

Oracle Fusion Cloud Human Resources

Implementing Absence Management



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G34709-01

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Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

Get Help in the Applications

Some application pages have help icons  to give you access to contextual help. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons. If the page has contextual help, help icons will appear.

Get Support

You can get support at [My Oracle Support](#). For accessible support, visit [Oracle Accessibility Learning and Support](#).

Get Training

Increase your knowledge of Oracle Cloud by taking courses at [Oracle University](#).

Join Our Community

Use [Cloud Customer Connect](#) to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, suggest [ideas](#) for product enhancements, and watch events.

Learn About Accessibility

For information about Oracle's commitment to accessibility, visit the [Oracle Accessibility Program](#). Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

You can email your feedback to oracle_fusion_applications_help_ww_grp@oracle.com.

Thanks for helping us improve our user assistance!

1 Absence Management Implementation Overview

How You Set Up Absence Management

Create absence plans and types to enable people to record their time off. Define authorization rules and set up payment rules for employees on long term absence, such as maternity and sick leave.

These tasks in the Setup and Maintenance work area are part of the Workforce Deployment offering in the Absence Management functional area.

Getting Started

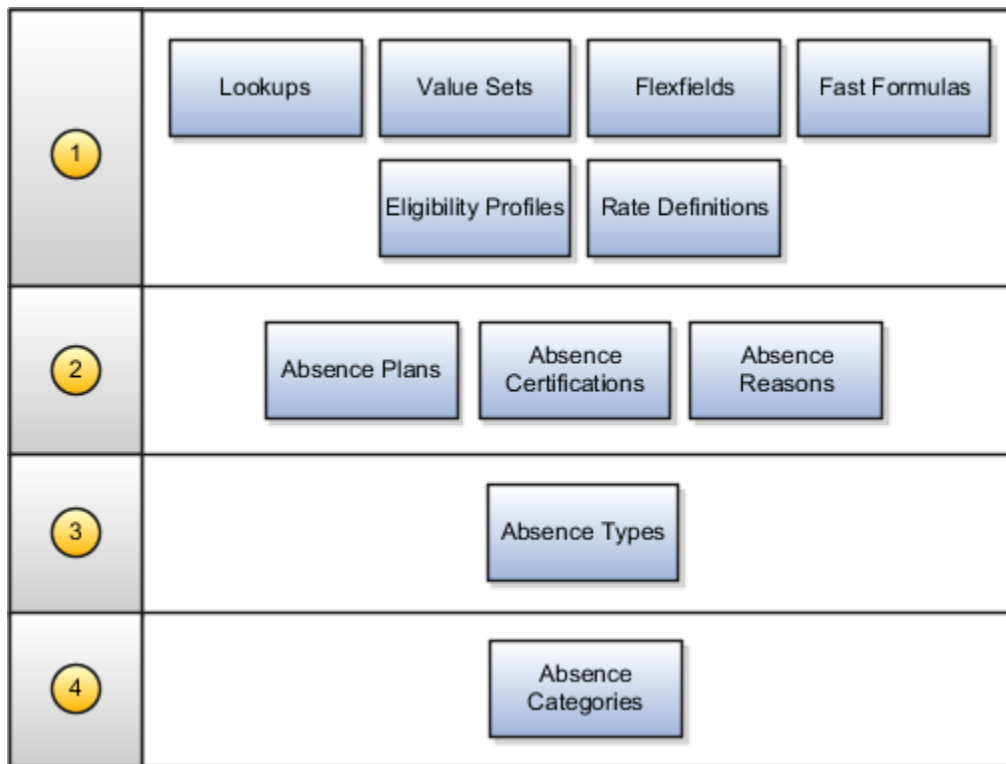
Before you begin, review the following documents available in the Absence Management functional area:

- Lists of setup tasks
- Descriptions of the functional areas and features you can select when you configure the offering
- Lists of business objects and enterprise applications associated with the offering

Setup Sequence

The following figure illustrates the sequence for setting up absence management:

1. Add new values to lookups, value sets, and flexfields based on your requirement. Write fast formulas to include rules in the absence objects in addition to the predefined ones. Create rate definitions to define payment rates for absence plans.
2. Create absence plans to define rules for time accruals and entitlements. Create certification requests that you want workers to complete to continue receiving entitlements during absence periods. Create absence reasons that you want workers to select while recording absences.
3. Create absence types, such as sickness leave or vacation, and associate each type with the relevant plans, reasons, and certifications.
4. Create absence categories, such as personal leave or medical leave, and associate them with the relevant absence types for reporting purposes.



Setup Tasks for Implementing Absence Management

Before you start implementing the Absence Management application, review the following setup tasks.

Task List	Task name	Description	Recommended Help
Define Absences	Absence Certifications	Configure, review, and update absence certifications, which are requirements that the worker must complete to continue receiving entitlements during an absence period.	Options for Absence Certification Requirements Absence Certification Requirement Types Options to Trigger Certification Requirements Options to Manage Actions For Certification Events
	Absence Reasons	Review, create, and update absence reasons, which further describe the nature of the absence type with which they are associated.	How Absence Components Work Together
	Absence Plans	Review, create, and update absence plans, which contain rules to define how absence entitlements are provided to employees.	Types of Absence Plans Options to Define Accrual Plans

Task List	Task name	Description	Recommended Help
			Options to Define Qualification Plans Options to Define Compensatory Plans Options to Define Donation Plans
	Absence Types	Review, create, and update absence types, which are used to record absences. You can configure rules to determine which fields or sections a particular worker sees based on their role. You can also define the rules of the absence. For example, you can restrict workers so that they can record absences only of a particular duration.	How Absence Components Work Together Absence Display and Processing Rules Absence Approval and Processing Rules Absence Dates and Duration Rules
	Absence Categories	Review, create, and update absence categories, which are used to group related absence types for reporting and analysis.	How Absence Components Work Together
	Leave Agreements	Review, create, and update shared parental leave agreements between an employee and partner. The shared parental leave enables workers to curtail their maternity or adoption leave in order to share it with their partner.	How You Create a Shared Parental Leave Agreement
Define Absence Formulas and Rates		Define formulas and rates for absence.	Overview of Using Formulas
Define Absence Time Periods		Define time periods for absence processing.	Options to Define Frequency of Accrual Periods
Define General Absence	Manage Global Absences Lookups	Review and edit predefined lookup values for global absences, such as absence categories and reasons, and define new values.	Overview of Lookups
	Manage Global Absences Value Sets	Manage value sets to validate the content of a flexfield segment for global absences.	How Flexfields and Value Sets Work Together
	Manage Global Absences Descriptive Flexfields	Configure validation and display properties of descriptive flexfields for global absences. Use descriptive flexfields to add attributes to entities.	Overview of Flexfields How Flexfields and Value Sets Work Together
	HCM Availability Types	Review, create, and edit availability types used to define contracted or other availability for a worker.	How You Configure and Assign Work Schedules

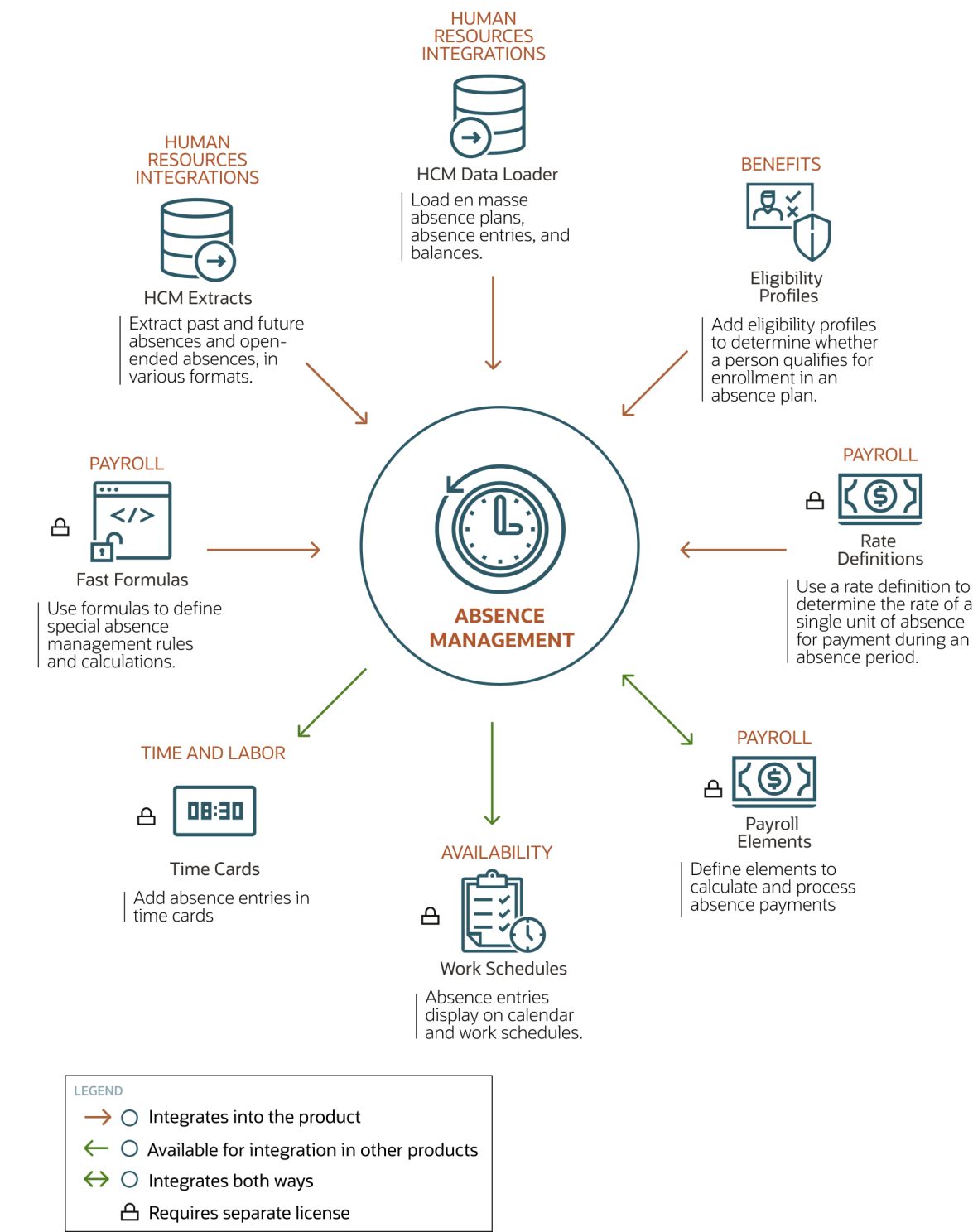
Security Reference

The tasks that people can do and the data that they can see depend on their roles, duties, and privileges. For information about these factors, see these two guides:

- [*Securing HCM*](#)
- [*Securing Reference for HCM*](#)

Absence Management Integrations

Here's a diagram that shows you which features originating from other products are used in Absence Management. The diagram also shows which Absence Management features are used elsewhere. Products that require a separate license are indicated accordingly.



Here's a table that explains the connections used in the diagram.

Feature	Description	Integration	License Required
HCM Extracts	Extract past and future absences and open-ended absences, in various formats.	Integrates out of Absence Management	No
HCM Data Loader	Load en masse absence plans, absence entries, and balances.	Integrates into Absence Management	No
Eligibility profiles	Add eligibility profiles to determine whether a person qualifies for enrollment in an absence plan.	Integrates into Absence Management	Yes
Rate definitions	Use a rate definition to determine the rate of a single unit of absence for payment during an absence period.	Integrates into Absence Management	Yes
Payroll elements	Define elements to calculate and process absence payments.	Integrates both ways	Yes
Calendar	Absence entries display on calendar and work schedules.	Integrates out of Absence Management	Yes
Time cards	Add absence entries in time cards.	Integrates out of Absence Management	Yes
Fast Formulas	Use formulas to define special absence management rules and calculations.	Integrates out of Absence Management	Yes

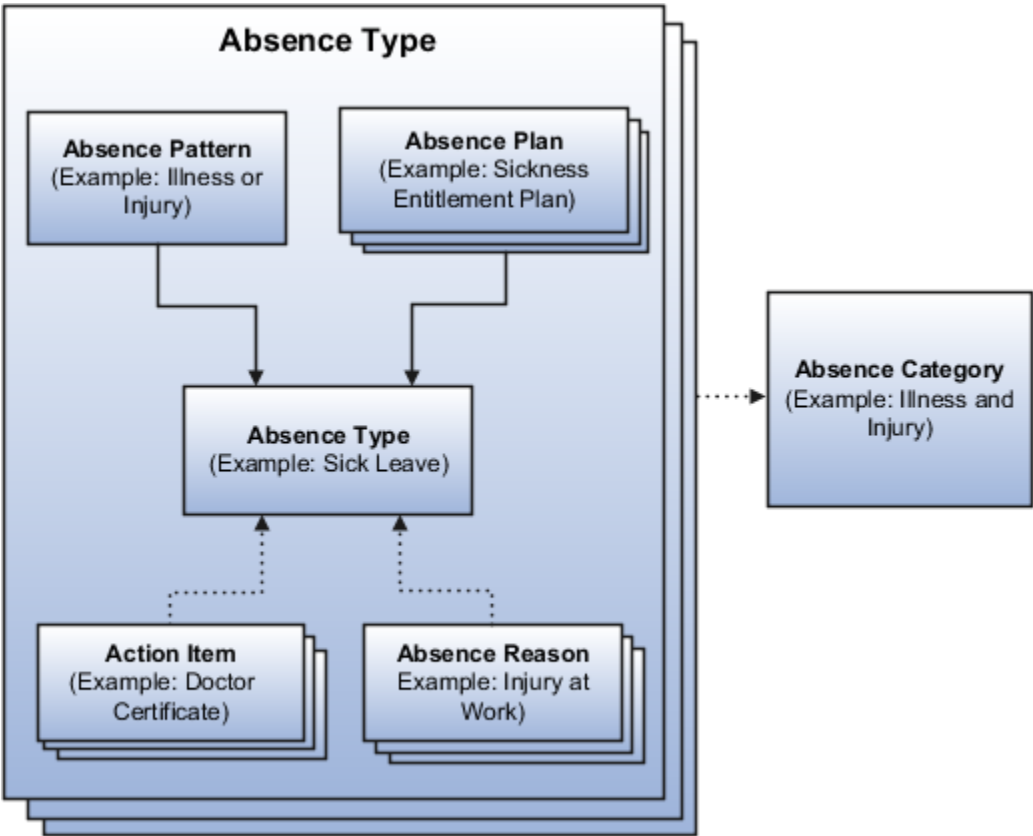
How Absence Components Work Together

Configure absence components such as types, categories, patterns, plans, reasons, and certifications to reflect the absence management policy of your enterprise.

Component	Location in the Absences Work Area
Absence types	Use the Absence Types task to create absence types.
Absence categories	Use the Absence Categories task to create absence categories and associate them with absence types.
Absence patterns	Review these settings on the Display Features tab when you create an absence type.
Absence plans	Use the Absence Plans task to create absence plans.

Component	Location in the Absences Work Area
Absence reasons	Use the Absence Reasons task to create absence reasons.
Absence certifications	Use the Absence Certifications task to set up a requirement. Then associate the requirement as an action item with an absence type so that every absence associated with the absence type is subject to that requirement.

This figure illustrates how the absence management components fit together.



Absence Type

When you create an absence type, such as sick leave, you include rules to determine when users record or manage an absence of that type. For example, you can restrict workers so that they can record absences only of a particular duration. An alert appears if the entered duration exceeds the maximum value.

Decide which fields or sections you want to show or hide for specific user roles when they record or approve a specific absence type.

Absence Category

Create absence categories to group absence types for reporting and analysis. For example, you can create an absence category called family leave and associate with it absence types, such as maternity, paternity, and child care.

Absence Pattern

An absence pattern contains a predefined set of rules that you can use as a starting point to create an absence type. When you create an absence type, you must associate it with any of the following predefined patterns:

- Illness or injury
- Childbirth or placement
- Generic absence

For example, you can select the Generic absence pattern to create an absence type to schedule vacation time using the time accrued under a vacation accrual plan.

The pattern that you select determines:

- Whether special fields appear on the absence type pages
- The options available to display and process various aspects of absence recording

For example, the Childbirth or placement pattern displays a field for selecting whether the absence type applies for childbirth or adoption placement.

Absence Plans

Create absence plans to define rules for accruing leave time and receiving payments during an absence period. You must associate at least one absence plan with an absence type.

To schedule an absence using an absence plan, the unit of measure defined in the plan must match the unit of measure defined in the associated absence type. If the unit of measure differs, you can define the conversion formula and attach it to the absence type. This formula is applicable only if the unit of measure is hours or days for the absence type.

Absence Reasons

Create absence reasons to select from when scheduling an absence. Absence reasons are independent of absence types. You can use the same reason for multiple absence types. When you create an absence type, you associate the reasons with the type.

Absence Certifications

Create certification requirements for absences that require documentation to authorize an absence. For example, in case of an absence due to illness, set up a requirement that workers must submit a doctor's certificate within a stipulated period of time. This ensures they receive full payment for the absence duration.

Related Topics

- [Create a Vacation Absence Type](#)
- [Create a Maternity Plan](#)
- [Create a Vacation Accrual Plan](#)
- [Create an Absence Certification Requirement](#)

How an Individual's Schedule Is Identified

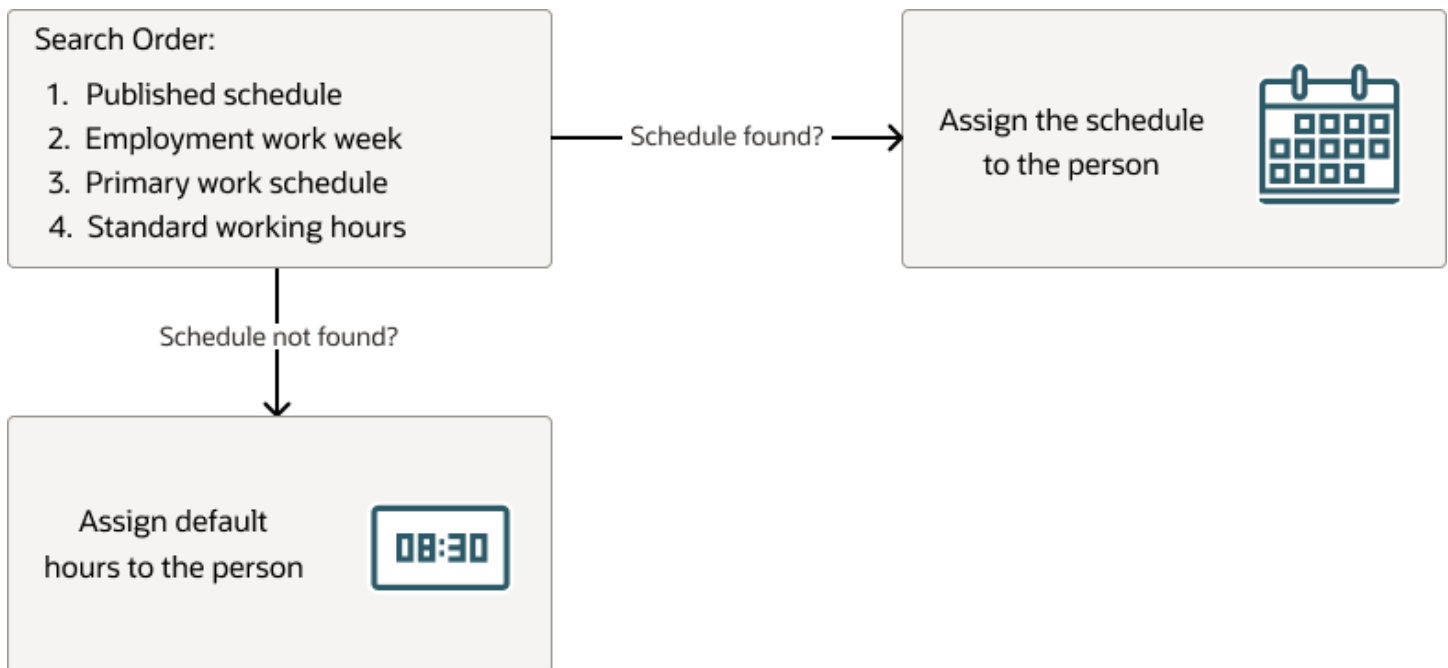
You can set up an individual's work time in different ways. So, the process that identifies a person's official schedule for a selected time period uses the individual's current schedule or work hours. It also considers applicable calendar events, work schedule resource exceptions, and absence entries.

Search Order

The process searches for someone's schedule in this order, before applying the result to the assignment:

1. Published schedule
2. Employment work week
3. Primary work schedule
4. Standard working hours

If the process doesn't find a schedule, it uses the default hours 8:30a to 5:00p.



Published Schedule (Workforce Management)

The process builds the published schedule using the employment work week, primary work schedule, or standard working hours for each person. It can also build it using published schedules from other scheduling apps. The published schedule shows applicable calendar events and absences.

Employment Work Week

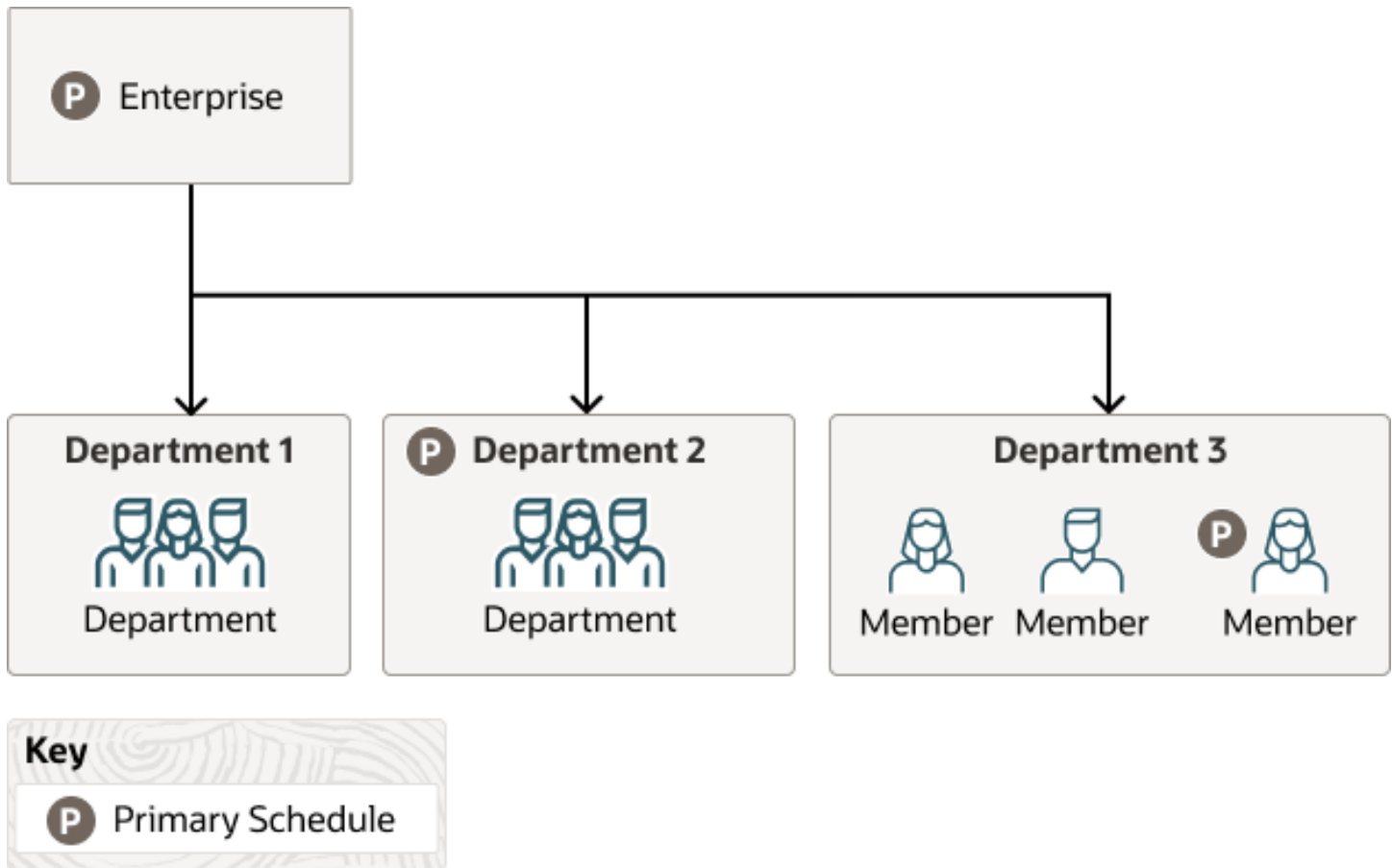
The person's employment record can include the setup for their employment work week. Schedules that the process builds from the work week also show applicable calendar events and absences.

Primary Work Schedule

The primary work schedule links to one of these levels. Schedules that the process builds from the work schedule also show assigned calendar events and resource exceptions, and applicable absences.

1. Primary assignment of the person
2. Position
3. Job
4. Department
5. Location
6. Legal Employer
7. Enterprise

The process moves through the schedule hierarchy in the specified order and stops as soon as it finds a primary schedule. This example hierarchy shows primary work schedules associated with three levels.



Departments 1 and 3 don't have primary schedules, so the primary schedule at the enterprise level applies to everyone, with one exception. A person in department 3 has a schedule for their primary assignment. That primary assignment schedule applies instead of the enterprise-level schedule. Department 2 has a primary schedule, and it applies to everyone in that department.

The calendar events and resource exceptions that exist in the primary work schedule affect everyone's schedules, regardless of level. Any absences they report during the selected time period also affect the individual's schedule.

Standard Working Hours

The person's primary assignment includes their standard working hours. Schedules built with these hours also show applicable calendar events and absences.

2 Responsive User Experience Setup

Deep Links

You can use deep links to provide easy navigation directly to a page in the HCM Cloud application.

You can also use deep links for mobile responsive pages on your intranet, custom and third-party applications, or in a document. This helps people run transactions in the HCM cloud and provides quick access to their HR information.

To access deep links:

1. Open the main menu.
2. Go to **Tools> Deep Links**.
3. Copy the URL for a deep link.
4. Paste the URL in the appropriate location.

When you open Deep Links, you find a list of all available deep links.

3 Absence Lookups, Value Sets, and Flexfields

Overview of Lookups

Lookups are lists of values in applications. You define a list of values as a lookup type comprising a set of lookup codes, each code's translated meaning, and optionally a tag.

On the UI, users see the list of translated meanings as the values available for selection. Lookups provide a means of validation and lists of values where valid values appear on a list with no duplicate values. For example, an application might store the values Y and N in a column in a table, but when displaying those values in the user interface, Yes or No (or their translated equivalents) should be available for users to select. For example, the two lookup codes Y and N are defined in the REQUIRED_INDICATOR lookup type.

Note: Don't include spaces in lookup codes. Use the underscore character (_) to separate the words if needed. For example, instead of creating the lookup code as DEV PROGRAM, create it as DEV_PROGRAM.

The following table contains an example of a lookup type for marital status (MAR_STATUS) that has lookup codes for users to specify married, single, or available legal partnerships.

Lookup Code	Meaning	Tag
M	Married	Not applicable
S	Single	Not applicable
R	Registered Partner	+NL
DP	Domestic Partner	-FR, AU

In this case, tags are used for localizing the codes. All legislations list Married and Single. Only the Dutch legislation lists Registered Partner. And all legislations except France and Australia also list Domestic Partner.

When managing lookups, you need to understand the following.

- Using lookups in applications
- Configuration levels
- Accessing lookups
- Enabling lookups
- The three kinds of lookups: standard, common, and set-enabled

Using Lookups in Applications

Use lookups to provide validation or a list of values for a user input field in a user interface.

An example of a lookup used for validation is a flexfield segment using a table-validated value set with values from a lookup type. An example of a lookup in a list of values is a profile option's available values from which users select one to set the profile option. Invoice Approval Status gives the option of including payables invoices of different approval statuses in a report. The lookup code values include All, so that users can report by all statuses: Approved, Resubmitted for approval, Pending or rejected, and Rejected.

Configuration Level

The configuration level of a lookup type determines whether the lookups in that lookup type can be edited. This applies data security to lookups.

Some lookup types are locked so no new codes and other changes can be added during implementation or later, as needed. Depending on the configuration level of a lookup type, you may be able to change the codes or their meanings. Some lookups are designated as extensible, so new lookup codes can be created during implementation, but the predefined lookup codes can't be modified. Some predefined lookup codes can be changed during implementation or later, as needed.

The configuration levels are user, extensible, and system. The following table shows the lookup management tasks permitted at each configuration level.

Permitted Task	User	Extensible	System
Deleting a lookup type	Yes	No	No
Inserting new codes	Yes	Yes	No
Updating start date, end date, and enabling the lookup code	Yes	Yes, only if the code isn't predefined data	No
Deleting codes	Yes	Yes, only if the code isn't predefined data	No
Updating tags	Yes	No	No
Updating module	Yes	No	No

Predefined data means LAST_UPDATED_BY = SEED_DATA_FROM_APPLICATION.

If a product depends on a lookup, the configuration level must be system or extensible to prevent deletion.

Once the configuration level is set for a lookup type, it can't be modified. The configuration level for newly created lookup types is by default set at the User level.

Access to the REST Resources

Users can retrieve information about lookups using the following REST resources:

- standardLookupsLOV
- commonLookupsLOV

- `setEnabledLookupsLOV`
- `genericLookupsLOV`

However, you can control whether a lookup is a part of the LOV or not. On the UI, for each lookup you can specify the **REST Access Secured** value that in turn determines whether it's included in the response or not. These values are:

- **Anonymous:** Lookup is available to a user having anonymous role or authenticated role.
- **Authenticated:** Lookup is available to a user having only the authenticated role.
- **Secure:** Lookups aren't available to users as part of generic REST Resources (Standard, Common, or Set-Enabled). To make it available, your security administrator must assign a specific function security policy for each lookup type to a role and assign that role to the selected users.

Note: The function security policy is provided only for predefined lookup types.

For all lookups, the default value is set to **Secure**. So, if you want to make the lookup available to users through any of those resources, you must change the value to **Authenticated** or **Anonymous**, depending on who needs to access that information.

Standard, Common, and Set-Enabled Lookups

The following table shows the available types of lookups.

Lookup Type	Description
Standard	Lists the available codes and translated meanings.
Set-enabled	Associates a reference data set with the lookup codes.
Common	Legacy lookups or lookups that have attributes.

Standard lookups are the simplest form of lookup types consisting only of codes and their translated meaning. They differ from common lookups only in being defined in the standard lookup view. Common lookups exist for reasons of backward compatibility and differ from standard lookups only in being defined in the common lookup view. These can also be lookups having attribute columns. Set-enabled lookup types store lookup codes that are enabled for reference data sharing. At runtime, a set-enabled lookup code is visible because the value of the determinant identifies a reference data set in which the lookup code is present.

Accessing Lookups

Standard, set-enabled, and common lookups are defined in the Standard, Set-enabled, and Common views, respectively. Applications development might define lookups in an application view to restrict the UI pages where they might appear.

In lookups management tasks, lookups might be associated with a module in the application taxonomy to provide criteria for narrowing a search or limiting the number of lookups accessed by a product specific task such as Manage Purchasing Lookups.

Enabling Lookups

A lookup type is reusable for attributes stored in multiple tables.

Enable lookups based on the following.

