



Specialized PeopleSoft 9.2  
Human Capital Management



# PeopleSoft Enterprise 9.2

## Introduction to PeopleSoft Human Capital Management

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# Agenda

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## ➤ Human Resources

- Human Resources Configuration
- Employee Data Entry

## ➤ Benefits

- Base Benefits Configuration
- Benefits Administration Configuration
- Benefits Administration Processing
- Employee Data Entry

## ➤ Payroll for North America

- Payroll for North America Configuration
- Employee Data Entry

## ➤ HR Reporting



# Human Resources

# HR Configuration

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## ➤ System Building Blocks

- Organization tables
- Job Attribute tables
- Personal tables
- Compensation Rules tables
- Workflow tables
- Workforce Administration tables
- Compensation
- Position Management tables

# HR Configuration

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## ➤ Organization related configuration.

- Person of Interest Types
- Holiday Schedules
- Business Units
- Companies
- Locations
- Company Locations
- Establishments
- Departments

# HR Configuration

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## ➤ Job Attribute related configuration.

- Job Codes
- Job Families
- Job Function
- Job Subfunction
- Job Code Tasks
- Job Tasks

# HR Configuration

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## ➤ Personal related configuration.

- Citizen Status
- National ID Type
- Address Type
- Name Format, Type, Prefix, Suffix and Title

# HR Configuration

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## ➤ Compensation Rules related configuration.

- Frequency
- Comp Rate Codes
- Rate Code Classes, Groups, Defaulting Options and Defaulting Rules



# HR Configuration

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## ➤ **Workforce Administration related configuration.**

- Actions and Action Reasons
- Company Property
- Ethnic Groups
- Visas/Permits

# HR Configuration

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## ➤ Compensation related configuration.

- Base Compensation Salary Plans and Grades

# HR Configuration

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## ➤ Organizational Development related configuration.

- Position Data

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# Person Model

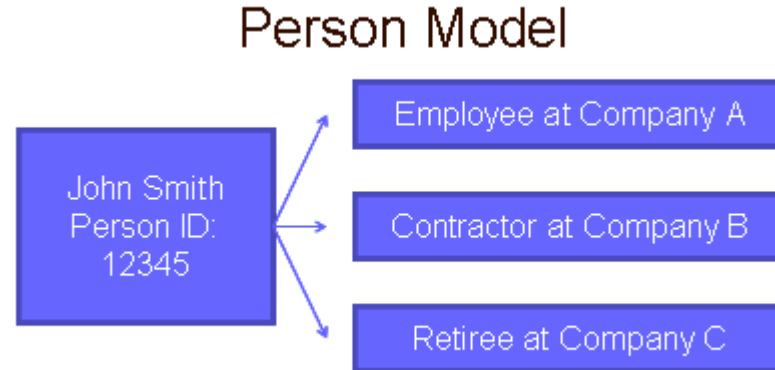
# Person Model Overview

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- **The Person Model is a term used to describe the information captured about a person and how the person is related to the organization.**
  
- **Some of the features of the Person Model include:**
  - Individuals have only one ID in the system, regardless of their organizational relationship.
  - Individuals may be saved in the system without a job.
  - Some individuals are not included in the Person Model such as Dependents and Beneficiaries.

# Person Model Overview

- A person is defined as any individual with a relationship to the organization that you chose to track in the system.
- Individuals may exist in the system with multiple Person Types all using the same Person ID (EMPLID).



# Adding a Person

➤ **When adding a person to the system, you are required to add the following information:**

- Name
- Effective Date
- Organizational Relationship
- Person ID (created when adding a Person)

➤ **There is additional information that may be tracked when adding a person. This information includes but is not limited to:**

- Address
- Date of Birth
- Phone Number
- Email Address
- Marital Status
- Gender

# Organizational Relationships

- **How a person is related to the organization as represented in the database is called an Organizational Relationship.**
- **There are three Organizational Relationships delivered with the Person Model:**
  - Employee
  - Contingent Worker
  - Person of Interest
- **A person can have one or more of these relationships at any one time, including multiple occurrences of the same relationship.**
- **Each distinct relationship that includes a Job Data record is uniquely identified by an EMPL\_RCD\*.**

\* Note. The relationships of people of interest do not always include a Job Data record.



