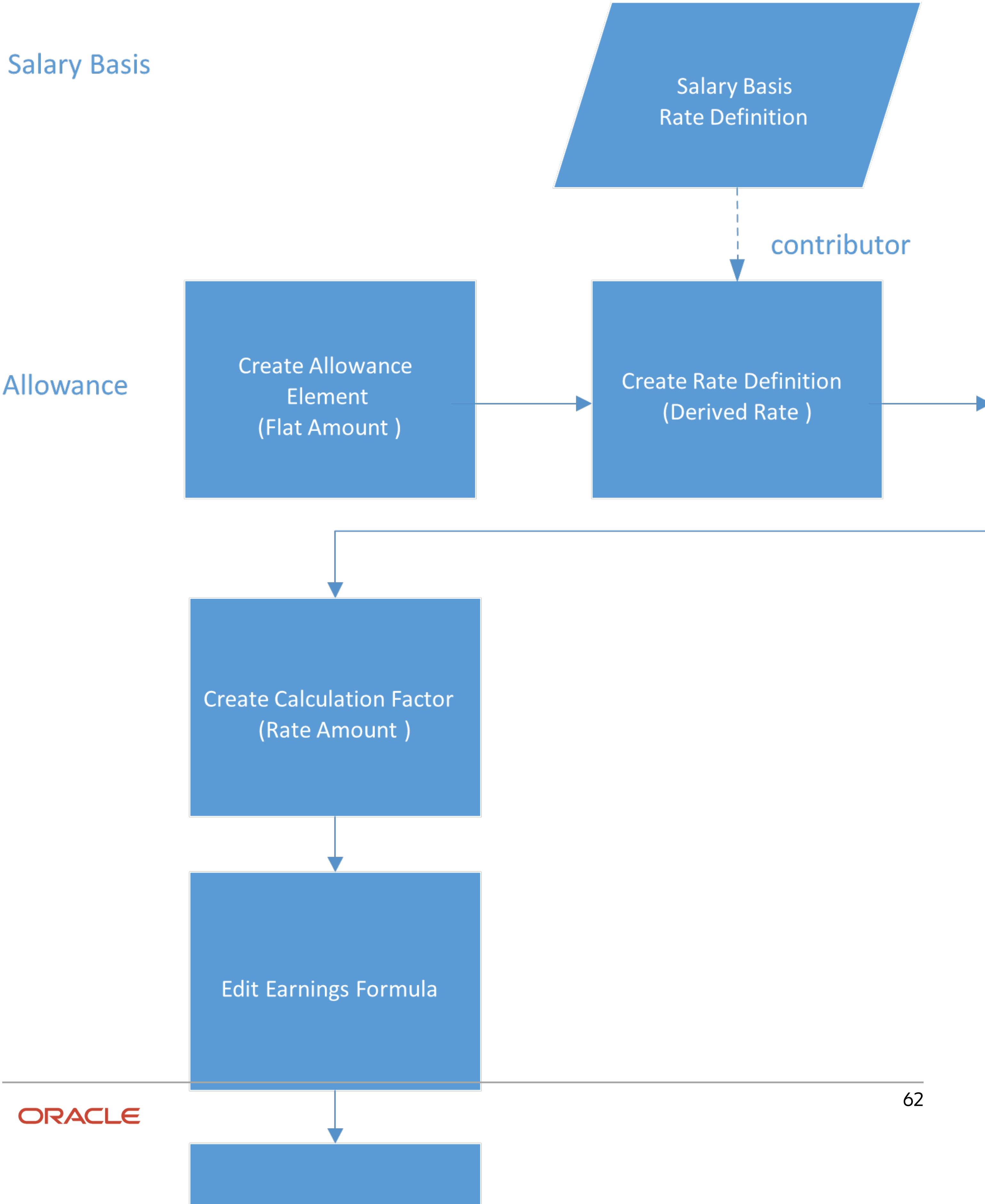
PARAMETER	VALUE
Process Mode	Full
Process Start Date	The earliest date from when you want to recalculate the rates
Process End Date	The latest date until when you want to recalculate the rates
Payroll	Optional
Payroll Statutory Unit	Optional

See the help topic Generating HCM Rates: Procedure for more information.

Overview of Single-Rate Allowances

Follow the steps described here to create an allowance that is payable to eligible employees in the organization at the same rate.

This is applicable where there is no variation in rate at employee level, but the rate is based on the employee's salary.



The following table summarizes the tasks and setup decisions.

Single-Rate Allowance Setup Summary:

TASK	ATTRIBUTE	VALUE
Create Allowance Element	Calculation rule	Flat amount
N/A	Periodicity	Annual
Create Rate Definition – Salary Basis	Category	Element
N/A	Storage Type	Amount
N/A	Element Name	User-defined salary basis element
Create Rate Definition – Derived Rate	Category	Derived Rate
N/A	Factor Rule	Value
N/A	Contributor Type	Rate Definition
N/A	Contributor Name	User-defined salary basis rate definition
Create Calculation Value Definition	Calculation Type	Rate Definition
N/A	Calculation Values - Rate Definition	User-defined rate definition created for derived rate
Create Calculation Factor for Allowance Element	Calculation Step	Rate Amount
N/A	Calculation Value Definition	User-defined calculation rate definition
Edit Earnings Formula	Formula Name	User-defined flat amount allowance element
Create Element Entries	N/A	N/A
Run Generate HCM Rates Process	Process Mode	Full

Set Up Single-Rate Allowance

Follow these steps to set up single rate allowances.

Create Allowance Element

Create a new flat amount earnings element for your allowance:

1. Using the Elements task, click **Create** to create a new Regular Earnings element (standard category).
2. Select Flat Amount as Calculation rule and Annually as Periodicity.
3. In the Special Rules section, select the user-defined allowance proration event group and the default Entry Changes for Retro event group.
4. Review the element details and enter further information in the UK Element Information region, including the element type (allowance). You must select Allowance in the Element Type field. Otherwise, the allowance is not identifiable as liable for reporting.

Create Rate Definition – Salary Basis Element

Create a rate definition for the salary basis element:

1. Using the Rate Definition task, click Create to create a new rate definition:
2. Enter the details as shown:

FIELD	VALUE
Category	Element
Storage Type	Amount
Element Name	The salary basis element you created previously

3. You do not need to make changes to the Basic Details and Returned Rate Details. Reporting Required and Calculate Live Rates must both be selected.

The contributor type for the rate definition is created automatically as Input Value.

Create Rate Definition – Derived Rate

Create a Derived Rate rate definition that will be associated with the salary basis rate definition:

1. Using the Rate Definition task, click Create to create a new rate definition.
2. Enter the details as shown:

FIELD	VALUE
Category	Derived Rate
Storage Type	Leave blank
Element Name	Leave blank

3. Uncheck the Calculate Live Rates field. Reporting Required is selected.
4. Select Value in the Factor Rule field and enter a name. The name is a numeric value, for example, 0.05 is 5%.
5. Create a new rate contributor. Select Rate Definition as the contributor type.
6. Enter the details as shown:

FIELD	VALUE
Add or Subtract	Add
Rate Name	Salary Basis rate definition
Periodicity	Annually

Create Calculation Value Definition

Create a calculation value definition for the Derived Rate rate definition:

1. Using the Calculation Values Definition task, click Create to create a new calculation value definition.
2. Enter the details as shown:

FIELD	VALUE
New Value Definition Group	New user-defined allowances group
Calculation Type	Rate Definition

3. Select Date Earned in the **Retrieval Date** field.
4. In the Calculation Values region, enter a range of values in the From Value and To Value columns and select the Derived Rate rate definition created previously to link it to the calculation value definition.

Create Calculation Factor

Create a calculation factor for the flat amount allowance element and link it to the calculation value definition created previously:

1. Using the Elements task, search for and open the flat amount allowance element.
2. Select Calculation Factors and click Create to create a new calculation factor.
3. Enter the details as shown:

FIELD	VALUE
Calculation Step	Rate Amount
Calculation Value Definition	User-defined value definition created previously.

Edit the Formula Attached to the Flat Amount Allowance Element

Using the Fast Formulas task, edit the earnings formula for the flat amount allowance element:

Replace the line 'l_amount = amount' with the following lines in order to obtain the rate definition values:

```
change_contexts(PART_NAME = 'ORA_RATE_AMOUNT')
 (
 SET_INPUT('BASE',0) EXECUTE('CALL_CALC_VALUE') l_amount = GET_OUTPUT('DED_AMOUNT',0)
```

Note: You must make the same changes to the flat amount earnings element formulas created for value by criteria allowances.

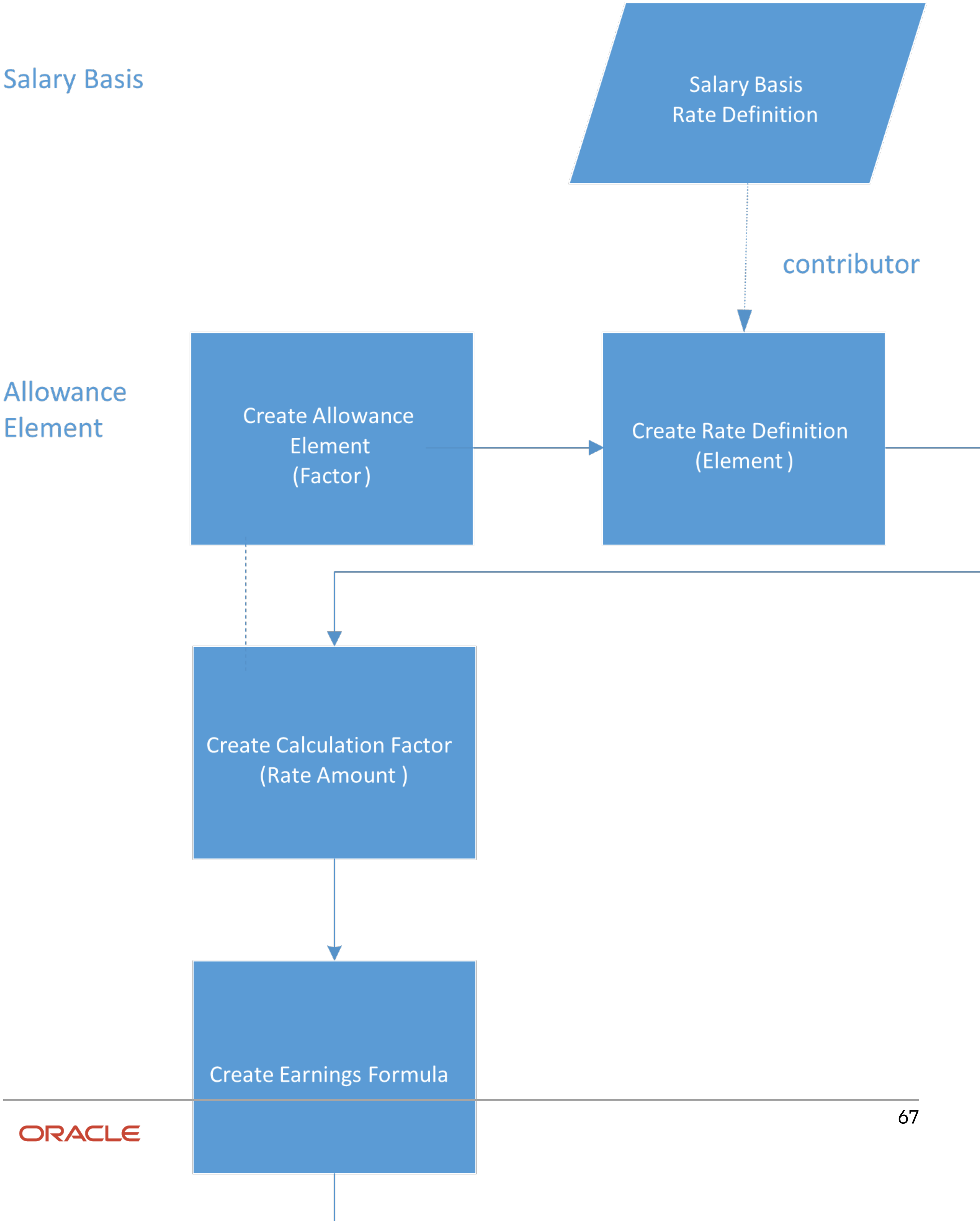
Create Element Entries

Once the above setup steps are completed, you can create element entries for employees who are in receipt of this type of allowance. Using the Element Entries task, select the flat amount allowance element. The Pay Value for the flat amount allowance element is stored on the rate definition and not the element entry. Therefore, the Amount field is blank on the element entry.

