

Recurring/Additional Payment Authorization Form

Document guide to assist with processing Recurring/Additional Payments accurately and on a timely basis, departments are highly encouraged to review the various documents on the Recurring-Additional Payment web page. <u>NU Values - Recurring-Additional Payment</u>

For assistance with ADIS access and/or completing the Recurring/Additional Payment form, please contact HR Records at <u>hrrecords@unmc.edu</u>

For questions regarding:

- a. Awards and Moving/Relocation Allowance, contact Payroll at unmcpayroll@unmc.edu
- b. Wage Types, contact HR Compensation at hrcompensation@unmc.edu

Important Notes:

- Individuals completing the Recurring/Additional Payments online form for UNMC employees <u>must</u> <u>have access to ADIS</u>. Contact <u>hrrecords@unmc.edu</u> to request an ADIS user account and enroll in training.
- ONLY for UNCA, UNK, UNL and UNO employees will departments complete the <u>Recurring/Additional Payment Authorization Payment form</u> (PDF/paper version). Departments must e-mail the completed/signed form (PDF) to <u>hrcompensation@unmc.edu</u> for review. Thereafter, HR - Records will send the form to the appropriate campus for SAP entry.
- 3. Forms must be received by HR Compensation/Payroll 3 days prior (Refer to Payroll Schedule for Recurring and Additional Payments) to the Payroll final (Final Day for Changes). This will allow time for review, follow-ups, and processing of entries into SAP before the Payroll final.
 - a. Reference/Review in detail the Payroll Schedule for Recurring and Additional Payments at the <u>NU Values Recurring-Additional Payment</u> web page.
 - b. **Supporting documentation** must be attached at the time the form is created in ADIS.
 - c. The required **approval signatures must be on the form** (online form in ADIS for UNMC employees and PDF/paper for UNCA, UNK, UNL and UNO employees) in order to be processed by HR Compensation/Payroll.
 - d. Moving Allowance/Relocation payments over \$5,000 require Dean and VC of Business & Finance.
 - e. The signature routing and approval process may take several days to complete. Please plan accordingly to ensure that the completed/signed form is received in HR Compensation/Payroll by the due date.
 - f. Automated email notifications are prompted to the Preparer and Approver(s) when a step needs to be initiated and/or is complete.
 - g. HR Compensation, Payroll and HR Records receive email notifications to prompt review and SAP entries.
 - h. Employees will not receive an email notification regarding the approved payment from the system. Departments are responsible for notifying (via letter or e-mail) employees and uploading notification in ADIS.

4. Chancellor Approval Requirement:

- a. 1404 Overload: If the duration for the recurring pay is for 6 months or more and the amount is 10% or greater (cumulative that includes the percentage increase received for the annual July 1 salary increase) Chancellor's approval is required.
- b. A <u>Salary Increase 10% and Greater Request Form</u> must be completed in addition to the Recurring/Additional Payment Authorization Form.
- 5. President Approval Requirement:

a. 1404 Overload: Academic-Administrative Overload assignment should not exceed 20% of base salary without prior approval of the President (except summer teaching/research appointment).

The GUIDE provides the steps to the process/workflow of the Recurring/Additional Payment form. There are four primary sections:

- Creating a Recurring/Additional Payment Form > Pages 2 9
- Assigning Approver(s) to the Recurring/Additional Payment Form > Pages 10 13
- Retrieving a Recurring/Additional Payment Form in Progress > Pages 14 16
- Access to Electronic Forms Recurring/Additional Payment Report > Pages 17 19
- How to Create a Recurring/Additional Payment Form for Amendment > Pages 20 27

CREATING A RECURRING/ADDITIONAL PAYMENT FORM

1. Login to <u>ADIS</u> site:



(Note: Your menu links might look different depending on your access levels)

2. Retrieve the Personnel Record, Enter -> Last Name of Employee.

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3. From the drop down, Select -> **Employee Name**.

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4. Select -> Personnel Record.

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5. Select -> **HR Documents.**

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# HOME	PERSONNEL RECORD	CLINICAL	EDUCATION	RESEARCH	REPORTS	MORE	QUICK MENU	
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6. Once in the employee document list, Click -> Add New.

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7. A pop up box will appear. Select -> Electronic Form.

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8. From Doc Type (drop down) Select -> **Recurring/Addtnl_Paymnt –** Select -> **Add.**

O File Upload @ Electronic Form	
Doc Type:	
New: Amendment:	
Electronic Sigs: Yes	
A03	
	close

9. The system will auto populate the employee name, personnel number, employee position, unit and department.

Recurring or Additional Payment Authorization Form						
Instructions: For detailed information and requirements, click here.						
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HR Records Technician	Business and Finance	HR Compensation/Staffing/HRIS				

NOTE > ONCE THE FORM HAS BEEN INITIATED, THE DOCUMENT CAN BE SAVED/PREVIEWED AT ANYTIME (SEE PAGE 8 <u>Step 14-e on How to Preview PDF</u>/ SEE PAGES 14 -16 on How to Retrieve a Saved Document)

Pay	yment Infoi	rmation			
_					
	Save	Preview PDF			

10. Complete **department authorizing payment** > Select from the **drop down**.

If same department as employee, Select -> same department from drop down. If different department from employee department, Select -> department from drop down.