# Contingent Worker

- **Contingent Workers are individuals tracked within the HR system that are not employees of the company but have job related information.**
  
- **The following are some attributes of a Contingent Worker**
  - May not be paid through North American Payroll
    - Note :When Contingent Workers are implemented it is recommended that they all be assigned to a separate non-pay paygroup. Otherwise paysheets will be created for these individuals but they will error out on the pay calc process.
  - Are not eligible for Benefits
  - Have the ability access to certain self-service pages (if security granted)
  
- **Some examples of Contingent Workers include:**
  - Leased Employees
  - Contractors
  
- **Each Contingent Worker Instance must have a distinct Employee Record Number (EMPL\_RCD).**

# Person of Interest

- **Persons of Interest are individuals tracked within the HR system that are not employees of the company and may or may not have job related information.**
- **The following are some attributes of a Person of Interest**
  - May be paid through North American Payroll
  - May be eligible for Benefits
  - Have the ability to access certain self-service pages (if security granted)
- **Examples of Person of Interest include:**
  - Retirees
  - Board Members
  - COBRA Beneficiaries
  - Volunteers
- **Persons of Interest that have job data records are identified with a distinct Employee Record Number (EMPL\_RCD). Persons of Interest that do not have job data records are identified by the Person of Interest Type (POI\_TYPE).**

# PS Delivered Person of Interest Types

POI_TYPE	Description	JOB Reqd	Comment
00000	Unknown	N	This POI type is used when a user creates a person but does not create an organizational relationship. Having this POI_TYPE will ensure that the user will be able to access these people. Once a known organizational relationship is created the system deletes the Unknown one.
00001	COBRA Qualified Beneficiary	Y	Used by PeopleSoft Benefits Administration for COBRA beneficiaries. These relationships can only be created on the components on the COBRA menu.
00002	Pension Payee	Y	Used by PeopleSoft Pension Administration. This relationship can only be created on the components on the Pension Administration menu.
00003	Stock - Board Member	Y	Used by PeopleSoft Stock Administration.
00004	Stock - Non-HR Employee	Y	Used by PeopleSoft Stock Administration.
00005	Global Payroll Payee	Y	Used by the PeopleSoft Global Payroll applications.
00006	Student Refund	Y	Used by PeopleSoft Campus Solutions applications. This POI_TYPE is created in the JOB table to process students who need to receive a refund payment using PeopleSoft Payroll for North America. Payroll for North America requires that people have a JOB record in order to process their check.
00007	External Trainee	N	Used by PeopleSoft Human Resources Administer Training. This relationship can be created in components on the Administer Training menu, the Administer Workforce menu, and also on Recruiting Solutions menus for people who need training prior to being hired.
00008	External Instructor	N	Used by PeopleSoft Human Resources Administer Training. While some external instructors are entered into the system as contingent workers and have a JOB record, some external instructors do not need a JOB record. This POI_TYPE relationship is used for external instructors who are <i>not</i> contingent workers.
00010	Other	N	Any other person that you need to track within HCM.

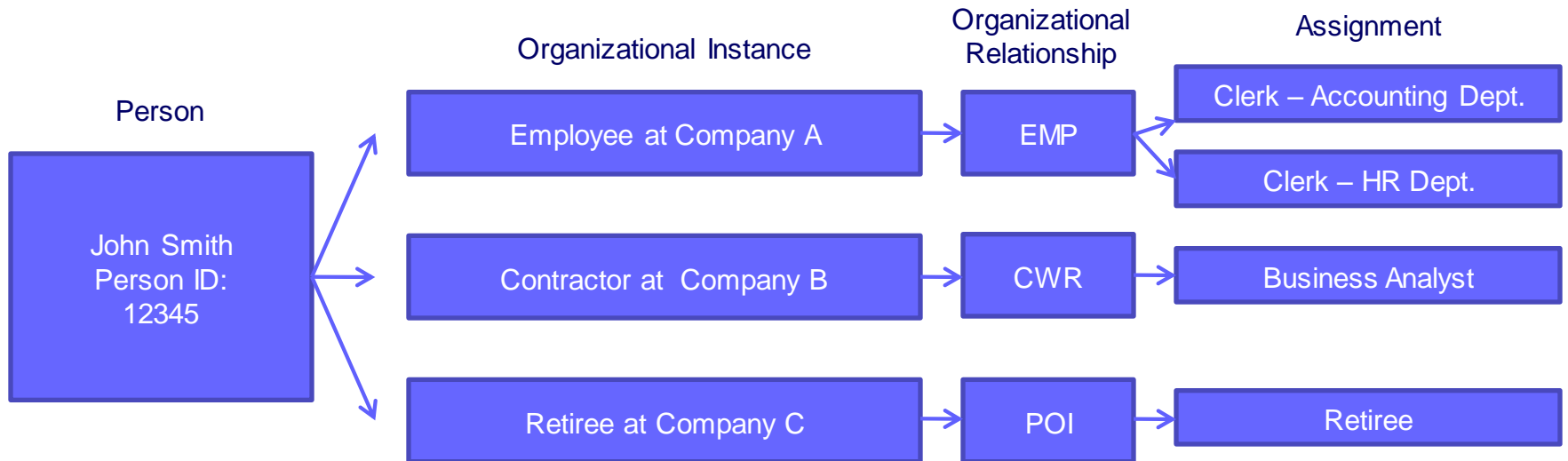
# Organizational Instance

- **An Organizational Instance is an occurrence of an Organizational Relationship.**
- **Organizational Instances can be limited to one assignment (EMPL\_RCD) or include multiple assignments, depending on your needs.**
- **Organizational Instances are two assignments that have completely separate relationships with the organization.**
- **Each Organizational Instance has a unique Hire Date (HIRE\_DT), Service Date (SERVICE\_DT), and Termination Date (TERMINATION\_DT)**