- Selecting an **Enabled** check box
- Specifying an enabled start date, end date, or both
- Specifying a reference data set determinant

If you make changes to a lookup, users must sign out and back in before the changes take effect. When defining a list of values for display rather than validation, limit the number of enabled lookup codes to a usable length.

To view the predefined lookups and their lookup codes, use the following tasks in the Setup and Maintenance work area:

- Manage Standard Lookups
- Manage Common Lookups
- Manage Set-Enabled Lookups

Translating Lookups

You can translate the lookups that you defined to the preferred language(s) without changing the language session of the application. Use the translation option available on the lookup code table. By default, for each lookup, all the permitted language rows in the translator dialog box appear in the source language (the current session language). When you edit a particular language entry, you can modify the translated meaning and description to the language in which you want the lookup to appear. Once the updates are made, the end-users can view the lookup in the translated text.

Note: You can add the translation for only as many languages as are permitted by the administrator. The functionality to limit the number of languages displayed on the dialog box is controlled through the Translation Editor Languages profile option. It can be set at the SITE or USER level. If nothing is specified, all active languages are displayed.

Deleting Lookup Types and Lookup Codes

You can delete lookup types and lookup codes from the lookups management tasks in the Setup and Maintenance work area. For example, you can delete lookups that are part of the Purchasing module, from the Manage Purchasing Lookups task in the Setup and Maintenance work area. Select the required lookup type to see the lookup codes associated with it. To delete a lookup code, select the required code and click the **Delete** icon. To delete a lookup type, similarly, select the required lookup type and click the **Delete** icon.

You can also use REST resources to delete lookup types and lookup codes.

- For more information about deleting a lookup type using REST resources, see the Delete a standard lookup section in the *REST API for Common Features in Oracle Fusion Cloud Applications* guide.
- For more information about deleting a lookup type, see the Delete a lookup code section in the *REST API for Common Features in Oracle Fusion Cloud Applications* guide.

Here are a few things to know about deleting lookup types and codes:

- Certain lookup types and codes can't be deleted, for example, predefined lookup types and codes can't be deleted.
- You can't delete lookup codes in bulk. Instead, you can delete an entire lookup type.

Related Topics

- [How can I access predefined lookups?](#)
- [Example of a Set-Enabled Lookup](#)
- [What's the difference between a lookup type and a value set?](#)
- [Example of a Standard Lookup](#)
- [How can I enter or edit translated text?](#)
- [Create Roles in the Security Console](#)

How Flexfields and Value Sets Work Together

Value sets are specific to your enterprise. When gathering information using flexfields, your enterprise's value sets validate the values that your users enter based on how you defined the value set.

You can assign a value set to any number of flexfield segments in the same or different flexfields. Value set usage information indicates which flexfields use the value set.

The following aspects are important in understanding how flexfields and value sets work together:

- Defining value sets
- Shared value sets
- Deployment

Defining Value Sets

As a key flexfield guideline, define value sets before configuring the flexfield, because you assign value sets to each segment as you configure a flexfield. With descriptive and extensible flexfields, you can define value sets when adding or editing a segment.

Note: Ensure that changes to a shared value set are compatible with all flexfield segments that use the value set.

Shared Value Sets

When you change a value in a shared value set, the change affects the value set for all flexfields that use that value set. The advantage of a shared value set is that a single change propagates to all usages. The drawback is that the change shared across usages may not be appropriate in every case.

Value Set Values

To configure user-defined attributes to be captured on the value set values in the *Manage Value Sets* task, configure the Value Set Values descriptive flexfield. The object's code is FND_VS_VALUES_B. This flexfield expects the context code

to correspond to the value set code. For each value set, you can define a context whose code is the value set code, and whose context-sensitive segments are shown for the values of that value set. By default, the context segment is hidden since it maps to the value set code and is not expected to be changed.

You can also define global segments that are shown for all value sets. However, this would be quite unusual since it would mean that you want to capture that attribute for all values for all value sets.

Deployment

When you deploy a flexfield, the value sets assigned to the segments of the flexfield provide users with the valid values for the attributes represented by the segments.

Related Topics

- [Overview of Flexfield Deployment](#)
- [How Flexfields Work with Oracle Application Cloud Architecture](#)
- [Validation Type Options for Value Sets](#)

Overview of Flexfields

A flexfield is a set of placeholder fields associated with business objects and placed on the application pages to contain additional data.

You can use flexfields to modify the business objects and meet enterprise data management requirements without changing the data model or performing any database programming. Using flexfields, you can capture different data on the same database table and modify the application features. For example, airline manufacturers may require specific attributes for orders that aren't predefined. Using a flexfield for the order business object, they can create and configure the required attribute.

When you first define your flexfields, you choose how many segments you want to use and what order you want them to appear in. You also choose how you want to validate each of your segments. The decisions you make affect how you define your value sets. When your user enters a value, your value sets validate that value. The value sets can be one of these types:

- List of valid values that aren't stored in any application table.
- Table-validated value sets that use a predefined list of values stored in an application table.
- Format only value sets that use any value as long as it conforms to your specified formatting rules. For example, the value must not exceed the maximum length you define for your value set.

You can assign a value set to a flexfield segment to define the valid values in that segment. While defining valid values in a segment, either reuse an existing value set or define a new value set. You can reuse a value set as often as you want across multiple flexfields or different segments within the same flexfield.

Flexfield Types

Here are the types of flexfields:

- Descriptive flexfields
- Extensible Flexfields

- Key Flexfields

Both extensible and descriptive flexfields provide an expansion space that you can use to configure additional attributes without additional programming. Descriptive flexfields are stored in additional columns on the same table as that of the object, whereas extensible flexfields are stored in a separate extension table.

Key flexfields consist of one or more segments, where each segment can have a meaning. You can use key flexfields to enter multipart values, such as a part number, a job code, or an account code. Users see the flexfields as fields or attributes on UI pages. To manage the flexfields, use any of these tasks in the Setup and Maintenance work area:

- **Manage Descriptive Flexfields:** To configure descriptive flexfield segments if you have enabled descriptive flexfields on a page.
- **Manage Extensible Flexfields:** To configure extensible flexfield segments if you have enabled extensible flexfields on a page.
- **Manage Key Flexfields:** To configure key flexfields, which is a configurable multipart key.
- **Manage Value Sets:** To create reusable value sets to validate values in flexfield segments.

Note: You can manage value sets within the **Manage Descriptive Flexfields** or **Manage Extensible Flexfields** tasks.

Related Topics

- [How can I access predefined flexfields?](#)
- [Overview of Descriptive Flexfields](#)
- [Overview of Extensible Flexfields](#)
- [Overview of Key Flexfields](#)
- [Overview of Value Sets](#)

4 Formula Creation and Error Handling for Absence Management

Overview of Using Formulas

Oracle Fast Formula is a simple way to write formulas using English words and basic mathematical functions. You can use information from your database in formulas without learning the database structure or a programming language.

Each formula usage summarized in this topic corresponds to one or more formula types, requiring specific formula inputs and outputs.

The formulas delivered in Oracle HCM Cloud contain English language names, but you can write formulas in other languages. You can provide formula names and descriptions in any language. Formula text isn't translated, but can handle non-English user-defined elements, input values, or balances. For example, if you define an element name in Chinese, the base element name is stored in Chinese. If you create a formula, it can have variable names or string values in other languages and character sets like Chinese.

Calculate Payrolls

You can write payroll calculations and skip rules for elements to represent earnings and deductions.

You can do these tasks using fast formulas:

- Control the repetition of a payroll flow.
- Control when elements are processed in a payroll run.
- Define a set of people for payroll processing, data entry, or reporting.
- Validate one or more element entry values. Provide a default value for an element entry value, or calculate entry values based on the user's entries in other entry values.
- Validate entries in user-defined tables.
- Proration formulas control how payroll runs prorate element entries when they encounter an event such as a mid-period change in an element entry value.
- Associate more than one payroll formula with each element to perform different processing for employee assignments with different statuses.
- Transformation formulas convert inbound data into a format that HCM Data Loader understands.
- Configure payment method preferences. For example, you can limit the number and types of payment methods.

Benefits Administration

You can use formulas to structure your benefit plans. Formulas provide a flexible alternative to the delivered business rules. Use formulas to configure:

- Date calculations, such as enrollment start and end dates, rate or coverage start and end dates, waiting periods and enrollment periods, or action item due dates
- Calculations of rate and coverage amount, minimum and maximum, or upper and lower limits

- Certification requirements
- Partial month and proration calculations
- Eligibility and participation evaluation

For example, you can write a formula to calculate benefits eligibility for those cases where the provided eligibility criterion doesn't accommodate your particular requirements.

Note: For more information, see Benefits Fast Formula Reference Guide (1456985.1) on My Oracle Support at <https://support.oracle.com>.

Define Configuration for Compensation

Here's what you can modify using formulas and add flexibility to existing compensation plan configuration:

- Start and end dates for compensation allocations under individual compensation plans
- Person selection, hierarchy determination, column default values, and currency selection for workforce compensation plans
- The source of items displayed in total compensation statements

Define Formulas to Create Rule Templates for Time and Labor

Use formulas with time repository rule templates to create rules. The formulas contain delivered combinations of rule parameters and output results. You can use one formula with multiple rule templates by varying the template configuration.

When creating a rule template, you select a formula name, and then configure the parameter type and display name of the parameters and variables. You don't have to redo the entire formula statement to determine what details to change to achieve a particular outcome.

Here's what you can use formulas to apply in Time and Labor:

- Logic for processing or calculating time
- Parameters that enable rules to pass values to the formula for use in calculations
- Output variables that the formula uses to return calculation results to the rules

For example, the Period Maximum Hours Template uses the WFM_PERIOD_MAXIMUM_TIME_ENTRY_RULE formula to compare reported time category hours to defined maximum hours.

Formulas for Absence Type

Use the Absence Types pages to define absence type rules. However, if you want to define other special rules to suit your requirement, you can write your own formulas.

Formulas for Absence Types

The following table lists the aspects of an absence type for which you can write a formula and identifies the formula type for each.

Rule	Description	Formula Type to Use
Conversion	Method to convert the absence duration to other units of measure. For example, your workers' work schedules are in work hours, but you want to display the duration in work days.	Global Absence Type Duration You can use the formula to convert absence duration values that are in work days or work hours only.
Validation	Rules in addition to the ones that you can define on the Absence Types pages to check the validity of the absence.	Global Absence Entry Validation

Formulas for Accrual Plans

Use the Absence Plan page to apply delivered accrual plan rules in the plan. However, if you want to define other special rules to suit your requirement, you can write your own formulas.

Formulas for Accrual Plans

The following table lists the aspects of an accrual plan for which you can write a formula and identifies the formula type for each.

Rule	Description	Formula Type to Use
Enrollment Start	Date when eligible workers are enrolled in the plan. If a worker is already enrolled in an existing accrual plan, you can't use this formula to change the enrollment start date.	Global Absence Plan Enrollment Start
Enrollment End	Date when workers are disenrolled from the plan. This formula works only if there is an eligibility profile associated with the plan.	Global Absence Plan Enrollment End
Conversion Formula	Method to override the default absence plan entry duration. Example: You might have a requirement to consider only whole working days in a vacation absence to update the accrual balance. In such cases, you define logic in a formula to convert the absence duration to a value that excludes partial days.	Global Absence Plan Duration
Anniversary Event	Method to determine the employment anniversary date on which you want the accrual plan to restart.	Global Absence Plan Period Anniversary Event Date

Rule	Description	Formula Type to Use
Accrual Event	Method to capture information about events during a calendar year that affect the accrual band of a worker. Example: An organization has a vacation plan in which enrolled workers accrue a certain number of days every year based on their grade. When the grade of a worker changes in the middle of the calendar year, the organization might want to prorate their total accrual balance. You can configure this proration rule using the global absence accrual event formula to capture the dates when such changes occur. This formula can't be attached to the plan definition at any point. When you create this formula, the formula name needs to be the same as the absence plan name. This automatically links the formula to the plan.	Global Absence Accrual Event
Accrual Vesting	A period during which workers accrue time, but can't use it.	Global Absence Vesting
Accrual Proration	Method to calculate the time workers accrue if they enroll in the middle of an accrual period.	Global Absence Proration
Ceiling	The maximum time that a worker can accrue.	Global Absence Ceiling
Ceiling Proration	Method to return a multiplying factor to prorate the defined ceiling limit.	Global Absence Ceiling Proration
Carryover	The maximum unused time that a worker can transfer to the next accrual term.	Global Absence Carryover
Carryover Proration	Method to return a multiplying factor to prorate the defined carryover amount.	Global Absence Carryover Proration
Accrual Definition	Method to determine the paid time, eligible workers accrue over the course of an accrual term.	Global Absence Accrual
Accrual Formula	Range of eligibility criteria that identify how much paid time eligible workers accrue over the course of an accrual term. The criteria may be years of service, grades, hours worked, or some other factor that you can define.	Global Absence Accrual Matrix
Partial Accrual Period	Method to determine the prorated accrual amount for workers who enroll or disenroll from a plan during the plan period.	Global Absence Partial Accrual Period Rate

Rule	Description	Formula Type to Use
Absence Payment Rate	Method to calculate payment during absence period.	Global Absence Plan Use Rate
Discretionary Disbursement Rate	Method to calculate payment when paying out part of the accrual balance.	Global Absence Plan Use Rate
Disbursement Rule	Method to determine the minimum, maximum, and increment amounts that the worker is eligible for to request a cash disbursement.	Global Absence Discretionary Disbursement Rule
Final Disbursement Rate	Method to calculate payment of accruals when plan participation ends.	Global Absence Plan Use Rate
Liability Rate	Method to calculate cost of accrual balance to determine employer liability.	Global Absence Plan Use Rate

When you schedule an absence for a worker using an accrual plan with formulas defined, the absence doesn't appear in the Absence Records section of the Manage Absences and Entitlements page. Instead, you can view the absence in the Plan Participation section. To view the absence:

1. In the Accrual Plans section, click the accrual plan to open the Accrual Plan Balance dialog box.
2. Enter the **Balance Calculation Date** to view the details of the absence. The details are displayed in the Summary and Details tabs.

Global Absence Elective Disbursement Evaluation Formula

The Global Absence Elective Disbursement Evaluation formula is used to validate elective disbursements in an accrual plan and set payment percentages for the disbursement. The formula can also be used to override the disbursement amount elected by the worker.

An organization might have a rule such that if an employee's accrual balance as of the election date is below a certain minimum threshold limit, then the disbursement should not be allowed. Whereas, if the balance is between two other threshold values, then the payment percentage should be 75%. In such cases, you can compose a Global Absence Elective Disbursement Evaluation formula and attach it to the accrual plan.

Configuration Point in HCM Cloud

If you have created this formula, you can attach this formula to the absence plan definition.

Navigation

1. In the Absence Administration work area, click **Absence Plans** to open the Absence Plans page.
2. On the Search Results section toolbar, click **Create** to open the Create Absence Plan dialog box.

3. In the Plan Type field, select **Accrual**.
4. Click **Continue**.
5. On the Edit Absence Plan page Accruals tab Plan Limits section, select a value other than **None** in the **Carryover Rule field**.
6. After defining the carryover rule as desired, select **Formula** in the **Carryover Proration** field
7. Select the defined formula from the **Carryover Proration Formula** field.

Contexts

The following contexts are available in this formula type:

Context Name	Data Type
ABSENCE_ENTRY_ID	Number
ABSENCE_TYPE_ID	Number
ACCRUAL_PLAN_ID	Number
DATE_EARNED	Date
EFFECTIVE_DATE	Date
END_DATE	Date
ENTERPRISE_ID	Number
HR_ASSIGNMENT_ID	Number
HR_RELATIONSHIP_ID	Number
HR_TERM_ID	Number
JOB_ID	Number
LEGAL_EMPLOYER_ID	Number
LEGISLATIVE_DATA_GROUP_ID	Number
ORGANIZATION_ID	Number
PAYROLL_ASSIGNMENT_ID	Number
PAYROLL_ID	Number
PAYROLL_RELATIONSHIP_ID	Number
PAYROLL_TERM_ID	Number
PERSON_ID	Number
START_DATE	Date

Input Values

Variable Name	Data Type	Description
IV_ACCRUAL	Number	Accrual value received from the accrual matrix
IV_CARRYOVER	Number	Carryover limit received from accrual matrix
IV_CEILING	Number	Ceiling limit received from the accrual matrix
IV_ACCRUALPERIODSTARTDATE	Date	Start date of accrual period
IV_ACCRUALPERIODENDDATE	Date	End date of accrual period
IV_CALENDARSTARTDATE	Date	Start date of accrual calendar year
IV_CALEDARENDDATE	Date	End date of accrual calendar year
IV_PLANENROLLMENTSTARTDATE	Date	Start date of enrollment
IV_PLANENROLLMENTENDDATE	Date	End date of enrollment
IV_BAND_CHG_DT1*	Date	If the accrual matrix band definition consists of grades or derived factors length of service or age, then this input value fetches the date on which worker has had a change in any of these factors within the period.
IV_BAND_CHG_BEFVAL1*	Number	Accrual value as per the matrix before IV_BAND_CHG_DT1
IV_BAND_CHG_AFTVAL1*	Number	Accrual value as per the matrix after IV_BAND_CHG_DT1
IV_EVENT_DATES	Date_Number	Array of dates returned by the Accrual Event formula.
IV_ACCRUAL_VALUES	Number_Number	Array of accrual values fetched from the accrual matrix as of the dates contained in the accrual event dates array.
IV_ACCRUAL_CEILING	Number	Annual accrual limit from the accrual matrix
IV_DISB_TYPE	Text	The disbursement type for current record which is being processed. Possible values: CSH / ORA_ANC_CSH_YREND / ORA_ANC_ELECT_DISB
IV_DISB_VALUE	Number	The disbursement value for current record which is being processed
IV_DISB_ELECTED_AMT	Number	Elected amount for the elective disbursement

Variable Name	Data Type	Description
IV_DISB_ELECTION_DATE	Date	Election date for the elective disbursement
IV_DISB_PROCD_DATE	Date	Exact processed date for the elective disbursement
IV_DISB_ELECT_PENDING	Text	If the elective disbursement is marked as pending or not. "Y" stands for pending, "N" stands for not pending.

Return Variables

Variable Name	Data Type	Description
paymentPercentage	Number	Payment percentage for the elective disbursement value
overrideValue	Number	Override value for elective disbursement

Sample Formula

Requirement: If the current balance of an employee is below 8 hours, then 0 hours are to be disbursed.

Solution: A Global Absence Elective Disbursement Evaluation formula such as the one below can be used.

FORMULA NAME: ANC_ELECTDISBEVAL

FORMULA TYPE: Global Absence Elective Disbursement Evaluation

DESCRIPTION: This formula validates the elective disbursement values for an accrual plan.

```

DEFAULT FOR IV_DISB_TYPE IS 'XX'
DEFAULT FOR IV_DISB_VALUE IS -1
INPUTS ARE IV_DISB_TYPE, IV_DISB_VALUE, IV_ACCRUAL_CEILING

ln_plan_balance = GET_PLAN_BALANCE('Vision Accrual Plan')

paymentPercentage = 100
overrideValue = IV_DISB_VALUE

IF (IV_DISB_TYPE = 'ORA_ANC_ELECT_DISB') THEN
(
  IF (ln_plan_balance <5) THEN
  (
    paymentPercentage = 0
    overrideValue = 0
  )
)
RETURN paymentPercentage,overrideValue

```

Formulas for Qualification Plans

Use the Absence Plan page to incorporate qualification plan rules. However, if you want to define other special rules to suit your requirement, you can write your own formulas.

Formulas for Qualification Plan Rules

The following table lists the aspects of a qualification plan for which you can write a formula and identifies the formula type for each.

Rule	Description	Formula Type to Use
Start Rule	When the rolling backward plan term starts. A rolling backward term is a specific time period that precedes the absence start date.	Global Absence Plan Roll Backward End
Qualification Date Rule	Date when eligible workers enroll in the plan.	Global Absence Plan Enrollment Start Date
Conversion Formula	Method to calculate the absence duration differently. Example: You want to consider only whole working days in a sickness absence in the entitlement calculation. In such cases, you define logic in a formula to convert the absence duration to a value that excludes partial working days.	Global Absence Plan Duration
Entitlement Definition Type	Determines payment percentages to apply during the absence period.	Global Absence Entitlement
Entitlement Formula (Qualification Details section)	A level that determines the payment that workers receive for a specific number of days during a long leave of absence based on their length of service.	Global Absence Band Entitlement
Absence Payment Rate Rule	Method to calculate payment during absence period.	Global Absence Plan Use Rate

Formulas for Donation Plans

Use the Absence Plan page to apply delivered donation plan rules in the plan. However, if you want to define other special rules to suit your requirement, you can write your own formulas.

Formulas for Donation Plans

The following table lists the aspects of a donation plan for which you can write a formula and identifies the formula type for each.

Rule	Description	Formula Type to Use
Disbursement Rule	Method to determine the minimum and maximum amount of leave balance that a worker can request as a cash disbursement from their donation plan. Also, an increment, which limits the disbursement amount to specific values between the minimum and maximum amount from a donation plan.	Global Absence Discretionary Disbursement Rule
Donation Rule	Method to determine the minimum and maximum amount of leave balance that a worker can donate from their accrual plan. Also, an increment, which limits the donation amount to specific values between the minimum and maximum amount.	Global Absence Discretionary Donation Rule

Example of Writing a Fast Formula Using Formula Text

In this example, you use the text editor to create a fast formula.

Here are the key decisions when deciding on which formula to create:

Key Decisions	In This Example
Is the formula for a specific legislative data group?	No, this is a global formula that can be used by any legislative data group.
Are there any contexts used in this formula?	No
Are there any database item defaults?	Yes, PER_ASG_JOB_NAME
Are there any input value defaults?	No
What are the return values?	MIN_HOURS, MAX_HOURS, FREQUENCY

Creating a Fast Formula Using the Text Editor to Determine a Manager's Scheduled Hours

1. Search for and select **Fast Formulas** in **My Client Groups**.
2. Click **Create**.
3. Complete these fields:

Fields for the Fast Formula	Values for the Fast Formula
Formula Name	Manager Range of Scheduled Hours
Formula Type	Range of Scheduled Hours
Description	Manager's Range of Hours
Effective Start Date	1-Jan-2010

4. Click **Continue**.
5. Enter these formula details in the Formula Text section:

```
/* DATABASE ITEM DEFAULTS BEGIN */
DEFAULT FOR per_asg_job_name IS ' '
/* DATABASE ITEM DEFAULTS END */
JOB_1 = PER_ASG_JOB_NAME
IF JOB_1 = 'Manager' then
  (MIN_HOURS = 25
  MAX_HOURS = 40
  FREQUENCY = 'H')
else
  (MIN_HOURS = 20
  MAX_HOURS = 35
  FREQUENCY = 'H')
return MIN_HOURS, MAX_HOURS, FREQUENCY
```

6. Click **Compile**.
7. Click **Save**.

Formula Compilation Errors

Compilation errors are displayed in the Fast Formulas page after you compile the formula. The compiler stops the compilation process when it encounters an error. Error messages display the line number and the type of error.

Common Compilation Errors

Here's some of the common formula compilation errors.

Formula Compilation Error	Description
Syntax Error	The formula text violates the grammatical rules for the formula language. For example, if you use IF1 instead of IF in an IF statement.
Incorrect Statement Order	ALIAS , DEFAULT , or INPUT statements come after other statements.
Misuse of ASSIGNMENT Statement	Occurs when any of these conditions exist: - An ASSIGNMENT assigns a value to a database item. - A context is assigned a value externally to a CHANGE_CONTEXTS statement. - The formula assigns a value to a non-context variable within a CHANGE_CONTEXTS statement. You can use CHANGE_CONTEXTS statements in a formula.
Misuse of ALIAS Statement	You can use an ALIAS statement only for a database item.
Missing DEFAULT Statement	A database item that specifies a default value must have a DEFAULT statement.
Misuse of DEFAULT Statement	You specify a DEFAULT statement for a variable other than as an input or a database item.
Uninitialized Variable	The compiler detects that a variable is uninitialized when used. The compiler can't do this in all cases. This error often occurs when the formula includes a database item that requires contexts that the formula type doesn't support. The formula treats the database item as a local variable. For example, balance database items require the PAYROLL_REL_ACTION_ID , PAYROLL_ASSIGNMENT_ID and CALC_BREAKDOWN_ID contexts. Typically, you use these statements in formulas of type Oracle Payroll.
Missing Function Call	The compiler doesn't recognize a function call. The combination of return type, function name, and parameter types doesn't match any available function.
Incorrect Operator Usage	An instance of a formula operator use doesn't match the permitted uses of that operator. For example, the + operator has two permitted uses. The operands are both of data type NUMBER , or both of data type TEXT .
Inconsistent Data Type Usage	The formula uses a formula variable of more than one data type. Or the formula uses a database item or context with the wrong data type. For example, Variable A is assigned a NUMBER value at the start of the formula, but is assigned a TEXT value later in the formula.
EXIT Statement Not Within WHILE Loop	A condition that eventually becomes false or an EXIT call for exiting the loop doesn't exist.
Misuse of Context	The formula uses a variable as a context, or a context as a variable. For example, a formula assigns a value to AREA1 as an ordinary variable, but later uses AREA1 as a context in a GET_CONTEXT call.

Formula Execution Errors

Fast formula execution errors occur when a problem arises while a formula is running. Typically, data-related issues cause these errors either in the formula or in the application database.

Formula Execution Errors

Here's some of the formula execution errors.

Formula Execution Error	Description
Uninitialized Variable	When the formula compiler can't fully determine if a variable or context is initialized, it generates a code to test if the variable is initialized. When the formula runs, the code displays an error if the variable or context isn't initialized.
Divide by Zero	Raised when a numeric value is divided by zero.
No Data Found	Raised when a non-array type database item unexpectedly fails to return any data. If the database item can't return data, then it should provide a default value. You can specify a default value using a DEFAULT statement. An error in formula function code can also cause this error message.
Too Many Rows	Raised when a non-array type database item unexpectedly returns more than a single row of data. The cause is an incorrect assumption made about how the data is being accessed. An error in the formula function code can also cause this error message.
NULL Data Found	Raised when a database item unexpectedly returns a NULL data value. If the database item can return a NULL value, then it provides a default value. Note: Some database items can't return a NULL value. If the database items can return a NULL value, then you can provide a default value for that database item.
Value Exceeded Allowable Range	Raised for a number of reasons, such as exceeding the maximum allowable length of a string.
Invalid Number	Raised when a formula attempts to convert a nonnumeric string to a number.
User Defined Function Error	Raised from within a formula function. The error message text is provided as part of the formula error message.
External Function Call Error	A formula function returns an error, but doesn't provide any additional information to the formula code. The function may have sent error information to the logging destination for the executing code.

Formula Execution Error	Description
Function Returned NULL Value	A formula function returns a NULL value.
Too Many Iterations	A single WHILE loop, or a combination of WHILE loops has exceeded the maximum number of permitted iterations. This error is raised to terminate loops that can never end, which indicates a programming error within the formula.
Array Data Value Not Set	The formula tries to access an array index that has no data value. This error occurs in the formula code.
Invalid Type Parameter for WSA_EXISTS	You specify an invalid data type in the WSA_EXISTS call.
Incorrect Data Type For Stored Item	When retrieving an item using WSA_GET , the actual data type doesn't match that of the stored item. This error occurs within the calling formula.
Called Formula Not Found	The called formula isn't found when attempting to call a formula from a formula. This error may occur due to an issue in the calling formula, or because of installation issues.
Recursive Formula Call	An attempt was made to call a formula from itself. The call could be made directly or indirectly from another called formula. Calling a formula in a recursive manner isn't permitted.
Input Data Has Different Types in Called and Calling Formulas	When calling a formula from a formula, the input data type within the called formula doesn't match the data type specified in the calling formula.
Output Has Different Types In Called and Calling Formulas	When calling a formula from a formula, the output data type within the called formula doesn't match the data type specified in the calling formula.
Too Many Formula Calls	When a formula calls another formula in its text, resulting in a hierarchy. The maximum depth of the hierarchy is 10.

FAQs

When do I run the Compile Formula process?

When you create or update multiple fast formulas simultaneously, run the Compile Formula process on the Submit a Process or Report page.

What's the difference between a formula compilation error and an execution error?

Compilation errors occur on the Fast Formulas page when you compile the formula. An error message explains the nature of the error.

Common compilation errors are syntax errors resulting from typing mistakes. You can view error messages on the dashboard or go to the messages tab directly after the process is run.

Execution errors occur when a problem arises while a formula is running. Typically, data-related issues either in the formula or in the application database cause these errors.

5 Eligibility Profiles for Absence Plans

How You Configure Eligibility for an Absence Plan

Use an eligibility profile to determine whether a person qualifies for enrollment in an absence plan.

Eligibility profiles that you associate with absence plans can determine the following:

- Who can enroll in absence plans
- Who can schedule absences

Using Eligibility Profiles with Absence Plans

To associate an eligibility profile with an absence plan:

1. Create the eligibility profile using the Eligibility Profiles task in the Absences work area.
2. Associate the eligibility profile with the absence plan using the Absence Plans task.

Example: To enable only female employees to record maternity leave, create an eligibility profile using the Manage Eligibility Profiles task. Then, when you create a maternity qualification absence plan, select the eligibility profile you created from the Eligibility section on the Participation tab.

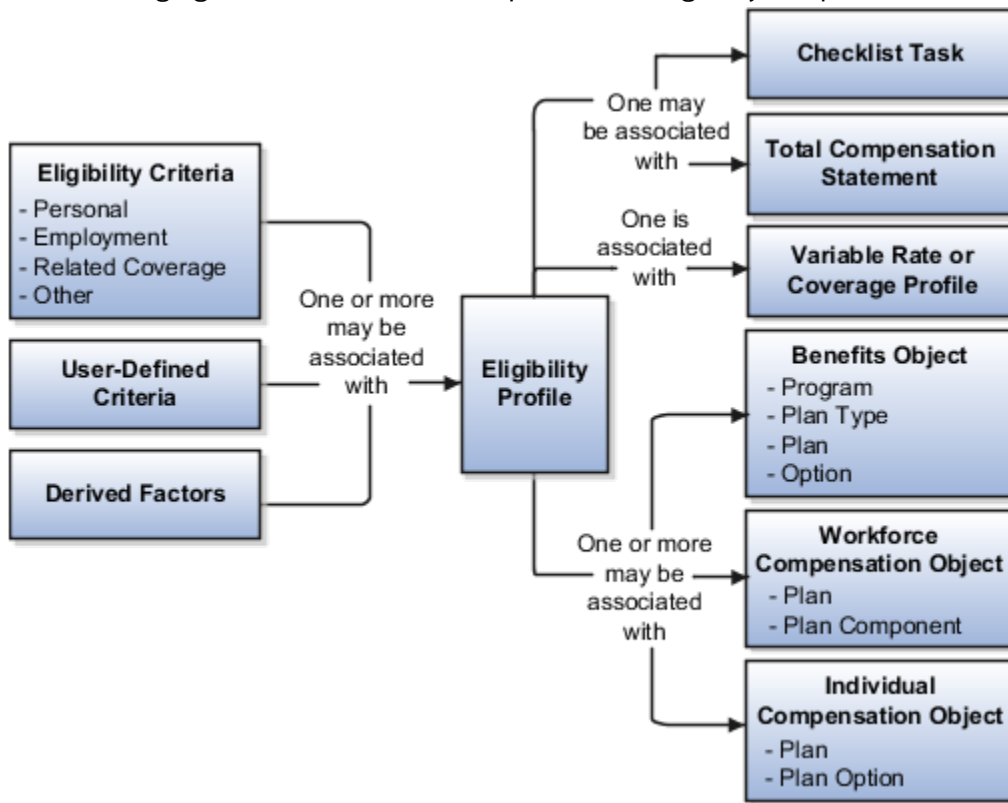
Related Topics

- [Create a Maternity Plan](#)

How Eligibility Works With Other Objects

You add eligibility criteria to an eligibility profile, and then associate the profile with an object that restricts eligibility.