Recurring or Additional Payment Authorization Form

Instructions: For detailed information and requirements, click here.		
employee name: * Miler, Geoffrey	employee personnel number (sap td); 🕷	
employee position: 🗎 Integration: default posi	engloyee burines unit: Business and Finance	employee department: * General Supply
department authorizing payment: *	—	

11. Complete the **reason/justification** section.

Recurring or Additional Payment Authorization Form

Instructions: For detailed information and requirements, click here.	
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enployee position 🕷 Integration: default posi	enployee busines units 🕷 Business and Finance
department authorizing payments 🕷	
employee's pay period: 🔿 monthly 🛞 bi-weekly 😭	
helped with a project	

12. If need to add additional information and/or have additional supporting document(s), attach document using the "Attach Document" feature (below the wage code section).

Please see Wage Types/Payment Types		
Payroll will complete the data entry O623*** Moving / Relocation O4601 Awards Attach Document: Supporting Documentation: Choose File No file chosen	HR Comperentry 1401 Ac 1420 Ju	
Please see Payroll Schedules		
Payment Information		
Attach Document: MillerG.SupportDoc.Nov2019 Payment Information	× 🔶	

13. Select -> **Wage code type** for the payment.

The form will only show the **Wage Codes/Types** based on the **employee's pay period** (biweekly or monthly).

REFERENCE the link > <u>Wage Types/Payment Types</u> for wage code definitions and payment types. Please see Wage Types/Payment Types Payroll will complete the data entry O 0623*** Moving / Relocation O 4601 Awards MR Compensation will review/HR Records will complete the data entry I 401 Additional Compensation O 1420 July 1 In Lieu Payment Stipend (Non-Academic Only) - ONE-TIME

14. The system will then populate a 'line' under the **Payment Information section** that will be for **One-Time** Payment(s) or **Recurring Payment(s)**. This is determined based on the wage code that has been selected.

Figurent Information				
One-Time Payment [a]	payment o	late	payment amount	cost center
Payment Information				
Recurring Payment code	start date	end date	payment amount	cost center

Prior to completing the Payment Information, reference the <u>Payroll Schedules</u> for Recurring and Additional Payments to determine **the appropriate dates and deadlines that apply.**

Please see Payroll So	chedules
Payment Information	n
One-Time Payment(s)
	payment code

a. Click on the **plus icon** to enter the payment information. The system prompts an 'entry box'. The entry dates is based on which type of payment is being processed.

DATE > One-Time Payment -> Must be **Payment date, Select ->** from the 'drop down'.

401 Additional Compensation syment Date :	Payment Amount (S) 🛸
Cast Center (no dashes) * Base Cancel	

DATE > Recurring Payment -> Must enter a "Start Date" and "End Date" <u>Start Date:</u> Click -> the calendar and search for date and select.

Page 6 of 28

End Date: Select -> date from the 'dropdown'.

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NOTE: A 'pop up' message will appear for both the One Time Payment and Recurring Payment <u>if the dates are past the deadline dates</u> as referenced in the **Payroll Schedules**. New entry of dates will be required.



NOTE: A 'pop up' message will appear for both the One Time Payment and Recurring Payment to <u>advise the deadline date to have submitted to HR or</u> <u>Payroll,</u> as referenced in the **Payroll Schedules**.



b. Enter -> **Payment Amount** and **Cost Center** (do not include dashes). Select -> **Save**.

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Cost control decord and in 11 fair regions	

If the cost center does not exist or if entered incorrectly, a pop-up message will appear.

Once saved, the system returns to the 'form' page and displays the entries completed.

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•	payment code	payment date	payment amount	cast center -
24	5401	##/27/2019	5500.00	1143230994

c. To add another One-Time Payment for the wage code originally selected or the payment is being split between more than one cost center, Click -> plus icon ф.

	payment cede	payment arte	payment amount	cost center -
28	5401	11/27/2019	\$500.00	1143230094

d. The system now populates the additional cost center and additional payment amount along with the previously entered information.

Payment Information					
Recarding Payment())					
•	pasment code	start dete	and date	payment amount.	cest center
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22	1414	12/24/2019	10.01/0019	5125.00	0140200244

Preview PDF

e. To review the form before next step, Select -> Preview PDF.

and repeat Step 14a-b.