Next, run the Generate HCM Rates Process prior to running your payroll.

Overview of Variable-Rate Allowance Setup

Follow the steps described here to create an allowance, the rate of which can vary at employee level.


Salary Basis
Salary Basis
Rate Definition
contributor
Allowance
Element
Create Allowance
Element
(Factor)
Create Rate Definition
(Element)
Create Calculation Factor
(Rate Amount)
Create Earnings Formula

The following table summarizes the tasks and setup decisions:

Variable Rate Allowances Setup Summary

TASK	ATTRIBUTE	VALUE
Create Allowance Element	Calculation rule	Factor
	Periodicity	Annual
Create Rate Definition – Factor Allowance Element	Category	Element
	Storage Type	Factor
Create Calculation Value Definition	Calculation Type	Rate Definition
	Calculation Values - Rate Definition	User-defined rate definition created for factor allowance element
	Contributor type	Rate Definition
	Contributor Name	User-defined salary basis rate definition
Create Calculation Factor for Allowance Element	Calculation Step	Rate Amount
	Calculation Value Definition	User-defined calculation value definition
Create an Earnings Formula	Type	Oracle Payroll
Create Status Processing Rules	N/A	N/A
Create Element Entries	N/A	N/A
Run Generate HCM Rates Process	Process Mode	Full

Set Up Variable Rate Allowance

Follow these steps to set up variable rate allowances.

Create Allowance (Factor) Element

Create a new Factor earnings element for your allowance:

1. Using the Elements task, click **Create** to create a new Regular Earnings element (standard category).
2. Select Factor as the calculation rule for the element.
3. In the Special Rules section, select the user-defined allowance proration event group and the default Entry Changes for Retro event group.
4. Review the element details and enter further information in the UK Element Information region, including the element type (allowance). You must select Allowance in the Element Type field. Otherwise, the allowance is not identifiable as liable for reporting.

Create Rate Definition (Factor Allowance Element)

Create a new rate definition for the factor allowance element:

1. Using the Rate Definition task, create a new rate definition for the factor element you created previously.
2. Enter the details as shown:

FIELD	VALUE
Category	Element
Storage Type	Factor
Element Name	Factor allowance element you created previously

3. You must uncheck the **Calculate Live Rates** field.
4. Click **Create** to create a new contributor type and select Rate Definition as the contributor type.
5. Select the previously created salary basis rate definition as the rate contributor in the **Rate Name** field.

The Rate Definition contributor type is created as follows:

Create Calculation Value Definition

Create a new calculation value definition for the factor allowance element:

1. Using the Calculation Values Definition task, create a new calculation value definition.
2. Enter the details as shown:

FIELD	VALUE
Name	Factor allowance element created previously
Calculation Type	Rate definition
New Value Definition Group	User-defined group for factor allowances

3. Select Date Earned in the **Retrieval Date** field.
4. In the Calculation Values region, enter a range of values in the From Value and To Value columns and select the Factor rate definition created previously to link it to the calculation value definition.

Create Calculation Factor

Create a calculation factor for the factor allowance element and link it to the calculation value definition created previously:

1. Using the Elements task, search for the factor allowance element.
2. Select **Calculation Factors** and click **Create** to create a new calculation factor.
3. Enter the details as shown:

FIELD	VALUE
Calculation Step	Rate Amount

FIELD	VALUE
Calculation Value Definition	User-defined value definition created previously.

Create a Factor Allowance Element Formula

Create a new earnings formula for the factor allowance element:

1. Using the Fast Formulas task, click Create to create a new formula.
2. Enter the details as shown:

FIELD	VALUE
Formula Name	User-defined factor allowance element
Type	Oracle Payroll
Effective Start Date	Start date of factor allowance element

3. Add the formula text. This is included in the Factor_Element_Formula.txt file.

Create Status Processing Rules

Create a new status processing rule to use the new formula:

1. Using the Elements task, search for and open the allowance factor element.
2. Select Status Processing Rules and click Create to create a new rule.
3. Enter the details as shown:

FIELD	VALUE
Formula Name	User-defined earnings formula created previously.
Result Returned	L_VALUE
Result Rule	Direct Result
Target Input Value	Pay Value

Create Element Entries

Once the above setup steps are completed, you can create element entries for employees who are in receipt of this type of allowance:

1. Using the Element Entries task, select the factor allowance element.
2. Enter the allowance percentage rate as a decimal, for example, 0.05 for 5%, in the Factor input value.
3. If the allowance rate changes during the month, update the element entry as of that date with a new rate in the Factor input value.

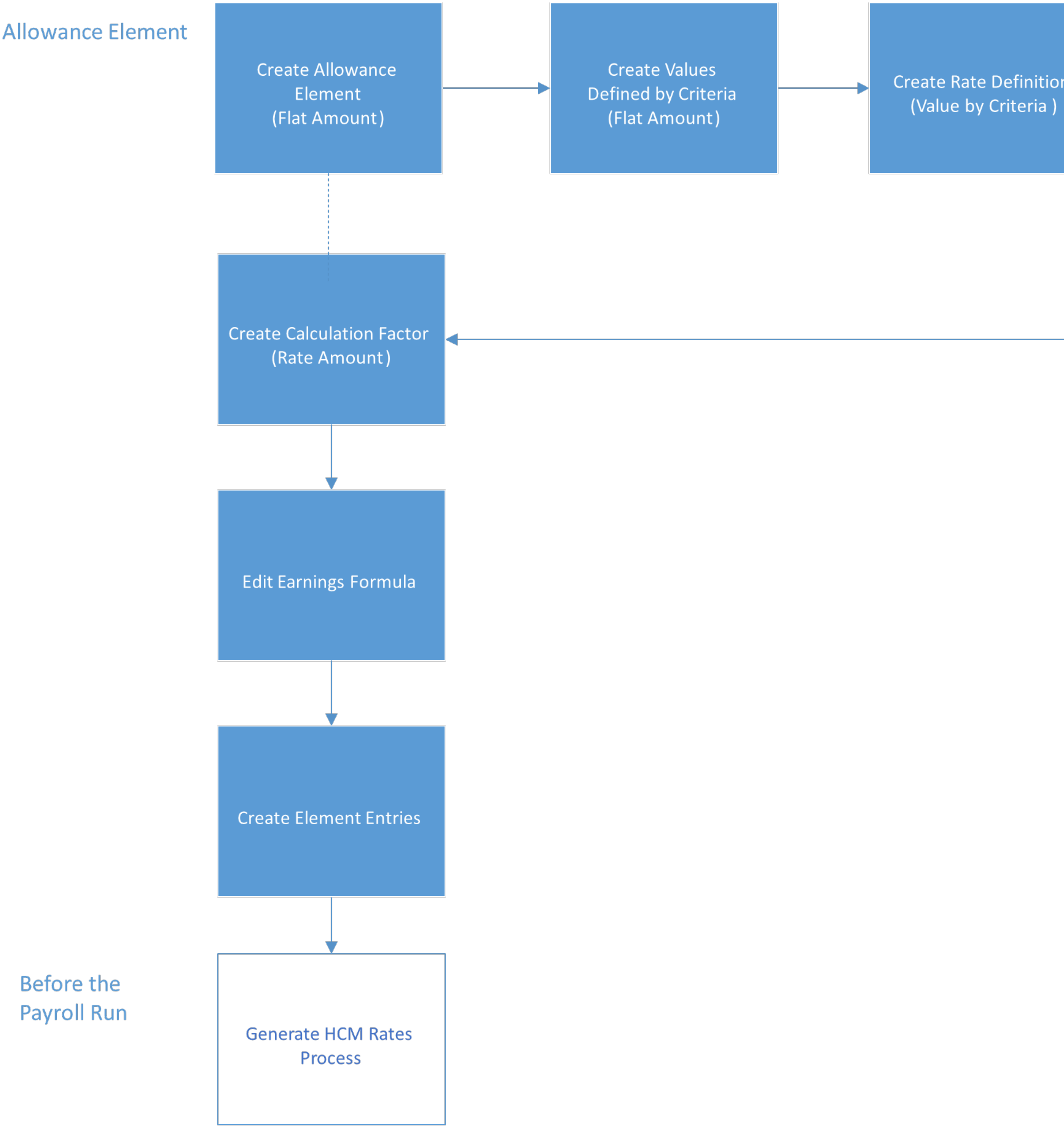
Next, run the Generate HCM Rates Process prior to running your payroll.

Overview of Value by Criteria Allowance Setup

Follow the suggested steps described in this section to set up an allowance that is paid at differing rates according to the criteria your organization uses.

See Values Defined by Criteria in Implementing Global Human Resources for more information.

It is a prerequisite that you complete the steps in the *Common Setup* section of this document.



The following table summarizes the tasks and setup decisions.

Value by Criteria Allowances Setup Summary

TASK	ATTRIBUTE	VALUE
Create Allowance Element	Calculation rule	Flat amount
N/A	Periodicity	Annual
Manage Descriptive Flexfields	N/A	Optional task - if additional information required to record criteria
Create Values Defined by Criteria	N/A	N/A
Create Rate Definition	Category	Value by Criteria
Create Calculation Value Definition	Calculation Values - Rate Definition	User-defined rate definition created previously.
Create Calculation Factor for Allowance Element	Calculation Step	Rate Amount
	Calculation Value Definition	User-defined calculation
Edit Earnings Formula	Formula Name	User-defined flat amount allowance element
Create Element Entries	N/A	N/A
Run Generate HCM Rates Process	Process Mode	Full

Consider the following example:

ALLOWANCE	GRADE	CRITERIA (CALCULATION VALUE DEFINITION)	ANNUAL ALLOWANCE AMOUNT (£)
Accountancy Allowance	01	Accountancy Lower	1500
Accountancy Allowance	01	Accountancy Higher	2400
Accountancy Allowance	02	Accountancy Default	2800
Accountancy Allowance	03	Accountancy London Lower	3200
Accountancy Allowance	03	Accountancy London Higher	3500
Accountancy Allowance	03	Accountancy National	300
Accountancy Allowance	AA	Accountancy Default	600

In the table shown, the same allowance is payable at a different rate according to the criteria shown:

- Employees on Grade 01 receive a higher or lower amount allowance payment.
- Employees on Grade 02 are eligible for a single allowance payment rate that is specific to their grade.
- Employees on Grade 03 and located in London are entitled to a higher or lower allowance payment. Employees on Grade 03 based elsewhere are entitled to a different amount.
- All other employees (not on Grade 01, 02, or 03) are eligible for a default amount.

Create Allowance Element;

Create a new flat amount earnings element for your allowance:

1. Using the Elements task, click **Create** to create a new Regular Earnings element (standard category).
2. Select Flat Amount as calculation rule and Annually as the periodicity.
3. In the Special Rules section, select the user-defined allowance proration event group and the default Entry Changes for Retro event group.
4. Review the element details and enter further information in the UK Element Information region, including the element type (allowance). This ensures the allowance is included in the Allowance Code and Allowance History files. (If there is no Allowance element type, the allowance is not identified as liable for MyCSP reporting.):

Record Additional Criteria – Manage Descriptive Flexfields

If additional criteria is required, consider how you will record it. In our example, the additional criteria is an employee's eligibility for the lower or higher rate. (The assumption is that the Grade and Location fields will also be referenced.) We configured the Assignment Descriptive Flexfield (PER_ASG_DF) to record the additional criteria.

> **Note:** As a prerequisite, create any new lookup type or value set that you require. We created a value set that contained a new lookup type (for the Higher and Lower values).

1. In Setup and Maintenance, select **Manage Employment Descriptive Flexfields** (or Manage Descriptive Flexfields) task.
2. Select the Assignment Attributes (PER_ASG_DF) flexfield and create a new context.
3. Add a context-sensitive segment, Grade Range, and then deploy the flexfield.
4. If you need to record further information on a flexfield, note the flexfield attribute used as you will need to use this when creating the value by criteria definition.
5. You can then record the additional information on the assignment. For example, in our example, there is now a Grade Range field on the assignment that contains two values: Higher and Lower.

Create Values Defined by Criteria

Create the criteria and values that your allowance will use:

1. Using the Values Defined by Criteria task, click **Create** to create a new value by criteria definition.
2. Create the criteria and calculation value definitions for each set of criteria:

Create Rate Definition – Value by Criteria

Create a new rate definition to associate with the values by criteria definition:

1. Using the Rate Definition task, click **Create** to create a new rate definition. The category must be Value by Criteria.
2. Select the Value by Criteria Name created previously. The Calculate Live Rates field must be unselected and Reporting Required selected. Then submit the rate definition.