The following figure shows the relationships between eligibility components.



Eligibility Criteria

You can add different types of eligibility criteria to an eligibility profile. For many common criteria, such as gender or employment status, you can select from a list of predefined criteria values. However, you must create user-defined criteria and derived factors before you can add them to an eligibility profile.

Eligibility Profile

When you add an eligibility criterion to a profile, you define how to use it to determine eligibility. For example, when you add gender as a criterion, you must specify a gender value (male or female) and whether to include or exclude persons who match that value.

Associating the Profile with Objects

This table describes associating eligibility profiles with different kinds of objects and whether you can attach more than one profile.

Object that Uses an Eligibility Profile	Purpose	Whether You Can Attach More Than One Profile?
Variable rate or variable coverage profile	Establish the criteria required to qualify for that rate or coverage	No
Checklist task	Control whether that task appears in an allocated checklist	No

Object that Uses an Eligibility Profile	Purpose	Whether You Can Attach More Than One Profile?
Total compensation statement	Apply additional eligibility criteria after statement generation population parameters	No
Benefits object	Establish the eligibility criteria for specific programs, plans, and options	Yes
Compensation object	Establish the eligibility for specific plans and options	Yes
Performance documents	Establish the eligibility for performance documents	Yes
Check-in templates	Establish the eligibility to use check-in templates for creating check-in documents	Yes
Goal plans or goal mass assignments	Establish eligibility for the goal	Yes
Absence plan	Determine the workers who are eligible to record an absence that belongs to that plan	Yes

Related Topics

- [Derived Factors](#)
- [Eligibility Profiles](#)
- [User-Defined Criteria](#)

Derived Factors

Derived factors define how to calculate certain eligibility criteria that change over time, such as a person's age or length of service. You add derived factors to eligibility profiles and then associate the profiles with objects that restrict eligibility.

Derived Factor Types

Using the **Manage Derived Factors** task, you can create six different types of derived factors:

- Age
- Length of service
- A combination of age and length of service
- Compensation

- Hours worked
- Full-time equivalent

Determination Rules and Other Settings

For each factor that you create, you specify one or more rules about how eligibility is determined. The following table provides example settings for two factors.

Factor	Example Settings
Age derived	Select a determination rule to specify the day on which to evaluate the person's calculated age for eligibility. Example: If the determination rule is set to the first of the year, then the person's age as of the first of the year is used to determine eligibility.
Full-time equivalent	Specify the minimum and maximum full-time equivalent percentage and whether to use the primary assignment or the sum of all assignments when evaluating eligibility. Example: If 90 to 100 percent is the percentage range for the sum of all assignments, then a person who works 50 percent full-time on two different assignments is considered eligible.

For derived factors pertaining to time and monetary amounts, you can also set the following rules:

- Unit of measure
- Rounding rule
- Minimum and maximum time or amount

Related Topics

- [Examples of Derived Factors](#)
- [Eligibility Profiles](#)

Examples of Derived Factors

The scenarios described here illustrate how to define different types of derived factors.

Age

Benefits administrators frequently use age factors to determine:

- Dependent eligibility
- Life insurance rates

Age factors typically define a range of ages, referred to as age bands, and rules for evaluating the person's age. The following table illustrates a set of age bands that could be used to determine eligibility for life insurance rates that vary based on age.

Derived Factor Name	Greater Than or Equal To Age Value	Less Than Age Value
Age Under 25	1	25
Age 25 to 34	25	35
Age 35 to 44	35	45
Age 45 to 54	45	55
Age 55 to 64	55	65
Age 64 or Older	65	75

The determination rule and other settings for each age band can use the same values, as shown in the following table:

Field	Value
Determination Rule	First of calendar year
Age to Use	Person's
Units	Year
Rounding	None

Length of Service

You use the length of service derived factor to determine eligibility based on an employee's length of service. For example, you can create a derived factor to determine if an employee has completed 10 years of service. You can specify the start date of the length of service period using any rule in the Period Start Date Rule list:

- Adjusted service date
- Date of hire
- Original hire date
- Seniority date

If you select Seniority Date, you use the Seniority Date list to select the specific configuration rule, such as the grade seniority date, to determine the date. If you have other special requirements to calculate the length of service, you can use a formula. You indicate the end of the length of service period by using a determination rule, such as end of month, first of month, as of event date, or end of pay period. The following table shows an example of a set of length-of-service bands.

A derived factor for length of service defines a range of values and rules for calculating an employee's length of service. The following table shows an example of a set of length-of-service bands. You can use the length-of-service bands to determine eligibility for compensation objects such as bonuses or severance pay.

Derived Factor Name	Greater Than or Equal To Length of Service Value	Less Than Length of Service Value
Service Less Than 1	0	1
Service 1 to 4	1	5
Service 5 to 9	5	10
Service 10 to 14	10	15
Service 15 to 19	15	20
Service 20 to 24	20	25
Service 25 to 29	25	30
Service 30 Plus	30	999

The determination rule and other settings for each length-of-service band are the same:

Field	Value
Period Start Date Rule	Date of hire This sets the beginning of the period being measured.
Determination Rule	End of year This sets the end of the period being measured.
Age to Use	Person's
Units	Year
Rounding	None

Compensation

A derived factor for compensation defines a range of values and rules for calculating an employee's compensation amount. The following table shows an example of a set of compensation bands. You can use the compensation bands to determine eligibility for compensation objects such as bonuses or stock options.

Derived Factor Name	Greater Than or Equal To Compensation Value	Less Than Compensation Value
Less than 20000	0	20,000
Salary 20 to 34000	20,000	35,000
Salary 35 to 49000	35,000	50,000
Salary 50 to 75000	50,000	75,000
Salary 75 to 99000	75,000	100,000
Salary 100 to 200000	100,000	200,000
Salary 200000 Plus	200,000	999,999,999

The determination rule and other settings for each compensation band are the same:

Field	Value
Determination Rule	First of year
Unit of Measure	US Dollar
Source	Stated compensation
Rounding	Rounds to nearest hundred

Related Topics

- [Eligibility Profiles](#)
- [Derived Factors](#)

Example of Using Range of Scheduled Hours

This example illustrates how to define eligibility criteria based on the number of hours a worker is scheduled to work within a specified period.

Weekly and Monthly Ranges

You want to limit eligibility for a benefits offering to workers who were scheduled to work either of the following ranges. Both ranges are as of the end of the previous quarter:

- Between 30 and 40 hours each week
- Between 130 and 160 hours each month

To do this, add two different ranges on the Range of Scheduled Hours subtab under the Employment tab of the create or edit eligibility profile pages. Set the values for the weekly range as shown in the following table:

Field	Value
Sequence	1
Minimum Hours	30
Maximum Hours	40
Scheduled Enrollment Periods	Weekly
Determination Rule	End of previous quarter

Set the values for the monthly range as shown in this table:

Field	Value
Sequence	2
Minimum Hours	130
Maximum Hours	160
Scheduled Enrollment Periods	Monthly
Determination Rule	End of previous quarter

Related Topics

- [Eligibility Profiles](#)
- [Create a Participant Eligibility Profile](#)

Eligibility Profiles

Create eligibility profiles to define criteria that determine whether a person qualifies for objects that you associate the profile with. You can associate eligibility profiles with objects in a variety of business processes.

The following are key aspects of working with eligibility profiles:

- Planning and prerequisites
- Specifying the profile type, usage, and assignment usage
- Defining eligibility criteria
- Excluding from eligibility
- Assigning sequence numbers
- Adding multiple criteria
- Viewing the criteria hierarchy

Planning and Prerequisites

Before you create an eligibility profile, consider the following:

- If an eligibility profile uses any of the following to establish eligibility, you must create them before you create the eligibility profile:
 - Derived factors
 - User-defined formulas
 - User-defined criteria
- Consider whether to combine criteria into one profile or create separate profiles depending on:
 - Whether the object for which you're creating eligibility accepts only one eligibility profile or more than one
 - Performance considerations
- Use names that identify the criteria being defined rather than the object with which the profile is associated, because eligibility profiles are reusable.

Example: Use Age20-25+NonSmoker rather than Supplemental Life-Minimum Rate.

Specifying Profile Type, Usage, and Assignment Usage

This table describes the basic profile attributes that you specify when you create an eligibility profile:

Setting	Description
Profile Type	Use only dependent profiles for Benefits plans or plan types when determining eligibility of participants' spouses, family members, or other individuals who qualify as dependents. All other profiles are participant profiles.
Usage	Determines the type of objects the participant profile can be associated with, such as benefits offerings and rates, compensation plans, checklist tasks, goal plans or mass goal assignments, or performance documents. Selecting Global makes the profile available to multiple business process usages.
Assignment to Use	Determines the assignment that the eligibility process evaluates for the person • Select Specific assignment when the usage is Compensation or Performance. • Select a value that includes benefit relationship when the usage is Benefits. You select this value to restrict eligibility evaluation to active assignments that are associated with the benefits relationship of the person on a given date. If you select other values, then you might need to include eligibility criteria to exclude inactive assignments. • Select one of the following values for all other usages, such as total compensation statements: ○ Any assignment - enterprise ○ Employee assignment only - enterprise ○ Primary employee assignment only - enterprise

Defining Eligibility Criteria

Here's the list of eligibility criteria that you can use to configure benefit offerings:

Category	Description
Personal	• Gender • Person Type • Disabled • Uses Tobacco • Service Areas • Home Location • Postal Code Ranges • Leave of Absence • Termination Reason • Qualification • Competency • Marital Status • Religion

Category	Description
Employment	• Assignment Status • Hourly or Salaried • Assignment Category • Grade • Job • Position • Payroll • Salary Basis • Department • Legal Entities • Performance Rating • Quartile in Range • Work Location • Range of Scheduled Hours • People Manager • Job Function • Job Family • Hire Date • Probation Period • Business Unit
Derived factors	• Age • Length of Service • Compensation • Hours Worked • Full-Time Equivalent • Combined Age and Length of Service • Benefit Groups • Health Coverage Selected • Participation in Another Plan • Formula • User-Defined Criteria
Other	• Benefit Groups • Health Coverage Selected • Participation in Another Plan • Formula • User-Defined Criteria
Related coverage	• Covered by Another Plan

Category	Description
	• Covered by Another Plan in Program • Covered by Another Plan Type in Program • Covered by Another Program • Dependent Eligible for Another Plan Type in Program • Eligible for Another Plan • Eligible for Another Plan Type in Program • Enrolled in Another Option in Plan • Enrolled in Another Plan • Enrolled in Another Plan in Program • Enrolled in Another Plan Type in Program • Enrolled in Another Program • Other Coverage
Labor Relations	• Bargaining Unit • Labor Union Member • Union • Collective Agreement

Some criteria, such as gender, provide a fixed set of choices. The choices for other criteria, such as person type, are based on values defined in tables. You can define multiple criteria for a given criteria type.

Excluding from Eligibility

For each eligibility criterion that you add to a profile, you can indicate whether persons who meet the criterion are considered eligible or are excluded from eligibility. For example, an age factor can include persons between 20 and 25 years old or exclude persons over 65.

If you:

- Exclude certain age bands, then all age bands not explicitly excluded are automatically included.
- Include certain age bands, then all age bands not explicitly included are automatically excluded.

Assigning Sequence Numbers

You must assign a sequence number to each criterion. The sequence determines the order in which the criterion is evaluated relative to other criteria of the same type.

Adding Multiple Criteria

If you define multiple values for the same criteria type, such as two postal code ranges, a person must satisfy at least one of the criteria to be considered eligible. For example, a person who resides in either postal range is eligible.

If you include multiple criteria of different types, such as gender and age, a person must meet at least one criterion defined for each criteria type.

Viewing the Criteria Hierarchy

Select the View Hierarchy tab to see a list of all criteria that you have saved for this profile. The list is arranged by criteria type.

Related Topics

- [Examples of Eligibility Profiles](#)
- [Derived Factors](#)
- [Single or Multiple Eligibility Profiles](#)
- [Create a Participant Eligibility Profile](#)
- [User-Defined Criteria](#)

Examples of Eligibility Profiles

The following examples show how to use eligibility profiles to determine which workers are eligible for a plan, compensation object, and checklist task.

In each case, you:

1. Create the eligibility profile using the Manage Eligibility Profiles task, which is available in several work areas, including the Setup and Maintenance work area and the Plan Configuration work area.
2. Associate the eligibility profile with the relevant object, such as a benefit plan.

Savings Plan Eligibility

A savings plan, such as a 401k plan, is restricted to full-time employees under 65 years of age. Create an eligibility profile to associate with your plan.

The following table provides the values for the eligibility profile definition.

Field	Value
Profile Usage	Benefits
Profile Type	Participant

Criteria Type	Name	Values	Select Exclude Check Box
Employment	Assignment Category	Full-Time	No
Derived Factor	Age	Select an age derived factor for the age band of 65 and older	Yes

Bonus Eligibility

You offer a bonus to all employees who received the highest possible performance rating in all rating categories. Create an eligibility profile to associate with your Bonus compensation object.

The following table provides the values for the eligibility profile definition.

Field	Value
Profile Usage	Compensation, or Global
Profile Type	Participant
Assignment to Use	Specific Assignment

The following table provides the values for the eligibility criteria for each rating category.

Criteria Type	Name	Values	Select Exclude Check Box
Employment	Performance Rating	Select the performance template and rating name, and then select the highest rating value	No

Checklist Task Eligibility

A new hire checklist contains tasks that don't apply to employees who work in India. Create an eligibility profile to associate with each checklist task that doesn't apply to workers in India.

The following table provides the values for the eligibility profile definition.

Field	Value
Profile Usage	Checklist
Profile Type	Participant

The following table provides the values for the eligibility criteria.

Criteria Type	Name	Values	Select Exclude Check Box
Employment	Work Location	India	Yes

Related Topics

- [Eligibility Profiles](#)
- [Derived Factors](#)
- [How can I restrict benefits enrollment opportunities based on provider location?](#)
- [How to Configure Grandfathered Benefits](#)

Single or Multiple Eligibility Profiles

You can define multiple criteria in an eligibility profile or create separate profiles for individual criterion.

To determine the best approach, consider the following:

- Does the object for which you are defining eligibility allow multiple eligibility profiles?
- What is the best approach in terms of efficiency and performance?
- Are your criteria both inclusive and exclusive?

Allowable Number of Eligibility Profiles

If an object permits only one eligibility profile, you must include all criteria in a single profile.

The following table shows which objects permit only one profile and which permit more.

Only One Profile	One or More Profiles
• Checklist tasks • Variable rate profiles • Variable coverage profiles • Total compensation statements • Absence types	• Benefits offerings • Individual and workforce compensation plans • Performance documents • Check-in templates • Goal plans or mass goal assignments • Absence plans

Efficiency and Performance in the Benefits Hierarchy

For optimum performance and efficiency, attach profiles at the highest possible level in the benefits object hierarchy and avoid duplicating criteria at lower levels. For example, to be eligible for a plan type, a person must satisfy eligibility profiles defined at the program and plan type in program levels.

The following objects inherit the eligibility criteria associated with the program:

- Plan types in program
- Plans in program
- Plans
- Options in plans that are in programs

However, it's sometimes more efficient to create more than one profile and attach the profiles at various levels in the hierarchy. The following table illustrates applying successively restrictive exclusion criteria at different levels in the hierarchy:

Level	Eligibility Profile Criteria
Program	Exclude employees who do not have an active assignment.
Plan type in program	Exclude employees who do not have a full-time assignment.
Plan	Exclude employees whose primary address is not within a defined service area.

Using Both Inclusive and Exclusive Criteria

Eligibility criteria can be used to include or exclude persons from eligibility. Sequencing of criteria is more complicated when you mix included and excluded criteria in the same profile. For ease of implementation, keep excluded criteria in a separate eligibility profile.

Related Topics

- [How Eligibility Works With Other Objects](#)
- [What happens if I include multiple criteria in an eligibility profile?](#)
- [Best Practices for Setting Up Eligibility in a Benefits Hierarchy](#)

Create a Participant Eligibility Profile

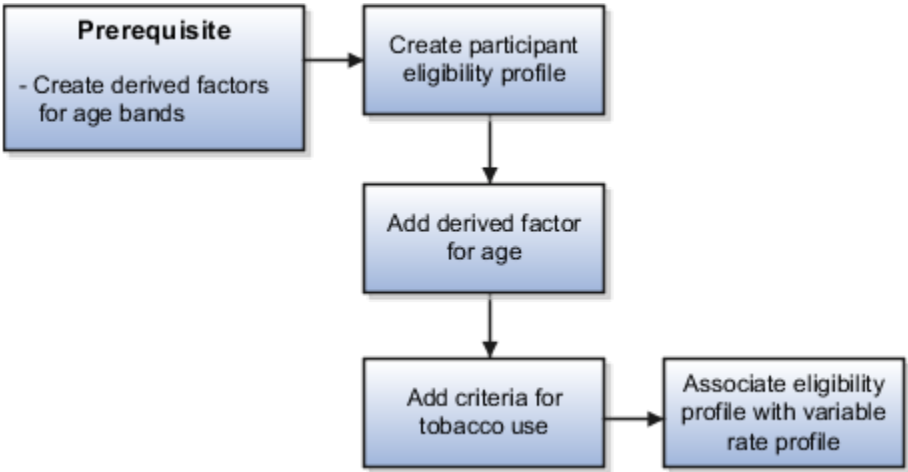
This example demonstrates how to create a participant eligibility profile used to determine eligibility for variable life insurance rates. Use the Plan Configuration work area to complete these tasks.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In this Example
What is the profile type?	Participant
What type of object is associated with this profile?	Variable rate for benefits offering
What types of eligibility criteria are defined in this profile?	Age derived factor (must have been previously defined) Uses Tobacco criteria
Should persons meeting these criteria be included or excluded from eligibility?	Included

Decisions to Consider	In this Example

The following figure shows the tasks to complete in this example:



In this example, you create one eligibility profile that defines the requirements for a single variable rate.

- Typically, you create a set of eligibility profiles, one for each variable rate.
- Create a separate profile for each additional rate by repeating the steps in this example, varying the age and tobacco use criteria.

Prerequisites

1. Create an age derived factor for ages less than 30.

Creating the Eligibility Profile

Use default values for fields unless the steps specify other values.

1. In the Tasks panel drawer, click **Manage Eligibility Profiles** to open the Manage Eligibility Profiles page.
2. On the Create menu, select **Create Participant Profile**.
3. In the Eligibility Profile Definition section, complete the fields as shown in this table.

Field	Value
Name	Age Under 30+ Non-Smoking
Profile Usage	Benefits
Status	Active
Assignment to Use	Any assignment - benefit relationship

Adding the Derived Factor for Age

Use default values for fields unless the steps specify other values.

1. In the Eligibility Criteria section, select the **Derived Factors** tab.
2. On the Age tab, click **Create**.
3. Complete the fields as shown in this table.

Field	Value
Sequence	1
Age	Select the derived factor that you previously defined for ages under 30
Exclude	Make sure that it's not selected

Adding the Criteria for Tobacco Use

Use default values for fields unless the steps specify other values.

1. Select the **Personal** tab.
2. On the Uses Tobacco tab, click **Create**.
3. Complete the fields as shown in this table.

Field	Value
Sequence	1
Tobacco Use	None
Exclude	Make sure that it's not selected

4. Click **Save and Close**.

Associating the Eligibility Profile with a Variable Rate Profile

Use default values for fields unless the steps specify other values.

1. In the Tasks panel drawer, click **Manage Benefits Rates** to open the Manage Benefits Rates page.
2. Select the **Variable Rates** tab.
3. Click **Create**.
4. In the **Eligibility Profile** field, select the eligibility profile you just created.
5. Complete other fields as appropriate for the rate.
6. Click **Save and Close**.

Related Topics

- [Examples of Eligibility Profiles](#)
- [Derived Factors](#)
- [Create a Benefit Variable Rate](#)

FAQs

What happens if I include multiple criteria in an eligibility profile?

If you define multiple values for the same criteria type, such as two postal code ranges, a person must satisfy at least one of the criteria to be considered eligible. For example, a person who resides in either postal range is eligible.

If you include multiple criteria of different types, such as gender and age, a person must meet at least one criterion defined for each criteria type.

6 Rate Definitions for Absence Payments

Rate Definitions for Absence Payments

Use a rate definition to determine the rate of a single unit of absence for payment during an absence period. However, you calculate and resolve the rates only in Oracle Fusion Global Payroll or a third-party payroll application.

This topic covers the following aspects:

- Using rate definitions with absence plans
- Types of absence payments that support rate definitions

Using Rate Definitions with Absence Plans

To associate a rate definition with an absence plan:

1. Create the rate definition using the Manage Rate Definitions task in the Absences work area.
2. Optionally, associate the rate definition with the absence plan on the Entries and Balances tab of the Manage Absence Plans task.

Example: If you want to calculate payments of each time unit when you disburse an accrual balance, you create a rate definition using the Manage Rate Definitions task. Then, when you create an absence plan, you select the rate definition that you created from the Disbursement Rate Rule list on the Entries and Balances tab.

The rate fields are optional in Absences even when you select the **Transfer absence payment information for payroll processing** check box. You can define the rates on the payroll side.

Types of Absence Payments that Support Rate Definitions

The following table describes the types of absence payments for which you can associate a rate definition:

Rates	Description
Absence Payment Rate Rule	Calculates payment during an accrual and qualification absence period. For a qualification absence plan, you can select this rate definition to calculate payment for a qualification absence period. When you create a qualification plan, remember that you define qualification bands to specify the percentage of payment during an absence period. Example: You want to award the worker 75 percent pay up to the first 90 days of the absence. You use a rate definition to define the calculation method to translate that percentage into an actual payment value.
Final Balance Payment Rate Rule	Calculates payment of accruals when plan participation ends. Example: If the worker is terminated or loses eligibility for the absence plan, you might want to use a rate definition to calculate the final accrual balance. Create a rate definition that considers the worker's salary details and calculates the payment value for each unit of accrued time.
Partial Disbursement Rate Rule	Calculates payment when paying out part of an accrual balance.

Rates	Description
	Example: If the worker is terminated or loses eligibility for the absence plan, you might want to disburse the remainder of the accrual balance as cash. Create a rate definition that considers the worker's salary details and calculates the payment value for each unit of accrued time.
Liability Booking Rate Rule	Calculates the cost of a worker's accrual balance to determine employer liability. Example: If the is terminated or loses eligibility for the absence plan, you might want to determine employer liability for worker time accruals for the rest of the accrual term.

Overview of Rate Definitions

Use rate definitions to create rates such as salary rates, absence rates, time card rates, and other types of payroll rates.

Further, you can use a rate definition for different types of rate calculations. For example, use a salary rate definition to display an employee's salary on the salary page. You can also use it to display the employee's salary rate on the time card and to pay the employee's salary in Cloud Payroll.

Here are some rate types that you can create:

- Compensation rates, such as a base salary or car allowance rate.
- Rates based on a set of criteria and conditions. For example, a union rate that's based on the job and location of an employee.
- Rates with multiple rate contributors, such as an overall salary rate, which is the sum of multiple salary components.
- Rates derived on the grade of an employee, such as a base salary rate and payroll balance rates, such as pension reporting rate.
- Rates calculated based on other rates. For example, a shift allowance rate that's calculated based on a percentage of the employee's salary rate.

You can define minimum and maximum validation rules for your rate definition. For example, define a minimum rate rule to ensure that an employee isn't paid less than the minimum hourly rate for their job.

When you create a rate definition, you can define a frequency for the rate returned by the calculation, such as 50,000 annually, or 7.25 hourly. Alternatively, you can define a rate that's calculated for a unit of work, such as a shift rate, or a mileage rate. You can control if the application calculates the rate values live or retrieves it based on the results of the Generate HCM Rates process. For example, it's a common practice for salary rates to be calculated live when you enter the salary page for an employee.

As a cloud payroll user, you can calculate most rate calculations live in the payroll run. However, you'll need to perform some complex rate calculations using the Generate HCM Rates process. In this scenario, Cloud Payroll retrieves the stored rate value directly from the rates reporting table for an employee. You can use the rates generated by the Generate HCM rates process for generating reports, such as pension reports.

Use the Rate Definitions task to define and manage rate definitions.

Categories

To create a new rate, select a category from this table.

Category	What it Does
Derived Rate	Retrieves values from one or more payroll balances or other rate definitions, including rates that retrieve element entry values. Use this option to create a rate that retrieves a value from one or more rate contributors.
Element	Retrieves rate information from an element input value. When using salary rates, use this type of rate definition to create and update entries, such as create or update a salary element entry. Select a storage type of Amount or Factor and then select the name of a corresponding element. You can select one of these storage types: - Amount: Retrieves a value from or posts to the element input value with a special purpose of Primary Input Value. For example, 'Amount' is the primary input value for elements created with the flat amount calculation rule, such as salary. If you associate a flat amount salary element with a rate, the application retrieves or posts to the salary amount for an employee. - Factor: Retrieves a value from or posts to the element input value with a special purpose of Factor. The 'Factor' is the primary input value for elements created with the Factor calculation rule. Use this rate definition to apply the factor held on an element entry to a payroll balance. You can also use it to apply it to another rate definition including base rates or an overall salary rate. For example, the application calculates your company's car allowance rate based on a factor of salary. The application captures the factor value, such as 0.05 at the employee level on their car allowance element entry. When creating the car allowance rate definition, select your car allowance element to enable the rate to retrieve the factor value for an employee. In the rate contributor region, select your salary rate definition. This selection ensures that the application calculates the car allowance rate based on a factor value of the employee's salary rate. Note: The element rate doesn't support the input value information that's held on Hours x Rate elements. It's a common practice for the payment rate for this type of element to be based on a recurring flat amount element, such as salary. Note: Salary rates supports Factor, but the payroll run doesn't. Use the Generate HCM Rates process to calculate this type of rate. Also, you can use the process to retrieve the stored value in the payroll run using the predefined CALL_CALC_VALUE formula.
Value by Criteria	Retrieves values from a single value by criteria definition. A value by criteria definition specifies one or more evaluation conditions that determine a particular value or rate. You can specify the conditions as a tree structure to define the evaluation sequence. For example, you can define a value-by-criteria to capture car allowance and housing allowance values based on an employee's job. Define a rate definition to retrieve car allowance rates and another rate definition to retrieve housing allowance rates. Both rate definitions refer to the same value-by-criteria and use the criteria of job to retrieve the appropriate rate values for an employee.

Category	What it Does
Grade Rate	Retrieves values based on an employee's grade details.
Formula	Retrieves values from a rate definition formula. The Generate HCM Rates process supports the calculation of most formula-based rates. However, rates that include complex payroll formula contexts or use balances calculated within the payroll run, are calculated by the payroll run. Note: Formula-based rates are only supported for rate calculations in the payroll run.

Related Topics

- Options to Configure Rate Definitions
- Rate Contributors for Derived Rates
- Configure Elements Used by Rate Definitions
- Overview of Values Defined by Criteria
- Calculate Values Defined by Criteria

Options to Configure Rate Definitions

To configure rate definitions to get your desired rates, you should know how to use the various rate definition options. For rates based on a single element entry value, you can also apply override and defaulting rules.

Note: Use the **HCM Generate Rates** process to calculate factor based element rates.

This table describes the fields that you can configure for the Derived Rate, Element, and Value by Criteria category types.

Field	Category	Description
Storage Type	Element	If you select the Element category to define a rate, you must select a storage type of Amount or Percentage. For example, you can configure a rate definition using the Salary element. If the salary is held as a monetary value, select Amount. If the salary is a factor of another value, such as a balance, select Percentage. Note: This field is hidden for all rate definition categories other than Element.

Field	Category	Description
Element Name	Element Derived Rate	For the Element category, the field is enabled only when you select the storage type. If you select the Element category to define a rate, you must select an element name. This is required if you're configuring a primary rate. This is a rate that retrieves a value from a single element, such as salary. For the Derived Rate category, the field is enabled when you access the page.
Employment Level	Derived Rate Value by Criteria	Select either Payroll Relationship, Term, or Assignment. This field is mandatory for all derived rates and value by criteria rate definitions. It controls which employment ID the rates process uses when calling a rate. If the employee has multiple assignments, the rates process uses the assignment ID to identify the correct assignment record for the employee. Sometimes the contributor value is held at a different level to the employment level defined on the rate. In such cases, the rate process uses the employment ID to locate the correct record.
Status	Element Derived Rate Value by Criteria	Set the status of a rate to active or inactive. You can't assign an inactive rate to an employee. Employees that are allocated a rate while it was active aren't impacted by a change in status to inactive.
Base Rate	Element	Select this option if the rate represents a base rate that another rate uses in its calculation. For example, you might have day shift employees and night shift employees, with different base pay rates. If each set of employees receives an allowance that's a percentage of the base rate, define one allowance rate. And that rate is calculated based on the two rates that have the Base Rate option selected.
Overall Salary	Element Derived Rate	If you're defining rates for use on the Salary page, use the derived rate category and define an Overall Salary. To do this, you must associate a salary element to the rate. Define an Overall Salary Information element for this purpose.
Reporting Required	Element Derived Rate Value by Criteria	Select this option to indicate if the calculated rate value should be stored on the rate table for reporting purposes. If you're defining rates for use on the Salary page, you must select this option.

Field	Category	Description
		Rate definitions with this option selected are included when the Generate HCM Rates batch process is run. Use this feature to report on primary rates and not derived rates. HCM extracts use this report to send data to third parties.
Value by Criteria Name	Value by Criteria	If you select the Value by Criteria category to define a rate, you must select a Value by Criteria name. A value by criteria definition specifies one or more evaluation conditions that determine a particular value or rate.

Returned Rate Details

You can specify the periodicity of the returned rate, factor rules, currency, decimal display, rounding rules, and minimum and maximum rules. If the process returns a rate that's outside the minimum and maximum range, you can do one of these actions.

- Set up an action that enforces the rule, displays a warning
- Forces the user to fix the error

Select the **Return FTE Rate** check box to instruct the rate definition process to return a part-time value by applying an employee's FTE to the rate value.

Periodicities

You must specify a periodicity, such as hourly or weekly, for the returned rate and each rate contributor. However, when you use the rate in a formula, you can override the default periodicity.

The rate calculation converts each contributor to the periodicity specified on the rate contributor. It then adds or subtracts the rate contributors, even if the periodicities are different. In most cases, they will be the same. Once the rate contributors are summed up, the rate calculation then converts them into the return periodicity and currency.

For example, for a rate with a periodicity of weekly using the Standard Rate Annualized conversion formula, the rate calculation does these actions.

1. Calculates an annual figure from the value and periodicity of each contributing earning and deduction.
2. Converts the annual figure into a weekly value.

By default, rates are converted using these predefined rate conversion formulas.

- Standard Rate Annualized
- Standard Rate Daily
- Standard Working Hours Rate Annualized
- Assignment Working Hours Rate Annualized
- Periodic Work Schedule Rate Annualized

If the values in the predefined conversion rules don't meet your requirements, you can define your own.