Payment &	dermation.					
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	•	pasment code	start dete	and date	payment amount	cest center
	22	1404	12/31/2019	47/11/2014	512.10	3140230244
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Recurring	g or Additional r detailed information	Payment Authorization F and requirements, click here.	form
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Employee Deservest		HD Concension/SuffractDis	
Department & therizing Payment		HR Compensation/Station/HRIS	
Reason / Justification (Required): STURF			
Please see Recurring/Additional P	ayment Procedures (or wage code type definitions.	
Payroll will complete data entry			
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HR Compensation will review / HP	t Records will comple	rte data entry	
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		1413 Summer Research	
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Recurring Payment			
Recurring Payment Start Date	End Date	Payment Amount	Cost Center
Recurring Payment Start Date 12/31/2019	End Date 12/31/2019	Payment Amount 12,500	Cost Center 3143230244

f. From top of screen, Select-> 'Electronic Recurring/Additional...' tab to exit the Preview PDF.

Recurring or Additional Paymer 🗙	Electronic Recurring/Additional Pay $ imes$	+

g. The form can now be further edited and/or entries can be removed.



h. Once the Payment Information is complete, Click -> Save.

The next section is the Proceed to Signature Page steps to assign approver(s).

ASSIGNING APPROVER(S) TO THE RECURRING/ADDITONAL PAYMENT FORM

It is important that the Preparer knows who the Approver(s) are prior to proceeding. If the name needing to select as an Approver is not in the listings provided within the drop down selections – contact HR Records at <u>hrrecords@unmc.edu</u>

1. While still in the Form, Click -> **Proceed to Signatures.**

payment code	payment ante	payment amount	cost center
5401	11/27/2019	5500.00	1143230094
	5401	5401 ±1/27/2019	5401 11/27/2019 550.00

A pop-up message appears indicating when the approval signatures will need to be completed based on the payment date or start date entered previously. Select-> **OK**.

NOTE: The dates in the message are based on the Payment date entered for a One-Time Payment and the Start date entered for a Recurring Payment

		-
To have a payment date of 12/31/2019, this form must be signed and sent to HF	R before 12/13/2019.	
	ОК	

2. Click -> **Plus icon** to **assign approver**(s).

Documents for:	Erik Palafox					a sum a s
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* *	- C (2)	Polafox, Erth	PalatoxERecurAddtiPayment.Novem2019	Recurring/Addtni Payments	11/14/2019	

3. Click -> drop-down in the Select Administrator field and Select -> appropriate name.

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The name selected will then populate to the field.

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4. If additional signatures are needed, Select -> additional signor.

If Chair or Dean needs to approve this request, **Select** the appropriate check box(s) (Note: The '**Individual' selection does not apply** to Recurring/Additional payments).

5. Click -> Process.

Signatures document menos anován recenteléfipopularis nevenálily Solact all to apply			
addtanal egen dens limete dens limete			
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Copyright 2007 University of Nebraska Medical Ce	nter, All Rights Reserved		
The system returns to the p following icon	revious screen wh ags that the form	ere the Plus icon changes to the (request) has been submitted for signature.	
8 9 💩 🔶	9 🗭	Miller, Michael S	N

6. A **Workflow Notification email** is sent to the **Preparer** and assigned **Approver(s)** indicating that there is an item awaiting review/approval in ADIS.

NOTE: If there are multiple Approvers assigned, the workflow will first go to the Administrator that has been assigned. The additional signor will receive a Workflow Notification email once the Administrator has approved.

7. The **Approver(s)** logs in to ADIS; any items for review/approval will be the first item(s) that appears on the screen.

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open	sign/approve¢	document	doc type	load date 🗢
8		Johnson-Randle TMRecurAddtlPayment.Novem2	019 Recurring/Addtnl Payments	11/04/2019
8		SmithPSRecurAddtPayment. Octob2019	Recurring/Addtnl Payments	10/28/2019

- b. The **Approver(s)** will Select -> '**By clicking you verify that you have reviewed the document'.** This prompts a display of the form for review.
- c. The Approver(s) will Select -> Accept and sign to Approve the payment.



- d. The system will return the **Approver back to the approval screen** if they have any other items waiting for review/approval.
- e. If the Approver has not acted on the form(s) request(s), the system will prompt an additional **Workflow Notification email** to the **Preparer** as a reminder. This will occur two days from the due date for HR Compensation or Payroll to receive.

f. If the Approver selects Reject with Comments -> a pop up box appears to enter reason for rejecting the document and Click -> OK.



The **Reject with Comments** action will prompt the document status to **Additional Modifications. The Preparer will receive a Workflow Notification email** and can then retrieve the form to further change/correct any items needed.

See RETRIEVING A RECURRING/ADDITONAL PAYMENT FORM IN PROGRESS section (Pages 14 – 16)

- Once a form has been approved, based on the wage code selected for the payment, a Workflow Notification email will go to the Preparer, HR Compensation or Payroll indicating there is an item ready for review in the Electronic Forms – Recurring/Additional Payment Report in ADIS.
- 9. HR Compensation/Payroll will review and HR Records/Payroll will process the payment(s) via data entry to the employee's record in SAP. The status is changed to SAP Completed and the form is saved to the employee's documents in ADIS.

