Oracle Fusion Cloud Human Resources

How do I configure employee self-service pages in Redwood for the United Kingdom?

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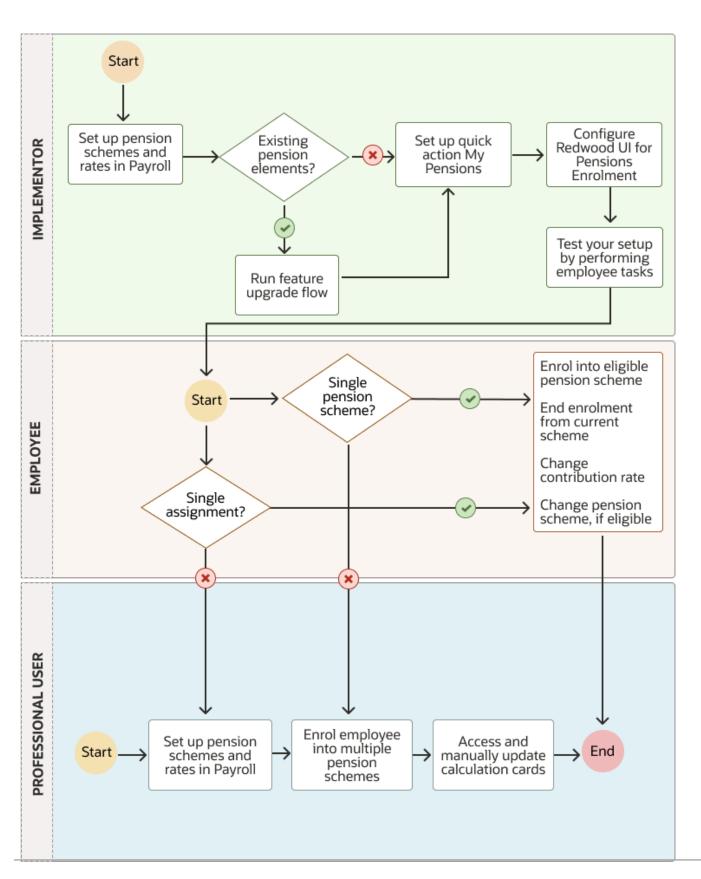
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About This Playbook

1 About This Playbook

Use this playbook to set up and configure Redwood pages for employee self-service and enable your employees to manage their pensions enrolments and new starter declaration.

Employee Self-Service for Pensions Enrolments

Here's the workflow for different users when you set up the employee self-service for pensions enrolment.

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Chapter 1
About This Playbook

Here are the steps to set up and configure employee self-service pages in Redwood for pensions enrolments:

1. Set up pension schemes and rates in **Payroll** at the legal employer level. Use the existing eligibility profiles to link the profiles with rates.
2. If you've created pensions elements before this set up, run the feature upgrade flow.
3. Set up the quick action My Pensions for your employees using the predefined roles and privileges.
4. Configure the profile options to make the employee self-service pages available in Redwood.
5. Create rate validation formulas and add them to pensions scheme definition at the legal employer level.

Your employees can perform these tasks using the self-service pages to manage their pension enrolments:

- Enrol into an eligible pension scheme

- End enrolment from their current scheme

- Submit changes to their contribution rate

- Change their pension scheme, if they're eligible to do so

Employee Self-Service for New Starter Declaration

Configure the profile options to make the employee self-service pages available in Redwood.

The new starter declaration is a replica of the HMRC paper form. It's an employee statement to their employer regarding their tax and student or postgraduate loan status.

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Chapter 2
Pensions Enrolment Employee Self-Service

2 Pensions Enrolment Employee Self-Service

Set Up Pension Schemes

To use this feature, set up the pensions schemes in the Payroll work area and not in Benefits. The employee can access this feature from their My Benefits page.

Set up the pensions scheme and the rates at the legal employer level, for individual schemes and link to eligibility profile. No changes are required in the Pension Element template.

> **Note:** **Enterprise** > **Setup and Maintenance** > **Legal Structures** > **Manage Legal Entity HCM Information**

1. On the legal entities page, select Pension Schemes .
2. Add all the relevant pensions schemes for your organization. You need to add one row for each pensions scheme with all the required details.

   > **Note:** You need to set up the pension scheme information for each legal employer.