Factor Rules

You can apply a factor or multiplier to a calculated rate, or to an individual rate contributor. To apply a factor rule, do these steps.

- Select Value as the factor rule.
- In the Factor field, enter the number by which you want to multiply the rate.
- Add the contributor.

You can apply a factor rule to the rate definition, rate contributors, or both. For example, you can define rate contributors to calculate hourly values based on salary and bonus. You can then apply a factor of 1.0 or 100 percent to the salary balance contributor and a factor of 0.5 or 50 percent to the bonus balance contributor. The factor rule is applied to the rate before the periodicity conversion is applied.

Minimum and Maximum Values

You can define minimum and maximum values for the returned rate, and for individual rate contributors.

Use the **Limit Violation Action** field to display an error, warning, or enforce the application to use minimum or maximum value that you enter. For example, you can enter 500 as the minimum value and then select **Enforce Rules**. If the returned value comes back as 400, the application uses 500 as the value.

This table explains the options for the minimum and maximum rate values.

Value	Comments
Null	No minimum or maximum value
A specified value	Example: 2000
Based on another rate	Uses the calculated value of the rate definition that you select. Be careful that you don't create a loop. For example, Rate A has minimum value that's based on Rate B, which has a minimum value based on Rate A. This situation would result in a runtime error.
Value by Criteria	Minimum or maximum value based on a value by criteria definition.

Override and Defaulting Rules

You can set override and default rules only if you select Element as the category when you define rate definitions. Set up override rules for the element associated with your rate definition. If you select the **Override Allowed** check box, you can enter rate values on the Salary page.

If an element input validation formula has been defined for the rate contributor input value, you can view it in the Override and Defaulting Rules section.

Note: You can't define override and defaulting rules if you select the Values by Criteria category to define a rate. But you can select a formula to validate any rate that's returned and also use formulas to create default values.

For example, you can use the HCM Rates Default Value formula type to define the number of workdays in a year for your organization.

```
workday = 250
periodicity = YEAR
return workday, periodicity, currency
```

In addition, you can use a value by criteria definition as the default type. Here, the process uses the value for the first record created and carries that value forward in subsequent records, unless it's manually overridden. The rate engine reevaluates the rate that the value by criteria method creates for each subsequent record. So, this rate could change. For example you could use a value by criteria definition to enable a default value of 10 percent for bonuses that are targeted to all eligible employees.

Contributor Rules

You can specify the periodicity for the contributor total. To process contributor totals as full-time equivalency amounts, select **Yes** in the **Process Contributor Total as FTE Amount** field. The final rate value is converted from this status to the Return Rate FTE status.

Information

In this section, enter text that explains the purpose of the rate, how the rate is calculated, or provides further details for the rate. This section isn't available for rate definitions using the Value by Criteria categories.

Related Topics

- [Rate Contributors for Derived Rates](#)
- [Configure Elements Used by Rate Definitions](#)
- [Configure Periodicity Conversion Rules](#)
- [Element Input Validation Formula Type](#)

Create Rate Definitions for Leave

In this example, let's calculate an employee's absence rate as of a particular date.

The rate includes a combination of average salary and car allowance. The employee has an annual year-to-date salary of 26,000. The employee also receives an annual car allowance payment of 2,000. The absence rate is $26,000 + 2,000 = 28,000$. To provide a daily absence rate, you convert this rate into a daily rate.

This table summarizes the key information you use in the example.

What You Need To Consider	For This Example
What elements do I need to create before I define the rate?	• Salary (assignment level) - This element contains the salary value to be retrieved by the rate definition. You must create it using the Flat Amount calculation rule. • Car Allowance (assignment level) - This element contains the car allowance value to be retrieved by the rate definition. You must create it using the Flat Amount calculation rule. • Absence - Use the Absence template to create the element. Enter Sickness as the classification and Absence as the category.

What You Need To Consider	For This Example
Which balances hold the contributing values?	- Salary is fed by the Salary element. - Car Allowance is fed by the Car Allowance element.
Should I process contributor totals as full-time equivalent amounts?	Yes

Create the Rate Definition

1. On the Home page, click the **Rate Definitions** quick action under the **My Client Groups** tab.
2. In the Search Results section, click **Create**.
3. Enter these values.

Field	What You Select
Category	Derived Rate
Effective Start Date	A date that's after the creation date of the objects that you're referencing
Legislative Data Group	Your legislative data group

4. Click **OK**.
5. In the Basic Details section, enter these values.

Field	Value
Name	Absence Rate - Salary and Car Allowance
Short Name	ABS RATE - SAL/CAR ALLOW

6. In the Returned Rate Details section, **Periodicity** field, select **Daily**.
7. Click the Contributor Rules tab and in the **Process Contributor Total as FTE Amount** select, **Yes**.

The balances referenced need to be populated using payroll runs for the periods covered by the balance dimension or the rate definition won't generate a meaningful value.

Create Rate Contributors

1. In the Rate Contributors section, click **Create**.
2. In the **Contributor Type** field, select Balance and click OK.

3. On the Create Rate Contributors page, enter these values.

Field	What You Enter
Add or Subtract	Add
Balance Name	Regular Salary
Balance Dimension	Assignment State Period to Date
Periodicity	Daily

4. Click **Save and Continue**.
5. In the Rate Contributor section, click **Create**.
6. In the **Contributor Type** field, select **Balance** and click **OK**.
7. On the Create Rate Contributor page, enter these values.

Field	What You Enter
Add or Subtract	Add
Balance Name	Car Allowance
Balance Dimension	Assignment State Period to Date
Periodicity	Daily

8. Click **Save and Continue**.
9. Click **Submit**.
10. Assign an Absence element entry to the employee's assignment. You will then need to pass the absence entry to payroll using the absence interface.

Related Topics

- [Options to Configure Rate Definitions](#)
- [Rate Contributors for Derived Rates](#)
- [Generate HCM Rates](#)
- [Integrate Absence Management with Global Payroll](#)

7 Elements for Absence Management

Define Payroll Elements to Process Absences

You define elements to calculate and process absence payments in Oracle cloud. When you define an absence element, your responses to the element template questions determine which elements, balances, formulas, and calculation components the template generates.

Defining an absence element involves these steps:

- Define an absence element
- Complete absence detail questions
- Complete accrual liability and balance payment questions
- Complete absence payment questions
- Submit the element
- Define element eligibility records and cost distributions

Define an Absence Element

Use the **Elements** task to define an absence element, selecting a primary classification of Absence, and a secondary classification. Typically, the predefined values include vacation, maternity, and sickness.

Complete Absence Detail Questions

The questions you complete in the Absence Details section determine which subsequent questions the template displays. You enter this information in the Absence Details section:

1. Specify the calculation units to use when reporting the absence, for example that's shown on the payslip, and statement of earnings. Typically, you select Days or Hours for your reports that correspond to the units for your absence plan. When creating an absence element, select the work calculation rule to calculate the absence rate.
2. Select the absence information to transfer to payroll based on the type of absence management plan.

Absence Management Plan Type	Absence Information to Transfer
Accrual	Accrual Balances
Accrual, Leave Donation, Compensatory	Accrual Balances and Absences
Qualification	Qualification Absences
No Entitlement	No Entitlement Absences

Complete Accrual Liability and Balance Payment Questions

If you transfer accrual balances, complete these questions.

Question	Steps
Calculate absence liability?	1. Select Yes, if you calculate liability. 2. Select a liability rate. Usually the rate is the same as the absence payment rate. You might select a different rate when estimating liability for billing purposes.
Does this plan enable balance payments when enrollment ends?	1. Select Yes to configure a final disbursement element and to maintain balances for the disbursement hours and payments. 2. Optionally, select a rate to use for the calculation.
Does this plan enable partial payment of balance?	1. Select Yes to configure a discretionary disbursement element and to maintain balances for disbursement hours and payments. 2. Optionally, select a rate to use for the calculation.

Complete Absence Payment Questions

Complete these questions:

1. Select a method to reduce regular earnings if employees don't complete a time card.:
 - o Reduce regular earnings by absence payment (entitlement payment balance)
 - o Select rate to determine absence deduction amount (entitlement deduction balance)

You might select one of these options:

- The **Reduce regular earnings** option to reduce regular earnings by the absence payment. This means that the employee is paid the same net amount as if they weren't absent.
- The **Select rate to determine deduction amount** option when the employee isn't due to be paid for the absence at the same rate as their regular earnings. In this case, the absence deduction rate that you select will be a rate that deducts 100% of the regular earnings. However, the absence payment rate would be a different rate, for example 50%.

2. Optionally, select a rate to calculate the absence payment.

If you have standard earnings and absence elements in the same payroll run that reduce regular earnings, the payroll calculation reduces earnings in this sequence:

- a. Using absence element entries
- b. Using any standard earnings elements that reduce regular earnings

The salary balance isn't reduced beyond zero.

3. You can now ensure that absence entitlement payments are made to employees after terminations. Use the **Does this plan enable entitlement payments after termination?** question on the absence element template to set the entitlement element to **Final Close**.

Example: Amelia is due to be paid maternity payments after her termination. Select **Yes** in this question to set the latest entry date of the entitlement elements to final close. With this, the absence entitlement payments are

made to Amelia after her termination. When Amelia is terminated, change her employment assignment status to **Process When Earning**. Also, set the **TERM_INCLUDE_PR_LEVEL** action parameter to **Y**, so that payroll relationship level entries are considered for processing.

Submit the Element

When you submit the element, the template automatically configures a base pay element, balances, formulas, and calculation components.

The template also configures additional elements, depending on the options selected in the template to transfer absence information, as shown in this table.

Type of Absence Information to Transfer	Optional Balance Payments Selected	Additional Elements Configured
Accrual Balances	- Discretionary Disbursements - Final Disbursements	- Accrual - Discretionary Disbursement - Final Disbursement
Accrual Balances and Absences	- Discretionary Disbursements - Final Disbursements	- Accrual - Entitlement - Discretionary Disbursement - Final Disbursement
Qualification Absences	none	Entitlement
No Entitlement Absences	none	Entitlement

Define Element Eligibility Records and Cost Distributions

Define element eligibility records for all elements generated by the template, for example for your accrual, entitlement, discretionary and final disbursement elements.

If your enterprise calculates cost distributions, specify costing for all the element eligibility records. For example, for an accrual element, you do these steps

1. Define element eligibility records for the accrual, accrual results, accrual retroactive, and accrual retroactive results elements.
2. Specify costing for the accrual results and retroactive results elements.

The costing process costs the change in the liability balance since the last payroll period, debits the expense account and credits the liability account.

Related Topics

- [Define Elements, Balances, and Formulas](#)
- [How Payroll Elements Hold Information for Multiple Features](#)
- [Element Costing Options](#)
- [Import Absence Entries to Payroll](#)
- [Rates Used to Calculate Absences in Payroll](#)

Define Payroll Elements for an Absence Accrual Plan

This example shows how to define an absence element for a vacation accrual absence plan.

Based on your setup decisions, this procedure configures these additional elements:

- Accrual element to process absence liability amounts
- Entitlement element to process payments for absence during vacation
- Discretionary Disbursement element to process disbursement of partial time accruals
- Final Disbursement element to process accrual disbursement when the absence plan enrollment ends

The name of the element is prefixed to each additional element.

Note: Each absence accrual plan will have its own, specific payroll element defined. The element you define for an absence accrual plan shouldn't be used across multiple plans. You can't map one element to multiple absence accrual plans.

This table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
What type of an absence are you transferring to payroll?	Accrual balances
Who's eligible to receive this element?	All workers
What units do you want to use for reporting calculations?	Days
Do you want the element to calculate absence liability?	Yes
Which rate should the calculate absence liability use?	Liability Rate
Does your absence plan enable balance payments when enrollment ends?	Yes

Decisions to Consider	In This Example
Which rate should the final disbursement payment use?	Final Disbursement Rate
Does your absence plan enable payment of partial accrual balances?	Yes
Which rate should the partial disbursement payment use?	Partial Disbursement Rate
How do you want to calculate deductions for paid absences for employees not requiring a time card? - Reduce regular earnings by the amount of the absence payment so that the worker doesn't get paid twice? - Select a rate to determine the absence deduction amount?	Reduce regular earnings by absence payment

Before You Begin

Ensure that you configured a rate definition to determine the monetary value of a unit of absence. And depending on your enterprise separate rates to calculate liability, discretionary disbursement, and final disbursement payments. You configure a rate definition using the **Rate Definitions** task.

Define an Absence Element

1. On the Elements page, click **Create**.
2. In the Create Element window, complete the fields as shown in this table.

Field	Value
Legislative Data Group	Select your legislative data group.
Primary Classification	Absences
Secondary Classification	Select an appropriate value for your legislation, such as Vacation.

3. Click **Continue**.
4. On the Create Element: Basic Information page, enter Vacation Payment in the **Name** and **Reporting Name** fields.

5. In the Absence Plan Details section, complete the fields as shown in this table. Use default values for fields unless the steps specify other values.

Field	Value
What calculation units are used for reporting?	Days
Work Units Conversion Rule	Standard Rate Daily
What type of absence information do you want transferred to payroll?	Accrual Balances and Absences

6. Click **Next**.
7. On the Create Elements: Additional Details page, in the Accrual Liability and Balance Payments section, complete the fields as shown in this table. Use default values for fields unless the steps specify other values.

Field	Value
Calculate absence liability?	Yes
Which rate should the liability balance calculation use?	Liability rate.
Does this plan enable balance payments when enrollment ends?	Yes
Which rate should the final balance payment calculation use?	Final disbursement rate.
How do you want Payout Amount to be taxed?	Supplemental
Absence Payout Process Mode	Process and pay with other earnings
Does this plan enable partial payments of absences?	Yes
Which rate should the discretionary disbursement use?	Discretionary disbursement rate.

Field	Value
How do you want Cash out amount to be taxed?	Regular

8. On the Create Elements: Additional Details page, in the Absence Payments section, complete the fields as shown in this table. Use default values for fields unless the steps specify other values. For the purposes of this worked example, all fields are being entered, however, only required fields must be entered and others may be blank.

Field	Value
How do you want to reduce earnings for employees not requiring a time card?	Reduce regular earnings by absence payment.
Which rate should the absence payment calculation use?	Absence payment.

9. Click **Next**.
10. On the Create Element: Review page, review the information that you entered so far.
11. Click **Submit** to open the Element Summary page.

The template generates all the related elements, balances, and formulas.

Define Element Eligibility

1. In the Element Overview section of the Element Summary page, click the **Element Eligibility** node.
2. Click **Create Element Eligibility** from the Actions menu.
3. In the Element Eligibility section, enter Vacation Payment Open in the **Element Eligibility Name** text box. Leave the rest of the fields on the page blank.
4. Click **Submit**.
5. Click **Done**.
6. On the Elements page, search for the other elements prefixed with your absence element name.
7. Select each element in turn and repeat the steps on the Element Summary page to define eligibility for each element.

8 Effective Dates in Absence Management

Date Effectivity

Date effectivity preserves a history of changes made to the attributes of some objects. As a Professional user, you can retrieve and edit past and future versions of an object.

Many Human Capital Management (HCM) objects, including person names, assignments, benefits plans, grades, jobs, locations, payrolls, and positions are date-effective.

Logical and Physical Records

Date-effective objects include one or more physical records. Each record has effective start and end dates. One record is current and available to transactions. Others are past or take effect in the future. Together, these records constitute the logical record or object instance. For a date-effective logical row, which is a collection on contiguous temporal physical rows, each physical row CreatedBy (CREATED_BY) and CreationDate (CREATION_DATE) are the same.

This table shows changes to the department manager attribute in a department business object. Each row represents a single physical record.

Physical Record	Effective Start Date	Effective End Date	Department Manager
4	18 January, 2022		C. Woods
3	15 October, 2021	17 January, 2022	A. Chan
2	13 June, 2020	14 October, 2021	T. Romero
1	22 March, 2019	12 June, 2020	G. Martin

Note: The physical record number doesn't appear in the record.

Effective End Dates in Physical Records

Every physical record except the last has an effective end date. The update process adds this date, which is the day before the effective start date of the next record, whenever you update the object.

Object End Dates

You can enter a final effective end date for some date-effective objects. For example, terminating an assignment adds a final effective end date to the assignment. Alternatively, the **End Date** action may be available. If you end date a date-effective object, then it isn't available to transactions after that date. But the object's history is retrievable.

Status Values in Date-Effective Objects

Some date-effective objects, such as grades and jobs, have both effective dates and status values. When the object status is **Inactive**, the object isn't available to transactions, regardless of its effective dates. Setting the status to **Inactive** makes objects unavailable to transactions. If you can't enter an effective end date for an object, then changing its status has the same effect.

Future-Dated Changes

For date-effective objects, you can enter future changes. For example, you enter the worker promotion shown in this table on 25 July, 2022 to take effect on 18 October, 2022.

Physical Record	Effective Start Date	Effective End Date	Grade
2	18 October, 2022		IC2
1	14 December, 2020	17 October, 2022	IC1

Physical record two becomes current on 18 October, 2022. From 14 December, 2020 until 17 October, 2022 physical record one is current and available to transactions. If you can access the object history, you can see physical record two before it takes effect.

When future-dated changes exist, other actions may be limited. For example, to end this worker's assignment before the promotion takes effect, you must first delete the promotion.

Date-Enabled Objects

Some objects, such as work relationships, are date-enabled rather than date-effective. They have start and end dates that define when they're available, but they have no history of changes. New attribute values overwrite existing attribute values.

Related Topics

- [Examples of Updating Date-Effective Objects](#)
- [Examples of Correcting Date-Effective Objects](#)
- [How You Make Multiple Updates to Date-Effective Objects in One Day](#)
- [How You Delete Physical Records from Date-Effective Objects](#)

Examples of Correcting Date-Effective Objects

You can correct most attributes of date-effective objects, regardless of whether they occur in current, past, or future physical records.

If you correct the effective start date of an object's first physical record, then the revised date must be before the current effective start date. For the second and subsequent records, the revised date must be between the record's current effective start and end dates.

Correcting a Current Error

On 11 December, 2022 you create a location definition but enter the wrong phone. On 21 December, 2022, you search for the definition and select the **Correct** action. Before correction, the object history is as shown in this table.

Physical Record	Effective Start Date	Effective End Date	Location Phone
1	11 December, 2022		650.555.0175

After correction, the object history is as shown in this table.

Physical Record	Effective Start Date	Effective End Date	Location Phone
1	11 December, 2022		650.555.0176

Because you corrected the object, no change history exists.

Correcting a Past Error

A worker's assignment history is as shown in this table.

Physical Record	Effective Start Date	Effective End Date	Job	Working at Home
4	20 October, 2022		Line Manager	No
3	18 August, 2022	19 October, 2022	Senior Administrator	No
2	10 May, 2022	17 August, 2022	Senior Administrator	Yes
1	25 July, 2021	9 May, 2022	Administrator	Yes

You learn that the worker's job was actually Project Leader from 10 May to 19 October, 2022. As this period spans physical records 2 and 3, you must correct both.

To retrieve physical record 2, you set the effective as-of date in the person search to any date between 10 May and 17 August, 2022. You select the assignment from the search results and make the correction.

You then retrieve physical record 3 and make the same correction.

Examples of Updating Date-Effective Objects

When you update a date-effective object, you insert a physical record in the object's history. Typically, the inserted record follows the current record and the effective start date is today. However, you can also enter future-dated changes and update past records.

Entering Future-Dated Changes

The grade EC3 exists from 17 June, 2019. Its ceiling step changes from 1 January, 2023. On 30 November, 2022, you change the grade's ceiling step and enter an effective start date of 1 January, 2023. This change creates a physical record in the grade definition, as shown in this table.

Physical Record	Effective Start Date	Effective End Date	Ceiling Step
2	1 January, 2023		4
1	17 June, 2019	31 December, 2022	3

From 1 January, 2023 physical record 2 is in effect. Until then, physical record 1 is in effect.

Applying Historical Updates to Later Records

Jennifer Watts has one assignment, as shown in this table.

Physical Record	Effective Start Date	Effective End Date	Grade	Location
2	18 September, 2022		A1	Area Office
1	10 April, 2022	17 September, 2022	A1	HQ

You promote Jennifer to grade A2 from 1 July, 2022. You update her assignment with an effective start date of 1 July, 2022 and enter grade A2. This update:

- Inserts a physical record between existing records 1 and 2
- Sets the effective end dates of physical record 1 to 30 June, 2022 and of the inserted record to 17 September, 2022

You also correct existing physical record 2 to change the grade from A1 to A2.

Jennifer's assignment history is now as shown in this table.

Physical Record	Effective Start Date	Effective End Date	Grade	Location
3	18 September, 2022		A2	Area Office
2	1 July, 2022	17 September, 2022	A2	HQ
1	10 April, 2022	30 June, 2022	A1	HQ

FAQs

What's the effective as-of date?

A date value that filters search results. For any date-effective object that matches the other search criteria, the search results include the physical record for the specified effective as-of date. The effective as-of date is one of the search criteria.

What's the difference between updating and correcting a date-effective object?

When you update an object, you insert a physical record in the object's history. Typically, the inserted record follows the current physical record, and the effective start date is today's date. However, you can edit the object history or create a future-dated change by

When you correct a date-effective object, you edit the information in an existing physical record. You don't create a physical record.

What happens when I end date an object?

The date that you enter becomes the final effective end date for the object. If physical records exist for the object beyond the effective end date, either they're deleted automatically or you delete them.

The object's history remains available. For example, the object may appear in search results if the search criteria include an effective as-of date that's within the object's effective dates.

9 Accrual Absence Plans

Types of Absence Plans

Create the following types of plans using the Absence Plans task in the Absences work area:

- Accrual
- Qualification
- No Entitlement
- Agreement
- Compensatory
- Donation

Accrual

Use this type to create absence plans that enable workers to accrue time for taking paid leave, such as a vacation plan. Configure rules that determine various aspects of leave time, such as:

- Length and type of the accrual term in which workers accrue time
- Maximum time that workers can accrue in a term
- Maximum time that workers can carry forward to the next term

Qualification

Use this type to create an absence plan where workers qualify for the plan and receive payments during the absence period. For example, use qualification plans for defining absence rules related to events, such as long term illness or maternity. Configure rules to determine the payment percentages that apply for specific periods during the absence, for specific workers.

No Entitlement

Create absence plans of this type to track unpaid absences without maintaining an accrual balance or providing leave entitlements, such as periodic accruals. Similar to an accrual plan, you can define the length and type of the plan term and determine when eligible workers can enroll in the plan. You can also use plans of this type in combination with a qualification plan. For example, use a no-entitlement plan if a worker isn't eligible for a standard maternity absence qualification plan.

Agreement

Create absence plans of this type in accordance with statutory rules for use under an agreement. For example, create a shared parental leave agreement for a worker and qualified parental partner to allocate paid or unpaid time off among parenting partners.

Compensatory

Create absence plans of this type to track earned compensatory time that can be used for time off. Compensatory time is offered as compensation for working outside of regular work schedules. Instead of paying overtime, an employer can create a policy to give paid time off.

Donation

Create absence plans of this type to track donated time that a worker receives. Workers can donate their accrual plan balance to a coworker who needs additional time off and is eligible to receive the donated time.

Related Topics

- [Create a Maternity Plan](#)
- [Create a Vacation Accrual Plan](#)

Options to Define Accrual Plans

Configure the following rules when you create an absence accrual plan in accordance with the leave policy of your enterprise:

- Plan term
- Plan eligibility
- Enrollment and termination
- Transfer and rollover
- Prior balance reinstatement
- Vesting period
- Plan limits
- Balance Updates
- Payments
- Disbursement
- Donation

Plan Term

An accrual term is a period of time during which workers accrue time. You must specify the type of accrual term to use for the plan. For example, you can define one of these term types:

- An accrual term of one calendar year that restarts on January 1
- An accrual term that starts on the worker's annual hire date and restarts on every anniversary

Plan Eligibility

Associate an eligibility profile with the accrual plan to determine the set of workers who can enroll in that plan.

Enrollment and Termination

Decide when to enroll workers in the accrual plan. Indicate how to handle negative and positive balances where only plan enrollment ends, or both plan enrollment and employment ends.

Transfer, Rollover, and Carryover

Define the limits for transfer of some or all of the accrual balance to a new plan when the existing plan is terminated due to loss of eligibility. The Transfer Rules section is enabled only when you select **Transfer positive balance** in the Balance Disposition section.

Additionally, for year end processing, you can define:

- Rollover limits so that employees can transfer remaining balance to a new plan. Select **Unlimited** if you don't want to define a limit for rollover.
- Carryover limits to determine the maximum unused leave time that employees can take over to the next term for the same plan.

If the unused absence balance at the end of the term is above the defined rollover and carryover limit, you can choose to pay out the remaining balance. If you don't select the **Disburse remaining balance** check box, the unused accrual balance expires.

Note: During the year end processing, the application first processes the rollover, and only then processes the carryover with the leftover balance.

Prior Balance Reinstatement

Configure accrual plans so that when a worker is terminated or loses plan eligibility, the remaining balance can be optionally held for reinstatement upon rehire or return to plan eligibility.

Absence plan setup options allow you to define the balance amount eligible for reinstatement along with the time frame for which the withheld balance can be reinstated. You can configure this option in the Re-enrollment Rules section. You can find this section in the Plan Participation tab when you create or edit an absence plan.

If you select **Allow Prior Balance Reinstatement**, a new row in accruals called "Plan Balance close transaction" is created that deducts the remaining balance on the last day of the employee. This is the transaction that will act as a reference to calculate the reinstated balance if the employee is re-hired within the time frame limit configured in the plan setup.

However, if you select **Allow Prior Balance Reinstatement**, and leave the **Balance Reinstatement Limit** and **Time Frame Limit** fields blank, the entire closing balance can be reinstated any time.

Vesting Period

Define if you want newly enrolled workers to accrue time, but not use it until after a specific amount of time.

Plan Limits

Define rules for the maximum leave time that workers can accrue. For incremental plans, Absence Management applies the limit to each accrual period. When there are accrual transactions such as adjustments, balance transfers, and disbursements, which impact the ceiling or carryover value, then the periodic accrual balance calculation takes precedence and readjusts the balance accordingly.

Balance Updates

You can enable the following types of adjustments that HR specialists can make during maintenance of absence records and entitlements:

- Balance transfer across plans
- Other adjustments
- Elective disbursements

Payments

Decide how you want to calculate payment of accrual balances for the following scenarios:

- When workers must be paid a different rate during the absence period
- When a part of the accrual balance must be disbursed to workers as cash
- When the cost of accrual balance must be calculated to determine employer liability
- When the accrual balance must be paid to workers when their plan participation ends

Disbursement

Determine whether workers are eligible for cash disbursement requests. Decide who can initiate the disbursement. Additionally, define disbursement rules and the number of hours that can be disbursed.

Donation

Define whether workers are eligible to donate accrual balances to a coworker. Decide who can initiate the donation. Additionally, define donation rules and the number of hours that can be donated.

Related Topics

- [Create a Vacation Accrual Plan](#)

Options to Define an Accrual Term

When you create an accrual plan, you must select one of the following term types to define an accrual term during which workers accrue leave:

- Calendar year
- Anniversary year

Calendar Year

The accrual term starts on the month, day, and year that you select. The term restarts next year on the same day. For example, if you select January 1, 2015, the accrual term starts on that day and restarts on January 1, 2016.

Anniversary Year

The accrual term starts on the hire date and restarts on each anniversary. For example, if the enrolled worker's hire date is May 1, 2015, the accrual term starts on this date and restarts on May 1, 2016.

Entering a continuous service date when enrolling in the accrual plan doesn't affect the start date. The continuous service date affects the length-of-service calculations while processing a waiting period, vesting period, or plan limits defined in an accrual band matrix. However, it doesn't affect the accrual term.

Related Topics

- [Create a Vacation Accrual Plan](#)

Options to Configure Accrual Enrollment and Termination

Workers are enrolled into accrual plans as a result of employment and eligibility. They're disenrolled from accrual plans when they're terminated or their plan eligibility ends.

Define when you want to enroll or disenroll a worker in the Participation tab of the Absence Plan setup page. Configure the plan to do the following:

- Automatically enroll workers when they're hired or when a transfer event occurs.
- Use a formula if you want to consider other aspects or rules to determine when to enroll workers.

Define a waiting period if you want newly enrolled workers to start accruing time under that plan only after a specific amount of time elapses after the date of enrollment.

Configure the plan to automatically disenroll workers as a result of employment termination or loss of eligibility to a plan. On plan termination, define how to:

- Disburse the amount for payment if the worker has a positive absence balance.
- Recover the amount from the last pay if the worker has a negative absence balance.

For example, if a worker is terminated from employment on October 12, 2017, the following updates can occur to reflect the termination.

- If an absence starts on or after October 12, it's withdrawn.
- If there is an absence spanning the termination date of October 12, the end date is automatically calculated as the termination date for the absence. For example, if the worker schedules an absence from October 9 to October 17, since the termination date is October 12, the end date of the absence is updated as October 12.
- If an absence is open-ended, the end date of the absence is October 12 since the termination date is calculated as the last day of the absence.
- Plan use is recalculated for all updated absences.
- All active accrual enrollments are updated to reflect an end date of October 12.
- Final disbursements are transmitted to payroll, if final disbursement is configured.

How You Configure Eligibility for Absence Plans

An eligibility profile in Absence Management defines criteria used to determine whether a person qualifies for an accrual or qualification absence plan. Define eligibility profiles and then associate it with a plan to determine the set of workers who can enroll in that plan.

1. Create the eligibility profile using the Manage Eligibility Profiles task in the Absences work area.
2. Associate the eligibility profile with the absence plan using the Absence Plans task.

If you want all workers to be eligible for the absence plan, then don't add an eligibility profile. If a plan doesn't have an eligibility profile associated with it, then it doesn't mean that workers are enrolled automatically into the plan. New hires may be enrolled automatically, if that's the option set in the plan definition. Existing workers have to be enrolled manually.

Carryover Limit Rules

You can transfer your unused leave time from one plan term to the next using the carryover limit configuration options on the absence plan setup page. The carryover options are available in the Year End Processing section of the **Accruals** tab.

You can use these options in the **Carryover Limit Rule** field:

Carryover Option	Description
No Carryover	No balance (positive or negative) is carried over from the end of the previous plan term to the new term.
No Limit	All the balance from the end of the previous plan term (positive or negative) is carried over to the next plan term without any limit.
Flat Amount	Configure the carryover limit in the dedicated field under the Carryover Limit Rule field. The balance amount carried over from the previous plan term to the next one can't exceed this limit. Negative balance is carried over even if the limit is 0.
Include in Matrix	Configure the carryover limit in the Accrual Matrix section. Negative balance is carried over even if the limit is 0.
Formula	The limit is set by the Global Absence Carryover formula selected in the plan setup. This formula doesn't return the carryover value. It only determines the upper limit of the balance from the end of the previous plan term, carried over to the next plan term.

Carryover Expiration Rules

Set carryover balance to expire after a certain period. To do this, enable the **Carryovers expire after specific time** check box available in the **Accruals** tab of the absence plan setup page. After you enable it, the **Expiration Period** field will be available to you where you can select the number of days, weeks, months, or years after which the carryover expires.

Note: If you select the Flat Amount, Include in Matrix, or Formula option in the **Carryover Limit Rule** field instead of No Limit, you can't set an expiration period longer than 1 year.

If you make any changes to the plan, you need to run the Calculate Accruals and Balances absence process to calculate the updated carryover. Select the last day of the previous plan term as the effective date. This will recalculate the balance from the end of the plan term and change the Carryover value from the first day of the next plan term, based on the plan changes.