Payroll will complete data entry	
4601 Awards	06F3 Outstanding Performance Stipend (NON-FACULTY ONLY)
HR Compensation will review / HR Records will comp	plete data entry
1401 Additional Compensation (ORE-TIME PAYMENT)	X 1404 *Overfoad (NOT TO EXCEED 20% OF BASE SALARY)
1420 July 1 In Lieu Payment Stipend (NON-ACADEMIC ONLY)	1419 New Faculty / Retention Stipend (PACULTY ONLY)
	4605 Honorarium (ONE-TIME PAYMENT)
Overload assignments for Academic-Administrative should not exceed 20% of base salary w	ithout prior approval of the President (except summer teaching/research appointment).
Unit/Department will complete data entry	
1410** Supplemental Compensation Stipend	1412 Summer Instructional
	1413 Summer Research
"A fully signed Supplemental Compensation Plan Terms of Employment Agreement covering	the payment period(s) must be on file and loaded in ADIS to pay supplemental compensation.

NOTE: If the wage code you selected is one of those listed above within "Unit/Department will complete data entry", proceed to the ACCESS TO ELECTRONIC FORMS – RECURRING/ADDITIONAL PAYMENT REPORT section (Pages 17-19) once the Workflow Notification email has been received.

RETRIEVING A RECURRING/ADDITONAL PAYMENT FORM IN PROGRESS

1. Select -> Personnel Record.

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2. Select -> HR Documents

ADIS								
+ HOME	PERSONNEL RECORD	CLINICAL	EDUCATION	RESEARCH	REPORTS	MORE	QUICK MENU	
PERSONNEL	RECORD		ELECTRONI	C SIGNATUR	E		PERSONNEL RECORD	
Change Registe	r		Electronic Signature Report				Ad-Hoc Reports	
			Signature Docu	ments			Document Admin	
							HR Documents	
							Personnel Summary	
							Publications Summary	

3. Search for an employee using the search box on the top right corner to access their list of documents.

ADIS	Monday, November 64, 2019 @ Solarch	i j
HOME PERSONNEL RECORD RESEARCH REPORTS MORE		
Manage Personnel File (Documents)		Advanced Men
	Monday, October 21, 2019 Palafox	
	Palafox, Erik IT Development and Operations	
		Classic Menu

4. Locate the document which needs to be finished and in the lock/use column, Click ->

Attributes. icon 🗭

UNMC ITS-App	lication Ser	vices	* * DEVELOPMENT * *				
ADIS	;						
+ HOME	HR	RECORDS	PERSONNEL RECORD	RESEARCH	REPORTS	MORE QUICK MENU	
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5. In the Attributes section, Click -> Edit

UNMC ITS-Application Services	* * DEVELOPMENT * *			
ADIS				
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Manage HR File	(Documents)			
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6. The **Saved Form** is retrieved and can continue completing the form **referencing the** steps in the CREATING A RECURRING/ADDITONAL PAYMENT FORM section (pages 2 – 9).

Recurring or Additional Payment Authorization Form

For detailed information and r	equinements, dick here.			
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Please see Recurring/Addition Payroll will complete the © 00FJ Outstanding Perform © 4601 Awards	ail Reyment Procedums for wage o data ontry ance Stipend (Non-Faculty Only)	ode definitions. Please choose one below. Unit/Department will complete the data entry © 1410" Supplemental Compensation Scipend © 1412 Summer Instructionat © 1413 Summer Research	HR Compensation will review/HR Records will o the data entry. # 1401 Additional Compensation © 1404 ^{rre} Overload	complete
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Person see Recurring/Addition Payroll will complete the © 06/3 Outstanding Perform © 4601 Awards	ual Rayment Procedums for vege c data entry ance Stipend (Non-Faculty Only)	ode definitions. Please choose one below. Unit/Department will complete the data entry © 1410" Supplemental Compensation Stipend © 1412 Supmer Instructional © 1413 Summer Research	HR Compensation will review/HR Records will on the data entry. # 1401 Additional Compensation © 1408 Year Faculty/Retention Stipend (Faculty On © 1418 Year Faculty/Retention Stipend (Faculty On © 1420 July 1 In Use Payment Stopend (Hon Academ ON-THE) © 1000 July 1 by Depart Stopend (Hon Academ	complote 97 96 Only) -
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ACCESS TO ELECTRONIC FORMS – RECURRING/ADDITIONAL PAYMENT REPORT

The status of the Recurring/Additional Payment forms are tracked via this report based on selecting the various statuses which also defines the workflow process:

- <u>New/In Progress</u> > Preparer is processing the form (has started creating form and has saved).
- <u>Signature Routing</u> > Preparer has assigned Approver(s) and signatures are pending.
- <u>Pending Review</u> > Approver(s) has/have signed and HR Compensation or Payroll reviewing the form(s).
- <u>Reviewed</u> > HR Compensation or Payroll has reviewed the form(s) and ready for HR Records or Payroll to process payment entry into SAP.
- <u>SAP Completed</u> > Entry has been made into SAP and the form is completed
- <u>Additional Modifications</u> > can be prompted by the Approver, HR Compensation and/or Payroll primarily of there is additional information needed or a change/correction needs to be made.
- <u>Declined</u> > can be prompted by the Approver, HR Compensation and/or Payroll if there is a need to do so.