3. On the Legal Employer tab, select Pensions and Benefits Information. You can enable either single scheme or multiple scheme enrolments.
4. Select **Enable single scheme enrolment**, which is also the default value.
5. Select **Enable association when employee self-enrols** . This lets the application associate the assignment in the Benefits and Pensions calculation card. If you don't select this option, the application uses the default roles defined for the TRU for automatic card creation.
6. Save your changes.
7. You can use the existing eligibility profiles.
   - Link the profile with the rate provided on the pension scheme page, for each row you create.
   - Use the attribute **Scheme Eligibility ID** and select the relevant eligibility from the list of values. If no eligibility profiles are available, you need to set them up.

Run Feature Upgrade Flow

You need to run the feature upgrade flow to set the required attribute, if you've already created pension elements before setting up pensions enrolment using employee self-service.

Here are the steps to do this:

> **Note:** **My Client Group** > **Show more** > **Submit a Flow**

1. Select the legislative data group for which you want to run the process.

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2. Search for and select the **Run Feature Upgrade flow**.

3. Provide a name for the payroll flow.

4. Select the feature Set Category Code for Employee Self Service Pension Contributions flow parameter.

5. In **Additional Information**, enter the name of the legislative data group that you selected earlier.

> **Tip:** This should be the same name as the one you provided earlier. It's a required parameter to run this flow accurately even though it appears as optional information.

6. Submit the flow.

Set Up Security Role and Privileges

The quick action menu My Pensions isn't automatically enabled for employees. To make this feature available for your employees in the quick actions menu **Me > Benefits**, you need to make this user interface visible.

> **Note:** **Navigator** > **Configuration** > **Structure**

1. Go to Me. On the Quick Actions tab, expand Benefits.

2. Select My Pensions.

3. Ensure that the setting Visible is enabled. To enable this, go to Edit Quick Action page, and select **Yes** for the field **Visible**.

4. Save your changes.

Roles and Privileges

> **Note:** **My Enterprise** > **Setup and Maintenance** > **Users and Security** > **Manage Duties**

To enable this option for the employees, use the new duty role Manage UK Pensions Contribution that's included in the delivered role `ORA_HRX_MANAGE_UK_PENSION_CONTRIBUTIONS`.

Search for and select Manage UK Pensions Contribution in Roles and Privileges to view the privileges attached with this duty role:

Table with Privilege Name and Description

Privilege Name	Technical Name	Description	Granted to Duty Role
Manage UK Pension Contributions	HRX_MANAGE_UK_PENSION_ CONTRIBUTIONS_PRIV	Enables UK employees to enrol or change their pension contributions	Manage UK Pension Contributions

When you enable this option, any data the employees' record is automatically updated in the relevant calculation cards and calculation components.

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Data Security Policy

The data security policy (DSP) is enabled so that data entered using the employee self-service updates the Benefits and Pensions calculation card and Pensions Automatic Enrolment component.

Data Security Policy for Pension Roles and Privileges

Duty Role	Type	Privilege Title	Object	Feature
UK Pension Enrolment	Aggregated Privilege	Manage Pension Contribution Data	Payroll Personal Deductions	PERSON

Configure Pensions Enrolment for Employee Self-Service

You can enable the Redwood UI for the Pensions Enrolment pages for your employees. Your employees can access this from **Me** > **Payroll** > **New Starter Declaration**.

Before you start

To enable any of the Redwood pages, the central profile option ORA_HCM_VBCS_PWA_ENABLED (Enable VBCS Progressive Web Application User Interfaces across HCM application) needs to be set to **Yes**.

For more information, see *HCM Redwood Pages with Profile Options.*

> **Note:** **Navigator** > **My Enterprise** > **Setup and Maintenance** > **Tasks** > **Search** > **Manage Administrator Profile Values**

Here's what to do

1. On the Manage Administrator Profile Values page, search for and select these profile options:
   a. ORA_HRX_GB_MYPENSIONS
   b. ORA_HRX_GB_VBCS_ESS_BP
2. Select **Yes** in the profile value field.

> **Note:** If ORA_HRX_GB_MYPENSIONS is set to **Yes**, and ORA_HRX_GB_VBCS_ESS_BP is set to **No**, then this page will appear in the Responsive UI.

3. Save your changes.

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Sample Formulas

You can add the rate validation formula to a pension scheme definition. This enables you to implement validations that are more complex that just checking for minimum and maximum contributions, and increments.