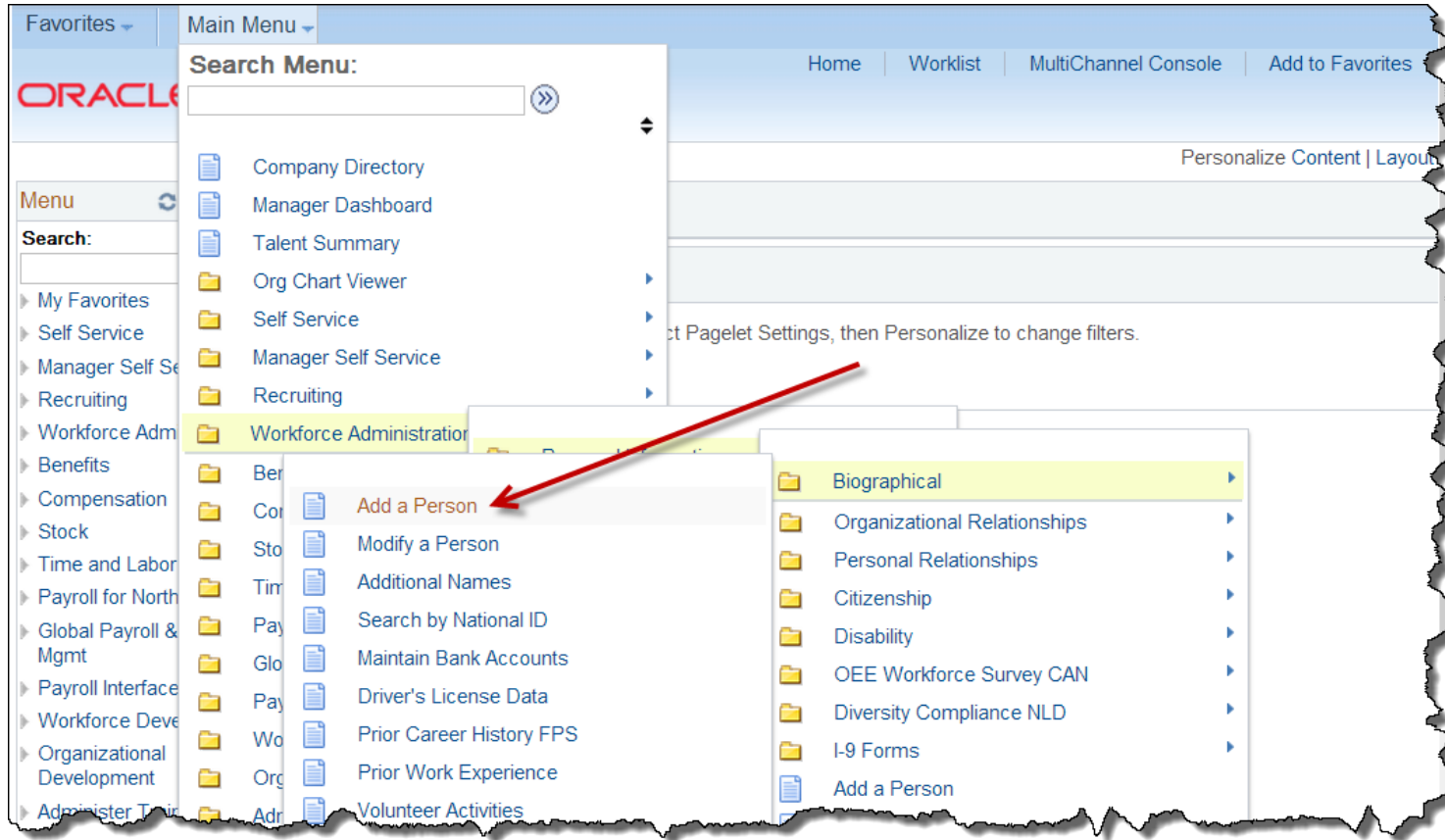
# Assignments

- **An Assignment is a unique numeric identifier for each relationship that a person has that requires Job information.**
- **Individuals may have one Organizational Instance that contains multiple Assignments.**
- **For example; John Smith may have been hired as an employee on 2/10/98 to work in the accounting dept. On 1/15/99, he takes another job as a clerk for the people dept. If you do not want to identify John's second job as a new hire, you would simply add an additional assignment.**
- **When a Person has multiple Assignments tied to the same Organizational Relationship, one of those assignments is identified as the controlling instance. This EMPLID/EMPL\_RCD combination stores the HIRE\_DT, general SERVICE\_DT, and the TERMINATION\_DT.**

# Person Model Overview



# New Hire Process



# New Hire Process