1. Login to <u>ADIS</u> site:



Enter your NetD		
Enter year Passwort		

Log In Forget Reaward?



(Note: Your menu links might look different depending on your access levels)

2. Select -> PERSONNEL RECORD then Select -> Document Admin.



3. Select -> View Reports.



4. Select -> Electronic Forms – Recurring/Additional Payment Report.

ADIS Document Reports

Unit: Business and Finance

report name	φ.	report type	φ
Academic Administration		PDF	
Active Paid Faculty		PDF	
Faculty - Active Templates		HTML	
Faculty - Special Appointments with End Dates		PDF	
Faculty - Expired Documents		HTML	
Faculty - List		PDF	
Faculty - Missing Document Types by Template		HTML	
Faculty - Missing New Hire Documents		HTML	
Electronic Forms - Stipend Report		HTML	
Electronic Forms - Recurring/Additional Payment Report	t	HTML	
Employee - Orphan Documents		HTML	
Faculty - Orphan Templates (Includes Declined)		HTML	
Faculty - Part Time		PDF	
Faculty - Promotions		PDF	
Faculty - Separated, Missing Documents		HTML	
Faculty - Tenured		PDF	
Faculty - Will Expire Documents		HTML	
Full Faculty Appointments		PDF	
HP Renewals		PDF	
Volunteer Faculty - Missing New Hire Documents		HTML	

5. The system prompts the report based on a given status. Click -> **Status** drop down to display other statuses and Select -> to retrieve the selected status report.

Status of <u>Reviewed</u> > are forms that are ready to be entered to the employee record in SAP.

The Unit/Department will do the data entry on wage types below (then edit to SAP Complete status). HR Records/Payroll will complete all other wage types.

Unit/Department will complete the data entry

- 1410* Supplemental Compensation Stipend
- 1412 Summer Instructional
- 1413 Summer Research
- 6. The entries to SAP can be made by either referencing the **PDF form (action column)** or if there numerous forms, an **Export to Excel** is available. This downloads the information needed to process the SAP entries. (can copy/paste from report to SAP fields).

NOTE: If there is more than one line for the form (due to multiple cost centers, etc.), **only need to select SAP Complete action once in ADIS.**

rit/Dept/Sect Campus		_	Status: Reviewed													
- 00															E Expe	et to Excel
tione status e persona	ele rivit e	e liste	ensp-dept.	businesse unit	dept.authorizing.prof.	+ type#	type desc 4	trequency#	one time e	start #	end date #	un/ment.a	cost cester •	position .	added e	date .
	Perei	Sentit	HR Compensation/Staffing/It	Suiteta and Presocal	HR Senetts	3437	Additional Compensation	Shreekiy	11/21/2010			100,000	3143230364	HRIS Debe/Kecond Technicien	Huerta, Anthony J	10/25/2019
	Michae	s water	HIL Compensation/Staffing/H	Burkest and Stratoe	General Education	1434	Oversona	normy		11/27/2019	12/31/2019	5000-800	3147230244	Talent Acquisition Specialist	Haets, Anthony J	11/05/2019

Electronic Forms - Recurring/Additional Payment Report

A	в	с	D	E	F	G	н	1	J	к	L	м	N	0	P	Q
Status	Person nel #	First	Last	Emp Dept	Emp Business Unit	Dept Authorizing Pmt	Туре	Type Desc	Frequenc y	One-Time Date	Start Date	End Date	Payment Amt	Cost Center	Position	Added by
Reviewer	187853	Pamela	Smith	HR Compensation/Staffing /HRIS	Business and Finance	HR Benefits	1401	Additional Compensation	Biweekly	11/21/2019			100	3143230264	HRIS Data/Records Technician	Huerta, Anthony
Deview	157624	Mishaal	D.Giller	HR Compensation/Staffing	Business and	Canaral Education	1404	Quadrad	Manthh		11/27/2010	12/21/2010	5000	2142220244	Talent Acquisition	Huerta,
Reviewed	157634	Michael	Millor	HR Compensation/Staffing	Business and	General Education	1404	Overload	Monthly		11/27/2019	12/31/2019	5000	3143230244	Talent Acquisition	Huerta,
Reviewed	157634	Michael	Miller	HR Compensation/Staffing /HRIS	Business and Finance	HR Compensation/Staffing /HRIS	1410	Supplemental Compensation Stipend	Monthly		12/31/2019	12/31/2019	500	3143230244	Talent Acquisition	Miller, Michael S
Reviewed	157634	Michael	Miller	HR Compensation/Staffing /HRIS	Business and Finance	HR Compensation/Staffing /HRIS	1413	Summer Research	Monthly		11/27/2019	11/27/2019	5	3143230244	Talent Acquisition Specialist	Miller, Michael S

 Once the payment has been entered to the employee record in SAP, go back to ADIS and in the Action column click on the following icon that corresponds with the payment you just entered.