Options to Define Frequency of Accrual Periods

Configure accrual periods to award leave time to workers throughout an accrual term in equal installments.

Determine the frequency of accrual periods by selecting one of the following Balance Frequency Source values on the Accruals tab in the Create Absence Plan page:

- Person primary frequency
- Repeating time period

If there is a change in payroll relationship, the repeating period is automatically updated when running accruals. For example, when employee payroll changes from weekly to monthly.

Person Primary Frequency

Select **Person Primary Frequency** to award time at the start of each payroll period. For example, if the worker enrolled in the plan receives weekly payroll, the leave time accrues once a week.

Repeating Time Periods

The worker accrues time at the start of each instance in a repeating time period. For example, you created a biweekly repeating period for an annual accrual term. The worker accrues time every two weeks during the term.

You create the repeating time period using the Manage Repeating Time Periods task in the Absences work area. Then, associate the repeating time period with the accrual absence plan on the Create Absence Plan page.

Note: When you create a repeating time period, ensure that the period has a duration of at least 7 days. For example, if you select a period type of **Daily** and a period length of **More than one day**, you need to select a value that's greater than or equal to 7.

Related Topics

- [Create a Vacation Accrual Plan](#)
- [Repeating Time Periods](#)

Plan Limits for Accrual Plans

You can configure the following plan limits for accrual plans:

Plan Limit	Description
Annual Accrual Limit Rule	Determines the maximum amount of leave time that workers can accrue within a plan year.
Ceiling Rule	Determines the maximum leave time that workers can accrue.

Use an accrual band matrix to build criteria using various factors, such as length of service, to determine workers who qualify for specific plan limits. Alternatively, you can use a formula to determine each plan limit.

When accruals and balances are calculated, an annual accrual limit is evaluated. If the current period accrual results in the accrual balance exceeding the limit, the accrual amount for that period is reduced. If a ceiling is also configured, it can further impact the accrual amount.

Examples of Accrual Bands

Use accrual bands to vary accrual benefits to workers depending on employment criteria, such as length of service, grade, or other factors.

You can define various types of accrual bands in the Accrual Matrix section on the Absence Plan setup page. The examples show accrual bands based on the following factors:

- Length of service
- Location and length of service
- Grade

Creating Bands Based on Length of Service

Scenario: You want to create two accrual bands based on worker length of service, as shown in the following table.

Band Sequence	Length of Service	Accrual Rate	Maximum Carryover	Ceiling
1	Less than five years	15	15	45

Band Sequence	Length of Service	Accrual Rate	Maximum Carryover	Ceiling
2	Greater than or equal to five years	20	15	60

To create the bands:

1. Create the following length of service derived factors using the Manage Derived Factors task in the Absence Administration work area.
 - Length of service less than 5 years
 - Length of service greater than or equal to 5 years
2. Use the expression builder to create bands using the derived factors that you created:

Band Sequence	Expression
1	[LengthOfService.LessThan5]
2	[LengthOfService.GreaterThan5]

Creating Bands Based on Location and Length of Service

Scenario: You want to create accrual bands of varying length of service for workers who belong to specific geographic locations, as shown in the following table.

Band Sequence	Location	Length of Service	Accrual Rate	Maximum Carryover	Ceiling
1	Paris	Less than five years	15	15	45
2		Greater than or equal to five years	20	15	60
3	Tokyo	Less than three years	10	10	30
4		Greater than or equal to three years	15	15	45

To create the bands:

1. Create the following length of service derived factors for the specific geographic locations using the Manage Derived Factors task in the Absences work area.
 - Length of service less than 5 years
 - Length of service greater than or equal to 5 years
 - Length of service less than 3 years

- Length of service greater than or equal to 3 years
2. Use the expression builder to create bands using the derived factors that you created:

Band Sequence	Expression
1	[Person.Location] = "Paris" AND [LengthOfService.LessThan5] The person.location attribute is on the Entities tab in the Expression Builder dialog box. The LengthOfService derived factors are available from the Derived tab.
2	[Person.Location] = "Paris" AND [LengthOfService.GreaterThan5]
3	[Person.Location] = "Tokyo" AND [LengthOfService.LessThan3]
4	[Person.Location] = "Tokyo" AND [LengthOfService.GreaterThan3]

Creating Date-Effective Accrual Bands Based on Grade

Scenario: Your enterprise wants to change its leave policies every year in accordance with government regulations, as shown in the following table.

Band Sequence	Effective Start Date	Grade Range	Accrual Rate	Maximum Carryover	Ceiling
1	April 1, 2014	A1 - A3	15	15	45
2		A1 - A6	20	15	60
3	April 1, 2015	A1 - A3	20	20	30
4		A1 - A6	25	15	40

Set the session effective date to April 1, 2014 and create band 1 and band 2 using the following expressions:

Band Sequence	Expression
1	[Person.Grade] >= "A1" AND [Person.Grade] <= "A3" The person.grade attribute is on the Entities tab in the Expression Builder dialog box.
2	[Person.Grade] >= "A4" AND [Person.Grade] <= "A6"

Save your work and set the session effective date to April 1, 2015. Then, create band 3 and band 4 using the same expressions that you used for band 1 and band 2:

Band Sequence	Expression
1	[Person.Grade] >= "A1" AND [Person.Grade] <= "A3"
2	[Person.Grade] >= "A4" AND [Person.Grade] <= "A6"

Related Topics

- [Create a Vacation Accrual Plan](#)

How You Configure a Plan for Discretionary Cash Disbursement

Workers can initiate a cash disbursement request for their accrual or donation plan balance. Administrators and managers also have the option to initiate a cash disbursement request on behalf of a worker.

To enable self-service cash disbursement for a worker and manager, complete these steps:

1. On the Absence Plans page for an accrual or donation plan, go to the Entries and Balances tab, Discretionary Disbursements section.
2. Select **Enable for administrator**. The **Enable for manager** and **Enable for worker** fields are available for you to select.
3. Configure the disbursement rules and define limits for the number of hours to disburse. For the disbursement rule, you can select either **Formula** or **Flat Amount**. When you select **Flat Amount**, you may also specify the following quantities. When you select **Formula**, you must specify a formula that returns values for these same quantities:
 - The minimum number of hours that the worker is eligible to request a cash disbursement
 - The maximum number of hours that the worker can request, for instances where you want to limit the amount to a certain number of hours
 - An increment to prevent workers from entering decimal places, and thus avoid rounding issues later

If you don't specify any minimum, maximum, and increment quantities, the application assumes that there are no minimum, maximum, and increment outputs.

Initiate Cash Disbursement Request

Here's how workers and managers start a cash disbursement:

1. Click **Cash Disbursements** in the Time and Absences page. Managers can navigate to this page using the Cash Disbursements quick action from My Team page.
2. Click **Add** in the Request Cash Disbursement page.

3. Select the date and absence plan you want to disburse from. Enter the amount of time you want to disburse.

Note: Employees with multiple assignments must select the assignment and then the plan from which they want to donate. Managers and administrators will see one row per assignment when they search for the employee. Select the assignment from which donation is to be made.

4. Click **Submit**.

If you're an administrator, here's how you disburse an employee's balance:

1. Click **Absence records** in the Absences work area under the My Client Groups tab.
2. Search and select the employee to open the Manage Absences and Entitlements page.
3. Select the absence plan and click **Disburse Balance** on the Enrollments and Adjustments menu. This menu is in the Plan Participation section.
4. Select the date and enter the amount to be disbursed.
5. Click **Submit**.

Approve Cash Disbursement Request

Optionally, you can configure approval notifications for the self-service cash disbursement requests. For example, you want line managers to approve cash disbursement transactions requested by workers. Managers can view these notifications by clicking the **Notifications** icon on the Home page or receive these notifications by email and decide whether to approve or not.

To configure disbursement approval notifications:

1. Go to the BPM Worklist.
2. In the BPM Worklist, on the **Task Configuration** tab, select the **AbsencePlanBalanceDisbursementApproval** workflow task to configure, and then click the **Edit** task icon in the **Tasks to be configured** toolbar.
3. Open the **Assignees** subtab and modify the approval rule, if required.
4. Click **Save**.
5. Click the **Commit** task icon in the **Tasks to be configured** toolbar when you're ready to deploy your changes.

Options to Enable Absence Accrual Balance Adjustments

Use the Entries and Balances tab on the Absence Plans page to enable the following types of accrual plan adjustments:

- Balance transfer across plans
- Other adjustments
- Elective disbursements

When you enable these adjustments, it then allows HR specialists to make adjustments to plan balances on the Manage Absence Records and Entitlements page. To make adjustments, HR specialists can select an option on the Enrollments and Adjustments menu of the Plan Participation section.

Balance Transfer Across Plans

This adjustment option enables HR specialists to select a source plan and specify an amount of time to transfer to a target plan balance.

Other Adjustments

This adjustment option enables HR specialists to make special adjustments to plan balances, such as award leave time to a worker for exemplary performance at work. When HR specialists make adjustments on the Manage Absence Records and Entitlements page, they can select Clerical Error or Compensatory as the adjustment reason.

Elective Disbursements

This adjustment option integrates benefits election with absences so that participants can sell all or part of their vacation or sick accrual balance. You can create vacation or sick time sell plans in Benefits. During open enrollment or an annual anniversary, a participant who's eligible for these plans can select the number of units to disburse and the date the disbursement should be processed by payroll for payment. When participants make their elections to specify how much time to sell and when, the information is sent to Absence Management for further processing. These elections reflect in Absence Management when the accrual process is run.

To integrate benefits election with absences:

1. Select **Enable benefits integration**.
2. Select **Mark as pending** to indicate whether the disbursement is finalized or not after the accrual process is run and the information sent to payroll.
3. Select one of the following options for the **Election Date Rule**:
 - **Current plan year end**: The end date for the current plan year is used as the disbursement date.
 - **Determined by election**: The end date is elected within Benefits. If you select this option, the elective amount is disbursed only if the employee has a valid payroll relationship.

Automatic Plan Enrollment and Balance Copy During Local and Global Transfer

The Local and Global Transfer process automates accrual plan enrollment and copying of plan balances from the old organization to the new one. When an employee is transferred, all active plans are end-dated in the old organization. If the employee is eligible for the same plans in the new organization, the application automatically enrolls the employee to the same plans in the new entity.

Here's how other attributes of the absence plan are processed during the transfer:

Configurations	What happens during the transfer
Absence plan with carryover enabled	The carryover amount, as well as the carryover expiration details, if applicable, is copied over to the new plan. The new plan shows an initial balance copied over from the old organization and any applicable carryover amounts that expire on or after the transfer.
Absence Plan with vesting options enabled	The vesting attributes from the old entity are copied to the new entity. For example, an employee has 8 hours of unvested accruals earned on January 1st that are set to vest on April 1st and a local or global transfer happens on March 15th. The 8 hours of unvested accruals will still vest on April 1st just like it would've in the old entity.

Configurations	What happens during the transfer
Absence Plan with waiting period options enabled	The same enrollment date based on the waiting period defined in the old entity is copied to the new entity. For example, if an employee enrolled in a plan with a 90 day waiting period beginning on January 1st, is transferred on March 15th, the enrollment in the new entity will be on April 1st just like it would've been in the old entity.
Plans with disbursement and/or rollover options enabled	The applicable attributes from the old entity are copied to the new entity.

You can view information about all the absences plans, future or scheduled absences and future plan transactions in the Absences section of the HR Local and Global Transfer page. The **Absence Plans** section shows you details about all the plans that the employee is currently enrolled in. This includes the plan's name, enrollment date, disbursement option, and balance as of the transfer date. During a global transfer, the final balance is calculated one day before the global transfer date.

The **Existing Absences** section displays all absences that are currently in progress. It also shows all future and scheduled absences, scheduled on or after the transfer date. Open-ended absences that don't end before the transfer date will be end dated on the day before the transfer date. All future absences scheduled on or after the transfer date will be withdrawn automatically. The **Additional Transactions** section shows you all future plan transactions scheduled on or after the transfer date that will be withdrawn. These transactions include donations, disbursements, transfers, compensatory time and adjustments.

Create a Vacation Accrual Plan

This example shows how to create an absence accrual plan for vacation leave. The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
Who is eligible for this plan?	All workers
What unit of measure should this plan use to process absences?	Days
What is the start date and length of the accrual plan term?	Start on January 1 and restart the same day in the following year.
When can workers start accruing leave time on the plan?	1 month after hire date
When can workers start using the leave time that they accrued	2 months after hire date

Decisions to Consider	In This Example
How much leave time can workers accrue in a term?	Workers who belong to grade A and B accrue at the rate of 15 days each accrual term. They can carry-over 5 days to the next term. Workers who are grade C and D accrue at the rate of 12 days each accrual term. They can carry-over 2 days to the next term.
Do you want workers to accrue time for the whole term at once or accrue in increments?	Accrue time each pay period.
What is the maximum leave time that workers can accrue?	40 days
Can workers use more time than their standard accruals during the plan term?	Yes, up to 5 days
How do you want to calculate cash disbursements of partial accrual balances at any time?	50 percent of the salary amount determines the payment for a unit of absence.
How do you want to calculate final balance payments for a terminated worker?	The salary amount determines the payment of a unit of absence.

Task Summary

To create the absence plan:

1. Create two rate definitions and a payroll element.
2. Create the absence plan.

Prerequisites

Before you create the absence plan, in the Absences work area:

1. Use the Rate Definitions task to create two rate definitions that calculate payment of a unit of absence based on 50 percent and 100 percent of the salary amount.
2. Use the Manage Elements task to create a nonrecurring element. Specify Absences as the primary classification and Vacation as the secondary classification in the Create Element dialog box, and complete the sections as shown in this table.

Section	Value
Absence Plan Details	Select Accrual Balances and Absences as the type of absence information to transfer to payroll.
Accrual Liability and Balance Payments	Select Yes for these questions:

Section	Value
	○ Calculate Absence Liability? ○ Does this plan enable balance payments when enrollment ends? ○ Does this plan enable partial payments of absences? You must specify a rate for the liability calculation, which should be the same rate specified as the liability booking rate rule in Absence Management.
Absence Payments	Select the Reduce regular earnings by absence payment option for the following question: ○ How do you want to reduce earnings for employees not requiring a time card?

Creating the Rate Definitions

1. In the Absences work area Tasks panel tab, click **Rate Definitions**.
2. Click **Create**.
3. On the Create Rate Definition page, complete the fields, as shown in this table.

Field	Value
Name	Unit Rate of 50 Percent Salary
Short Name	UR_50_PC_Salary
Legislative Data Group	Select your legislative data group.
Periodicity (Returned Rate Details section)	Bimonthly
Balance Dimension	Year to Date
Periodicity (Calculation section)	Bimonthly

4. Click **Create**.
5. On the Create Rate Contributors page, complete the fields, as shown in this table.

Field	Value
Balance Name	FIT Gross
Balance Dimension	Year to Date

Field	Value
Type	Actual
Add or Subtract	Add
Factor Rule	Value
Factor Value	0.50

- Click **Save and Close**.
- Repeat step 2 through step 6 to create another rate definition. Ensure that you provide the following key information, as shown in this table:

Field	Value
Name	Unit Rate of Salary
Short Name	UR_Full_Salary
Factor Value	1.00

Creating the Absence Plan

- In the Absences work area Tasks panel tab, click **Absence Plans**.
- Click **Create**.
- In the Create Absence Plan dialog, complete the fields, as shown in this table.

Field	Value
Legislation	Select your legislation.
Plan Type	Accrual

- Click **Continue**.

5. On the Create Absence Plan page, complete the fields, as shown in this table.

Field	Value
Plan	Vacation
Legislative Data Group	Select your legislative data group.
Status	Active
Plan UOM	Days
Type	Calendar year
Calendar	Select the first day of your plan term year. In this example, select January 1 of the current year.

6. Click **Save**.
7. Select the Participation tab, and complete the fields, as shown in this table.

Field	Value
Waiting Period UOM	Months
Duration	1

8. Click **Save**.
9. Select the Accruals tab, and complete the fields, as shown in this table.

Field	Value
Accrual Method	Incremental
Accrual Frequency Source	Person primary frequency
Accrual Vesting Rule	Elapsed period
Duration	2
UOM	Months

Field	Value
Ceiling Rule	Flat amount
Ceiling	40
Carryover Rule	Include in matrix
Negative balance allowed	Select
Negative Balance Limit	5

10. In the Accrual Matrix section, create accrual bands, as shown in this table.

Sequence	Expression	Accrual Rate	Carryover Limit
1	([Person.Grade] = "A") OR ([Person.Grade] = "B")	15	5
2	([Person.Grade] = "C") OR ([Person.Grade] = "D")	12	2

11. Click **Save**.
12. Select the Entries and Balances tab, and complete the fields, as shown in this table.

Field	Value
Final Balance Payment Rate Rule	Select the Unit Rate of Salary rate definition that you created.
Disbursement Rate Rule	Select the Unit Rate of 50 Percent Salary rate definition that you created.
Absence Payment Rate Rule	Select the Unit Rate of Salary rate definition that you created.
Liability Booking Rate Rule	Select the Unit Rate of Salary rate definition that you created.
Transfer absence payment information for payroll processing	Select

Field	Value
Element	Select the element that you created as part of the prerequisite task.

13. Review the information you entered in all the tabs.
14. Click **Save and Close**.

Managing Existing Absence Plans

You can update or correct existing absence plans from the Absence Plans page.

Best Practices for Inactivating Absence Plans

You can inactivate absence plans as of a specific date, but you need to ensure that you don't run accruals beyond this date. If you do, employees can't add or withdraw absences. That's because the application attempts to rerun accruals and reprocess future absences that lie beyond the inactive date of the plan.

Ensure that you set the plan inactivation date to a date that's after the accrual run date for all employees. Employees won't be able to perform transactions if the absence plan is inactivated. Decide how you want to deal with the accrued leave balances of the employees. You should either un-enroll all employees from the plan before you inactivate it or withdraw accruals to a date prior to the inactivation date using the **Withdraw Accruals and Balances** process.

Before you make any date effective changes to the plan, try it out on test environment first. See whether the change produces the results you expect. If it does, implement the change on a production environment.

FAQs

What happens to absences during an employee's termination or reverse termination?

When an employee is terminated, the absence plan enrollment end date is set to the termination date. The balance that's accumulated from the enrollment start date to the termination date becomes the new absence balance. All disbursements and calculation cards after the termination date are removed.

If the employee's termination is reversed, the original absence plan enrollment date is restored. The absence plan balance reflects the balance from the last balance run date before the employee was terminated. However, the disbursements and calculation cards that were removed due to termination aren't restored.

What happens to the absence plans when I create a global temporary assignment for an employee?

When you create a global temporary assignment for an employee, the application creates new absence plan enrollments for the new assignment.

The status of the existing assignment for which the global temporary assignment was created is set to the status of Suspended - Payroll Eligible. The assignment and the absence plan aren't end dated. The absence plan continues to accrue balance.

10 Qualification Absence Plans

Types of Absence Plans

Create the following types of plans using the Absence Plans task in the Absences work area:

- Accrual
- Qualification
- No Entitlement
- Agreement
- Compensatory
- Donation

Accrual

Use this type to create absence plans that enable workers to accrue time for taking paid leave, such as a vacation plan. Configure rules that determine various aspects of leave time, such as:

- Length and type of the accrual term in which workers accrue time
- Maximum time that workers can accrue in a term
- Maximum time that workers can carry forward to the next term

Qualification

Use this type to create an absence plan where workers qualify for the plan and receive payments during the absence period. For example, use qualification plans for defining absence rules related to events, such as long term illness or maternity. Configure rules to determine the payment percentages that apply for specific periods during the absence, for specific workers.

No Entitlement

Create absence plans of this type to track unpaid absences without maintaining an accrual balance or providing leave entitlements, such as periodic accruals. Similar to an accrual plan, you can define the length and type of the plan term and determine when eligible workers can enroll in the plan. You can also use plans of this type in combination with a qualification plan. For example, use a no-entitlement plan if a worker isn't eligible for a standard maternity absence qualification plan.

Agreement

Create absence plans of this type in accordance with statutory rules for use under an agreement. For example, create a shared parental leave agreement for a worker and qualified parental partner to allocate paid or unpaid time off among parenting partners.

Compensatory

Create absence plans of this type to track earned compensatory time that can be used for time off. Compensatory time is offered as compensation for working outside of regular work schedules. Instead of paying overtime, an employer can create a policy to give paid time off.

Donation

Create absence plans of this type to track donated time that a worker receives. Workers can donate their accrual plan balance to a coworker who needs additional time off and is eligible to receive the donated time.

Related Topics

- [Create a Maternity Plan](#)
- [Create a Vacation Accrual Plan](#)

Options to Define Qualification Plans

Configure the following rules when you create an absence qualification plan in accordance with the leave policy of your enterprise:

- Plan term
- Plan eligibility
- Enrollment and termination
- Payments

Plan Term

A qualification plan term is an assessment period for which the Evaluate Absence process calculates entitlements for the total absent time recorded in that period. When you create an absence qualification plan, you must select the type of plan term. For example, you can limit the duration of the plan term to the duration of the absence.

Plan Eligibility

Associate an eligibility profile with the qualification plan to determine the set of workers who are eligible to record an absence that belongs to that plan.

Enrollment and Termination

Decide when to enroll workers in the qualification plan. Also, decide whether ongoing payments under this plan must continue if a worker is terminated or loses eligibility for the plan.

Payments

Use an entitlement band matrix to determine the payment percentages that apply for specific time periods during an absence. Decide how you want to calculate the payment rate of a single unit of absence. You can use a rate definition to include the calculation rules, or use a formula. For example, you want workers who have completed a particular tenure to receive specific percentage of pay for a specific absence period.

The following table shows a sample scenario:

Length of Service	Payment Rule
5 to 10 years	75 percent up to 10 absent days.
10 to 20 years	75 percent up to 20 absent days.

Decide how you want to calculate the payment rate of a single unit of absence. You can use a rate definition to include the calculation rules, or use a formula.

Related Topics

- [Create a Maternity Plan](#)

Options to Define a Qualification Term

A qualification plan term is an assessment period during which absence entitlement for the total absence time recorded in that period is considered.

While creating a qualification absence plan using the Absence Plans task, you need to select one of the following plan term types:

- Calendar year
- Rolling backward
- Rolling forward
- Absence duration

Calendar Year

The qualification plan term starts on the month, day, and year that you select. The duration of the term is one year. For example, if you select January 1, 2015, the qualification term starts on that day and ends on December 31, 2015.

Rolling Backward

A rolling-backward term calculates absence entitlements based on the total duration of absences for a specific time period that precedes the absence start date. For example, if you specify a one year rolling period, and the worker's absence start date is January 1, 2015, then the calculation considers absences scheduled from January 2, 2014. You can also configure rules to determine how to deal with absences that overlap rolling backward terms.

Rolling Forward

A rolling forward term calculates absence entitlements based on the first date a worker's absence begins and calculates the end date by adding the term duration to the start date. For example, if the term duration is 365 days and the absence start date is 12 February, then the end date will be 11 February of the following year. The rolling forward option evaluates absences between this start date and end date to track plan entitlements for that period.

Absence Duration

The absence duration determines the qualification plan term. For example, if a worker schedules a maternity absence from January 1, 2015 to April 15, 2015, then that's the duration of the qualification plan term.

Related Topics

- [Options to Define Overlap Rules for Qualification Plans](#)
- [Create a Maternity Plan](#)

Options to Define Overlap Rules for Qualification Plans

When you define a rolling backward plan term for an absence qualification plan, you must select an overlap rule that determines how to deal with absences where only a partial period overlaps the current term.

The examples in this topic will help you understand how you can use the following:

- Include rule to assess absences that overlap current and previous terms
- Exclude rule to ignore the entire absence that overlaps the current and previous terms
- Split rule to assess absences falling within the current term only

The Include Rule

If an absence overlaps the beginning of the rolling period, you consider the entire absence in the current assessment period.

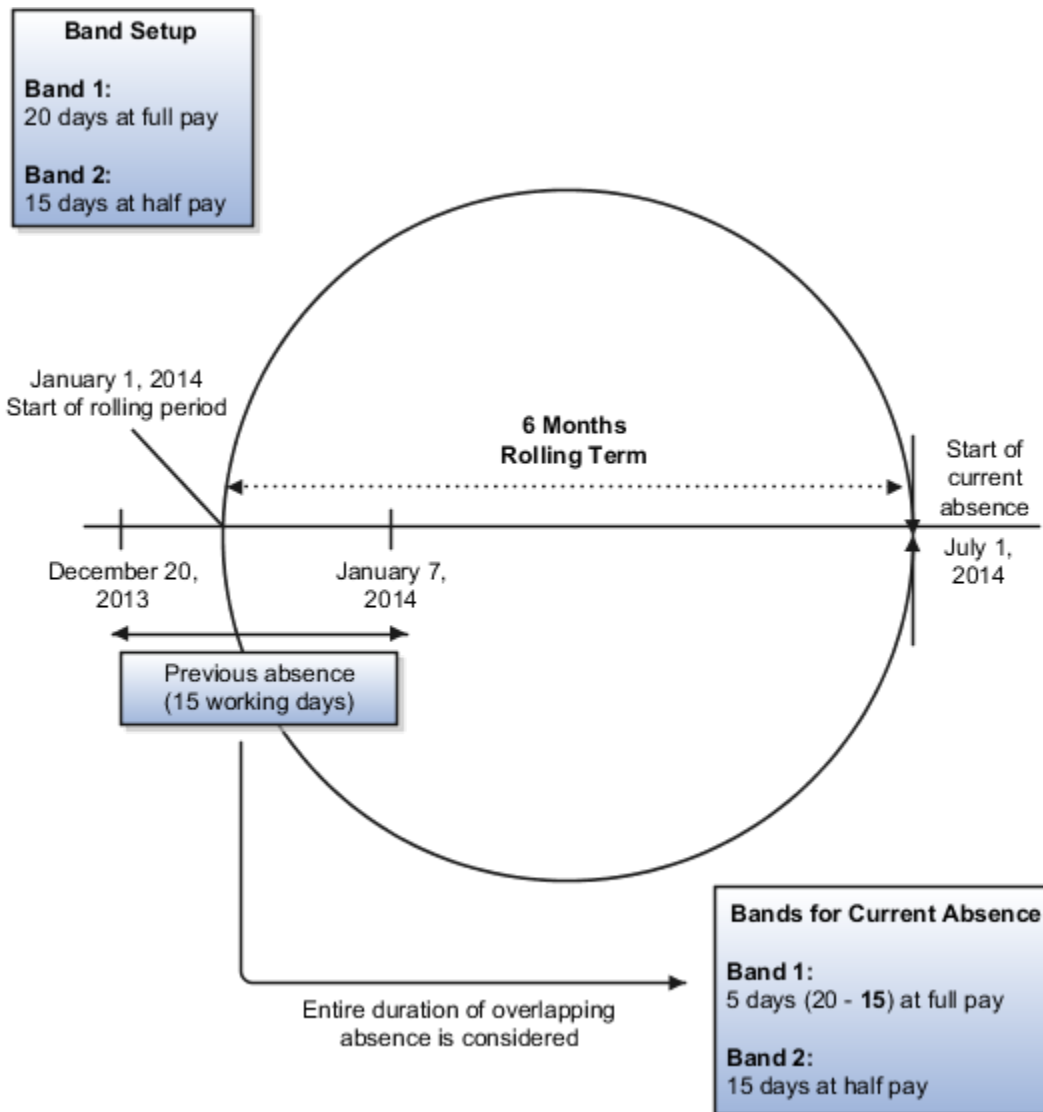
Scenario: You defined a six-month rolling-backward term in your qualification plan and set up bands that entitle workers to 20 days absence at full pay and a further 15 days at half pay.

- The assessment period for a worker began on January 1, 2014.
- The worker starts sick leave on July 1, 2014.

Previously, the worker received payment under the same sick leave entitlement plan for 15 working days from December 20, 2013 to January 7, 2014.

Because you configured the plan term to use the Include rule, the previous absence that overlaps the current assessment period is considered. So for the absence beginning on July 1, 2014, the worker receives full pay for the first 5 (20 - 15) days of the absence and half-pay for the next 15 days.

The following figure shows the usage of the Include rule in this scenario.



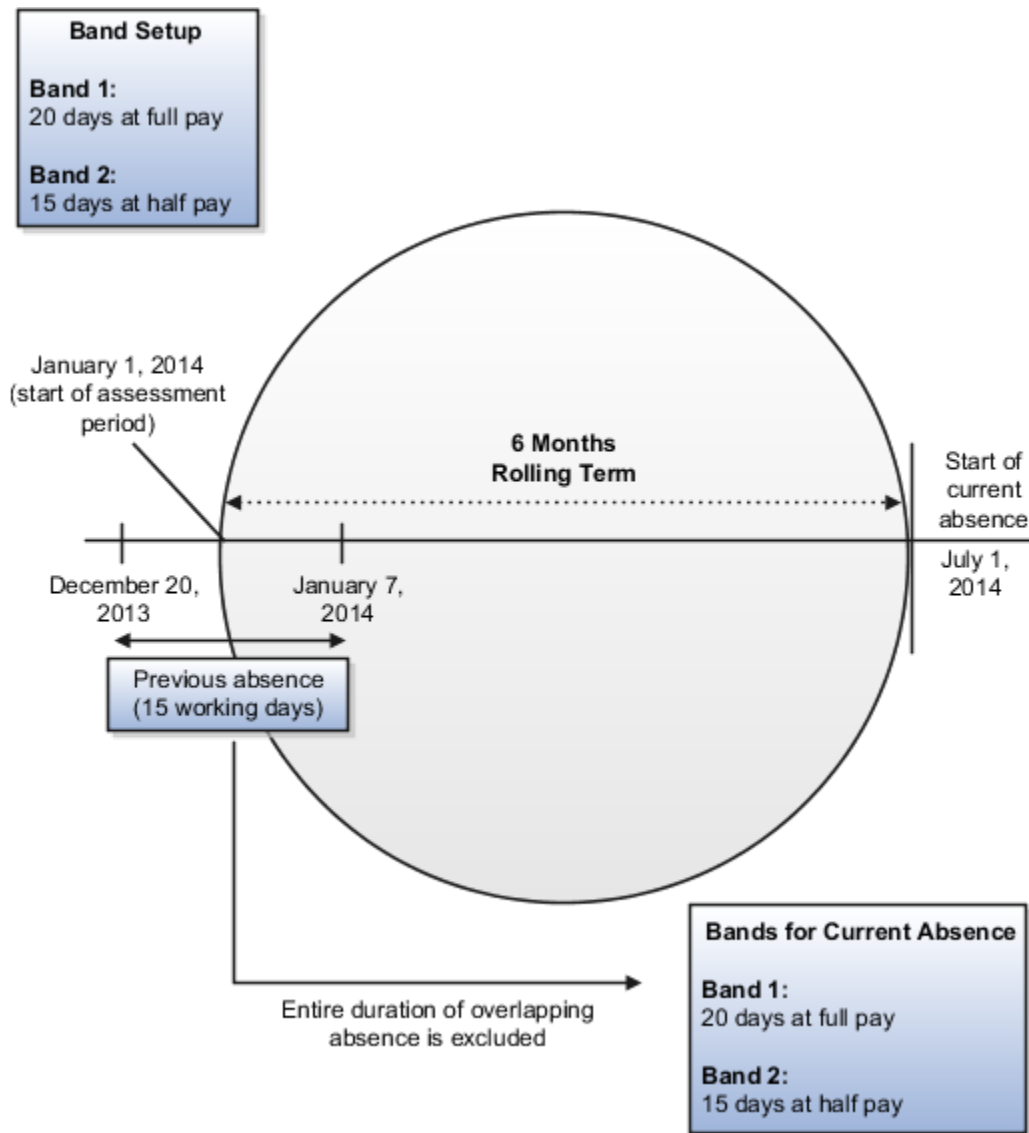
The Exclude Rule

If a worker is absent at the beginning of an assessment period, this rule ignores the entire absence that overlaps the period. In the example used in the previous scenario, for a rolling backward term that uses the Exclude rule, the worker receives:

- Full pay for the first 20 days of the absence
- Half pay for the next 15 days

Even though the previous absence overlaps the current assessment period, the worker receives the entitlement band benefits for the current absence without any deductions.

