

Oracle Fusion Cloud Human Resources

Element Eligibility for the US

FA Latest



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1 What is element eligibility for the US?

Element eligibility is the method of identifying which employees are eligible for an element.

If you want an element to be available for an employee, you must set up its eligibility.

To set element eligibility, when you select **Create Element Eligibility**.

1. After you've defined the element, use the Elements task to open its definition for editing.
2. In **Element Overview**, select **Element Eligibility**.
3. Select **Actions > Create Element Eligibility**.
4. Set the following in **General Information**.

Tab	What you can do here
General Information	<p>In this area you define the criteria of employees that are eligible for this element.</p> <ul style="list-style-type: none">• To have all employees eligible for this element, add the eligibility record with no criteria.• If you want only certain employees to be eligible for this element, add the eligibility record with your specific criteria. <p>The available criteria in this area are:</p> <ul style="list-style-type: none">• Legal Employer• Department• Job• Grade• Employment Category• Location• Position• Payroll
Input Values	<p>Input values can be:</p> <ul style="list-style-type: none">• The same default value for each set of eligibility criteria• Changed to different default values for each set of eligibility criteria you create <p>If the default values are the same, you don't need to enter anything in this area.</p>
Costing	<p>Costing is the financial accounting of your payroll costs. It breaks down the costs of a payroll into customer-defined units (such as a location, division, or project). Costing of payments is a separate post-payments process. For customers not using Oracle Fusion General Ledger, you can disable the Transfer to Subledger Accounting task by copying the US Simplified Flow and creating your own flow and removing the task.</p> <p>For further info, see:</p> <ul style="list-style-type: none">• Payroll Costing of Elements for the US in the Help Center• Oracle Cloud Global Human Resources Implementing Payroll Costing Guide

Tab	What you can do here
	<p>Costing values can vary by different eligibility settings as well.</p> <p>If transferring your payroll data to General Ledger, you should setup costing for the results and retroactive elements.</p>

Eligibility Criteria

You define element eligibility using the following criteria.

Level	Available criteria
Payroll Relationship	<ul style="list-style-type: none"> Payroll Statutory Unit Relationship Type
Assignment	<ul style="list-style-type: none"> Legal Employer Department in which the person works Job Grade Employment Category People Group <p>Note: You set up all the people groups appropriate for your enterprise. For example, you could group people by company within a multicompany enterprise or by union membership.</p> <ul style="list-style-type: none"> Location of person's office Position Payroll All payrolls eligible

Tip: You must define element eligibility for every element, including predefined elements and indirect elements. If you want the element to be available to all workers, add an eligibility name and save the element eligibility record with no additional criteria selected. This is the usual practice for compensation and benefit elements where you decide eligibility using eligibility profiles.

Element Types

As a guideline, when the element template creates a base, results, and retroactive element, you must:

1. Set up element eligibility records for the base, results, and retroactive elements.

The base, results, and retroactive element eligibility records can serve different purposes. For example, you might create two records for the base element to limit who's eligible, and one open record for the results, if you cost the element results for your eligible people the same way.

2. Specify costing info for the results and retroactive element eligibility records.

Note: To capture costing info for your retroactive payments, you must either:

- Set up costing for your retroactive elements through element eligibility.
- Identify at which hierarchy level you must configure costing to capture costing info for your retroactive payments. For further info, see Global Human Resources Costing Guide (1918574.1) on My Oracle Support.

You must define element eligibility for the following elements. Set up costing for them as well if required.

Primary Classification	Secondary Classification	Indirect Elements Generated	Input Value
Standard Earnings	All	<User Element> Results <User Element> Retro Results	Earnings Calculated Note: If you also need to cost hours, you must cost the appropriate hours input value in the Results element.
Supplemental Earnings	All	<User Element> Results <User Element> Retro Results	Earnings Calculated
Imputed Earnings	All	<User Element> Results <User Element> Retro Results	Earnings Calculated
Nonpayroll Payment	All	<User Element> Results <User Element> Retro Results	Earnings Calculated
Pretax Deductions	Deferred Compensation 401K	<User Element> Results	Deduction Calculated
Pretax Deductions	Deferred Compensation 401K Catch Up	<User Element> Results	Catchup Deduction Calculated
Pretax Deductions	All other than Deferred Compensation 401K and Deferred Compensation 401K Catch Up	<User Element> Results <User Element> Retro	Pay Value
Employee Tax Deductions	All	<Predefined Element>	Tax Calculated
Employer Liabilities (deferred compensation)	NA	<User Element> Employer Match Results	Employer Match Calculated