Č	nit/Dept Campu	t/Sect B				Status: Reviewed		•											
i.	-30																	🗐 Exp	ort to Excel
-	tione	etatus . e	personnel.	nist #	liste	enp-dept. 6	erip businesse unit	dept authorizing prot	tipe#	type desc	trequency#	one time .	start #	end date #	unit.	cost center •	position .	added a	date .
C	200	Reviewed	187852	Pereta	Sentth	HR. Compensation/Staffing/HRIS	Businets and Preasor	YR Secetts	1477	Additional Compensation	Streetly	11/21/2010			105,200	3143230264	HRIS Deba/Records Technician	Huerta, Anthony J	10/25/2017
12		Reviewed	157634	Michael	Witer	HL Compensation/Staffing/HRS	Busicest and Plaace	General Education	1434	Очеткиа	HOODY(11/27/2019	12/31/2219	5006-800	3147230244	Telefit Acquisition Specialist	Hatrita, Anthony	11/05/2019

8. Click -> drop-down box, Select SAP Completed and Select -> Update.

Update recurring/additional payment status for: Smith, Pamela S 11/21/2019	
Current Status: Reviewed	
Set Status: SAP Completed	•
Update Cancel	

The **SAP Completed** status saves the completed form to the employee's documents in ADIS.

Move on to the next payment listed on the exported spreadsheet. Then once entered into SAP, go back over to ADIS and complete step # 8 again.

Repeat this process until all payments on the spreadsheet have been entered into SAP and processed as "SAP Completed".

The **SAP Completed** status will prompt a **Workflow Notification email** to the Preparer informing that the payment request has been processed.

HOW TO CREATE A RECURRING/ADDITIONAL PAYMENT FORM FOR AMENDMENT

A Recurring/Additional Payment form is an **"Amendment"** when the Recurring/Additional payment has been processed and:

- 1. Department needs to end payment **PRIOR** to the original end date that was submitted
- 2. Department needs to change the payment amount (increase or decrease amount).

A Recurring/Additional Payment form is **NOT** an "**Amendment**" when the Recurring/Additional payment has been processed and:

- 1. Department needs to **change Cost Center(s) allocation(s).** In this case, department completes Cost Center(s) change(s) as following:
 - a. Complete PAF with funding change and upload PAF in ADIS or Email Chain/Spreadsheet(s) with funding changes, <u>and</u>
 - b. Enter change in SAP using the University Funding Change action wage code 1401 Additional Compensation
- 2. Department needs to "**Extend**" payment date to future date. This is a "**Renewal**" of a Recurring/Additional payment. Thus, a new Recurring/Additional Payment form must be completed.

1. Login to ADIS site:



ADIS - Academic Department Information System

Enter your h	нD
Enter year P	atiword
Login	Forget Pasaword?



(Note: Your menu links might look different depending on your access levels)

2. Retrieve the Personnel Record, Enter -> Last Name of Employee.

AN ARROW ARADA ARADA My Name Tatagraphi
Ny Parse Name Contentials Name Image: Strategy product of the Strate Parset Strategy product of the Strate Strate Strate
Annual Schedule Facel Annual Schedule Facel
Date Developed D

3. From the drop down, Select -> **Employee Name**.



4. Select -> Personnel Record.

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Name				
	Bullet	Rank Doc Tree matter Chapter How Base How Base How Base How Base Database	Contracticutes AC Providence Ay FreeToon	Scalings (Fre Perers at UMAR) 9
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ma Ny Tala Anit Lon Alit Lon A	Ho Karn	(Folice) (Spinster) (Spinster)	a that	

5. Select -> HR Documents.

AD	IS								
* 1	IONE	PERSONNEL RECORD	CLINICAL	EDUCATION	RESEARCH	REPORTS	MORE	QUICK MENU	
PERS	ONNEL R	ECORD		ELECTRONI	C SIGNATUR	æ		PERSONNEL RECORD	
Char	ge Register			Electronic Sign	ature Report			Ad-Hoc Reports	
				Signature Docu	ments			Document Admin	
								HR Documente	
								Personnel Summary	
								Publications Summary	

6. Once in the employee document list, Click -> Add New.

Dept 19% Dept.gwerte	Paramoni Raccola (Documenta)	Actus Termheten	
Intradicia	Dept) HR Documen	fl Documents to for, Palafox, Erik	
Document Rame Planame Document Type Content Type Planate Date Loaded		Dato Express Laneway/Gat # Stato I mused Load by admin- Land by Dupp: Artica Devalution	

