Oracle Fusion Cloud Human Resources

How do I set up a vacation absence plan?

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G17287-02

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Get Help

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Chapter 1
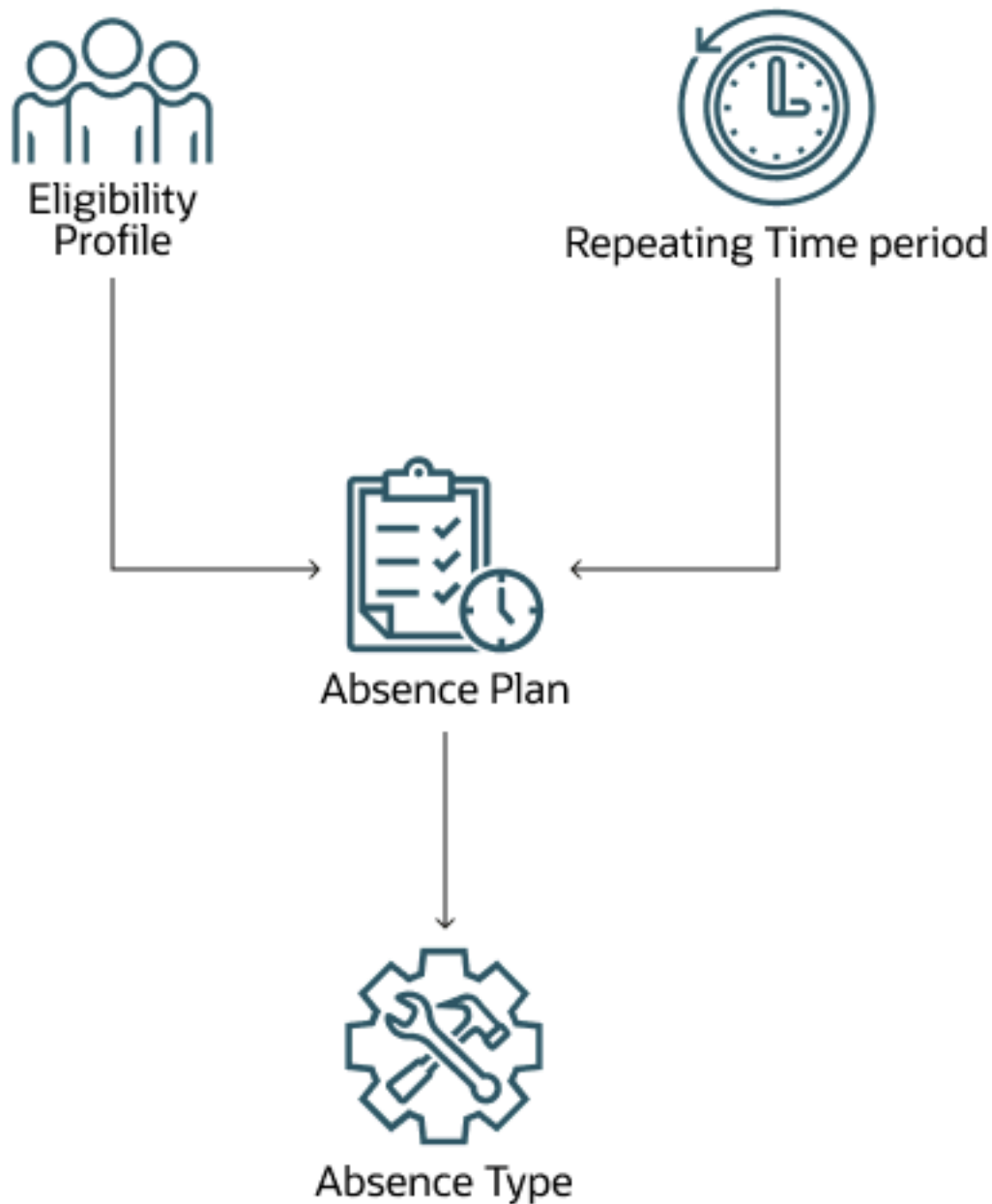Implementation Summary

1 Implementation Summary

Scenario

You are an absence administrator who wants to set up a paid vacation plan for employees, with these features:

Plan Feature	Details
Who is eligible for this plan?	All full-time regular employees belonging to a specific department can use this vacation plan.
How much balance can an employee accrue?	If the employee's length of service is less than 2 years, they can accrue 12 days at the rate of 1 day per month for 1 year. If their length of service is more than 2 years, they can accrue 18 days at the rate of 1.5 days per month for 1 year.
What is the maximum amount of balance that can be accrued?	The maximum limit for the total balance accrued is 25 days.
Can some balances be carried over to a new term?	Employees with less than 2 years of service can carryover 4 days of balances to the next term. Similarly, if the employee has more than 2 years of service, then they can carryover 6 days of balance to the next term.

This playbook provides you the implementation steps to configure the absence plan and type, and testing steps to ensure your setup is accurate.