Create Calculation Value Definition

Create a new calculation value definition to associate with the value by criteria definition:

1. Using the Calculation Values Definition task, click Create to create a new calculation value definition.

2. Enter the details as shown:

FIELD	VALUE
Name	User-defined value by criteria definition created previously.
Calculation Type	Rate Definition

3. Select Date Earned in the **Retrieval Date** field.
4. Create a range of values in the **From Value** and **To Value** columns and link the calculation value definition to the Derived Rate definition created previously.

Create Calculation Factor

Create a calculation factor for the flat amount allowance element and link it to the calculation value definition created previously:

1. Using the Elements task, search for the flat amount allowance element.
2. Select Calculation Factors and click **Create** to create a new calculation factor.
3. Enter the details as shown:

FIELD	VALUE
Calculation Step	Rate Amount
Calculation Value Definition	User-defined value definition created previously.

Create Element Entries

Once the above setup steps are completed, you can create element entries for employees who are in receipt of this type of allowance:

1. Using the Element Entries task, select the flat amount allowance element.
2. The pay value for the flat amount allowance element is recorded on the rate definition and not the element entry, therefore the Amount field is blank on the element entry.

Next, run the Generate HCM Rates Process prior to running your payroll.

Set Up Value by Criteria Allowances

Follow these steps to set up value by criteria allowance.

Create Allowance Element

Create a new flat amount earnings element for your allowance:

1. Using the Elements task, click Create to create a new Regular Earnings element (standard category).
2. Select Flat Amount as calculation rule and Annually as the periodicity.
3. In the Special Rules section, select the user-defined allowance proration event group and the default Entry Changes for Retro event group.
4. Review the element details and enter further information in the UK Element Information region, including the element type (allowance). This ensures the allowance is included in the Allowance Code and Allowance History files. (If there is no Allowance element type, the allowance is not identified as liable for MyCSP reporting.):

Record Additional Criteria – Manage Descriptive Flexfields

If additional criteria is required, consider how you will record it. In our example, the additional criteria is an employee's eligibility for the lower or higher rate. (The assumption is that the Grade and Location fields will also be referenced.) We configured the Assignment Descriptive Flexfield (PER_ASG_DF) to record the additional criteria.

> **Note:** As a prerequisite, create any new lookup type or value set that you require. We created a value set that contained a new lookup type (for the Higher and Lower values).

1. In Setup and Maintenance, select Manage Employment Descriptive Flexfields (or Manage Descriptive Flexfields) task.
2. Select the Assignment Attributes (PER_ASG_DF) flexfield and create a new context:
3. Add a context-sensitive segment, Grade Range, and then deploy the flexfield:
4. If you need to record further information on a flexfield, note the flexfield attribute used as you will need to use this when creating the value by criteria definition.
5. You can then record the additional information on the assignment. For example, in our example, there is now a Grade Range field on the assignment that contains two values: Higher and Lower.

Create Values Defined by Criteria

Create the criteria and values that your allowance will use:

1. Using the task, click **Create** to create a new value by criteria definition.
2. Create the criteria and calculation value definitions for each set of criteria:

Create Rate Definition – Value by Criteria

Create a new rate definition to associate with the values by criteria definition:

1. Using the Rate Definition task, click Create to create a new rate definition. The category must be Value by Criteria.
2. Select the Value by Criteria Name created previously. The Calculate Live Rates field must be unselected and Reporting Required selected. Then submit the rate definition.

Create Calculation Value Definition

Create a new calculation value definition to associate with the value by criteria definition:

1. Using the Calculation Values Definition task, click Create to create a new calculation value definition.
2. Enter the details as shown:

FIELD	VALUE
Name	User-defined value by criteria definition created previously.
Calculation Type	Rate Definition

3. Select Date Earned in the **Retrieval Date** field.
4. Create a range of values in the **From Value** and **To Value** columns and link the calculation value definition to the Derived Rate definition created previously.

Create Calculation Factor

Create a calculation factor for the flat amount allowance element and link it to the calculation value definition created previously:

1. Using the Elements task, search for the flat amount allowance element.
2. Select Calculation Factors and click Create to create a new calculation factor.
3. Enter the details as shown:

FIELD	VALUE
Calculation Step	Rate Amount
Calculation Value Definition	User-defined value definition created previously.

Create Element Entries

Once the above setup steps are completed, you can create element entries for employees who are in receipt of this type of allowance:

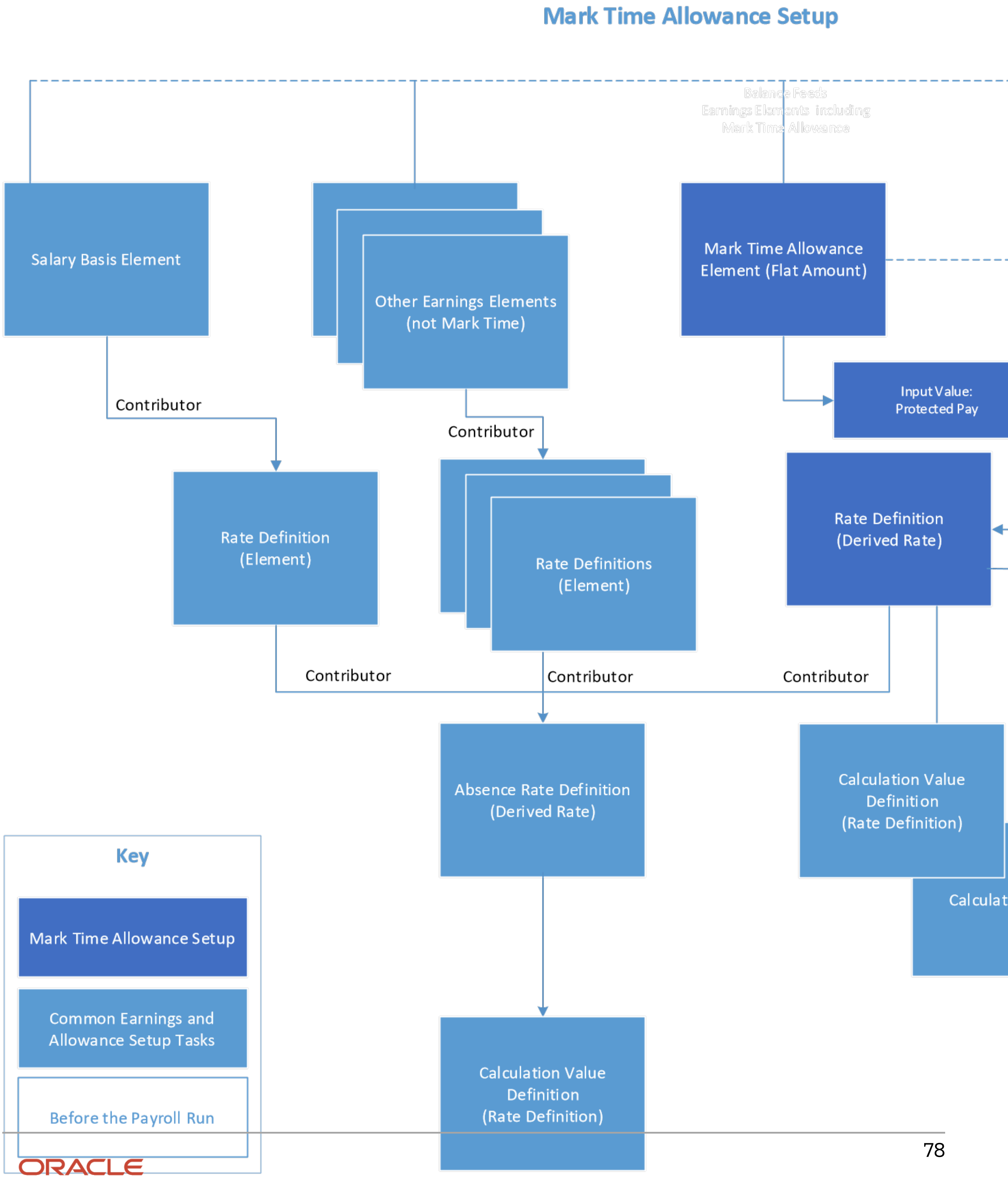
1. Using the Element Entries task, select the flat amount allowance element.
2. The pay value for the flat amount allowance element is recorded on the rate definition and not the element entry, therefore the Amount field is blank on the element entry.

Next, run the Generate HCM Rates Process prior to running your payroll.

Overview of Mark Time Allowance Setup

Follow the steps described here to set up the elements, balance and rate definitions to calculate and report an eligible employee's mark time amount in the Allowance History file.

Then record the agreed protected pay of an employee in an allowance element entry. This will be compared against the employee's total regular earnings so that any shortfall can be calculated and reported as a mark time allowance.


Mark Time Allowance Setup
Balance Feeds
Earnings Elements including
Mark Time Allowance
Salary Basis Element
Other Earnings Elements
(not Mark Time)
Mark Time Allowance
Element (Flat Amount)
Input Value:
Protected Pay
Contributor
Contributor
Rate Definition
(Element)
Rate Definitions
(Element)
Rate Definition
(Derived Rate)
Contributor
Contributor
Contributor
Absence Rate Definition
(Derived Rate)
Calculation Value
Definition
(Rate Definition)
Calculat
Calculation Value
Definition
(Rate Definition)
Key
Mark Time Allowance Setup
Common Earnings and
Allowance Setup Tasks
Before the Payroll Run

Prerequisites

- Elements and rate definitions for regular earnings elements, including salary and allowances (excluding mark time allowance).
  - Returned Rate Periodicity is Annually
- Absence element
  - Processing priority must be later than the processing priority of the mark time allowance element.

Set Up Mark Time Allowances

Create a new flat amount earnings element for your mark time allowance.

To create a new flat amount earnings element:

1. Using the Elements task, click **Create** to create a new Regular Earnings element (standard category).
2. Review the element details, adding element eligibility and further information in the UK Element Information region. Note: You must select Allowance in the Element Type field. Otherwise, the allowance is not identifiable as liable for reporting.
3. Create a new user-enterable monetary input value and name it Protected Pay. You use this to record the employee's protected pay amount.
4. Review the processing priority and edit if required. It must be later than other earnings elements but earlier than the absence element.

Create Mark Time Rate Definition - Derived Rate

Create a new rate definition for mark time. It must be a derived rate and its contributor is the mark time element's primary balance:

1. Using the Rate Definition task, click Create to create a new (derived rate) rate definition. Reporting Required must be selected. Calculate Live Rates must be unselected. (However, it will not cause issues if left selected.)
2. Enter the contributor rules as shown:

Mark Time Rate Definition Contributor Rules

FIELD	VALUE
Contributor Total Periodicity	Calendar Month
Contributor Type	Balance
Contributor Name	Mark Time element primary feed
Contributor Periodicity	Leave blank

Create Calculation Value Definition

Create a calculation value definition for the mark time rate definition:

1. Using the Calculation Values Definition task, click Create to create a new calculation value definition. The calculation type must be Rate Definition.
2. Select Effective Date in the Retrieval Date field.

3. Create a range of values in the From Value and To Value columns and select the mark time rate definition to link it to the calculation value definition.

Create Calculation Factor

Create a calculation factor for the mark time element and link it to the calculation value definition created previously:

1. Using the Elements task, search for the flat amount allowance element.
2. Select Calculation Factors and click Create to create a new calculation factor.
3. Enter the details as shown:

Calculation Factor for Mark Time Allowance Element

FIELD	VALUE
Calculation Step	Rate Amount
Calculation Value Definition	Mark Time Calculation Value Definition

Edit the Mark Time Allowance Earnings Formula

Using the Fast Formulas task, edit the earnings formula for the mark time allowance element so that the Subject to Protected Pay earnings balance is compared with the Protected Pay input value and the calculated difference is returned as the Pay Value.

Create Absence Payment Rate Definition – Derived Rate

Open the existing absence payment rate definition, or create a new rate definition (category: Derived Rate):

- The return rate periodicity for the element definition must be annual.
- The rate contributions are all the earnings rate definitions that are liable for absence payment (or deduction). This must include the mark time allowance.

Create Balance – Subject to Protected Pay

Create a new periodic balance. This balance comprises all earnings that can contribute to an eligible employee's protected pay (including their mark time allowance).

1. Using the Balance Definitions task, create a new balance, for example "Subject to Protected Pay".
2. Select the Payroll Relationship Period to Date balance dimension and feed the balance with the regular earnings that will contribute towards an employee's protected pay (salary, allowances, etc).

Create Element Entries

Record the agreed protect pay amount for the eligible employee as an element entry. Select the mark time allowance and enter the amount in the Protected Pay input value.