7. A pop up box will appear. Select -> Electronic Form.



8. From Doc Type (drop down) Select -> **Recurring/Addtnl_Paymnt –** Select -> Amendment -> Select -> **Add**.



9. The system will auto populate the employee name, personnel number, employee position, unit and department.

Recurring or Additional Payment Authorization Form								
Instructions: For detailed information and requirements, click here.								
esplayer cone * Huerta, Anthony	engloves personnet number (sap lig) * 000660034							
employee position 🛊 HR Records Technician	enployee busines with # Business and Finance	enployee departments						

NOTE > ONCE THE FORM HAS BEEN INITIATED, THE DOCUMENT CAN BE SAVED/PREVIEWED AT ANYTIME (SEE PAGE 8 <u>Step 14-e on How to Preview PDF</u>/ SEE PAGES 14 -16 on How to Retrieve a Saved Document)

Paym	ent Information			
	Save Prev	view PDF	I	

10. Complete **department authorizing payment** > Select from the **drop down**.

If same department as employee, Select -> same department from drop down. If different department from employee department, Select -> department from drop down.

Recurring or Additional Payment Authorization Form							
Instructions: For detailed information and requirements, click here.							
employee name: *	employee personnel number (sap id): 🗭						
Miler, Geoffrey	00060466						
engloyee position: 🖈 Integration: default posi	employee bus here unit: R Business and Pinance	General Supply					
department authorizing payment: *	—						

11. Complete the **reason/justification** section.

Recurring or Additional Payment Authorization Form

Instructions: For detailed information and requirements, click here.	
enployee namei 🕷 Miller, Geoffrey	englisyses personnel number (sap id): 📽 00060466
enployee position 📽 Integration: default posi	employee busines unit 📽 Business and Finance
department authorizing payments * HR Compensation/Staffing/HRIS	
employee's pay period: O monthly () to weekly *	
helped with a project	

12. If need to add additional information and/or have additional supporting document(s), attach document using the "Attach Document" feature (below the wage code section).

Please see Wage Types/Payment Types	
Payroll will complete the data entry O 0623*** Moving / Relocation O 4601 Awards Attach Document:	HR Comp∉ entry ○ 1401 Ad ○ 1420 Ju
Supporting Documentation: Choose File No file chosen	•
Please see Payroll Schedules	
Payment Information	

Attach Document:	-
Payment Information	

13. Select -> **Wage code type** for the payment.

The form will only show the **Wage Codes/Types** based on the **employee's pay period** (biweekly or monthly).

REFERENCE the link > <u>Wage Types/Payment Types</u> for wage code definitions and payment types.

Please see Wage Types/Payment Types	
Payroll will complete the data entry O 0623*** Moving / Relocation 4601 Awards	HR Compensation will review/HR Records will complete the data entry 1401 Additional Compensation 1420 July 1 In Lieu Payment Stipend (Non-Academic Only) - ONE-TIME

14. The system will then populate a 'line' under the **Payment Information section** that will be for **One-Time** Payment(s) or **Recurring Payment(s)**. This is determined based on the wage code that has been selected.

Payment Information				
Gne-Time Payment Isl	payment	date	payment ansont	cost center
Payment Information				
Recurring Payments				
a payment code	start date	end date	payment amount	cost center

Prior to completing the Payment Information, reference the <u>Payroll Schedules</u> for Recurring and Additional Payments to determine **the appropriate dates and deadlines that apply.**

Please see Payroll Sch	edules
Payment Information	•
One-Time Payment(s)	
\$	payment code

a. Click on the **plus icon** to enter the payment information. The system prompts an 'entry box'. The entry dates is based on which type of payment is being processed.

DATE > One-Time Payment -> Must be **Payment date, Select ->** from the 'drop down'.

wment Date *	Payment Amount (5) *
ist Center (no dashes) *	
Baye Cancel	
	—

DATE > Recurring Payment -> Must enter a "Start Date" and "End Date" <u>Start Date:</u> Click -> the calendar and search for date and select. <u>End Date</u>: Select -> date from the 'dropdown'.

dal Becarring Personal 494 Overlaud fort 8464 W		talitats #		1404 Overbar	ALL PROMINES							
Alexandra and a second s	抽	-iced a start data-	-	a second	1. A.A.				-			
hertrent Annie 151 🖷		Coll Contac (im Author)/#		Terrest Area	et (1) *							
	21	L				- ()	4.		4	8		
and the second se				10.000	DOR	+		. 18	. 11	18.1	. 10	10
And Inc. in Concession, name					and the second second	1.14		11	-4	18	-20	- 44
						-77	21	-24	·.34	38.	-21	. 18
						· 19-	- 11	*				

NOTE: A 'pop up' message will appear for both the One Time Payment and Recurring Payment <u>if the dates are past the deadline dates</u> as referenced in the **Payroll Schedules. New entry of dates will be required.**

		\mathbf{x}
	There are errors: -You are past the deadline date of 11/18/2019 for the payment date of .	
t wil		nsatio
enta		dition
Instru	ctional 🔍 1404**	Óverloa

NOTE: A 'pop up' message will appear for both the One Time Payment and Recurring Payment to <u>advise the deadline date to have submitted to HR or</u> <u>Payroll,</u> as referenced in the **Payroll Schedules**.