After creating the formula, you need to attach it to the pension scheme definition at the organization-level for a legal employer. You can do this in the Legal Entity Calculation Cards task for PSU-level values and the Legal Reporting Unit Calculation Cards task for TRU-level values.

- Create the Organization Pensions Automatic Enrolment.

- Select the Qualifying Pension Scheme Formula that you've created.

- Select the name of the Qualifying Pension Scheme the formula applies to.

Rate Validation

Scenario: The selected rate should be an integer number, but should also allow the values with decimals such as 4.5% and 5.5%

Solution: The rate is setup in the Pension Scheme Definition without an increment value. Instead, the rate validation formula is used to validate the rate.

```
FORMULA NAME: P_ALPHA_EE_RATE_VALIDATION
FORMULA TYPE: Payroll Access to HR
DESCRIPTION: This formula validates the selected employee contribution rate.
INPUTS ARE IV_EE_RATE, IV_COMPONENT_NAME
ERROR_MESSAGE = ' '
VALID = 'Y'

l_ee_rate = IV_EE_RATE
/* if the rate is not an integer value */
if ((l_ee_rate - floor(l_ee_rate)) > 0) then (
 /* if the value is not 4.5 or 5.5 */
 if (not (l_ee_rate = 4.5 or l_ee_rate = 5.5)) then (
 /* raise an error message in the UI */
 VALID = 'N'
 ERROR_MESSAGE = 'Rate needs to be whole number or 4.5 or 5.5'
 )
)
RETURN VALID, ERROR_MESSAGE
```

These contexts and input values are available for this formula type:

Contexts

Context Name	Data Type
EFFECTIVE_DATE	Date
HR_RELATIONSHIP_ID	Number
HR_TERM_ID	Number
HR_ASSIGNMENT_ID	Number

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Context Name	Data Type
LEGAL_EMPLOYER_ID	Number
LEGISLATIVE_DATA_GROUP_ID	Number
PERSON_ID	Number

Input Values

Variable Name	Data Type	Description
IV_COMPONENT_NAME	Text	Component name or scheme name
IV_EE_RATE	Number	Value of employee rate

Employer Rate Calculation

Scenario: You need to attach the employer rate calculation formula to the pension scheme definition. This enables you to decide on the employer contribution depending on the rate selected by the employee.

These contexts, input values, and return variables are available for this formula type:

Contexts

Context Name	Data Type
EFFECTIVE_DATE	Date
HR_RELATIONSHIP_ID	Number
HR_TERM_ID	Number
HR_ASSIGNMENT_ID	Number
LEGAL_EMPLOYER_ID	Number
LEGISLATIVE_DATA_GROUP_ID	Number
PERSON_ID	Number

Input Values

Variable Name	Data Type	Description
IV_EE_RATE	Number	Value of the employee rate

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Variable Name	Data Type	Description
IV_COMPONENT_NAME	Text	Component name or scheme name

Return Variables

Variable Name	Data Type	Description
Value	Number	Employer Rate Value

Scenario: The rate contributed by the employer should match the rate selected by the employee up to a value of 5%. If the employee selects a higher rate, the employer rate will stay at 5% maximum.

Solution: The rate is setup in the Pension Scheme Definition without an increment value. The Rate validation formula is used to validate the rate instead.

```
FORMULA NAME: P_ALPHA_ER_RATE_CALCULATION
FORMULA TYPE: Payroll Access to HR
DESCRIPTION: This formula calculates the employer contribution rate.
INPUTS ARE IV_EE_RATE,IV_COMPONENT_NAME

VALUE = 0.0

/* cap employee rate at 5% */
VALUE = LEAST(IV_EE_RATE, 5.00)

RETURN VALUE
```

Rate Details Override

You can use this formula if the scheme setup parameters for the rates differ for different groups of persons. The formula returns values that will be used for the rate processing in the user interface instead of the values directly specified on the scheme setup. Note that no values should be entered for these parameters, if the formula is used. The formula defines the guide text to be shown, the default value, whether the employee selects a rate, the minimum, maximum and allowed increment for the rate – based on criteria that might be evaluated using the provided context values. The formula doesn't override the validation and employer calculation formulas eventually selected for the rate.