During payroll processing, this value is compared against the "subject to protected pay" earnings balance. Then it is used to calculate the Pay Value of the mark time allowance for the period.

> **Note:** If there are subsequent changes to an employee's protected pay, for example, as the result of a pay award, you must enter this manually on the element entry.

Next, run the Generate HCM Rates Process after running your payroll.

Mark Time Use Case

In this example, the employee receives an annual salary of £20,000 and a shift allowance of £4,000.

- Half way through period 2, their shift allowance ends. Their pay becomes protected to the value of £24,000 (£2,000 per month).
- In period 4, they receive a pay rise; their new salary is £21,000 per year.
- Half way through period 5, they become eligible for a qualification allowance of £3,500 per year. The qualification allowance is a designated allowance that reduces mark time.

The following table shows how this would be calculated and reported.

Mark Time Use Case

PERIOD	1	2	3	4	5	6
Salary	£1,666.67	£1,666.67	£1,666.67	£1,750.00	£1,750.00	£1,750.00
Shift Allowance	£333.333	£166.67	0	0	0	0
Qualification Allowance	N/A	N/A	N/A	N/A	£145.83	£291.67
Protected Pay	N/A	£2,000	£2,000	£2,000	£2,000	£2,000
Mark Time Amount	N/A	166.67	£333.333	£250	£104.17	0
Total	£2,000	£2,000	£2,000	£2,000	£2,000	£2,041.67

Set Up Non-Pensionable Allowances

Do not enter information for non-pensionable allowances in the element EFF. Allowance elements that include information in the MyCSP context of the element EFF are reported.

Remove these three balance feeds for any pension scheme in which the allowance is non-pensionable:

- (Pension Scheme Name) Eligible Compensation
- (Pension Scheme Name) Permanent Pensionable Pay
- (Pension Scheme Name) Assumed Pensionable Pay
- (Pension Scheme Name) CSP Permanent Pensionable Pay

If an allowance is pensionable for one scheme but not another, set up different elements, removing the balance feeds as described.

> **Note:** Absence rates that include non-pensionable allowances require a second rate definition to ensure that the pensionable earnings are reduced correctly in cases where an employee is receiving reduced absence pay. See Absence Rate for Reducing Pensionable Pay to Exclude Non-Pensionable Allowances in the Appendix.

Frequently Asked Questions

Frequently asked questions on rate definitions, value by criteria and other important components.

1. **How are the Reporting Required and Calculate Live Rates checkboxes used in rate definitions?**

   The Reporting Required option ensures that the that HCM Rates Process populates the pay_rate_values table for the rate which is required for inclusion in the Allowance History file. The Calculate Live Rates option ensures that rate is processed in the payroll process.
2. **Can I run Generate HCM Rates at for a single pay relationship object group for my testing purposes?**

   No, but consider using the Generate HCM Rates Start Date parameter so that the process does not have to calculate rates back from the start date of each employee's record.
3. **How does the FTE option on the rate definition interact with the FTE input value for a flat amount element?**

   The behaviour of the contributor amount FTE option depends on the contributor. For example, in an element rate definition, if the element FTE input value is set to 'Yes', then selecting it at contributor level will calculate and return a part-time (actual) amount based on the FTE amount held on the element entry. If element FTE input value is set to 'No', then selecting an FTE at contributor level will mean the part-time value is returned (that is, the same part-time value that is held on the Amount input value).
4. **I want to create Value by Criteria at location level. Do I need any other criteria in addition to the location code attribute?**

   No, only the location code attribute is needed. Use the DBI for any criteria you want to use.
5. **How are the Reporting Required and Calculate Live Rates checkboxes used in rate definitions?**

   The Reporting Required option ensures that the that HCM Rates Process populates the pay_rate_values table for the rate which is required for inclusion in the Allowance History file. The Calculate Live Rates option ensures that rate is processed in the payroll process.
6. **Can I run Generate HCM Rates at for a single pay relationship object group for my testing purposes?**

   No, but consider using the Generate HCM Rates Start Date parameter so that the process does not have to calculate rates back from the start date of each employee's record.
7. **How does the FTE option on the rate definition interact with the FTE input value for a flat amount element?**

   The behaviour of the contributor amount FTE option depends on the contributor. For example, in an element rate definition, if the element FTE input value is set to Yes, then selecting it at contributor level will calculate and return a part-time (actual) amount based on the FTE amount held on the element entry. If element FTE input value is set to No, then selecting an FTE at contributor level will mean the part-time value is returned (that is, the same part-time value that is held on the Amount input value).
8. **I want to create Value by Criteria at location level. Do I need any other criteria in addition to the location code attribute?**

   No, only the location code attribute is needed. Use the DBI for any criteria you want to use.

Bonus Code File and Bonus History File Setup

Set up your bonus elements for the Bonus Code and Bonus History files.

1. Use the Elements task to create your Irregular Earnings bonus elements and create element eligibility.
2. Input values Pay Value and Amount are created. The Pay Value (or any other Input value that is the SPECIAL_OUTPUT reserved input value type) is used to report the bonus amount. The Amount field is ignored.
3. Create a Date Earned input value to report a bonus earned date that is different to the run results date. Enter the details as shown:

User-Defined Input Value: Date Earned

FIELD	VALUE
Name	Date Earned. This must be named as shown here.
Special Purpose	Earned Date. Optional, for information purposes only.
Unit of Measure	Date
Displayed	Select the check box
Allow User Entry	Select the check box

4. If a Date Earned input value isn't created or it has no value, the run result date is reported as the bonus effective date.
5. Record the additional bonus information in the MyCSP context of the Element Information EFF as follows:
   - For standard elements, record the element EFF information on the main element (that holds the final bonus value) and also the Retro element. The main element can be either a direct or indirect element.
   - For time card elements (for example, if you use the Bonus History file to report overtime), record the element EFF information on the main, Result and Retro elements.
6. Enter the details as shown:

Bonus Element: Additional Information

FIELD	DESCRIPTION
Element Type	Select “bonus” to identify this element as a bonus that is liable for MyCSP reporting. If you leave this blank, the bonus will not be reported.
Element Code	Bonus code, as agreed with MyCSP. This is required information.
Code Description	Bonus code description. This is not required information but is desirable as it helps MyCSP establish the bonus in the payment.
Spread Bonus	This is not currently supported in the application.
Contractual Bonus	Bonus element is liable for reporting for opt outs.

FIELD	DESCRIPTION
Industrial Grade	Optional industrial indicator.
Included in Basic Pensionable Salary	Optional basic pay reckonable indicator (industrial grades only).
Included in Pre-75 Pensionable Salary	Optional pre-75 pensionable salary indicator (industrial grades only) indicator.
Paypoint Code	The bonus is reported against every Paypoint Code in the enterprise unless you specify its Paypoint Code here.

Set Up Short Time Hours History (Single and Accumulated) File

If you haven't already done so, you'll need to specify at PSU or legal employer level which file type is used by your organization (single or accumulated).

If you use the accumulated file, you'll also have to specify the week day on which each reported period starts. (Sunday is used if no weekday is specified.) See section Payroll Statutory Unit (PSU) and Legal Employer Information Setup

Create a new Adjusted Hours standard or time card element to record the actual hours worked by a part-time employee, per day, compared to their contracted work hours:

1. Use the Elements task to create a new adjusted hours element. Click Create to create a new Regular Earnings element (either Standard or Time Card).
2. Select Hours as the calculation units for reporting.
3. Select a proration group. (This is required.)
4. Review the element details and open the UK Element Information region (MyCSP Information) to select Adjusted Hours in the Element Type field as follows:
   - For a standard element – specify the element type on the main element and retro element.
   - For a time card element – specify the element type on the results and retro elements only.

> **Note:** The assignment categories listed below in Part-Time History File Setup also identify an employee as eligible for reporting in Short-Time Hours.

Reporting Accumulated Short-Time Hours and Midweek Changes

If an employee goes from full-time to part-time in the middle of the week (i.e. not on the day on which their accumulated short-time hours record starts), any additional hours worked in that first (partial) week of part-time hours are reported in the Short-Time Hours Accumulated file with the start date on which the employee became part-time, not the start of the week specified on the PSU (or Sunday, if the Start of Week field is left blank).

For example, if the Start of Week field is null, a full-time employee who becomes part-time on Wednesday 15-Nov-2023 and works additional hours later that week will have a short-time hours record with a start date of 15-Nov-2023 (not Sunday 12-Nov-2023).

The same logic applies to a part-time employee who becomes full-time midweek; any additional hours worked in that final (partial) week of part-time working will be reported with an end date that is their last day of part-time working.

Set Up Part Time History File

There are no additional mandatory setup tasks for this file unless your organization reports part-time hours using gross hours.

Hours are reported as net (excluding breaks) by default. You specify gross or net hours on the PSU. See: Payroll Statutory Unit (PSU) and Legal Employer Information.

Workers with the following predefined assignment categories are reported:

- Part-Time Regular
- Part-Time Temporary
- Part-Time Casual
- Partial Retirement (if FTE is less than 1)
- User-defined assignment categories mapped to any of the above

See Setting up and Reporting Zero-Hours Workers for more information on setting up your workers on zero hour contracts for accurate reporting in the Part-Time History and Short-Time Hours History files.

Set Up Salary History Files

The requirement to use salary bases is described in the Allowance History section of this document.

Use of Element Entries for Cutover

An employee on Reduced Pay as at cutover date must have their Actual Reduced Pay amount reported in the Salary History File. Provide this value by creating an element entry for those employees.

> **Note:** The element entry is reported in cutover only if its effective start date is one or more days before the cutover date (and its effective end date is after the cutover date).

Use the predefined MyCSP Salary History Cutover information element to enter the information shown:

MyCSP Salary History Cutover Element Input Values:

INPUT VALUE	VALUE TO PROVIDE
Start Date	This field is not used.
Actual Reduced Pay	Provide this only when the employee is on a reduced pay absence as of cutover: If the payment is made at 100% the actual reduced pay is the same as actual pay (an annual amount) and can be derived from that amount.

INPUT VALUE	VALUE TO PROVIDE
	If the payment is made at the statutory rate, the actual reduced pay is the amount of statutory pay. No negative values are allowed.

> **Note:** Create eligibility for the predefined element prior to creating element entries. The Salary History cutover file reports from these element entries. Monthly files report changes using salary basis.

10 Absence Setup and Reporting

Overview of Qualifying and Reckonable Absences

Qualifying and Reckonable Absences: Use of Legislative Grouping Codes

See: Qualifying and Reckonable Absences: Use of Legislative Grouping Codes in the Appendix for more information.

The rate of payment determines start codes for these types of absence:

- Maternity (full pay, statutory pay, unpaid)
- Paternity (full pay, statutory pay, unpaid)
- Adoption (full pay, statutory pay, unpaid)
- Shared Parental Leave (full pay, statutory pay, unpaid)
- Sickness (half pay, unpaid)

A change in the rate of payment passed to payroll – for example, maternity pay decreasing from full to statutory pay – will trigger a new service history record. You must therefore ensure your absence plans are set up correctly.

Note: An absence record must be approved in order to be reported correctly in the Service History file. If an absence record has changes that are pending approval, that absence will not be reported, and in certain cases, could even cause a deletion file to be generated.

Qualifying and Reckonable Absences: Use of Legislative Grouping Codes

The legislative grouping code associated with an absence type and the absence payment rate(s) for family-related and sickness leave determine whether the absence period is considered qualifying and/or reckonable service:

LEGISLATIVE GROUPING CODE	ABSENCE PAYMENT RATE	QUALIFYING AND/OR RECKONABLE STATUS
UK Adoption	Unpaid	Non-reckonable (qualifying)
UK Adoption	Full Pay	Reckonable
UK Adoption	Statutory Pay	Reckonable
UK Break in Service	N/A	Non-qualifying (non-reckonable)
UK Maternity	Unpaid	Non-reckonable (qualifying)
UK Maternity	Full Pay	Reckonable
UK Maternity	Statutory Pay	Reckonable

LEGISLATIVE GROUPING CODE	ABSENCE PAYMENT RATE	QUALIFYING AND/OR RECKONABLE STATUS
UK Paternity Adoption	Unpaid	Non-reckonable (qualifying)
UK Paternity Adoption	Full Pay	Reckonable
UK Paternity Adoption	Statutory Pay	Reckonable
UK Paternity Birth	Unpaid	Non-reckonable (qualifying)
UK Paternity Birth	Full Pay	Reckonable
UK Paternity Birth	Statutory Pay	Reckonable
UK Shared Parental Leave Birth	Unpaid	Non-reckonable (qualifying)
UK Shared Parental Leave Birth	Full Pay	Reckonable
UK Shared Parental Leave Birth	Statutory Pay	Reckonable
UK Shared Parental Adoption	Unpaid	Non-reckonable (qualifying)
UK Shared Parental Adoption	Full Pay	Reckonable
UK Shared Parental Adoption	Statutory Pay	Reckonable
UK Sick Leave	Half Pay	Reckonable
UK Sick Leave	Unpaid	Qualifying
UK Special Unpaid Leave	N/A	Non-reckonable (qualifying)
UK Unauthorised Unpaid Absence	N/A	Non-qualifying (non-reckonable)
UK Unpaid Industrial Action	N/A	Non-qualifying (non-reckonable)
UK Unpaid Leave	N/A	Non-reckonable (qualifying)

It is therefore important that you configure reportable absences (those with a Service History implication) using the appropriate legislative grouping codes.