Primary Classification	Secondary Classification	Indirect Elements Generated	Input Value
		Note: Automatically generates when you answer Yes to the employer match question on the element template.	
Employer Liabilities	All	<User Element> Results <User Element> Retro	Pay Value
Involuntary Deductions	All	<User Element> Results	Deductions Calculated
Involuntary Deductions	All fees	<User Element> Organization Fee Results <User Element> Person Fee Results <User Element> Processing Fee Results	Fee Calculated
Voluntary Deductions	All other than Roth Deferred Compensation	<User Element> Results <User Element> Retro	Pay Value
Voluntary Deduction	Roth Deferred Compensation	<User Element> Results <User Element> Retro	Deduction Calculated

For further info, see the following in the Help Center.

- [Indirect Elements for the US](#)
- [Payroll Costing of Elements for the US](#)

Multiple Rules of Eligibility

You can define more than one eligibility record for each element. Doing so is useful when you want only certain groups of people to be available for an element, but not all them. There can't be any overlap between the eligibility records.

For example, you can create one record for the combination of grade A and the job of accountant. However, you can't create one record for grade A and a second for the job of accountant. These rules would imply that an accountant on grade A is eligible for the same element twice.

If you have more than one element eligibility record, you can enter different default values and costing info for each eligibility group.

Examples of Eligibility Criteria

You can restrict who can receive an element entry like the following.

- Your enterprise provides company cars only to people in the Sales or Customer Support departments.
 - a. Create two eligibility records.
 - b. Use **Department** to specify the eligibility criteria. Select **Sales Department** for one record and **Customer Support** for the second.
- Your enterprise offers a production bonus to people who work full-time in production and are on the weekly payroll. You and
 - a. Create one eligibility record.
 - b. Select **Full-time regular** as the employment category, **Production** as the department, and **Weekly** as the payroll.

Related Topics

- [Example of Defining Element Eligibility for the US](#)
- [Maintain Element Eligibility](#)
- [Indirect Elements for the US](#)
- [Payroll Costing of Elements for the US](#)

2 Maintain Element Eligibility

After saving an element eligibility record, you can only make certain changes. You can't update the eligibility criteria.

This table summarizes the actions you can take.

Action	What's The Result
Change the input value default values and validation	These changes affect all new entries, and updates to existing entries. Changes to runtime defaults affect existing entries too.
Delete the element eligibility record	<div>The application automatically ends all existing recurring entries when you end the element's eligibility.</div> <div>Note: You can't delete the element eligibility record if any nonrecurring entries exist at the date you want to end the record. You must delete existing entries before you end the element's eligibility.</div>

- Related Topics
- [Payroll Element Eligibility](#)

3 How do I set eligibility for predefined elements for the US

Before you hire any workers, you must set eligibility for any predefined payroll elements.

This applies if you set the country extension on the Manage Features by Country or Territory task to either **Payroll** or **Payroll Interface**.

1. Start the Elements task.
2. Search for and select the US Taxation element.
3. Enter **1/1/1901** as the effective as-of date.
4. Enter a name for the eligibility rule, and click **Submit**. Since you haven't selected any eligibility criteria, all employees are eligible for the element.
5. Click **Done**.

4 Example of Defining Element Eligibility

Here's an example of how you can use eligibility definition to configure your element behavior.

Define an On-Call Hours Element

In this example, you use element eligibility to define an "on-call hours" element that applies to multiple jobs.

1. Complete the element template, and navigate to the Element Summary page.
2. To make this element available to only your employees with a job title of Security Specialist or Security Manager, set up two eligibility records on the **General Information** tab.
 - o One indicating this element is available for employees with a job title of Security Specialist
 - o Another indicating this element is available for employees with a job title of Security Manager
3. Assign different rate calculations to your Security Specialists and Security Managers.
 - a. Select **Input Values** for each of the eligibility records you defined.
 - b. For the Security Specialist eligibility record, you want to pay double their regular rate.

Insert a default multiple of **2**.
 - c. For the Security Manager eligibility record, you want to pay triple their regular rate.

Insert a default multiple of **3**.
4. Cost each "on-call hours" payment differently for each eligibility record.
 - a. Select **Costing** for each of the eligibility records you defined.
 - b. For each employee type, specify the appropriate General Ledger account number segment.