These contexts, input values, and return variables are available for this formula type:

Contexts

Context Name	Data Type
EFFECTIVE_DATE	Date
HR_RELATIONSHIP_ID	Number
HR_TERM_ID	Number
HR_ASSIGNMENT_ID	Number

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Context Name	Data Type
LEGAL_EMPLOYER_ID	Number
LEGISLATIVE_DATA_GROUP_ID	Number
PERSON_ID	Number

Input Values

Variable Name	Data Type	Description
IV_COMPONENT_NAME	Text	Component name or scheme name

Return Variables

Variable Name	Data Type	Description
GUIDE_TEXT	Text	Guide text shown in the UI
ENTERABLE	Text	Employee can change the value
UOM	Text	Unit of Measure (P:percent, A:amount)
VALUE	Number	(Default) value
MIN	Number	Minimum value
MAX	Number	Maximum value
INCREMENT	Number	Allowed increment

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Important Considerations

While implementing pension enrolment for employee self-service, consider these points related to multiple assignments, and enrolment into multiple pension schemes.

- Employees with multiple assignments can't enrol all their assignments into their pension scheme. A professional user needs to do this for them.

- Employees can't enrol into multiple pension schemes using employee self-service. A professional user can enroll employees into multiple schemes at the same time.

Employee Submission for Pensions Enrolment

Once the employee has selected the My Pensions action, the tasks they can perform depends on the options they select.

My Pension	Description	Possible Employee Actions
Not yet enrolled	It's possible that the employee isn't yet enrolled in any scheme. For example, if the Pensions Automatic Enrolment process hasn't yet run or the process has run but hasn't enrolled them in a scheme. Or, if the employee has opted out of enrolment manually, they get the option to see the pension schemes that they're eligible to join.	• To see all the pension schemes that the employee is eligible for, use the **Add** option. • If there's no pension scheme selected, select a pension scheme. • Edit contributions, and also edit other information.
Already enrolled	Already enrolled employees can view the current pension scheme and details in My Pension Enrolments.	• To change employee contribution, use the **Edit** option. • To change to a different scheme, they must first end the enrolment, and then select another scheme to enrol in. to do this, they need to use the **End Enrolment to Scheme** option.

CAUTION: Employer contributions aren't editable. These are based on the default employer rates for the pensions scheme. However, if these are based on a matching contribution rule, the contributions are defaulted to the correct rate. This could be up to the maximum rate set for the scheme. The employee can either leave or change the default values, as required.

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How Pension Calculation Cards are Updated

The application updates the Benefits and Pensions calculation card and the Pensions Automatic Enrolment calculation component when the employee enters data using the employee self-service option.

A professional user can access and update these calculation cards, if required.

- The pension process treats the employee self-enrolment as a manual enrolment. The application processes the employee and updates any other values for the pensions automatic enrolment component. If the criteria for the opt-in is met, the process sets the method to **Opt-In**.

- If the employee unenrols from the scheme, the process treats the leaving reason as **Left Scheme** or **Opt-Out**. If the employee self-unenrol reason was set within a month of the employee's joining date, the process changes the reason to **Opt-Out** based on the current opt-out rules.

Here's what happens if the pension scheme is set up at the organization level and no value is provided for employee contribution:

- If a pension is enrolled using the employee self-service, the default contribution values for employee and employer contributions defined at the time of element creation are used.

- If a Benefits and Pensions calculation is automatically created through the Pensions Automatic Enrollment process, the default values will not be fetched from the element. If no overrides are defined, it will be blank. Otherwise, the contributions are taken from the overrides.

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New Starter Declaration Employee Self-Service

3 New Starter Declaration Employee Self-Service

Configure New Starter Declaration for Employee Self-Service

You can configure the New Starter Declaration page in Redwood for your employees. They can access this page from **Me** > **My Benefits** > **My Pensions** .

Before you start

To enable any of the Redwood pages, the central profile option ORA_HCM_VBCS_PWA_ENABLED (Enable VBCS Progressive Web Application User Interfaces across HCM application) needs to be set to **Yes**.

For more information, see *HCM Redwood Pages with Profile Options.*

> **Note:** **Navigator** > **My Enterprise** > **Setup and Maintenance** > **Tasks** > **Search** > **Manage Administrator Profile Values**

Here's what to do

1. On the Manage Administrator Profile Values page, search for and select the ORA_HRX_GB_VBCS_ESS_NSD profile option.
2. Select Yes in the Profile Value field.
3. Save your changes.

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