Employee and Employer Contribution Base for Assumed Pay Absences

This table shows the basis for employee and employer contributions where some or all of an absence has as assumed pay basis.

This depends on the absence type's legislative grouping code and the payment rate in effect at the time as shown on the absence calculation card.

ABSENCE	ABSENCE PAYMENT RATE	EMPLOYEE CONTRIBUTIONS BASED ON	EMPLOYER CONTRIBUTIONS BASED ON
Sickness	Paid at full pay	Actual pensionable pay	Actual pensionable pay
	Paid at SSP rate	Actual pensionable pay	Assumed Pay
	Paid at 50%	Actual pensionable pay	Assumed Pay
	Unpaid	No contribution	No contribution
Maternity	Paid at full pay	Actual pensionable pay	Assumed Pay
	Paid at SMP rate	Actual pensionable pay	Assumed Pay
	Unpaid	No contribution	No contribution
Adoption	Paid at full pay	Actual pensionable pay	Assumed Pay
	Paid at SMP rate	Actual pensionable pay	Assumed Pay
	Unpaid	No contribution	No contribution
Shared Parental Leave	Paid at full pay	Actual pensionable pay	Assumed Pay
	Paid at SMP rate	Actual pensionable pay	Assumed Pay
	Unpaid	No contribution	No contribution
Paternity	Paid at SPP	Actual pensionable pay	Assumed Pay
Parental	Unpaid	No contribution	No contribution

How Child-Related and Sickness Absences Impact the Service History File

The Service History start codes for child-related and sickness absences vary according to the rate of pay that applies to the absence at the time it's reported.

Certain payment rate changes also act as the trigger for new Service History records.

Here's an example of how maternity leave setup impacts the Service History file. Refer to the section Creating a Plan and Type for Maternity Leave in the UK Statutory Absences Implementation and Functional Considerations product paper (Doc ID 2235239.1) on My Oracle Support (MOS), for detailed setup information that complies with UK legislation.

Here's a summary of what you need to create:

- One statutory maternity absence plan associated with the UK Statutory Maternity legislative grouping code.
- One or more occupational maternity absence plans. Legislative grouping codes do not apply to occupational plans.

- One maternity absence type associated with the UK Maternity legislative grouping code. Add both the statutory and occupational absence plans to it.

When you then create a maternity absence record for an employee, the system calculates entitlement according to the rules specified in your statutory and occupational plans. The MyCSP interface process interprets those results to determine the rate at which the absence is paid (full rate, statutory rate, or unpaid). Here's the MyCSP logic to report maternity absences:

- If Payment Percentage on occupational scheme is 100, the absence is considered paid at full pay and reported with start code MF.
- If Payment Percentage on occupational scheme is 0 but Payment Percentage on statutory scheme is 100, the absence is considered paid at statutory rate and reported with start code MS.
- If Payment Percentage is 0, the absence is considered unpaid and is reported with start code MN.

For cutover, the Service History file retrieves entitlement information from the employee's absence record as of cutover date minus one. An absence record that starts on cutover date is reported in the first monthly submission following cutover (as are any changes to an existing absence record that occur on cutover date and that have a service history impact.)

Statutory Maternity Pay (Example)

In this example, the employee is on maternity leave, has no entitlement to occupational pay (JS Maternity plan), but is entitled to SMP. If the cutover file is produced when the employee is receiving statutory maternity pay, the start code for this employee's Service History record will be MS.

Statutory and Occupational Maternity Pay (Example)

This employee is on maternity leave and is entitled to both SMP and occupational pay (therefore occupational pay takes precedence). If the cutover file is produced when the employee is receiving occupational maternity pay, the start code for this employee's Service History record will be MF.

For monthly reporting, if the absence payment rate of an existing absence changes and indicates a new start code is needed, a new Service History record is triggered. For example, if SMP applied to an absence reported in cutover but the payment then ended, the unpaid absence triggers a new Service History record in the monthly interface submission.

The sickness absences use a similar logic to report the Service History start code for absences that are paid at half pay or are unpaid.

Absence Rate for Reducing Pensionable Pay to Exclude Non-Pensionable Allowances

Follow the steps described here to create an additional rate for any absence rate that includes non-pensionable allowances.

This additional absence rate excludes non-pensionable allowance rate definitions as contributors. If an employee is on an absence and receiving less than full pay, this rate will ensure that their pensionable pay is reduced using the pensionable elements of their absence payment only.

Prerequisites

Elements and rate definitions for:

- Pensionable salary element
- Other pensionable elements
- Non-pensionable elements
- Absence payment/deduction
- Absence element processing priority must be later than that of the salary and allowance elements
- Rate definition category: Derived rate
- Contributors: rate definitions for salary, non-pensionable and pensionable elements

Reduced Pensionable Pay Rate Setup

Create Rate Definition – Derived Rate

1. Using the Rate Definition task, create a new (derived rate) rate definition for the reduced pensionable pay rate.
2. Enter the details as shown:

FIELD	VALUE
Category	Derived Rate
Periodicity	Annual
Calculate Live Rates	Selected by default
Contributors	Salary and pensionable allowance rate definitions created previously

Create Calculation Value Definition

1. Using the Calculation Value Definition task, create new calculation value definition.
2. Enter the details as shown:

FIELD	VALUE
Calculation Type	Rate Definition
Retrieval Date	Date Earned
Calculation Values > Rate Definition	Rate definition created in previous step.

Create Calculation Factor

Create a calculation factor for the Entitlement Result absence element and link it to the calculation value definition created previously:

1. Using the Elements task, search for the Entitlement Result absence element.

2. Select Calculation Factors and click Create to create a new calculation factor.
3. Enter the details as shown:

FIELD	VALUE
Calculation Step	Rate Amount
Calculation Value Definition	Calculation Value Definition (created in previous task)

Edit the Entitlement Result Element

Using the Elements task, open the absence Entitlement Result element.

1. Edit the Entitlement Result element formula to fetch the pensionable pay value, convert it to a daily value and return the daily reducing pensionable pay. See the reduced_pensionable_pay_entitlement_result_ff.txt file that is associated with this document.
2. Create 2 new monetary input values to return:
    - Direct result of daily reduction of pensionable pay (input value name: Reduced Pensionable Pay)
    - Daily reduction of pensionable pay with all factors (input value name: Reduced Pensionable Pay All Factors) Alternatively, create a separate element for returning the two values as an indirect result.
3. Using Status Processing Rules, created 2 new formula result rules on the Entitlement Result element to return the:
    - Reduced pensionable pay value.
    - Reduced pensionable pay value with all factors.
4. Enter the details as shown:

FIELD	VALUE
Result rule (1)	Direct Result (if using the Entitlement Result element, otherwise Indirect)
Result Returned	L_REDUCE_PP
Target Input Value	New input value - Reduced Pensionable Pay (created previously)
Result rule (2)	Direct Result (if using the Entitlement Result element, otherwise Indirect)
Result Returned	L_REDUCE_PP_ALL_FACTORS
Target Input Value	New input value - Reduced Pensionable Pay All Factors (created previously)

11 Validation and Diagnostics

Validate Initial Setup and Prepare Interface Submissions with MyCSP Diagnostics

Diagnostic reports are used in the troubleshooting process to identify and resolve issues.

They are available from the Diagnostic dashboard, which you access by selecting Settings and Actions - Troubleshooting - Run Diagnostic Tests. Run these diagnostics reports to validate both your initial one-time MyCSP setup, your cutover and monthly interface submissions and assignment-level setup:

- HCM UK MyCSP Generic Setup Diagnostics
- HCM UK MyCSP Interface and Assignment Diagnostics

These are checks that cannot be performed in the user interface. For example, the generic setup diagnostic report can validate if you have not added the required Date Earned input value that is critical for bonus element reporting.

For more information on troubleshooting, see Diagnostics Tests in Oracle Applications Cloud Using Common Features on the Oracle Help Center.

Run the HCM UK MyCSP Generic Setup Diagnostics Report

The purpose of this report is to analyze your setup at PSU and Paypoint Code level and to inform you if information that is critical to MyCSP is either incomplete or nonexistent.

Run this report as often as needed during your initial setup and also if you make later changes such as creating new allowances.

The following checks are performed:

VALIDATION TYPE	VALIDATION CHECK DESCRIPTION
MyCSP Pension Scheme Elements	Display a message if no elements exist for the MyCSP main pension schemes.
	List of elements created for the MyCSP main pension schemes.
	Display a message if no elements exist for the MyCSP additional contribution pension schemes.
	List of elements created for the MyCSP additional contribution pension schemes.
Allowance, Bonus, and Adjusted Hours Elements	Display a message if no allowance elements exist.
	List of allowance elements created.
	Display a message if no bonus elements exist.

VALIDATION TYPE	VALIDATION CHECK DESCRIPTION
	List of bonus elements created.
	Display a message if no Adjusted Hours elements exist.
	List of Adjusted Hours elements created.
Element Eligibility	List of elements for pension schemes, bonuses, allowances, adjusted hours, Salary History and Allowance Cutover that have no element eligibility.
Input Values	Display a message if no Hours input value exists for the Adjusted Hours element.
	Display a message if no Amount input value exists for the bonus elements.
	Display a message if no Date Earned input value exists for the bonus elements.
Value Definitions	List of predefined calculation value definitions with values created.
	List of predefined calculation value definitions that have no values created.
Balances	Display a message if there aren't balance feeds for any of these predefined balance definitions: • <pension scheme element> Permanent Pensionable Pay • <pension scheme element> CSP Permanent Pensionable Pay • <pension scheme element> Assumed Pensionable Pay • <pension scheme element> Employer Pensionable Base • <pension scheme element> Pensionable Earnings
	List of balance feeds for the above predefined balance definitions.
Grades	List of grades with no Paypoint Code (therefore the grades are applicable to all Paypoint Codes) or that match the selected Paypoint Code.
	List of grades that are associated with a different Paypoint Code. These grades will not be reported against the selected Paypoint Code.
Absence Type Legislative Grouping Codes	List of legislative grouping codes that are used by MyCSP and the absence types that are associated with them.
	List of legislative grouping codes that are used by MyCSP but have no associated absence types.

To run this initial setup report:

1. Select Run MyCSP Diagnostics Reports from the **Settings and Actions** menu.
2. Select **HCM UK MyCSP Generic Setup Diagnostics**.
3. Enter the details as shown:

PARAMETER	DESCRIPTION
Effective Date	The effective date for which the report is run (required).
Paypoint Code	The Paypoint Code at either PSU or legal employer level for which the report is run (required).
Payroll Statutory Unit	The payroll statutory unit for which the report is run (required).

Run the HCM UK MyCSP Interface and Assignment Diagnostics Report

The purpose of this report is to identify potential issues prior to submitting your interface files to MyCSP.

It allows you to validate:

- Whether a run has been submitted.
- The validity of setup data for inclusion in certain files.
- An employee's eligibility for inclusion in a submission.

The diagnostic report is typically run prior to the cutover and monthly interface submissions. If the interface process indicates an issue with a particular assignment in the MyCSP files, you can run the diagnostic report to help identify and then fix the issue.

You can run this report at Paypoint Code or assignment level, depending on your validation requirements. The following checks are performed.