	1 2	•		
ple			pr	
ime ime	To have a payment date of 12/31/2019, this form must be signed and sent to HR bef	ore 12/13/2019.		
			þt	
		ОК	'R	
	U	1420 JULY I III L	cied I	

b. Enter -> **Payment Amount** and **Cost Center** (do not include dashes). Select -> **Save**.

E-Bit One Time Pryment 1811 addition CooperLative Payment hole # 139550000 Cash Instar (on Eldent) # 314230034 Set CooperLative CooperLative Heat prophet	Annual Innuati (SC# 10.080.00	Torona Cancel
---	----------------------------------	---------------

If the cost center does not exist or if entered incorrectly, a pop-up message will appear.

Once saved, the system returns to the 'form' page and displays the entries completed.

me Reimentici				
4	payment code	payment date	payment ansautt	cost center .
24	5401	#1/27/2019	\$500.00	1143230094

c. To add another One-Time Payment for the wage code originally selected or the payment is being split between more than one cost center, Click -> plus icon
 and repeat Step 14a-b.

Payment Information				
One-Time Paymen				
	axyment code	poyment date	payment aneasts	cast center
28	5401	11/27/2019	\$500.00	1143230094
Sate Prevery PDP				Proceed to Signatures Page

d. The system now populates the additional cost center and additional payment amount along with the previously entered information.

	pasment code	start dete	and date	payment amount	cest center
28	5454	12/31/2889	42/31/3099	512.90	3140238244
22	9454	12/21/2019	12/21/2019	515.00	2140220244

ment Information							
or the Research's							
۲	pasment code	start dete	and date	payment amount.	cext cen		
28	3404	12/14/2389	42/31/3009	512,60	3140236		
22	984	12/21/2019	42/31/3009	5105.00	01402000		
San Preise FCF					Dava		
in the second second					1.000		
	LINIXC						
	Recurring or	Additional Payment Aut	horization Form				
	For detail	led information and requirements	, dick here.				
	Position: Takent Accusition 5	(Finit) Michael loocialist Employee Pas	Personnel #: 15/634 Period: X. Monthly Bi-weekly				
	Employee Business Unit Business and Provide						
	Employee Department HB Compensation/Staffing/HBIS Department Authorition Research HB Compensation/Staffing/HBIS						
	Department Austration (Pequind): PHC Compensation/stating Hids						
	STUFF						
	Please see Recurring/Additional Payme						
	Payroll will complete data entry						
	4001 Awards	06F3 Outstandin	g Performance Stipend www.wcourremens				
	HR Compensation will review / HR Reco	rds will complete data entry					
	1401 Additional Compensation generative	x 1404 "Overload a	NOT TO UNDER UPS OF BINE SALARY				
	1420 July 1 In Lieu Payment Stipend ave-	CARRECTION 1419 New Pacality	y / Relention Stipend provingers				
		4605 Honorarium	(INF. TIME PRIMERT)				
	"Dominal antigeneerin he Austenia Administrative should not more	6378 of land solary with ad price approval of the President	i (maryi narone inading/warash appointent),				
	Unit/Department will complete data entr	Y					
	1410 ^m Supplemental Compensation Stipe	nd 1412 Summer Inc	structional				
	_	1413 Summer Ro	esearch				
	98 July signed Luggimmerial Compression Flat Tenns of Employee	of Byromed covering the payment periodic) and he as it	in and localed in AD21 is pay supplemental compression.				
	Recurring Payment						
	Start Date	End Date Payment	t Amount Cest Center				
	12/31/2019	2/31/2019 12	500 3143230244				
	12/31/2019	2/31/2019 125	.000 3143230244				
	Preparer's Name:	Alice Wesant	Phone: 402-559-5913				

e. To review the form before next step, Select -> Preview PDF.

the Preview PDF.

🛲 Recurring or Additional Paymer 🗙	Electronic Recurring/Additional Pay \times +

g. The form can now be further edited and/or entries can be removed.

i	Select -> Information .	t the ir	nformation.	Select -> 样	to remove the
	Payment Information				
	Recurring Payment(s)				
	\$				
	28				
	2 🗶				

h. Once the **Payment Information is complete**, Click -> **Save.**

<u>The next step is the Proceed to Signature Page steps to assign approver(s).</u> <u>See page 10 – 13. One these steps have been completed then the form for</u> <u>amendment will go through the normal approval/review/entry process. Once</u> <u>the form for amendment has been been processed the prepare will receive a</u> <u>workflow notification.</u>