Setup Sequence

Here's a diagram that illustrates the main components involved in setting up the vacation plan:

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Here are the steps:

1. Set up an eligibility profile for full-time regular employees who belong to a specific department.
2. Create a repeating period that will determine how often the accruals are run for the vacation plan balance.
3. Create an absence plan and associate the eligibility profile with the absence plan. You need to create accrual band matrix in the Accruals tab to determine the amount of balance and the rate of accrual.
4. Create an absence type and add the absence plan you created with this absence type. Specify who can update absences of this type and set maximum and minimum duration limits.
5. Test your setup to see if everything is working as intended. Use the Absence Records task, search for your employee and try submitting a vacation request using the vacation plan you just set up. Additionally, try calculating the accruals for a future date to confirm if the calculations are correct.

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Chapter 2
Configure Vacation

2 Configure Vacation

Create Repeating Time Period

Create a repeating period to determine how often the accruals are processed for the plan. In this example, you create a monthly repeating period, which means a portion of the time will be accrued every month.

1. Start the **Repeating Time Periods** task from the Absences work area.
2. Click **Create**.
3. Enter a suitable name and description for the repeating period.
4. In the Period Usage field, enable the **Accrual Processing** check box.
5. In the Period Definition section, complete these fields:

Field	Value
Period Type	Monthly
Period Length	Calendar Month
Sample Start Date	1-1-24

6. Save your changes.

Create Eligibility Profile

Create an eligibility profile to determine who gets to avail the vacation. In this example, you create a profile to check if the person is a full-time employee and if they belong to the Finance department.

1. On the Home page, click **My Client Groups** > **Absences**.
2. Start the **Eligibility Profiles** task.
3. Create a participant profile.
4. Provide a meaningful name for your eligibility profile and set the **Status** to Active.
5. In the Eligibility Criteria section, click **Employment** > **Assignment Status** and complete these fields:

Field	Value
Sequence	10 The sequence indicates which criteria you want to process first. But in this example, you need to define only 1 criterion, so you can provide any number you like.
Assignment Status	Active – Payroll Eligible

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6. Click the **Department** tab and complete these fields.

Field	Value
Sequence	10
Department	Finance

7. Save your changes.

Create Absence Plan

Create the vacation plan with the accrual bands to determine the rate of accrual for the employees:

1. Start the **Absence Plan** task from the Absences work area.
2. Create an accrual plan.
3. On the Create Absence Plan page, complete the fields, as shown in this table.

Field	Value
Plan Name	Vision Vacation
Legislative Data Group	Select your legislative data group.
Status	Active
Plan UOM	Days
Type	Calendar year In this example, the plan starts on the day you selected which is Jan 1, 2024, and will restart next year on the same date.
Calendar	01/01/24

4. On the Participation tab, add the eligibility profile that you previously created in the Eligibility section.
5. Select the **Accruals** tab, and complete the fields:

Field	Value
Accrual Method	Incremental The worker will accrue time in increments over the course of the plan term.
Accrue On	End of repeating period
Balance Frequency Source	Repeating Period

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Field	Value
	This determines the frequency of accrual periods. In this example, the worker accrues time at the end of each instance of the repeating time period which is every month during the term.
Repeating Period	Select the repeating period you created earlier.
Accrual Vesting Rule	Elapsed period
Duration	1
UOM	Months
Ceiling Rule	Flat amount
Ceiling	25 days
Carryover Limit Rule	Include in matrix

6. In the Accrual Matrix section, create the following bands:

Sequence	Expression	Accrual Rate	Carryover Limit
1	[LengthOfService.YearsofService] < 2	1	4
2	[LengthOfService.YearsofService] >= 2	1.5	6

7. Save your changes.

Create Absence Type

Create an absence type to configure rules to define the rules of the absence. You can determine which fields or sections a particular worker sees based on their role.

1. Start the **Absence Types** task from the Absence work area.
2. Create a Generic absence type.
3. On the Create Absence Type page, Type Attributes tab, complete the fields, as shown in this table.

Field	Value
Name	Vacation
UOM	Days
Status	Active
Legislative Data Group	Select your legislative data group.

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4. In the Absence Record Maintenance section, enable updates for employee, manager, and administrator.
5. In the Plans and Reasons tab, add the absence plan you created earlier.
6. Save your changes.

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Chapter 3
Test Your Setup

3 Test Your Setup

Test Your Setup

You can test your setup as an administrator. You can even log in as an employee if you want to see it from an end user's perspective.

1. On the home page, click **My Client Groups** > **Absences.**
2. Start the **Absence Records** task and select an active employee belonging to your enterprise.
3. In the Manage Absences and Entitlements page, Plan Participation section, click **Enrollments and Adjustments > Add Enrollment.**
4. Add the plan you created and select a start date for it.
5. The Vacation absence plan appears in the Plan list in the same section with information about the balance they have.
6. Check if the accruals are being calculated correctly for your plan. Select the plan and click **Accruals > Run Accruals for Selected Plan**.
7. In the Balance As-of Date field, enter the month end for the enrollment start date that was entered, and calculate the accruals and balances. The balance column in the Plan Balances section will reflect the balance as of that day.
8. Click on the balance to get a detailed view of the balance and the number of times accruals were processed.
9. Check if you're able to enter an absence for the employee. To do this, click **Add** in the Existing Absences section. This will take you to the Absence entry page. Select the absence type you created in the **Absence Type** field. Enter the details of the absence and submit it. If the absence request that you submitted, appears in the Existing Absences section, then it means your setup is working as intended.

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