The parameters and any specific parameter values for each check are shown:

VALIDATION TYPE	VALIDATION CHECK DESCRIPTION	PARAMETERS REQUIRED IN THIS CHECK
Interface Submissions	Check whether the MyCSP cutover process was run.	Effective Date Paypoint Code Payroll Statutory Unit MyCSP Interface File Type = C
	Check whether the MyCSP cutover was submitted more than once.	Effective Date Paypoint Code Payroll Statutory Unit MyCSP Interface File Type = C
	Check whether the MyCSP monthly interface submission was already submitted for the same period.	Effective Date Paypoint Code Payroll Statutory Unit MyCSP Interface File Type = M

VALIDATION TYPE	VALIDATION CHECK DESCRIPTION	PARAMETERS REQUIRED IN THIS CHECK
Employee Status and Benefits and Pensions Card	Display a message if the employee does not exist in the payroll statutory unit for which the report is run.	Assignment Number Effective Date Paypoint Code Payroll Statutory Unit
	Display a message if any of the following don't exist: Benefits and Pensions card MyCSP qualifying pension scheme component Card association Card association detail	Assignment Number Effective Date Paypoint Code Payroll Statutory Unit
Missing Pension Payroll ID	Display a message if no pension payroll identifier or historical pension payroll identifier exists for the day before cutover for the assignment number shown.	Assignment Number Effective Date Paypoint Code Payroll Statutory Unit MyCSP Interface File Type = C
	Display a message if no pension payroll identifier or historical pension payroll identifier exists for the assignment number shown.	Assignment Number Effective Date Paypoint Code Payroll Statutory Unit MyCSP Interface File Type = M
Part-Time Hours History and Short-Time	Display a message if the employee's working hours are less than standard working hours but they do not have a part-time assignment category.	Assignment Number Effective Date Paypoint Code

VALIDATION TYPE	VALIDATION CHECK DESCRIPTION	PARAMETERS REQUIRED IN THIS CHECK
Hours files		Payroll Statutory Unit MyCSP Interface File Name = Part-time Hours or Short-time Hours
MyCSP Allowance History file	Display a message if the MyCSP Allowance History Cutover Information element entry is not effective as of cutover. That is, the element entry start date is not cutover minus one or earlier.	Effective Date Paypoint Code Payroll Statutory Unit MyCSP Interface File Name = Allowance MyCSP Interface File Type value = C
MyCSP Salary History file	Display a message if the MyCSP Salary History Cutover Information element entry is not effective as of cutover. That is, the element entry start date is not cutover minus one or earlier.	Effective Date Paypoint Code Payroll Statutory Unit MyCSP Interface File Name = Salary MyCSP Interface File Type value = C

To run this report:

1. Select Run MyCSP Diagnostics Tests from the Settings and Actions menu.
2. Select HCM UK MyCSP Interface and Assignment Diagnostics.
3. Enter the details as shown:

PARAMETER	DESCRIPTION
Assignment Number	The assignment for which the report is run (optional for some checks). If an assignment number includes a prefix letter, include the letter too, for example, enter the E for automatically generated assignment number E45678.
Effective Date	The effective date for which the report is run (required).
Paypoint Code	The Paypoint Code at PSU or legal employer level for which the report is run (required).
Payroll Statutory Unit	The payroll statutory unit for which the report is run (required).
MyCSP Interface File Name	Usage of this parameter is required for the following checks:

PARAMETER	DESCRIPTION
	◦ Part-time Hours (for Part-Time Hours History file hours check) ◦ Short-time Hours (for Short-time Hours history file hours check) ◦ Allowance (for Allowance History file element entry check) ◦ Salary (for Salary history file element entry check)
MyCSP Interface File Type	The file type (optional for some checks). C (for Cutover) or M (for Monthly)

Note: If you leave all three optional parameters (MyCSP Interface File Type, Assignment Number, MyCSP Interface File Name) blank, no report output is generated.

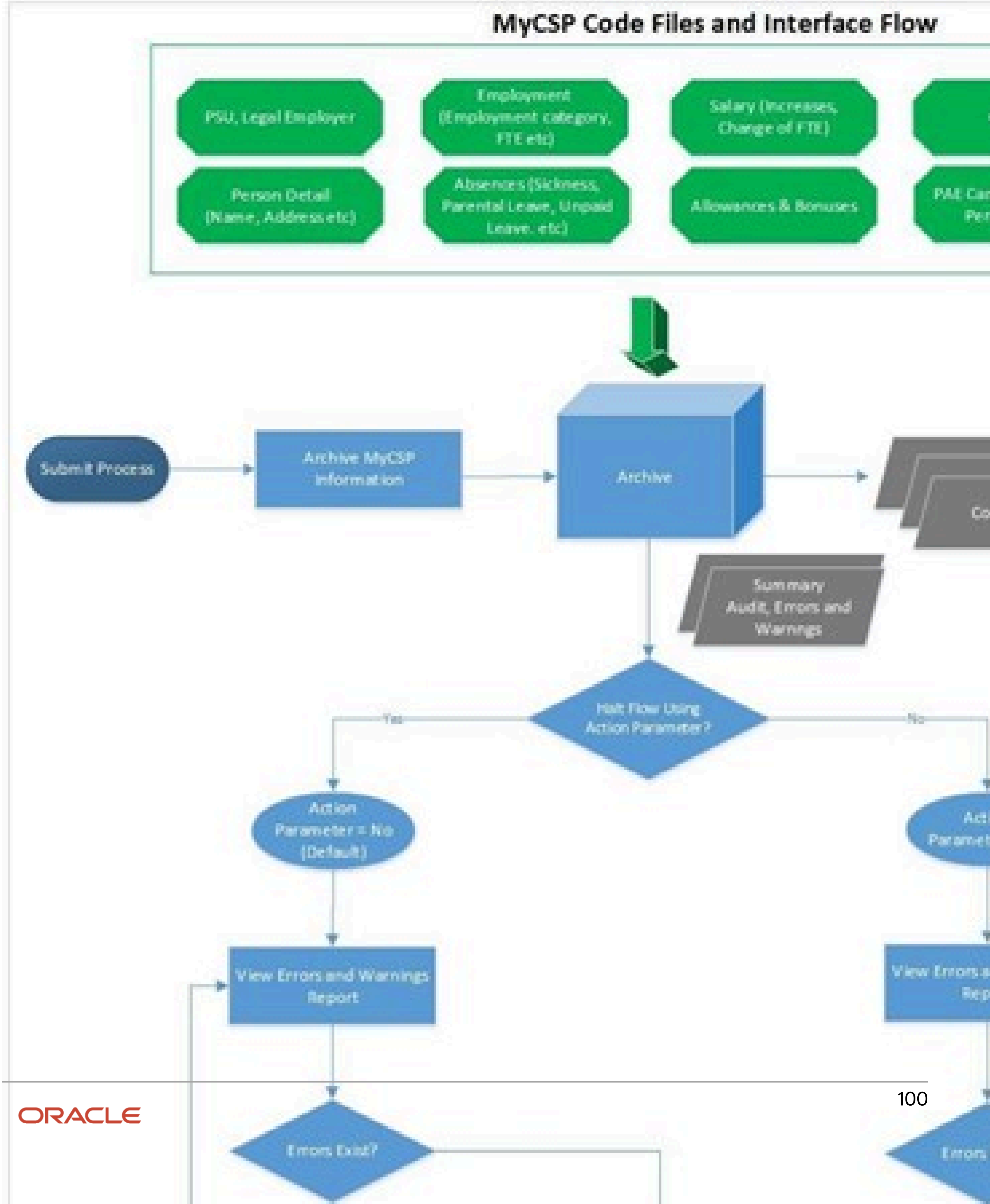
12 Code, Cutover and Monthly Files

Solution Overview

Two flows are provided to enable you to generate the code, cutover and monthly interface files:

- Generate MyCSP Interface Code Files
- Generate MyCSP Interface

This flowchart is a summary of the different stages of the flow production.



Files and Exceptions

There are a few file and exceptions components that need to be configured for MyCSP.

Cutover Files

The cutover files are a snapshot of an employee's data as of the cutover date. All members of a Civil Service Pension scheme, as well as those who have opted out, must be included in the cutover files. If any transactional data is effective on cutover files, they should not be included in the cutover file. You must ensure that the set of MyCSP data recorded on Cloud Payroll as at cutover date matches the last interface sent on your legacy payroll system.

Monthly Interface Files

MyCSP interface is incremental; only changed records are submitted. This helps MyCSP build the employee record throughout the pension year in order to access their pension rights. It is therefore important that all changes are recorded and reported in a timely manner. The types of change that are reported to MyCSP include (but are not limited to):

- New hire or rehire.
- Employee's basic information such as name, marital status, and address.
- Change to employment information such as assignment category, and change of FTE.
- Absences – most absence types are reportable to MyCSP. How an absence is reported is determined by the legislative grouping code you associate with its absence type.
- Some absences constitute cases of Assumed Pensionable Pay. These are identified automatically based on the absence type and the rate of pay.
- Changes to the employee's enrolment such as a transition to Alpha, or move to a partnership scheme.
- Members opting in or out of a pension scheme.
- Leavers.
- Salary increases.
- New bonus or allowance, or a change to an existing bonus or allowance.

Interface files are submitted on a calendar month basis only and both the monthly code and interface files default to the last date of the previous calendar month based on the system date.

The Control Totals file is generated as part of the cutover and monthly interface process.

Exceptions

All changes that take place during the month, as well as retrospective changes effective in previous months will be included within the relevant files. However, there are a few exceptions:

- Retrospective changes with an effective date prior to cutover date: those changes will be reported as at cutover date, and not effective date.
- Retrospective changes with an effective date prior to the start of the previous pension year. All changes effective in the current year, current year minus 1, or current year minus 2, will be reported with correct effective date. Older changes will be reported as at the start of previous pension year.

- Retrospective changes relating to the previous period of employment: where an employee has left the company and was rehired at a later date, any changes related to the previous period of employment will not be reported.

It is your responsibility to inform MyCSP where a change of Start Date is required.

Code Files

Assuming the minimum required setup was completed, all grades, bonuses, and allowances for the selected Paypoint Code are included in the cutover and monthly code files, irrespective of whether they are assigned to an employee or not, and irrespective of whether or not there have been changes to a code file since the previous month. It is recommended that you run this file every month.

Archive Process

Here's what happens when you submit the Generate MyCSP process:

- The first task archives the complete set of data required to produce all MyCSP files (cutover, monthly, or code files)
- At the same time, the process performs a number of validations to help with data integrity and ensure the quality of data submitted to MyCSP. You can check the Errors and Warnings report produced and correct the data prior to generating the files.

  Note: It is advisable to correct errors wherever possible before you proceed to generate the files.

This task also identifies the types of records required. Monthly interface submissions consist of two distinct sets of files: Change files and Deletion files. Both sets must only contain data that has changed or requires deletion since the previous interface.

This is grouped into these type of payroll transactions:

FIELD	MYCSP ACTION	SUPPLIED IN
Inserts - new payroll records	Inserted as a new record	Changes files
Updates - amended payroll records	Updates an existing record	Changes files
Deletes – purged or deleted payroll records or changes to the key fields	Deletes an existing record	Delete files

Note: Cutover files contain Inserts only.

Generating and Regenerating the Cutover and Monthly Interface Files

You can submit one set of files only for each month (or cutover) for each Paypoint Code (and for the same contiguous sequence number that is used across all files).

A full set of files is required to enable the archive process to compare the current and previous submission and to identify and archive the changes between each. The process generates all files (excluding the code files).

Do not, therefore, attempt to run the process:

- For selected files only.
- More than once for the same monthly period.
- More than once for the same cutover run (regardless of effective date).

The archive process will detect any of these scenarios and will not process any people and the "Halt Process on Error" task will intentionally error out.

> **Note:** If there are people that were not included in an initial MyCSP flow because, for example, there was no association detail on an employee's Benefits and Pensions card, a retry process does not add those missing records to the existing archive. In these cases, a rollback and new submission is required.

Error Handling

Two reports are provided to help you prepare your files for submission.