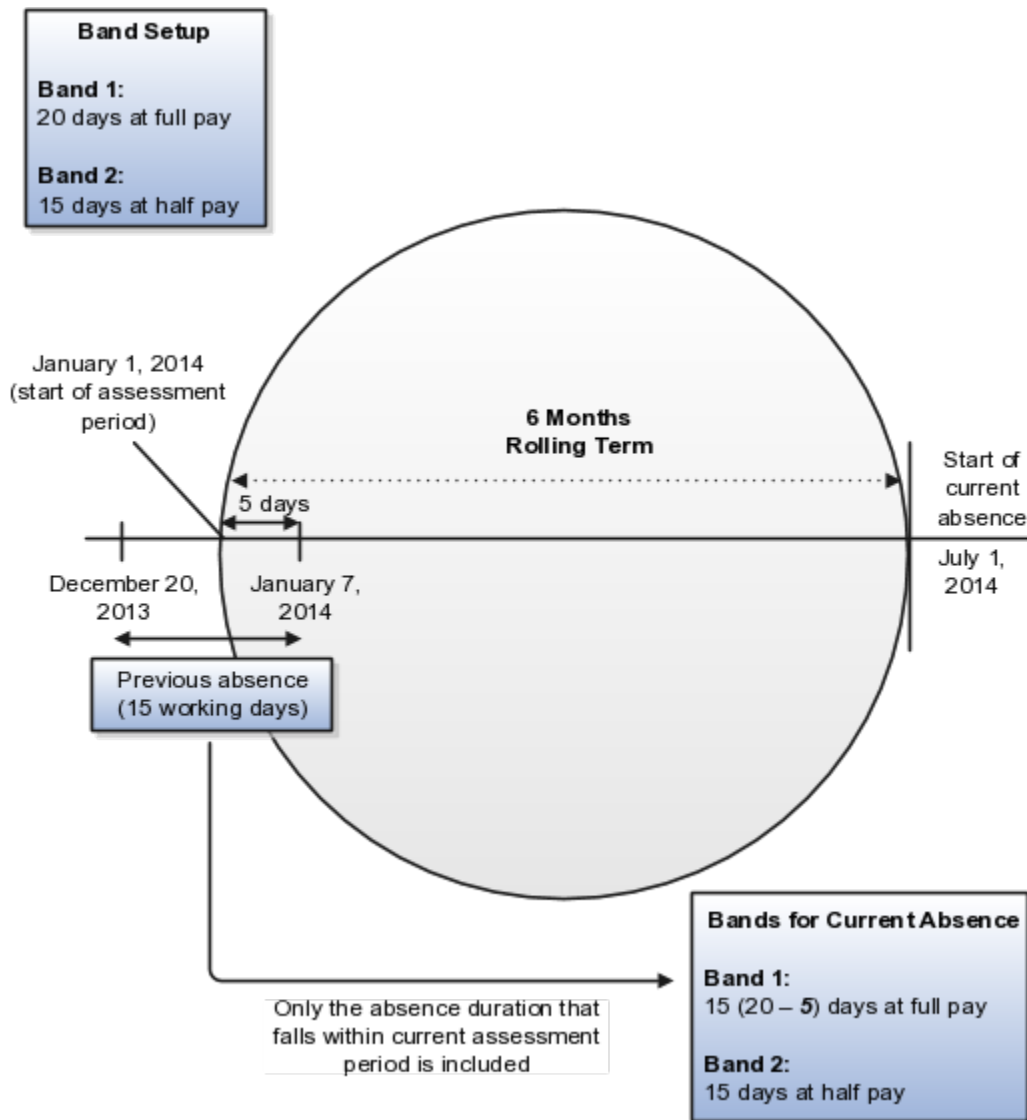
The following figure shows the usage of the Exclude rule in this scenario.



The Split Rule

This rule assesses overlapping absences that fall within the current plan term only. In the example used in the previous scenario, for a qualification plan that uses the Split rule, the worker receives full pay for the first 15 (20 - 5) days of the absence and half pay for the next 15 days.

The following figure shows the usage of the Split rule in this scenario.



Related Topics

- [Create a Maternity Plan](#)

Options to Configure Qualification Enrollment and Termination

Workers qualify for qualification plan entitlements as a result of an event, such as childbirth, and these entitlements stop when they are terminated or their plan eligibility ends.

Define when you want to enroll or disenroll a worker in the Participation tab of the Absence Plan setup page. Configure the plan to do the following:

- Enroll workers in the plan when a worker or an administrator schedules an absence using an absence type associated with a qualification plan.
- Use a formula if you must consider other aspects or rules that determine when to enroll workers in the plan.

Decide whether ongoing payments under this plan must continue if a worker is:

- Terminated
- Not terminated, but loses eligibility for the plan

How You Configure Eligibility for Absence Plans

An eligibility profile in Absence Management defines criteria used to determine whether a person qualifies for an accrual or qualification absence plan. Define eligibility profiles and then associate it with a plan to determine the set of workers who can enroll in that plan.

1. Create the eligibility profile using the Manage Eligibility Profiles task in the Absences work area.
2. Associate the eligibility profile with the absence plan using the Absence Plans task.

If you want all workers to be eligible for the absence plan, then don't add an eligibility profile. If a plan doesn't have an eligibility profile associated with it, then it doesn't mean that workers are enrolled automatically into the plan. New hires may be enrolled automatically, if that's the option set in the plan definition. Existing workers have to be enrolled manually.

Examples of Qualification Bands

Use qualification bands to determine the payment percentages that workers receive for specific time periods during a long leave of absence. Use employment criteria, such as length of service, grades, or other factors to filter workers.

You can define various types of qualification bands in the Qualification Band Matrix section on the Absence Plan setup page. The examples show qualification bands based on the following factors:

- Length of service
- Grade
- Length of service and grade

Creating a Single Payment Band for Multiple Length of Service Ranges

Scenario: You want to create a single payment band for workers who have completed the following years of service:

- For workers who have completed between 5 and 10 years of service to receive 75 percent of pay for up to 10 days of absence
- For workers who have completed between 11 and 20 years to receive the same pay percentage, but up to 20 days of absence

To create the bands:

1. Create the following length of service derived factors using the Manage Derived Factors task in the Absence Administration work area.
 - Length of service greater than or equal to 5 years and less than 10 years
 - Length of service greater than or equal to 10 years and less than 20 years
2. Use the expression builder in the Qualification Band Matrix section to create bands using the derived factors that you created:

Band Sequence	Expression
1	[LengthOfService.GreaterThan5_LessThan10]
2	[LengthOfService.GreaterThan10_LessThan20]

For each band that you create in the Qualification Band Matrix section, you must create band details in the Qualification Details section.

This table shows the band details that you must create for Band 1, which you created for workers who have completed between 5 and 10 years of service.

Band Sequence	Detail Name	Duration	Payment Percentage
1	75 percent up to 10 days of absence	10	75

This table shows the band details that you must create for Band 2, which you created for workers who have completed between 10 and 20 years of service.

Band Sequence	Detail Name	Duration	Payment Percentage
1	75 percent up to 20 days of absence	20	75

Creating Multiple Payment Bands for a Grade Range

Scenario: You want all workers who belong to grade A1 and above to receive:

- 100 percent of pay for up to 10 days of leave
- 75 percent of pay for up to a further 15 days of leave

This table shows the band information that you create using the expression builder in the Qualification Band Matrix section.

Band Sequence	Expression
1	[Person.Grade] >= "A1" The person.grade attribute is on the Entities tab in the Expression Builder dialog box.

This table shows the band details that you must create for Band 2 in the Qualification Details section

Band Sequence	Detail Name	Duration	Payment Percentage
1	100 percent pay up to 10 days of absence	10	100
2	75 percent pay for the next 15 days	15	75

Creating Multiple Payment Bands for Multiple Length of Service and Grade Ranges

Scenario: You want workers who have completed the following years of service:

Length of Service	Payment Percentage
Less than 5 years	To be eligible for: 75 percent of pay for up to 10 days of absence 50 percent of pay for a further 15 days of absence
Greater than or equal to 5 years and who belong to the A1 grade	To be eligible for: - Full pay up to 10 days of absence 75 percent of pay for a further 15 days of absence

To create the bands:

- Create the following length of service derived factors using the Manage Derived Factors task in the Absence Administration work area.
 - Length of service less than 5 years
 - Length of service greater than or equal to 5 years
- Use the expression builder in the Qualification Band Matrix section to create bands using the derived factors that you created:

Band Sequence	Expression
1	[LengthOfService.LessThan5]

Band Sequence	Expression
2	[LengthOfService.GreaterThan5] AND [Person.Grade] = "A1"

This table shows the band details that you must create for Band 1 in the Qualification Details section.

Band Sequence	Detail Name	Duration	Payment Percentage
1	75 percent pay up to 10 days of absence	10	75
2	50 percent pay for the next 15 days	15	50

This table shows the band details that you must create for Band 2 in the Qualification Details section.

Band Sequence	Detail Name	Duration	Payment Percentage
1	100 percent pay up to 10 days of absence	10	100
2	75 percent pay for the next 15 days	15	75

Related Topics

- [Create a Maternity Plan](#)

Evaluate Entitlement without Absence Record

Use the **Evaluate remaining entitlement without absence record** check box to determine how the Manage Absences and Entitlements page displays entitlements. The check box is available on the Participation tab of the Absence Plan setup page.

The following table outlines the impact of the check box on the display of information in the Manage Absences and Entitlements page:

Check Box Value	Actions Available for HR Specialist
Selected	View complete qualification plan entitlement details defined for the worker, even without an absence record
Not selected	View partial plan entitlement details of scheduled absences with different payment percentages. They can't view the plan period, qualified entitlement, and remaining entitlement. HR specialists can view partial plan entitlements in the following scenarios:

Check Box Value	Actions Available for HR Specialist
	- Worker applied for only a single absence for the plan - Worker applied for multiple absences and all of the absences are falling in the same payment percentage - Worker applied for multiple absences and all of the absences are falling in different payment percentages If the worker hasn't scheduled any absence for the plan, the Qualification Plans section of the Manage Absences and Entitlements page displays no plan details.

How Qualification Plan Entitlement Appears

For qualification plans, the qualified entitlement details for a worker are displayed in the Qualification Entitlements section of the Manage Absences and Entitlements page. The payment percentage defined during plan setup determines the calculation of these qualified entitlements.

Settings That Affect Display Of Qualification Plan Entitlement

To view all qualified entitlement details, you must select the **Evaluate remaining entitlement without absence record** check box. This check box is available on the Participation tab of the Absences Plans page. If you don't select the check box during plan creation, you can view only the payment percentage and used entitlement in the Qualification Plans section. No data appears for the plan period, qualified entitlement, and remaining entitlement columns.

How Qualification Plan Entitlement Is Calculated

Scenario: You defined a one-year rolling backward term in your qualification plan. You set up bands that entitle workers to 30 days absence at full pay and an additional 30 days at half pay.

A worker took an absence for 88 days, from June 1, 2015 to September 30, 2015. The Qualification Plans section displays the following qualified entitlements for an effective date of Sep 30, 2015 (Plan period will be Oct 01, 2014 - Sep 30, 2015):

Plan	Plan Period	Payment Percentage	Qualified Entitlement	Used	Remaining
Sick Leave		100	30	30	0
Sick Leave		50	30	30	0

The worker schedules another absence using the same plan from September 1, 2016 to September 30, 2016 for 22 days. Since you defined a one-year rolling backward term, the details considered for the 365 day time period that precedes the absence start date are:

Decisions to Consider	In This Example
Rolling backward start date	September 2, 2015

Decisions to Consider	In This Example
Used entitlements during the rolling backward time period	21 days at 0 percent (September 1, 2015 to September 30, 2015)
Available entitlements	30 working days at 100 percent, and the next 30 working days at 50 percent

For the 22-day absence from September 1 through September 30, 2016, the worker qualifies for full payment. The Qualification Plans section displays the following qualified entitlement for an effective date of Sep 30, 2016 (Plan period will be Oct 01, 2015 - Sep 30, 2016):

Plan	Plan Period	Payment Percentage	Qualified Entitlement	Used	Remaining
Sick Leave		100	30	22	8
Sick Leave		50	30	0	30

If you don't select the **Evaluate remaining entitlement without absence record** check box during plan creation, the qualified entitlements appear as shown in the following table:

Plan	Plan Period	Payment Percentage	Qualified Entitlement	Used	Remaining
Sick Leave		100		22	

Open-ended Absences

For qualification plans, you can record an open-ended absence when the employee isn't sure about the end date of the absence. This open-ended option is applicable for some absences, such as maternity or illness.

When you select the **Open-ended** check box, the end date is no longer available. You can enter an estimated end date, but this date is not used in entitlement calculation. Instead, the entitlement is calculated for 365 days. If the absence requires an extension beyond one year, a **Pending Evaluation** record is created, which denotes that the absence can be extended by 90 days when the **Evaluate Absences** process is run.

When an end date is entered on the absence, the entitlement is recalculated based on the actual end date.

Calculation of Qualified Entitlements for Open-ended Absences

The applicable payment percentage defined during plan setup determines the entitlement calculation for open-ended absences.

For example, an employee is eligible for qualified entitlements for 365 days. When the employee schedules an open-ended absence, the calculation displays as follows in the Entitlements section of the Plan Use tab:

Absence Duration	Qualified Entitlement Display
365 days	Displays the absence in a new row with the activity as Qualified Entitlement .
Exceeds 365 days	Displays the absence in a new row with the activity as Pending evaluation . This denotes that the absence can be extended by 90 days when the Evaluate Absences process is run.

After the employee enters an end date, a new row is generated with an **Entitlement exceeded** entry for the unpaid days.

Create a Maternity Plan

This example shows how to create an absence qualification plan for employees taking maternity leave.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
Who is eligible for this plan?	Only full time regular employees
What unit of measure should this plan use to process absences?	Weeks
What is the plan term to assess entitlements?	6 months, rolling backward from the absence start date
How do you deal with absences that overlap the plan term?	Use the Include rule to assess the entire absence.
How do you deal with terminated workers and workers who lose eligibility while receiving entitlements from the plan?	Continue entitlements if worker is terminated. Stop entitlements if worker loses eligibility.
For how much leave time are workers entitled to receive payment?	Workers who have completed less than 5 years of service are entitled to 8 weeks payment at 90 percent pay followed by a further 16 weeks at 50 percent pay. Workers who have completed more than 5 years of service are entitled to receive payment for the first 6 weeks at full pay followed by 12 weeks at 75 percent pay.
How do you want to calculate payments?	The declared salary determines the payment of a unit of absence.
Transfer payments for payroll processing?	Yes

Decisions to Consider	In This Example

Prerequisites

Before you create the absence plan, in the Absences work area:

1. Use the Manage Eligibility Profiles task to create a participant eligibility profile to restrict eligibility of the absence plan to full time regular workers. In the Employment tab, Assignment Category subtab, select Full-time regular from the Full Time or Part Time list.
2. Use the Manage Derived Factors task to create length of service derived factors. Don't create a qualification absence plan with multiple expression builders where all expression builders are satisfied. If there is a specific scenario, create multiple plans instead of multiple expression builders.
3. Use the Manage Rate Definitions task to create a rate definition for payment of a unit of absence based on the declared salary on the absence start date.
4. Use the Manage Elements task to create a nonrecurring element. Use Absences as the primary classification and Maternity as the secondary classification. In the Absence Plan Details section, select Qualification Absences as the type of absence information you want transferred to payroll.

Creating the Length of Service Derived Factors

1. In the Absences work area Tasks panel tab, click **Manage Derived Factors**.
2. In the Length of Service tab, click **Create**.
3. In the Create Derived Factor Length of Service dialog box, complete the fields, as shown in this table.

Field	Value
Name	LengthOfService_LessThan5
Unit of Measure	Years
Less Than Length of Service	5
Period Start Date Rule	Date of hire
Determination Rule	As of event date

4. Click **Save and Create Another**.
5. Complete the fields, as shown in this table.

Field	Value
Name	LengthOfService_GreaterThan5

Field	Value
Unit of Measure	Years
Greater Than or Equal to Length of Service	5
Period Start Date Rule	Date of hire
Determination Rule	As of event date

6. Click **Save and Close**.

Creating the Rate Definition

1. In the Absences work area Tasks panel tab, click **Manage Rate Definitions**.
2. Click **Create**.
3. On the Create Rate Definition page, complete the fields, as shown in this table.

Field	Value
Name	Maternity Leave
Short Name	MAT LEAVE
Legislative Data Group	Select your legislative data group.
Periodicity (Returned Rate Details section)	Bimonthly
Balance Dimension	Year to Date
Periodicity (Calculation section)	Bimonthly

4. Click **Create**.
5. On the Create Rate Contributors page, complete the fields, as shown in this table.

Field	Value
Balance Name	FIT Gross

Field	Value
Balance Dimension	Year to Date
Type	Actual
Add or Subtract	Add
Factor Rule	Value
Factor Value	1.00

6. Click **Save and Close**.

Creating the Absence Plan

1. In the Absences work area Tasks panel tab, click **Manage Absence Plans**.
2. Click **Create**.
3. In the Create Absence Plan dialog box, complete the fields, as shown in this table.

Field	Value
Legislation	Select your legislation.
Plan Type	Qualification

4. Click **Continue**.
5. On the Create Absence Plan page, complete the fields, as shown in this table.

Field	Value
Plan	Maternity
Legislative Data Group	Select your legislative data group.
Status	Active
Plan UOM	Weeks
Type	Rolling backward

Field	Value
Term Duration	6
Term Duration UOM	Months
Start Rule	Absence Start Date
Overlap Rule	Include

6. Click **Save**.
7. Click the Participation tab, and complete the fields, as shown in this table.

Field	Value
On Loss of Plan Eligibility Only, Terminate Entitlement	Select
Eligibility	Select and add the eligibility profile that you created as part of the prerequisite task.

8. Click **Save**.

Defining an Entitlement Matrix for the Maternity Plan

1. Click the Entitlements tab.
2. In the Entitlement Attributes section, select **Matrix**.
3. In the Qualification Band Matrix section, click **Add** to add a row.
4. In the **Sequence** field, enter 1.
5. Click the **Expression Builder** icon.
6. In the Derived tab, expand Length of Service, and select **LengthOfService_LessThan5**.
7. Click **Insert Into Expression**.
8. Click **OK**.
9. In the Create Absence Plan page, click **Save**.
10. Repeat step 3 through step 9. Ensure that you provide the following key information, as shown in this table:

Field	Value
Sequence	2
Derived factor to select in the expression builder	LengthOfService_GreaterThan5

11. In the Qualification Band Matrix section, click the **LengthOfService_LessThan5** row.
12. In the Qualification Details section, complete the fields, as shown in this table.

Sequence	Detail Name	Duration	Payment Percentage
1	8 weeks at 90 percent pay	8	90
2	16 weeks at 50 percent pay	16	50

13. In the Qualification Band Matrix section, click the **LengthOfService_GreaterThan5** row.
14. In the Qualification Details section, complete the fields, as shown in this table.

Sequence	Detail Name	Duration	Payment Percentage
1	6 weeks at full pay	6	100
2	12 weeks at 75 percent pay	12	75

15. Click **Save**.
16. Click the Entries and Balances tab, and complete the fields as shown in this table.

Field	Value
Absence Payment Rate Rule	Select the Maternity Leave rate definition that you created.
Transfer absence payment information for payroll processing	Select
Element	Select the element that you created as part of the prerequisite task.

17. Review the information you entered in all the tabs.
18. Click **Save and Close**.

Related Topics

- [Define Payroll Elements to Process Absences](#)

How You Create a Shared Parental Leave Agreement

In accordance with government-mandated rules of your country, you can configure a shared parental leave agreement. The shared parental leave enables workers to curtail their maternity or adoption leave in order to share it with their partner.

The shared parental leave may be paid or unpaid. The amount of leave which can be taken depends on how much leave the person curtailing the maternity or adoption leave has left.

Here's how you create a shared parental leave agreement for your legislation:

1. Create absence plans for Childbirth and Adoption using the Absence Plans task in the Absences work area.
2. Create absence types for Childbirth and Adoption using the Absence Types task in the Absences work area.
3. Set up an agreement template that specifies the source plan and the target plan using the Leave Agreements task in the Absences work area.

Creating Absence Plans for Shared Parental Leave

Select the **Agreement** plan type and create the following absence plans for Shared Parental Leave:

- Childbirth
- Adoption

Add two bands, one paid and the other unpaid in the Entitlements tab.

Creating Absence Types for Shared Parental Leave

Select the **Generic absence** pattern and create the following absence types for Shared Parental Leave:

- Childbirth
- Adoption

On the Create Absence Types page:

1. In the Type Attributes tab, select the **Agreement Selection** field.
2. In the Plans and Reasons tab, ensure that the status of the selected plan is **Active** and the priority is set to **1**. Occupational plans can also be added to the same absence type. However, make sure the priority of those plans is higher than the statutory plan and they're not concurrent. This ensures that the entitlement under the statutory plan is always calculated, irrespective of whether the workers are eligible for occupational plans or not.
3. In the Display Features tab, set the Open Ended field to **Do not display**. This field is in the Dates and Duration section.

Setting up an Agreement Template

The Shared Parental Leave functionality is governed using two processes which are based on agreement templates. Two Agreement Templates patterns are available out of the box:

- Childbirth or placement conversion (Giver)
- Childbirth or placement agreement(Receiver)

You can use them to set up an agreement template using the Leave Agreements task, which specifies:

- The mother or primary adopter's source plan (Giver) where the entitlement is converted to shared entitlements.
- The partner's target plan (Receiver) associated with the Shared Parental Leave agreement that receives the mother's or primary adopter's entitlements.

Use agreement templates to define eligibility rules and reason codes for denial or withdrawal of agreements. You can also specify entitlement or eligibility formula, enable partner selection and entitlement allocations, and give the option to add documentation certifications.

Once you've created both the agreement templates, you can associate them to an absence if the absence type has been configured for it during absence entry. The absence will consume from the entitlements shared through the agreement. However, the absence needs to be entered within the agreement period and must not be longer than the duration allocated on the agreement.

11 Compensatory Time

Options to Define Compensatory Plans

Configure the following rules when you create a compensatory plan in accordance with the leave policy of your enterprise:

- Earned time expiration
- Plan eligibility
- Enrollment and termination
- Vesting period
- Plan limits
- Manual Adjustments

Earned Time Expiration

Define whether compensatory time earned is subject to expiration. If yes, define the expiration limit and time frame, and how you want to process the expired earned time. You can choose whether to expire the full amount or whether it should be disbursed for payment. The application consumes compensatory time based on the expiration date. This means that the absence consumes the hours of the compensatory plan that expires first.

Plan Eligibility

Associate an eligibility profile with the compensatory plan to determine the set of workers who can enroll in that plan.

Enrollment and Termination

Decide when to enroll workers in the compensatory plan and choose when to disenroll a terminated worker from the plan. Administrators and managers can control the date when balances expire based on your configuration. You can determine who can control these dates in the Expiration Date Updates section of the **Entries and Balances** tab.

Vesting Period

Define a vesting period for the plan if you want workers to use it after a specific amount of time after plan enrollment.

Plan Limits

Determine the maximum compensatory time that a worker can accumulate into the plan. Additionally, select if a negative balance is allowed for the plan.

Manual Adjustments

Administrators and managers can manually adjust the compensatory time balance for workers. You can determine who can make these adjustments in the Manual Adjustments section of the **Entries and Balances** tab.

Expiration Rules for Earned Compensatory Time

When you create a compensatory plan, you need to select an expiration rule to define if the earned compensatory time is subject to expiration.

There are four expiration rules available for you to choose from:

- Acquisition date
- End of acquisition pay period
- End of acquisition week
- No expiration

Acquisition Date

Compensatory time expires in a defined amount of time from the acquisition date. For example, if the compensatory time is earned on December 22 and the expiration time frame is defined as six months, the compensatory time expires on June 22.

End of Acquisition Pay Period

Compensatory time expires in a defined amount of time from the end of the pay period. For example, if the compensatory time is earned on December 22, the current pay period is December 16 to December 31, and the expiration time frame is six months, the compensatory time expires on June 30.

End of Acquisition Week

Compensatory time expires in a defined amount of time from the end of the week the compensatory time is earned. For example, if the compensatory time is earned on December 22, which is the week of December 17 to December 23, and the expiration time frame is six months, the compensatory time expires on June 23 since the end of the acquisition week is December 23.

No Expiration

The compensatory time earned is not subject to expiration.

Related Topics

- [Options to Define Compensatory Plans](#)

12 Donation

Overview of Donation

Workers can donate some or all of their accrual plan balances to others who need it. Administrators and managers can also do this on behalf of workers.

Here's how workers and managers donate time:

1. Click **Donations** in the Time and Absences page. Managers can navigate to this page using the Donations quick action from My Team page.
2. Click **Add** in the Donations page.
3. Select the date and absence plan you want to donate from. Enter the amount of time you want to donate.

Note: Employees with multiple assignments must select the assignment and then the plan from which they want to donate. Managers and administrators will see one row per assignment when they search for the employee. Select the assignment from which donation is to be made.

4. Select the alias or name of the recipient. If there's no alias, the recipient name appears.
5. Click **Submit**.

If you're an administrator, here's how you disburse an employee's balance:

1. Click **Absence records** in the Absences work area under the My Client Groups tab.
2. Search and select the employee to open the Manage Absences and Entitlements page.
3. Select the absence plan and click **Initiate Donation** on the Enrollments and Adjustments menu. This menu is in the Plan Participation section.
4. .Select the date and amount to be donated
5. .Select the alias or name of the recipient. If the alias isn't defined, the recipient name appears
6. Click **Submit**.

Options to Define Donation Plans

Create a donation plan for workers who need additional time off over and above their entitlement using the Absence Plans task in the Absences work area.

Donation Rules

Configure the following rules when you create a donation plan in accordance with the leave policy of your enterprise:

Rule	Description
Unit of measure	Specify the unit of measure for the donation plan. The unit of measure can be only Hours or Days . An accrual plan shows donors only donation plans with the same unit of measure as their accrual plans.

Rule	Description
	Enroll workers in only one donation plan of a specific unit of measure so that when a donor initiates a donation from their accrual plan, the balance transfers to the correct donation plan. For example, if a donor initiates a donation from a vacation accrual plan measured in days, the donation process looks for a donation plan measured in days. When it finds the corresponding donation plan, it transfers the donated time to the worker's donation plan. If you know that coworkers can donate from multiple plans with different units of measure, then enroll the worker into two donation plans, one measured in Hours, the other in Days.
Plan limits	Determine the maximum donated time that a worker can accumulate in the plan. Additionally, specify whether the plan allows a negative balance.
Termination	Specify how to disburse or recover donation plan balances when the worker is terminated.
Balance updates	Specify which types of donation balance adjustments must be available to HR specialists.
Disbursement	Specify whether workers are eligible for cash disbursement requests from the donation plan. Decide who can initiate the disbursement. Additionally, define disbursement rules and the number of hours that can be disbursed.
Donation type	Specify whether workers donate to an individual person or to a balance pool. Donations made to the pool are maintained as monetary fund by the payroll. When employees require additional PTO hours, they can request more hours from the donation pool.

Related Topics

- [Overview of Donation](#)

How You Can Set Up PTO Donations for Your Legislation

Set up absences so that you can ensure automatic transfer of donated time off between coworkers.

To configure absences for donation, complete these tasks:

1. Create a **Donation** plan type using the **Absence Plans** task. Set the unit of measure to **Hours** or **Days**. The unit of measure for the donation and accrual plans must be the same. This ensures that when workers initiate donations, the accrual plan can identify the correct donation plan.
2. Specify in the **Donation Type** field whether the donation is to an individual worker or to a pool.
3. Configure donation rules on the corresponding accrual plan to allow workers to donate their accrual balances. Use the Entries and Balances tab, Donation section to enable the donation feature on an accrual plan. You can configure donation rules and define the number of hours that a worker can donate to another worker.
4. You can also configure approval notifications for donation requests.
5. Enroll workers needing additional time off in the appropriate donation plan by selecting **Add Enrollment** on the **Enrollments and Adjustments** menu. This menu is on the Manage Absences and Entitlements page, in the Plan Participation section, Accrual Plans subsection.

Related Topics

- [Overview of Donation](#)
- [Options to Define Donation Plans](#)

Create a Donation Plan

Here's how you create a donation plan:

1. In the Absences work area, on the Tasks panel tab, click **Absence Plans**.
2. On the Absence Plans page, click **Create**.
3. On the Create Absence Plan dialog box, in the **Plan Type** field, select **Donation**.
4. Click **Continue**.
5. On the Create Absence Plan page, Plan Attributes tab, enter the name of the plan.
6. Select the legislative data group.
7. In the **Status** field, select **Active**.
8. Specify in the **Donation Type** field whether the donation is to an individual worker or to a pool. When creating a donation pool plan, you need to define the eligibility criteria for both the recipients and the donors on the **Participation** tab.
9. In the **Plan UOM** field, select **Hours** or **Days** so that this plan can receive donations from accrual plans with the same unit of measure. If coworkers can donate time to the worker from multiple plans with different units of measure, enroll the worker in 2 donation plans, one with **Hours** and the other with **Days**.
10. On the Plan Rules tab, optionally specify a ceiling amount. You can select **Flat Amount** or **Formula**. The ceiling amount limits the total donated amount that this plan can receive. You can also specify how to disburse or recover donation plan balances when the worker is terminated.
11. On the Entries and Balances tab, specify the transactions that this donation plan allows workers to make. For example, you can allow workers to cash out the donated leave instead of taking an absence.
12. Select **Transfer absence payment information for payroll processing** and select an absence element to transfer the donation balance for payroll processing. To integrate the absence plan with Global Payroll, create elements using the **Manage Elements** task in the Payroll Calculation work area. Then, associate the element with the plan on the Create Absence Plan page.

Related Topics

- [Overview of Donation](#)
- [Options to Define Donation Plans](#)

How You Configure Donation Rules on an Accrual Plan for Workers to Donate to Coworkers

Enable the donation feature of an accrual plan on the Absence Plans page. Use the Entries and Balances tab, Donation section. You can also configure donation rules and limit the number of hours that a worker can donate to another worker.

For the Donation Rule, you can select either **Formula** or **Flat Amount**. When you select **Flat Amount**, you can also specify the following quantities. When you select **Formula**, you must specify a formula that returns values for these same quantities:

- The minimum number of hours that the worker is eligible to donate
- The maximum number of hours that the worker can donate, for instances where you want to limit the amount to a certain number of hours
- An increment to prevent workers from entering decimal places, and thus avoid rounding issues later

If you don't specify any minimum, maximum, and increment quantities, the application assumes that there are none.