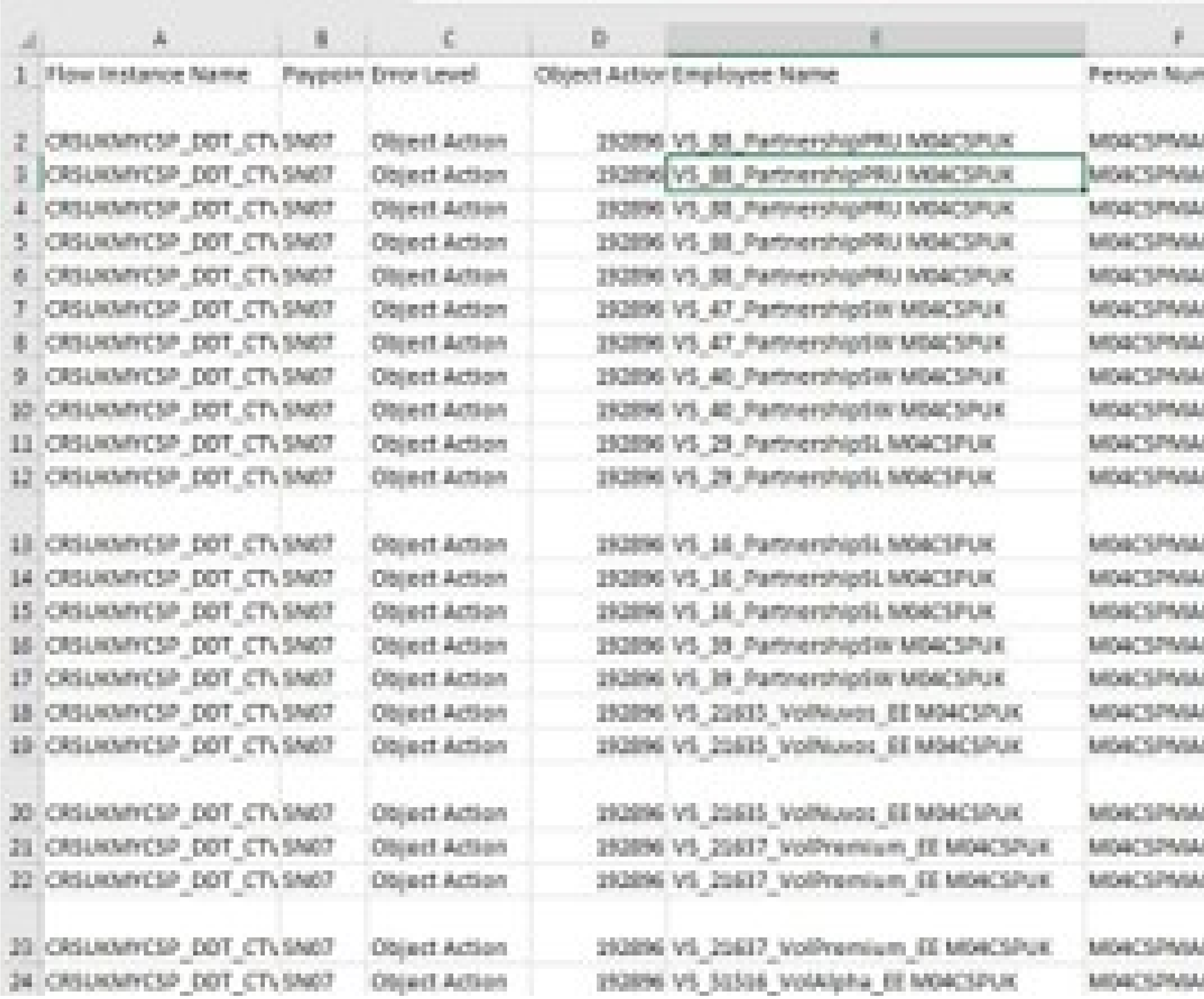
- Summary Audit
- Errors and Warnings

The initial summary audit report gives a file-level overview of the number of records processed and the number of errors and warnings in each interface (shown for both changes and deletions). The error percentage for the total number of records is also displayed.

A1

	A	B	C	D
1	ORACLE	MyCSP Summary Audit	Report Date	13-May-19
2			Page	1 of 1
3				
4				
5				
6				
7	File Type	Updates	Deletes	
8		File Name	Records	Errors
9	Basic	BASSN07.001	482	0
10	Address	ADDSN07.001	482	0
11	Service History	SERSN07.001	482	0
12	Part-Time Hours History	HRSSN07.001		0
13	Short-Time Hours History	STHSN07.001		0
14	Salary History	SALSN07.001	482	0
15	Allowance History	ALLSN07.001		0
16	Bonus History	BONSN07.001		0
17	Payment History	PAYSN07.001		0
18	WPS Contribution Rate History	WPSSN07.001		0
19	Scheme Contribution Rate History	SCRSN07.001		0
20	Totals		1928	0
21	Error Percentage			0
22				
23				
24				
25		End of Report		

The Errors and Warnings report (a comma-separated text file) provides detailed information at record level. The report messages (excluding those indicating a required value) also include the MyCSP validation reference number where one exists. The severity column indicates whether MyCSP handles this issue as an error or warning.



	A	B	C	D	E	F
1	Flow Instance Name	Paypoin	Error Level	Object Actior	Employee Name	Person Num

MyCSP Interface Process

The main setup required prior to running the cutover and interface files process determines how people with errors are processed.

Early in the submission process for the period, you will most likely need to review and correct errors before retrying the process on selected records in order to reduce your error count. Later in the monthly cycle, you will retry the process to include all records in order that the MyCSP interface file submission is complete. A new action parameter, the MyCSP interface process retains records in error parameter (halt action parameter) is provided to support this.

We recommend that you create a new configuration group prior to running the interface process and that you specify this group each time you submit the flow. You can use this configuration group to specify overrides for error handling.

MyCSP Interface Process Retains Records in Error (Halt Action Parameter)

The “MyCSP interface process retains records in error” process configuration parameter determines the behaviour of the interface flow if errors are found in the Archive MyCSP Information task.

Parameter Value is N

It is strongly recommended that you run the MyCSP interface process each month with the parameter set to N initially so that you can identify all records in error. After this, you can make corrections and retry without having to mark them for retry manually.

If the parameter is set to N (the default value):

The Archive MyCSP Information task has the status Completed. However, for any archive records in error, the top-level person action is marked as such on the View Process Results page, allowing you to more easily identify (and subsequently retry) those employees' records that are in error.

The application process marks the Halt Process on Error task status as Error. (If there are no errors on any of the archive records, this task is marked as Completed.)

You can review the Errors and Warnings report and correct the employee’s erroneous records in the live system.

After correcting the errors, you can retry the Archive MyCSP Information task (without having to manually mark the records for retry). This automatically reprocesses all person actions marked for retry or marked as errored. Before you run the Retry process, you can also update other employee’s records and manually mark them for retry; this will result in their records also being included in the Retry process.

This is an iterative process, and you can retry as many times as required until there are no errors. Once there are no errors, you can mark the task Review and Confirm MyCSP Audit Errors and Warnings as complete. The process then starts generating the interface files.

Warning: It’s recommended that you don’t skip the Halt Process on Error task. The task intentionally errors in order to prevent the generation of output files that would otherwise be incomplete.

Parameter Value is Y

Once you’ve run through an error checking and correction cycle, if you still find errors that you are unable to fix prior to generating the MyCSP Interface files, you can update the parameter to Y in order to generate all files including those with known errors.

If the parameter is set to Y or to the effective date of the process (in YYYYMM format):

- The Archive MyCSP Information task has a status of Completed. For any archive records in error, the person actions are not marked in error.
- The Halt Process on Error task is marked as Completed.
- You can review the Errors and Warnings report.

- Once you mark the Review and Confirm MyCSP Errors and Warnings task as complete, the process will continue to produce the MyCSP interface files, even if errors still exist. Employees that have errors will be included in the files.

Some additional considerations:

- Don't update MyCSP interface files manually. This is likely to cause inconsistencies and errors between the data you report and the information in the archive. Always make corrections and changes at source prior to running the Retry process.
- If you wish to correct any errors when the parameter is set to Y, you must identify and mark the employee's archive record manually for retry before you run the Retry process.
- If you have not corrected your errors but have already marked the Review and Confirm MyCSP Errors and Warnings task as complete (and the process has therefore generated the MyCSP interface files), you must identify and manually mark the employee's records for retry under each file generation task. Then you must identify and mark the employee's records for retry under the Archive MyCSP Information task.

Process Configuration Group

It is recommended that you specify the error handling action parameters in a configuration group.

Create a new process configuration group for use with the action parameter and specify this group each time you submit the flow. If you change the action parameter value later and want the retry process to use it, it will only do so if you specified the process configuration group on the original submission.

Use the Payroll Process Configuration task to create a new process configuration group and add the action parameters to your configuration group as shown here:

Configuration Group Parameters

PARAMETER NAME	USER ACTION	DEFAULT VALUE	SUGGESTED OVERRIDE
Maximum Errors Allowed Number of consecutive actions that can return an error before the entire process is given a status of Error.	Increase this to a number that is large enough to ensure that all the MyCSP validation checks are performed together for employees in the Paypoint Code. Otherwise, unless the parameter has already been increased for your default configuration group, it will default to 20 (or to the "Chunk Size", if specified).	Default: CHUNK_SIZE or 20; minimum: 0	50
MyCSP interface process retains records in error If the parameter is set to Y, then the process will continue to produce the MyCSP interface files, even if errors still exist.	Add this parameter to your configuration group if you need to generate your interface files for submission despite them still containing errors. We recommend that you enter the month (in format YYYYMM) of the current interface process's effective date (rather than entering value	Null (N)	YYYYMM

PARAMETER NAME	USER ACTION	DEFAULT VALUE	SUGGESTED OVERRIDE
	Y). A date override means that the parameter's setting effectively reverts to N for the next run in the subsequent month. For example, if the effective date parameter in the Generate MyCSP Interface process is 31 January 2020, enter 202001 here. The parameter will default to N for the February 2020 run. If you set this override to Y, remember to change it to N in the subsequent month for the error correction cycle.		

Run the Generate MyCSP Code Files Process

The Generate MyCSP Interface Code Files process generates the files containing your grade, bonus, and allowance codes, as required by MyCSP prior to cutover and monthly file submissions.

While the bonus code file is not mandatory for cutover, all 3 code files are generated as part of the process, so it is available for both cutover and monthly submissions.

1. Use the Client Groups > Payroll > Submit a Flow task. Select your legislative data group and Generate MyCSP Interface Code Files.
2. Enter the report parameters.

Generate MyCSP Interface Code Files Parameters

FIELD	DESCRIPTION
Payroll Statutory Unit	List of PSUs in the legislative data group.
Effective Date	Defaults to last day of the previous calendar month based on system date. Or override to cutover date for generating cutover files.
Paypoint Code	List of Paypoint Codes defined at PSU or legal employer level.

FIELD	DESCRIPTION
Process Configuration Group	List of process configuration groups. The parameters from the default group are used if left blank.

Each code file includes:

- All grades created for the enterprise unless a grade was created for a specific Paypoint Code only.
- The bonuses created for the Legislative Data Group, unless a bonus element was created for a specific Paypoint Code only. The element type field must be Bonus for it to be reported.
- The allowances created for the Legislative Data Group, unless an allowance element was created for a specific Paypoint Code only. The element type field must be Allowance for it to be reported.

You can rerun the file more than once in the same period prior to submitting it to MyCSP it, for example, if new codes were added since you last generated the files.

Run the Generate MyCSP Interface Process (Cutover and Monthly Files)

The Generate MyCSP Interface process generates all cutover and monthly files to include eligible employees' details, either as of the cutover date, or for the selected reporting period for monthly files.

To run the MyCSP interface process for cutover or monthly files:

1. Use the Client Groups > Payroll > Submit a Flow task. Select your legislative data group and Generate MyCSP Interface.
2. Enter the details as shown:

Generate MyCSP Interface

FIELD	DESCRIPTION
Payroll Statutory Unit	List of PSUs in the legislative data group.
Effective Date	Defaults to the last day of the previous calendar month, based on system date. Override this to the cutover date for cutover files.
Paypoint Code	Select the Paypoint Code. The list contains the Paypoint Code for the PSU selected earlier. If you additionally specified a Paypoint Code at legal employer level, that is shown too.
Submission Type	Cutover or Monthly. Defaults to monthly but can be overridden for cutover submission.
Final Submission	Defaults to No. Select Yes – final for year if the payroll year has been closed and you expect no further changes that will affect Payment History files.
Process Configuration Group	List of process configuration groups. The parameters from the default group are used if left blank.

> **Note:** Remove the .txt file extensions from the files created prior to submission to MyCSP.

Final Submission for Year

Select the Final Submission parameter and submit your final files for the scheme year when you expect no further changes that will impact Payment History files. The YRCLOSE field in the Control Totals file is populated to include the closed scheme year.

Do not resubmit a Payment History file for a closed scheme year. This will trigger MyCSP error reference 30035.

Generate the Five-Day Year-End Pension Input Period (PIP) Report

MyCSP requires the reporting of earnings and pension contributions for the period 1 to 5 April, the Pension Input Period (PIP). The PIP file is generated automatically in the application, but the submission of the data to MyCSP is a manual task that is external to the application.

The PIP file generation is a subtask of the main Generate MyCSP Interface flow, Generate MyCSP Interface April Five-Day PIP File. This subtask creates a .csv file, filename PPPPYYYYPIP (where PPPP = Paypoint Code). When the effective date of the flow is April, this .csv is populated with Payment History information for all members of Alpha. (A blank file is created when the effective date is not April.)

The amounts reported in this file are 5/30 of the Payment History April figures. Proration is adjusted for members who were hired or terminated during April. The calculation is the number of days they worked during the PIP period divided by the number of days they worked in the whole of April.

For example:

HIRE DATE	TERMINATION DATE	PRORATION FACTOR
3 April	N/A	3/28
Before 1 April	During April: 3 April 20 April	3/3 = 1 5/20
After 5 April	N/A	N/A. No record is generated for a person who was hired during April, but after 5 April.

The structure of the generated .csv is aligned with the column layout in the manual spreadsheet provided by MyCSP. This enables you to copy and paste the contents of the generated .csv file into the MyCSP manual spreadsheet that you can then send to MyCSP.

13 Appendix

MyCSP Code Mappings

These values must be reported to MyCSP using valid codes only:

- Marital status
- Title (as used in names)
- Address code
- End reason (the reason for an employee termination)

They are mapped to valid MyCSP codes using the Extended Lookups task. You can create mappings yourself as described here.

Marital Status Codes

These codes are reported in the MAR field in the Basics file. A predefined mapping is provided as indicated:

MyCSP Marital Status Codes and Descriptions

MARITAL STATUS CODE	MARITAL STATUS DESCRIPTION	PREDEFINED MAPPING EXISTS
D	Divorced	Yes
E	Ex-Married	No
M	Married	Yes
P	Civil Partner	Yes
S	Single (never married)	Yes
U	Unknown	Yes
W	Widowed	Yes
X	Ex-Civil Partner	Yes

Title Codes

The titles used in person names must be mapped to a valid MyCSP Title Code. These codes are reported in the TITLE field in the Basics file and a predefined mapping is provided as indicated:

MyCSP Title Codes and Descriptions

TITLE CODE	TITLE DESCRIPTION	PREDEFINED MAPPING EXISTS
ACOM	Air Commodore	No
AVM	Air Vice Marshall	No
BARN	Baron	No
BISH	Bishop	No
BRG	Brigadier	No
BRNS	Baroness	No
BRTH	Brother	No
CANO	Canon	No
CAPT	Captain	No
CDRE	Commodore	No
CHF	Chief	No
CHIN	Chief Inspector	No
CHPN	Chaplin	No
CHUP	Chief Superintendent	No
CMDR	Commander	No
CNSL	Councillor	No
CNST	Constable	No
COL	Colonel	No
CPL	Corporal	No
CPO	Chief Petty Officer	No
DAME	Dame	No
DR	Doctor	Yes
DTSP	Detective Superintendent	No
EARL	Earl	No
FR	Father	No
FTLT	Flight Lieutenant	No

TITLE CODE	TITLE DESCRIPTION	PREDEFINED MAPPING EXISTS
FTST	Flight Sergeant	No
GPCP	Group Captain	No
HON	Honourable	No
HPRF	Honourable Professor	No
IMAM	Imam	No
INSP	Inspector	No
JUDG	Judge	No
LADY	Lady	No
LORD	Lord	No
LT	Lieutenant	No
LTCD	Lieutenant Commander	No
LTCL	Lieutenant Colonel	No
LTGN	Lieutenant General	No
MAST	Master	No
MISS	Miss	Yes
MJGN	Major General	No
MJR	Major	No
MNST	Minister	No
MR	Mr	Yes
MRS	Mrs	Yes
MS	Ms	Yes
MX	Mx	No
PO	Petty Officer	No
PROF	Professor	No
PSTR	Pastor	No
RABI	Rabbi	No
RADM	Rear Admiral	No

TITLE CODE	TITLE DESCRIPTION	PREDEFINED MAPPING EXISTS
REV	Reverend	No
RREV	Right Reverend	No
RHON	Right Honourable	No
SGT	Sergeant	No
SHRF	Sheriff	No
SIR	Sir	No
SIST	Sister	No
SQLR	Squadron Leader	No
SSGT	Staff Sergeant	No
SUPR	Superintendent	No
SURG	Surgeon	No
VADM	Vice Admiral	No
VEN	Venerable	No
VISC	Viscount	No
WCDR	Wing Commander	No
WO	Warrant Officer	No

Address Codes

These codes are reported in the Address File. No predefined mappings exist. If no mapping is created, an address code is defaulted to HM.

ADDRESS CODE	ADDRESS CODE DESCRIPTION
HM	Home
OF	Office

Service History End Reasons

These codes are reported in the SVRSN field in the monthly service history files. No predefined mappings exist; you must map your termination actions (or action reasons) to them yourself.

END REASON CODE	END REASON DESCRIPTION
3	Retirement with pension
4	End of fixed-term contract
5	Resignation
6	Secondment
7	Death
9	Redundancy
10	Dismissal
14	Transfer out of pay centre
15	Transfer to other government department
18	Approved early retirement
19	Actuarially reduced retirement
20	Premature retirement for inefficiency
21	Retirement on grounds of ill health
24	Dismissal with compensation
25	Dismissal with compensation
46	Transition to Alpha

Setting up and Reporting Workers on Zero-Hour Contracts

Overview of Setting up and Reporting Workers on Zero-Hour Contracts

Zero-hours workers are liable for reporting to MyCSP. A worker's hours are reported to MyCSP using a combination of the Part-Time Hours and either of the Short-Time Hours History files.

This section explains how a zero-hours worker is handled for correct reporting.

A worker on a zero-hours contract is identified by both of the following:

- 0 in the Working Hours field on their assignment
  - The working hours value 0 must remain unchanged as long as the person is on a zero-hours contract. Use a time card or element entries to record their actual working hours. (You can specify in the Time Card Required field on the payroll relationship if a worker should only be paid when they have a time card.)
- Part-time assignment category:
  - Part-time regular
  - Part-time temporary
  - Part-time casual
  - Partial retirement, if FTE is less than 1
  - User-defined assignment category mapped to any of the above

Note: Other than the zero-hours worker being treated as a new starter in the usual way in Service History, this approach to handling a zero-hours worker does not trigger changes to the Service History file when the worker is working or not working. They are only reported as on a break when they are actually on a non-qualifying, non-reckonable absence.

Part-Time History and Short-Time Hours History Files

A zero value on Working Hours (together with a part-time or partial retirement assignment category) triggers a Part-Time

History file to indicate this employee is not a full-time worker. Returning 0 in the PTHRS field would generate an error, so

0.25 hours is defaulted into it. This 0.25 value is accrued each week, irrespective of the hours worked that week, as long as the worker is on a zero-hours contract.

The 0.25 hours that accrues each week in Part-Time History is automatically adjusted in either the single or accumulated

Short-Time Hours History file. (Specify whether you are reporting single or accumulated hours in the Short-Time Hours File Type field at PSU or legal employer level.)

In the following example, the zero-hours worker contract starts 1 June, and they work this pattern in June:

WEEK BEGINNING	HOURS WORKED
2 June	0 hours
9 June	8 hours on Wednesday
16 June	8 hours a day, Wednesday to Sunday (40 total)
23 June	0 hours
30 June	8 hours on both Monday and Tuesday (16 total)

The Part-Time History file is generated with a STRTDTE of 1 June and a PTHRS of 0.25, which accrues each week.

If your organization reports hours using the Short-Time Hours History (Accumulated) file, the value reported in the ADJHRS field is the total hours worked each week minus the 0.25 PTHRS hours:

WEEK BEGINNING	STRTDTE	ENDDTE	ADJHRS
2-Jun - 8-Jun	02-Jun	08-Jun	-0.25
9-Jun - 15 Jun	09-Jun	15-Jun	7.75
16-Jun - 22 Jun	16-Jun	22-Jun	39.75
23-Jun - 29 Jun	23-Jun	29-Jun	-0.25
30-Jun - 6 July	Reported in July		N/A

The start date of the week (reported in the STRTDTE field) is determined by the day specified in the Start of Week field at either PSU or legal employer level.

If your organization reports short-time hours by the day, a -0.25 adjustment is reported on the Saturday of each week. The actual hours worked are reported each day without any 0.25 deduction (unless there are working hours on the Saturday, in which case the deduction is applied).

So, using the same example as above, this is how the worker is reported in the single Short-Time Hours History file:

ST HOURS	EFFDTE	ADJHRS	COMMENT
2-Jun - 8-Jun	07-Jun	-0.25	Saturday Adjustment applied
9-Jun - 15 Jun	11-Jun	8	
N/A	14-Jun	-0.25	Saturday Adjustment applied
16-Jun - 22 Jun	18-Jun	8	N/A
N/A	19-Jun	8	N/A
N/A	20-Jun	8	N/A
N/A	21-Jun	7.75	Saturday Adjustment applied - includes deduction from hours worked that day
N/A	22-Jun	8	
23-Jun - 29 Jun	28-Jun	-0.25	Saturday Adjustment applied
30-Jun - 6 July	Reported in July		N/A

Additional Considerations:

- When a zero-hours worker starts or ends a contract mid-week, the adjustment of -0.25h is applied for the entire week. There is no proration.
- If a zero-hours contract ends before the end of the week (Saturday) the adjustment is applied on the last day of the zero hour contract.
- When an employee on a zero-hours contract is on non-qualifying/non-reckonable service for a complete week, or that absence starts before and ends after a weekend (when the 0.25 adjustment would be made), the adjustment of -0.25 is not applied for that week.

For details on setting up grade rates for hourly workers, see *Grade Rates with Hourly Amounts*

Grade Rates with Hourly Amounts

You can use this recommended setup for grade rates and salary for workers who are paid at an hourly rate, including those on zero-hours contracts for accurate reporting of notional and actual salary in the Salary History file.

Create a Grade

1. Use the Grades task to create a new grade. Include grade steps, grade ladder and additional MyCSP information.
2. Create hourly grade rates to meet your requirements. (You can also do this using the Grade Rates task).
3. Enter the details as shown:

Grade Rate Information

Field	Description
Rate Type	Salary
Frequency	Hourly
Annualization Factor	See below
Currency	GBP

The annualization factor converts base pay to an annual amount (52 x standard working hours).

For example:

52 * 40 hours per week = 2080

52 * 37 hours per week = 1924

Create Salary Basis

To create an hourly salary basis:

1. Use the Salary Basis task.
2. Enter the details as shown:

Create Salary Basis: Hourly Worker

Field	Description
Salary Basis Type	Salary amount is determined by user.
Frequency	Hourly
Annualization Factor	As specified on the grade rate, e.g., 2080.

3. Select the Element Mapping tab to select the salary basis element details:

Field	Description
Payroll Element	Salary payroll element
Input Value	Pay Value

4. Select the Salary Ranges tab to associate the salary basis with the previously created grade rate:

Mid-Month FTE Changes and Employer ASLC Contributions

Overview and Prerequisites

The employer's ASLC contribution rate is based on the employee's annualized FTE salary, which is calculated using the Permanent Pensionable Pay balance and their FTE.

The employee's FTE is checked at the start and end of each month:

- Where there is no change, their Permanent Pensionable Pay is annualized using the FTE that applies at the end of the month.
- Where there is a mid-month change in FTE, rate definitions are required; they use the FTE value before and after it changed together with the employee's Permanent Pensionable Pay.

Prerequisites

Pensionable earnings elements that have feeds to the Permanent Pensionable Pay balance.

Set Up Rate Definitions

Follow these steps to configure the rate definitions for MyCSP.

Create Rate Definition – Element

1. Using the Rate Definition task, create one rate definition for every earnings element that feeds the Permanent Pensionable Pay balance.
2. Enter the details as shown:

FIELD	VALUE
Category	Element
Storage Type	Amount
Calculate Live Rates	Must be selected
Reporting Required	Selected by default
Contributor Type	Automatically created as Input Value

Create Rate Definition – Derived Rate

1. Using the Rate Definition task, create a rate definition that will be fed by the earnings element rate definitions created in the previous task.
2. Enter the details as shown:

FIELD	VALUE
Category	Derived Rate
Calculate Live Rates	Must be selected
Reporting Required	Selected by default
Return Full-Time Rate (in Returned Rate Details)	Selected
Contributors	Select each element rate definition created previously.

Create Calculation Value Definition

1. Using the Calculation Value Definition task, create new calculation value definition.
2. Enter the details as shown:

FIELD	VALUE
Calculation Type	Rate Definition
Calculation Value Definition Group	New user-defined group
Retrieval Date	Effective Date

FIELD	VALUE
Calculation Values	Derived rate rate definition created previously.

Create Calculation Factor

1. Using the Elements task, search for the Calculator element of each pension scheme subject to ASLC contributions.
2. Enter the details as shown:

FIELD	VALUE
Calculation Step	Rate Amount
Calculation Value Definition	Calculation Value Definition (created in previous task)