Related Topics

- [Overview of Donation](#)
- [Options to Define Donation Plans](#)

Configure Approvals for Donation

You have the option to configure approval notifications for donation requests.

For example, you want line managers to approve donations initiated by workers. To view notifications, managers can click the **Notifications** icon on the Home page. They can also opt to receive notifications by email with approval options.

Here's how you configure donation approval notifications:

1. Go to the BPM Worklist.
2. On the **Task Configuration** tab, select the **AbsencePlanBalanceDonationApproval** workflow task to configure, and then click the **Edit** task icon in the **Tasks to be configured** toolbar.
3. Open the **Assignees** subtab and modify the approval rule, if required.
4. Click **Save**.
5. Click the **Commit** task icon in the **Tasks to be configured** toolbar when you're ready to deploy your changes.

Related Topics

- [Overview of Donation](#)
- [Options to Define Donation Plans](#)

Enroll a Worker in a Donation Plan

If the worker is eligible to receive a time-off donation from coworkers, here's how you enroll the worker in a donation plan:

1. In the Absences work area under the My Client Groups tab, click **Absence Records**.
2. On the Manage Absences and Entitlements page, in the Plan Participation section, Accrual Plans subsection, on the **Enrollments and Adjustments** menu, select **Add Enrollment**.
3. Select the donation plan.

4. Enter the date when the worker's plan eligibility starts.
5. Optionally, enter a unique alias to protect the identity of the donation recipient and comply with privacy requirements of your organization.
6. Optionally, decrease or increase the ceiling amount in the **Ceiling Override** field if you want to provide a different limit from the ceiling amount defined during plan setup.
7. Click **Submit**.

When workers initiate donations from their accrual plans, they see only recipients for donation plans with the same unit of measure as their accrual plans. Therefore, it's important to enroll workers in donation plans with the correct unit of measure.

You can make corrections or change the alias by selecting **Update Enrollment** from the Enrollments and Adjustments menu of the Manage Absences and Entitlements page. You can even update the ceiling amount to a value lower than the current balance. However, this means that no more donations are accepted for this plan because the balance is higher than the ceiling.

Administrators can also manually enroll a worker into a donation pool plan and add donations. Here's how it's done:

1. Click **My Client Group > Absences > Absence Records**.
2. Search and select the worker who needs to be enrolled into the pool plan.
3. In the Plan Participation section, click Enrollments and Adjustments, and click **Transfer Balance from Pool**.
4. Select the date and the amount to be donated.
5. Click **Submit**

If the worker loses eligibility or doesn't consume the donated hours in the period specified by company policy, the HR administrator can manually return the remaining balance from worker's pool plan enrollment back into the donation pool fund. To do so, click **Enrollments and Adjustments > Return Balance to Pool**.

Related Topics

- [Overview of Donation](#)
- [Options to Define Donation Plans](#)

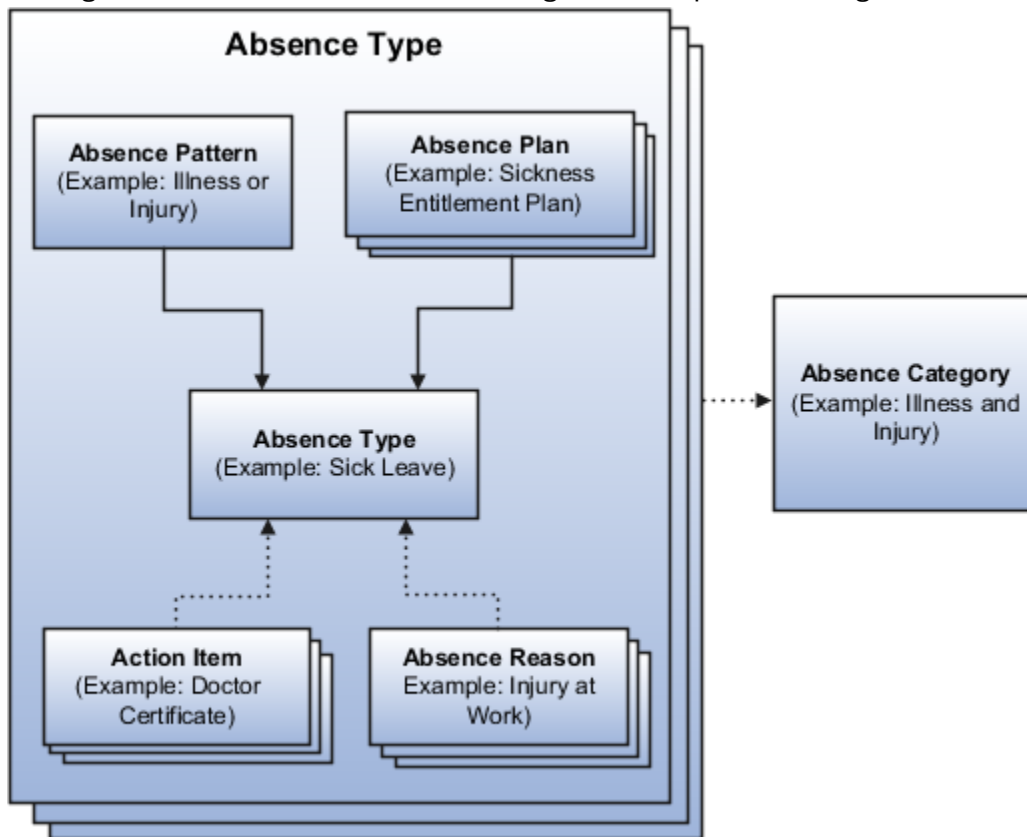
13 Absence Types, Reasons, and Categories

How Absence Components Work Together

Configure absence components such as types, categories, patterns, plans, reasons, and certifications to reflect the absence management policy of your enterprise.

Component	Location in the Absences Work Area
Absence types	Use the Absence Types task to create absence types.
Absence categories	Use the Absence Categories task to create absence categories and associate them with absence types.
Absence patterns	Review these settings on the Display Features tab when you create an absence type.
Absence plans	Use the Absence Plans task to create absence plans.
Absence reasons	Use the Absence Reasons task to create absence reasons.
Absence certifications	Use the Absence Certifications task to set up a requirement. Then associate the requirement as an action item with an absence type so that every absence associated with the absence type is subject to that requirement.

This figure illustrates how the absence management components fit together.



Absence Type

When you create an absence type, such as sick leave, you include rules to determine when users record or manage an absence of that type. For example, you can restrict workers so that they can record absences only of a particular duration. An alert appears if the entered duration exceeds the maximum value.

Decide which fields or sections you want to show or hide for specific user roles when they record or approve a specific absence type.

Absence Category

Create absence categories to group absence types for reporting and analysis. For example, you can create an absence category called family leave and associate with it absence types, such as maternity, paternity, and child care.

Absence Pattern

An absence pattern contains a predefined set of rules that you can use as a starting point to create an absence type. When you create an absence type, you must associate it with any of the following predefined patterns:

- Illness or injury
- Childbirth or placement
- Generic absence

For example, you can select the Generic absence pattern to create an absence type to schedule vacation time using the time accrued under a vacation accrual plan.

The pattern that you select determines:

- Whether special fields appear on the absence type pages
- The options available to display and process various aspects of absence recording

For example, the Childbirth or placement pattern displays a field for selecting whether the absence type applies for childbirth or adoption placement.

Absence Plans

Create absence plans to define rules for accruing leave time and receiving payments during an absence period. You must associate at least one absence plan with an absence type.

To schedule an absence using an absence plan, the unit of measure defined in the plan must match the unit of measure defined in the associated absence type. If the unit of measure differs, you can define the conversion formula and attach it to the absence type. This formula is applicable only if the unit of measure is hours or days for the absence type.

Absence Reasons

Create absence reasons to select from when scheduling an absence. Absence reasons are independent of absence types. You can use the same reason for multiple absence types. When you create an absence type, you associate the reasons with the type.

Absence Certifications

Create certification requirements for absences that require documentation to authorize an absence. For example, in case of an absence due to illness, set up a requirement that workers must submit a doctor's certificate within a stipulated period of time. This ensures they receive full payment for the absence duration.

Related Topics

- [Create a Vacation Absence Type](#)
- [Create a Maternity Plan](#)
- [Create a Vacation Accrual Plan](#)
- [Create an Absence Certification Requirement](#)

Absence Display and Processing Rules

When you create an absence type, you can configure various aspects of the absence type, such as processing rules, and display of various fields.

You can configure the following in the absence type setup page:

- The display of various fields and sections on the absence recording pages for specific user roles
- Rules related to entry of information into specific fields. Based on the absence pattern that you select, all fields and rules have default values, which you can configure on the Display Features tab.

You can configure the usage of the following sections:

Primary Details Configuration

Determine whether you want to show or hide the following fields in the Supplemental Details section on the absence recording pages:

- Reasons
- Comments
- Attachments

Balance Display on Notification Configuration

Configure absence types to display plan balance as of the absence end date in any generated notification. Select the **Display balance in approval notification** check box in the General Attributes section of the absence type setup page to display the plan balance on absence notifications. You can display plan balances only for accrual, compensatory, and donation plans.

Assignment Selection Configuration

Configure absence types for employees with multiple assignments so that managers, administrators, and employees can enter absences that impact either all assignments or a specific assignment. Select the **Allow assignment selection at absence entry** check box in the Type Attributes tab of Create/Edit absence type page to provide this option at absence entry.

When adding an absence, if you select an absence type from the list that has been configured to allow assignment selection during absence entry, the Business Title field appears. This is where you can select the assignment that you want to add an absence for. If you choose a specific assignment, the absence will impact only that particular assignment. But if you select the option **All**, the absence will impact all the assignments active as of the absence start date.

Absence Bidding Configuration

Employees can request an absence by submitting a bid with two preferred absence dates, designating one as the first preference and the other as the second preference. The manager can approve or reject these bids, depending on the configured rules. Only approved bids are converted into absence requests. If the line manager is the only approver, then the approved bid becomes a scheduled absence.

To enable bidding on an absence type, you need to select the **Enable bidding** check box in the General Attributes section of the absence type setup page.

Qualified Entitlement Rule

Configure this rule to show or hide the Qualified Entitlements section on the absence recording pages for qualification plans. When workers schedule an absence related to a qualification absence plan, the Qualified Entitlements section displays payment percentages that apply during the absence period.

Approval and Processing Rules

Configure rules related to absence approvals and processing that are available to specific roles in the approval page.

Insufficient Balance Enforcement Rule

Configure this rule to show or hide the Projected Balances section on the absence recording pages. When workers schedule an absence related to an accrual absence plan, an error message prevents workers from adding an absence if there is insufficient accrual balance.

Dates and Duration Configuration

Control the processing and display of the date-related fields that appear on the absence recording pages. This section covers the dates that are captured, calculated, and evaluated. The fields vary significantly by absence pattern.

Supplemental Details Configuration

Control the display of additional fields that collect additional information and support absence processing. The fields vary based on the pattern selected.

Related Topics

- [Examples of Start Date Validation Rule](#)
- [Absence Dates and Duration Rules](#)
- [Absence Approval and Processing Rules](#)
- [Options to Configure Display of Supplemental Details](#)

Absence Approval and Processing Rules

When you create an absence type, you can configure the absence approval and processing rules.

The following table explains the absence approvals and processing rules:

Rule	Effect of Enabling
Approval processing	All absence submissions must be approved.
Approvals reset on update	When you update an already scheduled absence, it resets approvals and goes through manager approval again. For example, the status changes from Scheduled to Awaiting approval.
Deferred processing	An absence that you schedule doesn't have any impact on accrual balance or entitlements until you confirm the absence. You must run the Evaluate Absences process to confirm deferred absences.
Additional payload attribute	Helps you configure the absence approval flow according to your organization needs. This allows more flexibility in routing approvals within your organization.
Concurrency	Enable workers to receive concurrent entitlements through different absence types for absences scheduled for the same time and day.

Rule	Effect of Enabling
Payable after termination	Enable workers to receive qualification entitlements even after termination. For example, in some legislations even though employment may end, the absence entitlement for maternity or adoption leave may continue to be paid.

Absence Dates and Duration Rules

When you create an absence type, you can configure the processing and display of various date-related fields that appear on the absence recording pages.

You can configure the following date-related fields:

- **Absence start date:** Configure this field to display the absence start date.
- **Planned absence start date:** Configure this field to determine the planned start date for an absence.
- **Planned absence end date:** Configure this field to determine the planned end date for an absence.
- **Absence end date:** Configure this field to display the absence end date.
- **Occurrence limit rule:** Configure this rule to set a limit on the duration and occurrence of an absence type.
- **Open ended:** Configure this rule to enable workers to submit an absence without entering an absence end date.
- **Absence start date validation:** For accrual plans, configure this rule to determine dates when workers can't schedule an absence. For qualification plans, configure this rule to determine a specific date, based on the absence start date, to process entitlements for the absence that the worker submitted.
- **Advanced absence entry:** This rule enables the Advanced mode option so that workers can schedule discontinuous dates, a weekly recurring absence, or a half day absence.
- **Override Daily Duration:** This rule enables workers to override the start and end time of a particular day on which they were absent.
- **Matching date:** For qualification plans, configure this rule to determine the date a child is matched with the worker for adoption purposes. When the child is from another country, it's usually the date the child enters the prospective parent's country. This field is applicable only when you select Placement as the event type.
- **Expected date of event:** Configure this field to determine the expected date of childbirth or adoption.
- **Expected week of event:** Configure this field to determine the expected week of childbirth or adoption.
- **Actual date of event:** Configure this field to enter the actual date of childbirth or adoption.
- **Intend not to return to work:** Configure this rule for qualification plans where the worker doesn't intend to return to work after the maternity absence.

Related Topics

- [Examples of Start Date Validation Rule](#)

Allow Daily Absence Duration Override

Use the Override Daily Duration rule to configure an absence type when the workers work variable hours and the employer doesn't want to change the work schedule.

Configure an absence type that uses hours as the unit of measure to override the start and end time of a particular absent day. A work schedule determines the times when a worker is available and unavailable for work based on the defined daily working hours for the worker. So when the worker schedules an absence, the defined daily working hours appear automatically on the absence request page. The Override daily duration rule enables the worker to modify the defined daily duration to more than the availability hours when scheduling an absence.

Note: If the employer changes the work schedule, and an absence is recorded with the same absence type that has the override daily duration rule enabled, the duration of the absence doesn't change.

Here's how you enable the Override daily duration rule:

1. In the Absences work area Tasks panel tab, click **Absence Types**.
2. In the Search Results section, click **Create** to open the Create Absence Type dialog box.
3. Select the pattern.
4. Click **Continue** to open the Create Absence Type page.
5. In the Type Attributes tab, enter the name.
6. Select the legislative data group.
7. Select the **Display Features** tab.
8. In the Dates and Duration section Override daily duration row, select **Enabled**.
9. Click **Save and Close** to return to the Absence Types page.

Workers use the advanced absence entry page to override the automatically calculated absence duration.

Options to Configure Display of Supplemental Details

When you create an absence type, you can control the display of the following fields that appear in the Supplemental Absence Details section on the absence recording pages:

- **Authorized absence:** Provides notification of an authorized absence.
- **Authorization status updated:** Determines the authorization status for an absence based on the certification update.
- **Block leave status:** Enables workers to report a fixed period away from work deducted from the worker's normal annual leave entitlement. For example, in financial organizations depending on the nature of work, certain workers are required to take a block of leave every year so that finance watchdog organizations can audit the financial transactions for any inconsistencies.
- **Notification date:** Determines the absence notification date.
- **Late notification waiver date:** Determines the waiver date when an absence notification qualifies as a late notification.
- **Late notification waived:** Determines when an absence notification that qualifies as a late notification is waived.

- **Special conditions:** Enables workers to select any special conditions relevant for the absence type. This field appears when you select the Illness or injury or Childbirth pattern.

Examples of Start Date Validation Rule

The examples in this topic show you how to use the absence start date validation rule to restrict accrual plan related absence entries to particular dates.

Use this rule to determine the date when you want to process entitlement calculations for a qualification plan related absence. You configure the absence start date validation rule in the Display Features tab when you create or edit an absence type.

Configuring the Rule for Accrual Plan Absences Using Two Conditions

Scenario:

- You want to enable workers to schedule an absence only if the absence start date is two days later than or equal to the current date.
- You also want another condition that prevents workers from scheduling an absence too far in advance. You want workers to schedule an absence only up to three months from the current date.

You configure the first condition of the absence start date validation rule with the following information.

Field	Value
Operation type	> (earlier than)
Reference date	System date
Operand	+
Time period	2
UOM	Calendar days

You configure the second condition of the absence start date validation rule with the following information.

Field	Value
Operation type	> (later than)
Reference date	System date
Operand	+

Field	Value
Time period	3
UOM	Months

Configuring the Rule for Qualification Plan Absences Using a Single Condition

Scenario: You have defined a qualification plan for workers to schedule maternity absences. Although you want to enable workers to submit the absence, you want to defer processing entitlements until thirty days after the absence entry date.

You configure the absence start date validation rule with the following information.

Field	Value
Operation type	= (equal to)
Reference date	System date
Operand	+
Time period	30
UOM	Days

How HCM Assignment Security Works With Absences Impacting Multiple Assignments

You can use the HCM assignment security feature to determine who gets access to the absence information of a worker enrolled in multiple assignments.

You can decide whether managers or administrators get access to all the absence information of the employee, or have restricted access to only the absence information pertaining to a specific assignment of the employee. HCM Assignment Security impacts the usage of various aspects of absence components.

Plan Balances

When HCM Assignment Security Is Disabled	When HCM Assignment Security Is Enabled
Managers can: • .View all the employee's assignments, during person search. • View plan balances of enrollments of all the employee's assignments.	Managers can: • View only those employee assignments that they have access to, during person search. • .View plan balances of enrollments of only those employee assignments that they can access.
Administrators can: • View all the employee's assignments, during person search. • View plan balances of all enrollments. • Do plan actions like transfer and adjust balance on any enrollment of the employee.	Administrators can: • View only those employee assignments that they have access to, during person search. • View plan balances of enrollments of only the employee assignment that was selected in person search. • Do plan actions like transfer and adjust balance on the enrollments of only the employee assignment that was selected in person search.

Plan Balances Using REST

When HCM Assignment Security Is Disabled	When HCM Assignment Security Is Enabled
Managers and administrators can use resources to return plan balances of enrollments of all the employee's assignments.	Managers and administrators can use resources to return plan balances of enrollments of only those assignments that they can access.

Disbursements and Donations

When HCM Assignment Security Is Disabled	When HCM Assignment Security Is Enabled
Managers and administrators can: • .View all the employee's assignments, during person search • .View disbursements and donations made from plans enrolled to any assignment of the employee. • Initiate disbursement or donation on behalf of the employee from enrollments of any assignment of the employee.	Managers and administrators can: • View only those employee assignments that they have access to, during person search. • View disbursements and donations made from plans enrolled to an employee assignment that they have access to. • View disbursements and donations made from plans enrolled to an employee assignment that they have access to.

Absences Self-Service Pages, Administrator Page and Absences REST

When HCM Assignment Security Is Disabled	When HCM Assignment Security Is Disabled
Managers and administrators can: - View all the employee's assignments, during person search. - View all the employee's assignments, during person search. - Create absences that impact any or all the assignments of the employee active as of the absence start date, depending on the absence type configuration. - Create absences that impact any or all the assignments of the employee active as of the absence start date, depending on the absence type configuration.	Managers and administrators can: - View only those employee assignments that they have access to, during person search. - Access all absences entered at the person-level which means that either assignment selection at absence entry isn't enabled, or the absence was entered for "all" employee assignments. - View absences entered for a specific employee assignment only if they have authority to access that assignment. - Enter absences for a specific employee assignment, only if they have authority to access that assignment. - View all absence certifications linked to a person-level absence. They can also View absence certifications linked to an assignment-level absence, if they have access to the employee assignment for which the absence was entered. - View all qualification plan entitlements and entitlement agreements if they have access to the person, as these are always at person level.

How You Configure Absence Types to Prevent Absences From Impacting Multiple Assignments

You can use the Allow assignment selection at absence entry and Allow only one assignment per absence check boxes to configure an absence type to ensure that all absences using that type will need to be entered for a specific assignment.

You can use these check boxes in the absence type setup page's Multiple Assignment Rules section to ensure that:

- When you select both these check boxes, workers can only enter absences for specific assignments in the self-service page. If the worker has only one assignment, or the manager has access to only one assignment, then they can only select that assignment. If HCM Assignment Security is enabled, then the managers can see only those assignments of the employee that they have access to in the Business Title. Similarly, on the absence entry page available to the administrator, the assignment drop-down list displays only those assignments that the administrator can enter an absence for. Workers can enter an absence only after they select an assignment.
- When you select only the **Allow assignment selection at absence entry** check box, workers can enter absences for only a specific assignment or for all the assignments. When the employee or manager selects the All option, the absence impacts all the assignments of the employee. Similarly, administrators can choose to select a specific assignment or All option from the assignment drop-down list on the absence entry page available to them.

If you don't select either of these check boxes, the application will continue its default behavior and won't allow the entry of absences for specific assignments.

How You Configure Plans to Offer Concurrent Entitlement

You define concurrent absence plans to ensure that workers receive payments from multiple plans simultaneously during the absence period. Use the example in this topic to understand how to indicate plans that must offer concurrent entitlement.

Statutory Plans and Occupational Plans

In accordance with government-mandated rules of your country, you want to enable workers going on maternity leave to receive simultaneous payments from:

- A statutory qualification absence plan
- An occupational maternity absence plan

The occupational maternity plan contains rules defined by your enterprise that entitle workers to payment in addition to the statutory payment rules.

When you create the statutory plan and the occupational plan, you must: select the Enable concurrent entitlement check box in the Plan Attributes tab for both the plans.

1. Select the Enable concurrent entitlement check box in the Plan Attributes tab for both plans.
2. Associate these plans with the maternity absence type when you create that absence type.

Examples of Prioritizing Absence Plans for an Absence Type

You prioritize absence plans associated with the absence type to determine the order in which the plans must process accrual balances and entitlements. These examples show how to prioritize plans according to your requirement.

Prioritizing Multiple Accrual Plans

Scenario: You want to enable workers to use vacation time from two accrual absence plans. When workers exhaust time from one plan, they must be able to use time from the other plan.

When you associate each of these plans with the absence type:

- Set a higher priority to the absence plan whose accrual balance workers must use first.
- Set a lower priority to the absence plan whose balance workers must use after they exhaust the other plan's balance.

Prioritizing Multiple Qualification Plans

Scenario: In accordance with statutory rules, you want workers on long-term sickness absence to receive payments from two plans in this sequence:

- Payments from a statutory plan
- Payments from an occupational sickness plan

When you configure the plans:

- Set a higher priority to the statutory plan so that workers are paid from that plan first.
- Set a lower priority to the occupational sickness plan so that payment rules in that plan are processed after the statutory plan.

Examples of Configuring a Concurrent Absence Type

This example shows how you can configure the concurrency rule so that a worker can record a concurrent absence for the same time period through multiple absence types. You configure the concurrency rule in the Display Features tab when you create an absence type.

Configuring the Concurrency Rule for an Absence Type

Scenario: A worker falls ill during a vacation period. You want to enable the worker to record a sickness absence for some dates overlapping with the vacation dates.

To ensure the worker can record a concurrent sickness absence, you must enable concurrency in the Display Features tab for one of the absence types. When concurrency is enabled, depending on the rules defined by the worker's enterprise, the worker can:

- Receive sickness entitlements
- Recover vacation days for those overlapping sickness days

Stop Sending ICS Calendar Invite Files in Absence Notifications

Here's how you can turn off the delivery of .ics files in the absence notification:

1. In the Setup and Maintenance work area, click **Search** on the Tasks panel tab, search for and open the **Manage Common Lookups** task.
2. On the Manage Common Lookups page, search for and open the **ANC_PROC_CONFIGS** lookup.
3. Add and enable a new lookup code, **ANC_NO_ICS**.
4. Click **Save and Close**.

What to do next

If you had previously configured **AbsencesApprovalTask** task in BPM Worklist to disable all absence attachments in email notification, you can now revert that change. To do so you need to first create the **ANC_NO_ICS** lookup code as described above, and then follow these steps:

1. In the Setup and Maintenance work area, click **Search** on the Tasks panel tab.
2. Search for and open the **Define Approval Management for Human Capital Management** task list.
3. Select the **Manage Task Configurations for Human Capital Management** from the task list.
4. Select **AbsencesApprovalsTask**, and click **Edit task** in the BPM Worklist page.
5. Click **Notifications**.
6. Select the **Send task attachments with email notifications** checkbox.
7. Click **Save**.

After you do this, approvers will start receiving attachments in their email for absence approvals without the calendar invite (.ics) file.

Schedule Hierarchy Start Point Options

When employees take time off, their work schedule determines the duration of the absence. For example, if an employee takes 2 days of absence, and is currently on a 4-hour schedule, their absence duration will be 8 hours.

When you create an absence type, you can select a starting point to indicate which level the application should start searching for a schedule. For example, if you select Published schedule, the application starts searching at that level and continues down until it finds the schedule or relevant work hours.

1. Published schedule
2. Work schedule
3. Assignment hours details
4. Work pattern

You select one of these starting point options on the Absence Type setup page in the **Schedule Hierarchy Start Point** field located under the Type Attributes tab.

Absences uses the schedule to determine the duration only if the absence type unit of measure is **Hours** or **Days** and there's no conversion formula defined. The schedule isn't used for other units of measure.

If the absence type is linked to an absence plan that has an **Alternate Schedule Category** field defined, the duration is generated using the plan schedule.

Related Topics

- [How an Individual's Schedule Is Identified](#)

Create a Vacation Absence Type

This example shows how to create an absence type to conform to a specific leave policy of an enterprise.

This table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
What is the name of the absence type?	Vacation
The absence type must belong to which absence pattern?	Generic absence
What unit of measure must workers use to record an absence?	Days
What is the minimum absence duration that workers must schedule to submit the absence?	2 working days
Can workers schedule an absence whose duration is less than the minimum limit?	Yes, but display a warning message before allowing users to submit the absence.
What is the maximum absence duration that workers can schedule?	10 working days
Can workers schedule an absence whose duration exceeds the maximum limit?	No. Display an error message that prevents users from submitting the absence
Can workers schedule partial-day absences?	No
Who can update absence records after submitting them?	Managers and workers only
Can workers record absences of this type from a time card?	Yes
Can workers and managers use the advanced absence entry method to record discontinuous absence dates?	No. Only administrators can use the advanced absence entry method.

Create the vacation absence type on the Manage Absence Types page.

In this example, use this page to:

- Specify who can update absences of this type
- Set maximum and minimum duration limits
- Enable the advanced absence entry function during absence scheduling

Creating an Absence Type

1. In the Absences work area Tasks panel tab, click **Manage Absence Types**.
2. Click **Create**.

3. On the Create Absence Type dialog box, complete the fields, as shown in this table. Use default values for fields unless the steps specify other values.

Field	Value
Legislation	Select your legislation
Pattern	Generic absence

4. Click **OK**.
5. On the Create Absence Type page, Type Attributes tab, complete the fields, as shown in this table. Use default values for fields unless the steps specify other values.

Field	Value
Name	Vacation
Status	Active
UOM	Days
Legislative data group	Select your legislative data group
Minimum Duration Alert	Warning
Minimum Duration	2
Maximum Duration Alert	Error
Maximum Duration	10
Partial Day Rule	Not allowed
Enable worker updates	Select
Enable manager updates	Select

6. Click the Display Features tab.

7. In the Dates and Duration section, complete the following fields for the **Advanced Absence Entry** usage rule.

Field	Value
Employees	Not enabled
Managers	Not enabled
Administrators	Enabled

8. Click **Save and Close**.

FAQs

Why can't I see my absence type on the absence categories page?

Ensure that the absence type is active and effective on the current date.

Why can't I see my absence plans and absence reasons on the absence types page?

Ensure that the absence plan and absence reason are active and effective on the current date.

How can I configure an absence type to include line managers of relevant assignments for approval?

You can configure approvers from the Absence Record Maintenance section of the Absence Type setup page.

For employees with multiple assignments, select the **Manager of all relevant assignments** option from the approver list. This will send the absence approval request to all the line managers of relevant assignments

How can I create an absence category?

You can create an absence category from the Absence Categories page in the Absences work area.

Click **Create** and enter the details of the absence category like name, legislation and effective end date. You then need to select the absence type you want to associate with the absence category in the Associated Types section. Click **Save and Close** to complete the process.

How can I configure an absence type to show absence reasons?

After you create an absence reason, you need to associate it with an absence type. To do that, add the absence reason from the Absence Reasons section of the Absence Type setup page. People can select the reason from the Reason list during absence entry for that absence type.

14 Absence Certifications

Options for Absence Certification Requirements

Configure absence certification requirements as action items that workers must complete to continue receiving entitlements during an absence period. Requirement components include type, trigger, and actions.

Configuring absence certification is a two-step process in the Absences work area:

1. Configure the certification requirements using the Absence Certifications task.
2. Associate the certification requirements with an absence type on the Action Items tab of the Create Absence Type page. When workers schedule an absence, they're subject to the certification requirements.

Absence certifications are supported only for absence types with the illness or injury and maternity absence patterns.

Certification Components

When you create a certification requirement, you configure the following aspects:

- Requirement type
- Requirement trigger
- Requirement phases and actions
- Requirement status during absence recording
- Entitlement reevaluations

Related Topics

- [Create an Absence Certification Requirement](#)

Absence Certification Requirement Types

Configure the certification requirements using the Absence Certifications task.

When you create a certification requirement, you must configure the following certification requirement types:

- Classification
- Absence Record Update Rule

Classification

Select one of the following to define an absence certification requirement:

Classification	Purpose
Documentation	Track documentation related to a worker's absence.

Classification	Purpose
Entitlement	Update payment percentages for qualification plans.

Absence Record Update Rule

Select one of the following to define an absence certification requirement:

Absence Record Update Rule	Description
Authorization	Select this rule if workers must complete an action item to receive entitlements. For example, you can mandate workers to submit certain medical reports and other documents to continue to receive entitlements for the absence period.
Timeliness	Select this rule to define the actions to take depending on when workers notify their managers about their absence. For example, you might want to revise entitlements for workers who have provided a late notification of their absence.
Other	Select this rule if you want to consider other special requirements. For example, you can define a certification requirement that HR specialists can initiate at any time to retract absence entitlements for a worker whose employment ends.

Options to Trigger Certification Requirements

When you create an absence certification requirement, you must configure the certification requirement rules to determine when the certification requirement takes effect.

Certification Requirement Trigger

Use one of the following rules to determine when the certification requirement takes effect:

Rule	Description
On demand	HR specialists add the certification requirement as an action item when they record an absence for a worker on the Manage Absence Records and Entitlements page.
On the absence start date	The certification requirement appears as an action item in the Edit Absence dialog box on the Manage Absence Records and Entitlements page.

HR specialists can set the status of the action item when the worker provides the required documents or other information.

Options to Manage Actions For Certification Events

When a worker schedules an absence that's subject to a certification requirement, decide what actions to take in each of the following phases of the requirement:

Phase	Description
On creation	When the certification requirement takes effect. Sometimes, your certification requirement might not require any action from the worker to complete it. For example, you might want to retract entitlements from a terminated worker when there is no further action required from the worker. In that case, you can configure the certification requirement to complete automatically when it becomes effective.
On passage of due date	When the certification requirement is past its due date.
On completion	When HR specialists evaluate the action item corresponding to the certification requirement and mark it complete.

For each phase, you can perform the following actions:

- Set the certification status that appears during absence recording.
- Reevaluate entitlements.

Certification Status during Absence Recording

When you create an authorization requirement or a timeliness requirement, a corresponding Update Status field, known as the target field appears in the Actions section. The following table shows the specific status field on the absence recording page for each requirement type:

Requirement Type	Target Status Field
Authorization requirement	Primary Certification Authorized
Timeliness requirement	Late Notification Override

In the Actions section of page, you specify the update status value in the target field for each phase of the requirement. For example, you can configure the target field on the absence recording page to display True when a worker provides the required documents to complete a certification requirement.

Entitlement Reevaluations

Depending on the status of the certification requirement, you can reevaluate entitlements that a worker receives during the absence period. Reevaluate entitlements as of the absence start date or the action date.

For example, you can change the worker's entitlement to half pay as of the absence start date when a certification requirement has passed its due date. When the worker completes the requirement, you can recalculate the entitlements from the absence start date or the completion date.

Use any of these rules to calculate entitlements:

Rule	Description
Override	Enables entry of a revised payment percentage that overrides the absence plan payment rules.
Recalculate	Calculates payments according to the absence plan payment rules.
Retract	Stops payments.

Related Topics

- [Create an Absence Certification Requirement](#)

Create an Absence Certification Requirement

This example contains steps to create an absence certification requirement for workers on long term sickness leave. The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
What action do you want workers to take to complete the certification requirement?	Submit a doctor's certificate to the manager within 14 calendar days of their absence start date.
What action do you want to take if workers don't complete the requirement within the stipulated time?	Revise entitlement for the rest of the absence period to 75 percent of pay.
When do you want the certification requirement to take effect?	On the absence start date
How do you want to configure the value of the Primary Certification Authorized field during absence recording?	Set status to True when the: • Certification requirement initiates on the absence start date • Worker completes the certification requirement

Decisions to Consider	In This Example
	Set status to False when the due date of the certification requirement passes.

Creating a Certification Requirement

1. In the Absences work area Tasks panel tab, click **Absence Certifications**.
2. Click **Create**.
3. On the Create Absence Certification page, complete the fields, as shown in this table.

Field	Value
Name	Doctor's Certificate
Type	Authorization
Status	Active
Trigger	On initial absence entry
Due Date Rule	Waiting period
Waiting Period Start Date	Absence start date
Duration	14
UOM	Calendar days
Classification	Entitlement

4. In the On Creation section, set the Target Field Update status to **True**.
5. In the On Passage of Due Date section, complete the fields, as shown in this table.

Field	Value
Target Field Update	False
Entitlement Reevaluation Rule	As of action date
Entitlement Update Rule	Override

Field	Value
Revised Payment Percentage	75

6. In the On Completion section, set the Target Field Update status to **True**.
7. Click **Save and Close**.

15 Absence Processes

Overview of Absence Processes

Use the Schedule and Monitor Absence Processes task in the Absences work area to run the following absence processes:

Process Name	Purpose	When is the Process Run
Evaluate Absences	Calculates entitlements for unprocessed absences based on absence plan rules	Automatically, when a user submits an absence, or under special conditions, such as: - When you need to extend an open-ended absence by 90 days - When a work schedule changes and you need to recalculate absence duration and plan deductions
Evaluate Certification Updates	Checks whether certification requirements for multiple employees are past their due dates	Administrators typically run this process daily to check if certifications are overdue. You run this process only if you use certifications with due dates.
Update Accrual Plan Enrollments	Updates enrollments based on the new hire and transfer events for multiple employees	Administrators typically run this process daily to determine plan eligibility for multiple employees.
Calculate Accruals and Balances	Calculates the accrual balances for multiple employees under an accrual absence plan	Administrators typically run this process at regular intervals. You can also run the process for individual enrollments.
Withdraw Accruals and Balances	Withdraws accruals or deletes enrollments in bulk for several employees	Administrators typically run this process when there is an error in calculation or the dates and they want to roll back the accrual balances to correct the error.
Generate Daily Breakdown of Absence Details	Generates the daily breakdown of absences for absence. The included absences are for absence types with Include in daily report breakdown selected on the create or edit absence type pages, Action Items tab	Administrators typically run this process to view the daily absence breakdown in the Absence Calendar Real Time Entry Report .

Related Topics

- [Options for the Calculate Accruals and Balances Process](#)
- [Options for the Update Accrual Plan Enrollments Process](#)
- [Options for the Evaluate Absences Process](#)
- [Options for the Evaluate Certification Updates Process](#)

Options for the Evaluate Absences Process

You calculate entitlements for unprocessed absences using the Evaluate Absences process in the Absences work area. Use this process to evaluate absences marked for deferred processing and reevaluate absences that meet the process parameters.

This process runs automatically when you submit an absence. To defer the process, select the rule **Deferred processing on initial entry** in the Display Features tab of the Create Absence Type page.

Process Parameters

Use combinations of these parameters to control which person records are processed:

Parameter Name	Description
Effective Date	Evaluates and updates absence records that are effective on the specified date This is a required parameter.
Person	Includes absences for only the specified person When you select a person record, the Scheduled Absences parameter appears.
Scheduled Absences	Includes a particular future-scheduled absence for the selected employee This parameter appears only when you select an employee in the Person parameter.
Business Unit	Includes employees in the selected business unit
Legal Employer	Includes employees assigned to the selected legal employer
Person Selection Rule	Includes specific employees identified by the person selection rule You can use the Person Selection formula type to include specific employees who meet special requirements for the absences batch process. You define the formula using the Manage Fast Formulas task and select that formula in the Person Selection Rule field.
Payroll	Includes employees assigned to the selected payroll

Parameter Name	Description
Legislative Data Group	Includes a group of one or more absence types that are associated with the legislative group that you select
Work Schedule Rule	Includes employees assigned to a particular work schedule
Record Selection	Decides which absence records are selected for processing: • Evaluate All Absences: Reprocesses all absence records that meet the other filtering options for the process • Evaluate Only Duration Changes: Reprocesses the absence records only if there is a change in absence duration • Evaluate Only Deferred Absences: Reprocesses deferred absences • Evaluate Only Open-ended Absences: Reprocesses open-ended absences that require an extension

Related Topics

- [View Status and Other Details for Scheduled Processes](#)
- [Statuses of Scheduled Processes](#)

Options for the Evaluate Certification Updates Process

You can check if certification requirements for multiple employees are past their due dates using the **Evaluate Certification Updates** process in the Absences work area.

When a requirement is past the due date, the process updates the absence records and entitlements. You typically run this process daily to check if certifications are overdue.

You run this process only when absence types have certification requirements and those requirements include actions to take after due dates have passed. For example, you want to change the employee's entitlement to half pay as of the absence start date when a certification requirement passes its due date. When the employee completes the requirement, you can recalculate the entitlements from the absence start date or the completion date.

Process Parameters

Use combinations of these parameters to control which person records are processed:

Parameter	Description
Effective Date	Evaluates and updates certification requirements that are effective on the specified date This is a required parameter.
Person	Includes absences for only the specified person

Parameter	Description
Business Unit	Includes employees in the selected business unit
Legal Employer	Includes employees assigned to the selected legal employer
Person Selection Rule	Includes specific employees identified by the person selection rule You can use the Person Selection formula type to include specific employees who meet special requirements for the absences batch process. You define the formula using the Manage Fast Formulas task and select that formula in the Person Selection Rule field.

Related Topics

- [View Status and Other Details for Scheduled Processes](#)
- [Statuses of Scheduled Processes](#)

Options for the Update Accrual Plan Enrollments Process

Update enrollments such as new hire, termination, and transfer events for multiple employees using the **Update Accrual Plan Enrollments** process in the Absences work area. You typically run this process daily to determine plan eligibility, and update plan enrollments and terminations for multiple employees.

Process Parameters

Use combinations of these parameters to control which person records are processed:

Parameter	Description
Effective Date	Evaluates and updates plan enrollments that are effective on the specified date This is a required parameter.
Person	Includes absences for only the specified person
Business Unit	Includes employees in the selected business unit
Legal Employer	Includes employees assigned to the selected legal employer
Person Selection Rule	Includes specific employees identified by the person selection rule You can use the Person Selection formula type to include specific employees who meet special requirements for the absences batch process. You define the formula using the Manage Fast Formulas task and select that formula in the Person Selection Rule field.

Parameter	Description
Absence Plan	Processes enrollments for only the selected accrual plan If you don't select an absence plan, you must select at least one of these parameters: • Person • Business Unit • Legal Employer • Person Selection Rule The process updates accrual plan enrollments for each employee identified by the other parameters.
Plan Category	Includes a specific category, such as balance transfers
Changes since last run	Includes employees with changes, such as assignment updates or corrections since the last process run
Payroll	Includes employees assigned to the selected payroll
Legislative Data Group	Includes only the absence types associated with the selected legislative data group If you want to automatically enroll employees to corresponding accrual plans based on their legislative data group, you need to define the following lookup type and lookup code: • Lookup Type: ANC_PROC_CONFIGS • Lookup Code: ENROLLMENT_PROCESS_LDG So when you run the process, the application automatically enrolls employees to eligible absence accrual plans associated with the legislative data group, even if you don't select this field.

Related Topics

- [View Status and Other Details for Scheduled Processes](#)
- [Statuses of Scheduled Processes](#)

Options for the Calculate Accruals and Balances Process

You can calculate accrual balances and update plan balances for multiple employees using the **Calculate Accruals and Balances** process in the Absences work area. You typically run this process at regular intervals, such as daily or weekly.

You can also run the process for individual enrollments. The process transfers accrual balance data to Oracle Fusion Global Payroll if the Transfer absence payment information for payroll processing option is selected for the absence plan.

Note: If you run the Calculate Accruals and Balances process after deleting a person's enrollment into an accrual plan and re-enrolling them into the same plan, the application won't display the absence information in the Plan Balances region. You'll need to run the Evaluate Absence process to bring the absence information over.

Process Parameters

Use combinations of these parameters to control which person records are processed:

Parameter	Description
Effective Date	Calculates the accrual balance for only those plans that are effective on the specified date This is a required parameter. You can select a past, current, or future date. The process only runs if a plan enrollment exists for the employee on the effective date. - If you don't select an absence plan with this parameter, the process calculates the accrual balance for multiple plans with differing accrual periods on the effective date. - If you select an absence plan, the process calculates the accrual balance for the accrual period of the selected plan on the effective date.
Person	Includes absences for only the specified person - If you select a person but not an absence plan, the process calculates the accrual balance for all plans in which the employee is actively enrolled in. - If you select a person and an absence plan, the process calculates the accrual balance for only the selected plan, if the employee is actively enrolled in the plan.
Business Unit	Includes employees in the selected business unit
Legal Employer	Includes employees assigned to the selected legal employer
Person Selection Rule	Includes specific employees identified by the person selection rule You can use the Person Selection formula type to include specific employees who meet special requirements for the absences batch process. You define the formula using the Manage Fast Formulas task and select that formula in the Person Selection Rule field.
Payroll	Includes employees assigned to the selected payroll
Payroll Relationship Group	Includes employees assigned to the selected payroll relationship group You can define payroll relationship groups for a group of people in a single payroll or in multiple payrolls.
Changes Since Last Run	Includes employees with either payroll or assignment updates or corrections since the last process run If you select: Payroll events since last run: The process calculates the accrual balance for employees whose payroll records have changed since the last scheduled run. For example, an employee schedules five days off on January 25 and you run the process on January 26. Due to an emergency, the employee returns to work on January 29, after being off

Parameter	Description
	just four days. The employee updates the absence record to reflect four days off instead of five. If you schedule the process again on February 1 and select Payroll events since last run, it generates the updated accrual balance for the employee. • HR Assignment changes since last run: The process calculates the accrual balance for employees whose assignment record last updated date is after the last scheduled run. For example, the last scheduled run was on January 1 and you update an employee's assignment on January 2. If you schedule the process again on January 3 and select HR Assignment changes since last run, it generates the updated accrual balance for the employee.
Legislative Data Group	Includes only the absence types associated with the selected legislative data group
Absence Plan	Calculates accrual balances for only the selected accrual plan When you select this option, the Repeating Period option appears. If you don't select an absence plan, you must select at least one of these parameters • Legislation • Business Unit • Legal Employer • Person Selection Rule • Person • Payroll • Payroll Relationship Group • Changes Only The process calculates accrual balances for each employee identified by the other parameters.
Repeating Period	Includes the selected accrual period for the selected plan This option appears only when you select a value in the Absence Plan option.

Related Topics

- [View Status and Other Details for Scheduled Processes](#)
- [Statuses of Scheduled Processes](#)

Options for the Withdraw Accruals and Balances Process

You withdraw and update employee accrual balances and delete enrollments using the **Withdraw Accruals and Balances** process. Run this process using the Schedule and Monitor Absence Processes task in the Absences work area.

You typically run this process to correct existing accrual data. You can also run the process for individual enrollments.

Process Parameters

Use combinations of these parameters to control which person records are processed:

Parameter	Description
Effective Date	Withdraws the accrual balance or deletes enrollments for only those plans that are effective on the specified date This is a required parameter. You can select a past, current, or future date as the effective date.
Processing Option	Withdraws accrual balances or deletes enrollments This is a required parameter.
Person	Includes absences for only the specified person
Legal Employer	Includes employees assigned to the selected legal employer
Person Selection Rule	Includes employees identified by the person selection rule You can use the Person Selection formula type to include specific employees who meet special requirements for the absences batch process. You define the formula using the Manage Fast Formulas task and select that formula in the Person Selection Rule field.
Payroll	Includes employees assigned to the selected payroll
Payroll Relationship Group	Includes employees assigned to the selected payroll relationship group You can define payroll relationship groups for a group of people in a single payroll or in multiple payrolls.
Legislative Data Group	Includes only the absence types associated with the selected legislative data group
Absence Plan	Withdraws accrual balance or deletes enrollments for the selected accrual plan

Generate Daily Breakdown of Absence Details Process

You can view the absence details of employees on the absence calendar by generating the daily breakdown of absences using the **Generate Daily Breakdown of Absence Details** process.

The absences that are processed belong to absence types that were configured to be included in the process. Use the **Include in daily report breakdown** check box that's available in the Action Items tab of the absence type setup page to configure the absence types for it. Run this process using the Schedule and Monitor Absence Processes task in the Absences work area. View the results in the Absence Calendar Real Time Entry Report.

How You Run the Process

You can run this process in two ways.

- When you run the job by passing the absence start and end dates as input parameters, the process will consider all absences that fall within that period for processing. The process ignores the effective date parameter in this case.
- When you run the job without passing the absence start and end dates, and if it's the first time you're running this job, the process will consider all absences that were created or updated on the effective date for processing. On subsequent runs, the process will consider only those absences that were created or updated after the previous run.

Note: When you schedule the absence process to run at a specific time, the application uses this specified time to calculate the effective date. For example, let's assume that you schedule the absence process to repeat every ten minutes starting at 21:30 from 26 May to 14 June. Now this would mean that the absence process would still be active on the morning of 15 June because the application considers it 14 June until the time 21:29. To avoid such discrepancies, you need to ensure that your schedule starts at 00:00.

Ways to Control Which Absences are Processed

There are two ways to control which absences are included in the process:

- Configure the absence type to include or exclude absences.
- Add more parameters to the job, like person and business unit to process only those absences that meet all the criteria you have specified.

You can schedule the job to run as often as required. The more often you run, the more up-to-date information will be available to your manager when they check the Absence Calendar. Any new absences or changes to existing absences that are made after running the job are synced up only in the subsequent run.

Process Parameters

Use combinations of these parameters to control which person records are processed:

Parameter	Description
Effective Date	Generates daily breakdown of absences for absence types that are effective on the specified date. This is a required parameter.
Absence Start Date	Includes absences whose start date falls on or after this specific date. If you enter this date, the process ignores the Effective Date parameter.
Absence End Date	Includes absences whose end date falls on or before this specific date. If you enter this date, the process ignores the Effective Date parameter.
Person	Includes absences for only the specified person. If you select a person but not an absence type, the process generates the daily breakdown of absences meeting the eligibility criteria

Parameter	Description
	If you select a person and an absence type, the process generates the daily breakdown of absences for only the selected absence type.
Business Unit	Includes employees in the selected business unit
Legal Employer	Includes employees assigned to the selected legal employer
Payroll	Includes employees assigned to the selected payroll
Legislative Data Group	Includes only the absence types associated with the selected legislative data group
Absence Type	Generates the daily breakdown for only the selected absence type

Create Event Processing Rules to Reprocess Absences

You can use HCM Events to configure absence types to automatically reprocess absences when an employee's work pattern or work schedule changes across HCM. This eliminates the need to schedule multiple absence processes to manage such reprocessing across absences.

Create Event Condition

Here's how:

1. In the My Client Groups tab, click the **HCM Experience Design Studio** quick action.
2. Click the **Event Conditions** tab.
3. Click **Add**.
4. Enter the necessary details of the event. Based on your requirement, specify the entity as Work Pattern Assignment, Work Pattern Break, or Work Pattern Shift. In the Condition Details section, enter the specific details of the conditions of the event in which it will be triggered. You need to enter the details for how a particular data changes from old to new.
5. Click **Save and Close**.

Configure Absence Type

Specify which absence types track that event and what needs to happen when that event is detected. Here's how you configure the absence type to respond to the event::

1. Click the newly added **Additional Details** tab in the absence type setup page.
2. In the Event Processing section, click **Select and Add**.
3. In the Select and Add Event Processing Rule window, select the event from the **Event** You can configure how an absence plan responds when this event occurs by selecting an option from the **Response** option.
4. Click **OK**, then **Save and Close**.

When you're done setting up the absence types, you can use the **Process Events** absence process to process all events. You can find this process in the Schedule and Monitor Absence Processes page.

16 Integrated Workbooks for Loading Absence Data

Integrated Workbooks for Absence Management

Use integrated Microsoft Excel workbooks to upload multiple records at one time for various Absence objects, such as:

- Absence records
- Absence plans
- Absence types
- Absence categories
- Absence reasons
- Absence certifications

Use the Initiate Spreadsheet Load task of the Data Exchange work area to use the absence spreadsheets.

All Absence Spreadsheets

You can only create absence business objects using the spreadsheets. You can't edit existing absence objects.

Absence Records Spreadsheet

You can create and load absence records only for the **Generic absence** and the **Illness or injury** pattern. You can't load absence records for absence types with the **Childbirth or placement** pattern.

Absence Plans Spreadsheet

Consider the following points when you enter data in the spreadsheet:

- You must enter the start month and start date to define the plan term.
- You can associate only one eligibility profile with an absence plan.
- You can create only one accrual band for an accrual plan.
- You can associate only one qualification band and only one band detail with a qualification plan.
- When you enter adjustment reasons, you must enter their corresponding codes separated by commas.
- When you associate a rate definition with an absence plan, you must enter the corresponding rate definition ID.

Absence Types Spreadsheet

Consider the following points when you enter data in the spreadsheet:

- You must enter the legislative data group ID.
- You can associate a maximum of five absence plans with an absence type.
- You can associate a maximum of five absence certifications with an absence type.

- Feature usages and rules for the absence type automatically upload with default values based on the absence pattern that you enter.
- When you enter special conditions for a qualification plan, you must enter the corresponding condition codes separated by commas.

Absence Categories Spreadsheet

You can associate a maximum of five absence types with an absence category.

Related Topics

- [Update Absence Data Using HCM Spreadsheet Data Loader](#)

Update Absence Data Using HCM Spreadsheet Data Loader

You can use the Data Exchange work area to create absence data using spreadsheets and upload to Oracle Fusion Absence Management using the HCM Spreadsheet Data Loader.

You can use the HCM Spreadsheet Data Loader to load the following business objects into spreadsheets:

- Absence Entry
- Absence Reason
- Absence Certification
- Absence Category
- Absence Accrual Plan Enrollment
- Absence Accrual Balance Component
- Absence Qualification Plan Entitlement

You can create, update and delete all the entities mentioned above.

Related Topics

- [Generate Spreadsheets](#)
- [Import Data to a Spreadsheet](#)
- [Manage Spreadsheet Data Sets](#)
- [Upload Data Using HCM Spreadsheet Data Loader](#)
- [How You Delete Data Using HCM Spreadsheet Data Loader](#)

Set Up Desktop Integration for Excel

You can create or edit records and upload them to the application using integrated Excel workbooks. To use these workbooks, you must install an Excel add-in.

Note: Every release of Oracle Fusion Cloud Applications is likely to have a new version of the Oracle ADF Desktop Integration add-in. When prompted, install the latest version of the add-in.

- For information on the new version, see the relevant *What's New* document.
- For information on the upgrade policy for the Oracle ADF Desktop Integration add-in, see: *Add-In Upgrade Policy for ADF Desktop Integration* (DOC ID 2242879.1) on *My Oracle Support*.

Install or Upgrade the Desktop Integration Add-In

To install or upgrade the Oracle ADF Desktop Integration Add-In for Excel, you must have the appropriate Excel and Windows version. See: *Supported Platforms for ADF Desktop Integration* (DOC ID 2242428.1) on *My Oracle Support*. Also, make sure that you have the Download Desktop Integrator (ATK_DOWNLOAD_DESKTOP_INTEGRATOR_PRIV) privilege to access the add-in installer.

1. Sign into your computer with your account.
2. Close Excel.
3. Click **Navigators > Tools > Download Desktop Integration** to download the installer file.
4. Run the `adfdi-excel-addin-installer-current-user.msi` installer just like you would run any program that you install on your computer.
5. Run Excel once to complete the installation.

Note: If you have administrator privileges, you can also install the add-in for all users. For more information, see: *How to install the ADF Desktop Integration Add-in for Excel* (DOC ID 2681794.1) on *My Oracle Support*.

Related Topics

- [Troubleshoot Desktop Integration for Excel](#)
- [Guidelines for Using Desktop Integrated Excel Workbooks](#)
- [Business User's Guide for ADF Desktop Integration](#)

Guidelines for Using Desktop Integrated Excel Workbooks

Where available, you can download a desktop-integrated Microsoft Excel workbook and use it to create or edit records. Your edits in the workbook don't affect the application until you upload the records back into the application.

What You Must Not Do

To ensure that you successfully upload your changes to the application, avoid doing these tasks:

- Rename text from the integrated workbook, such as the worksheet names.
- Add columns.
- Delete any part of the template, such as columns.
- Hide required columns and status columns or headers.

CAUTION: Don't close Excel using the Windows Task Manager and clicking the **End task** button because that might disable the add-in.

Conventions

Some column headers in the integrated workbook might include **[..]**. This means that you can double-click within any cell in the column to open a dialog box, where you can select a value to insert into that cell.

Statuses

You can use **Status Viewer** to see the status of the entire integrated worksheet and the status of any row in a worksheet. To use the status viewer, click **Status Viewer** on the Excel ribbon. You can see the status of the entire integrated worksheet by default. To see the status of a row, click any table row in a worksheet. You can use the information that appears on the **Status Viewer** to review and correct errors at the same time.

Searches

Some integrated workbooks include searches. To search within the workbook, you must first sign into the application. When you click the **Search** button, the application prompts you to sign in if you haven't already done so.

Refreshes After Upload

If your changes aren't reflected after you upload the records back into the application, you can try out these options:

- Refresh the table
- Use a filter or search on the table to see your changes

Related Topics

- [Set Up Desktop Integration for Excel](#)
- [Troubleshoot Desktop Integration for Excel](#)
- [How You Use Tables](#)

Troubleshoot Desktop Integration for Excel

If you run into any issues with the integration, use the Client Health Check tool first to find out what integration issues you might have and how to resolve them.

For more information, see: [How to use the ADF Desktop Integration Client Health Check Tool](#) (Doc ID 2010222.1) on [My Oracle Support](#).

If the health check tool doesn't resolve your issue, you can uninstall and reinstall the Oracle ADF Desktop Integration add-in. For more information, see: [Information Center: Troubleshooting Oracle ADF Desktop Integration](#) (DOC ID 2012600.2) on [My Oracle Support](#).

Note: To check the version of Oracle ADF Desktop Integration, see: [ADFdi Version Check](#) (Doc ID 2012570.1) on [My Oracle Support](#).

Uninstall the Desktop Add-In

Use the Microsoft Windows Settings to remove the ADF Desktop Integration add-in. After removing the add-in, you can use the integrated Excel workbooks on this system only after you reinstall the ADF Desktop Integration add-in.

1. Open **Windows Settings** and go to **Apps & features**.
2. Select **Oracle ADF Desktop Integration Add-In for Excel** from the list of programs.
3. Click **Uninstall** from the toolbar at the top of the program list.
4. When prompted, click **Uninstall** to remove the Oracle ADF Desktop Integration add-in.

Note: If you have installed the Oracle ADF Desktop Integration add-in on multiple user profiles using the current-user installer, you must remove it from each user profile.

Related Topics

- [Set Up Desktop Integration for Excel](#)

FAQ

What's the difference between Export to Excel and desktop integration for Excel?

You use the Export to Excel button or menu option to download data from your table as a Microsoft Excel file. You can then use this file to view or analyze your data.

You use desktop integration for Excel to create or edit records in Excel workbooks, and then upload them back into the application. This comes in handy when you have to work offline or make mass updates. In most cases, you download the desktop integrated workbook from a link in a panel tab or your table.

Related Topics

- [Guidelines for Using Desktop Integrated Excel Workbooks](#)

17 HCM Extracts for Absence Data

HCM Extracts for Absence Data

Extract past and future absences and open-ended absences using the Manage Extract Definitions task in the Data Exchange work area.

You can extract absence data based on the effective date or start date. The effective date might not always be the right option because you can make adjustments to existing and past absences.

Consider these aspects before you create an extract definition for absence data:

- Extract type
- Data groups

Extract Type

When you create an extract definition for absence data ensure that you:

- Select **HR Archive** from the Extract Type list.
- Select **Yes** in the Display column for Start Date in the Parameters section. The Effective Date is set to **Yes** by default.

Data Groups

The absence data group available is ABS_EXT_ABSENCE_ENTRY_UE. You can select it as the root data group. If you want person information such as first name and last name to appear, then you need to create a PER_EXT_SEC_PERSON_UE (Person) data group. The Person data group doesn't need to be the root data group.

Related Topics

- [Define Extracts](#)

Define Extracts

This example shows the steps required to create an extract definition.

Before you create an extract definition, you should understand the following details:

- Information that you want to extract.
- Structure in which the data must be extracted.
- How you want to deliver this data (including file format, delivery mechanism, and frequency information).

FAST Bank is a global organization with subsidiaries all over the world. As part of an external business reporting requirement, FAST Bank is required to extract the department and employee details (grouped by department) across

the entire company. This information must be sent to a third party in an XML file and to HR Managers in a PDF file using email. The following table summarizes the key decisions in this scenario:

Decisions to Consider	In This Example
How many extracts do I create to produce this type of report?	You create one extract definition to define a headcount report.
How many data groups do I create?	There are 2 functional groups of information, therefore you create two data groups, one for the department and one for employees.
How many records do I create?	You decide the number of records based on the subgroup of attributes within a data group. In this example, you create two records for the department data group: • Department Details • Department Summary You create one record for the employees' data group: Employee Details.
How many attributes do I create?	You decide the number of attributes based on the specific information required for that report. Create the following attributes for the Department Details record: • Department Name • Department Location For the Department Summary record, create the following attributes: • Record Code • Report Date • Employee Count For the Employees Details record, create the following attributes: • Full Name • Gender • Date of Birth • Salary • Bonus • Tax Rate
Do I create any fast formulas?	You can use fast formulas at the following levels: • Extract Criteria level to decide certain conditions. • Extract Rule level to derive attribute values. • Extract Advanced Condition level to specify complex conditions. • Extract Record level to automatically generate formulas using the Generate Formula option.

Create an Extract Definition

1. On the Extract Definitions page, click **Add > Create New** to open the Create Extract Definition page.

2. Select **HR Archive** and enter 01-Jan-2000 as the Session Effective Date. The session effective date is an effective start date that applies to all date-effective interactions in the current session.

Field Name	Entry
Name	FAST Bank Extract Note: The application uses this name to generate the XML output file.
Start Date	01-JAN-2010
Consumer	Undefined Note: Selecting Report in the Consumer field indicates that the extract is used for reporting purposes and that the data isn't interfaced with any external applications. Note: The Consumer field doesn't appear for the extract type Archive Retrieval.
Additional Details	HR Manager Note: The Additional Details field doesn't appear for the extract type Archive Retrieval and when you select Report in the Consumer field.
Changes Only	No

Field Name	Entry

Note: In the Consumer field you can include the consumer name or the external application to which the data generated by the HCM Extracts is sent to or interfaced with. Also, you can add details in the **Additional Details** field to capture the names of applications or consumers. The Consumer field has a list of values. If the application or consumer name isn't found in the list, you can provide the name in the **Additional Details** field. If you've a predefined extract that can be used as a template, select it from the **Source Template** list.

Note: Capturing the consumer name or the external application to which the data is interfaced provides information related to integration patterns and requirements from customers. This information can help Oracle identify common integration patterns and deliver predefined templates, thus simplifying the Extract creation and definition process.

3. Enter FAST Bank Extract as the name of the extract definition. The application automatically creates the tag name based on the extract name and uses this name to generate the XML output file.
4. Click **OK**. The application saves the extract definition and automatically generates the parameters based on the type of extract. The parameters control the output of an extract.

Configure Effective Date Defaulting Rule

When extracts are scheduled, the Effective Date parameter, which is a required attribute, needs to be specified for defaulting appropriate values. For example, running an extract daily will require passing the effective date in context to the date on which it's run. To configure the effective date rule:

1. Open the extract for which you want to specify the Effective Date parameter.
2. In the Define tab, go to the Parameters region and select **Advanced View** from the Show list.
3. Select the value from the Parameter Basis list.
4. Click **Save and Close**.

Rename Extract Definitions

You can rename an extract when you want to import or migrate a later version of the extract with the same name. Renaming will help references in external applications remain unaffected, while you can update the extract with a later version.

1. In the Extract Definitions page, click **Actions > Copy or Rename**.
2. Select **Rename** and enter the extract name.
3. Click **OK**. After renaming the extract, ensure that you run a new baseline if your extract is incremental.

Related Topics

- [Extract Components](#)
- [Guidelines for Delivering Extracts](#)
- [Define the BI Publisher Template in HCM Extracts](#)

Reconcile Absences and Payroll Info

You reconcile absence entries with absence payments by extracting a data file using the **Absences and Payroll Info for Reconciliation** extract and ensure that people correctly paid for their time off. Here's how you can access this extract: My Client Groups > Data Exchange > HCM Extracts Section > Submit Extracts. The data file includes absence hours reported in Oracle Global Absence Management and payroll info in Oracle Fusion Global Payroll Cloud Service.

The extract includes absence entries that belong to the current payroll period. Here's the data that is extracted:

Person and Assignment Details (first row)	Absence Summary (Second row)
Business Unit Name	Absence Plan
Person Number	Absence Plan Units
Manager Name	Absence Plan Units Difference
Assignment Number	Absence Plan Units in Payroll
Legal Employer Name	Absence Type
Employee Name	Current Retro Indicator
Location Name	Retro Absence Start Date
Business Title	Units of Measure
Department Name	

If the absence plan units difference column shows 0, it signifies that the data is reconciled. If the difference is negative, it means that some absence data wasn't transferred to Payroll.

