

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. [NU Values - Recurring-Additional Payment](#)

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

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:

1. Individuals completing the Recurring/Additional Payments online form for UNMC employees **must have access to ADIS**. Contact hrrecords@unmc.edu to request an ADIS user account and enroll in training.
2. **ONLY for UNCA, UNK, UNL and UNO employees** will departments complete the [Recurring/Additional Payment Authorization Payment form \(PDF/paper version\)](#). Departments must e-mail the completed/signed form (PDF) to hrcompensation@unmc.edu 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 [NU Values - Recurring-Additional Payment](#) 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 [Salary Increase 10% and Greater Request Form](#) 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 [ADIS](#) site:



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

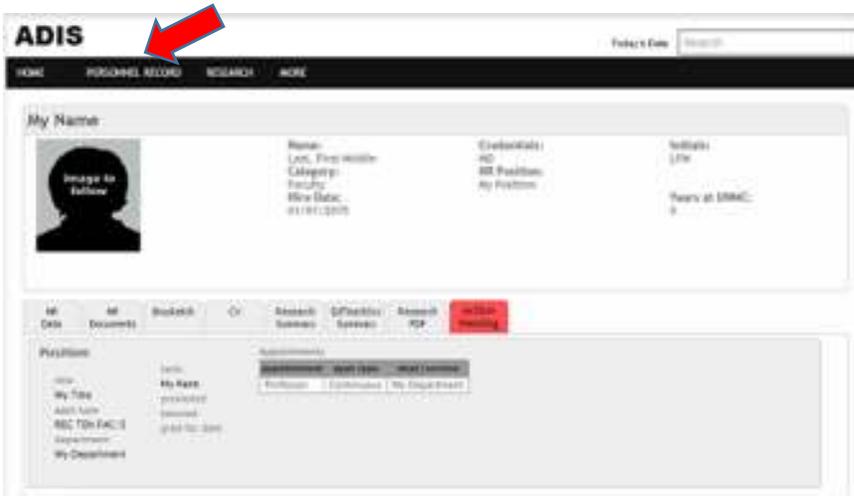
2. Retrieve the Personnel Record, Enter -> **Last Name of Employee.**



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



4. Select -> **Personnel Record**.



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



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



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

File Upload Electronic Form
 Document Name:
 File Name:
 Action Filter:
 Doc Type:
 Electronic Sigs:
 Effective Date:
 Date Expires:
 License/Doc #1:
 State:

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

File Upload Electronic Form
 Document Name:
 Doc Type:
 New: Amendment:
 Electronic Sigs:

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](#).
 employee name: employee personnel number (app. id):
 employee position: employee business unit: employee department:

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

Payment Information

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: *
Miller, Geoffrey

employee personal number (sap id): *
00060466

employee position: *
Integration: default posi

employee busines unit: *
Business and Finance

employee department: *
General Supply

department authorizing payment: *
Select



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

Recurring or Additional Payment Authorization Form

Instructions:
For detailed information and requirements, [click here](#).

employee name: *
Miller, Geoffrey

employee personal number (sap id): *
00060466

employee position: *
Integration: default posi

employee busines unit: *
Business and Finance

department authorizing payment: *
HR Compensation/Staffing/HRIS

employee's pay period: monthly bi-weekly *

reason/justification (1979 characters left): *
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

0623*** Moving / Relocation

4601 Awards

HR Compe entry

1401 Ad

1420 Ju

Attach Document: 

Supporting Documentation:

Choose File No file chosen 

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 > [Wage Types/Payment Types](#) for wage code definitions and payment types.

Please see [Wage Types/Payment Types](#) ←

Payroll will complete the data entry

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

One-Time Payment(s)	payment code	payment date	payment amount	cost center
+				

Payment Information

Recurring Payment(s)	payment code	start date	end date	payment amount	cost center
+					

Prior to completing the Payment Information, reference the [Payroll Schedules](#) for Recurring and Additional Payments to determine **the appropriate dates and deadlines that apply**.

Please see [Payroll Schedules](#) ←

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'.

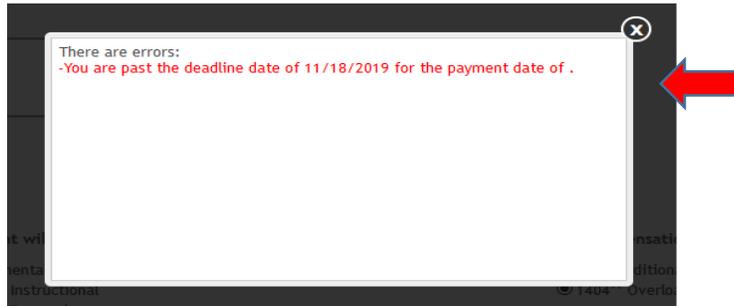


DATE > Recurring Payment -> Must enter a "Start Date" and "End Date"
Start Date: Click -> the calendar and search for date and select.

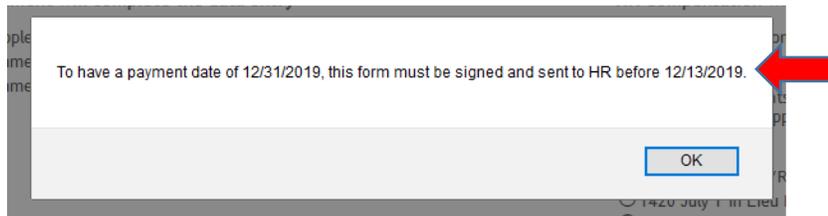
End Date: Select -> **date** from the 'dropdown'.



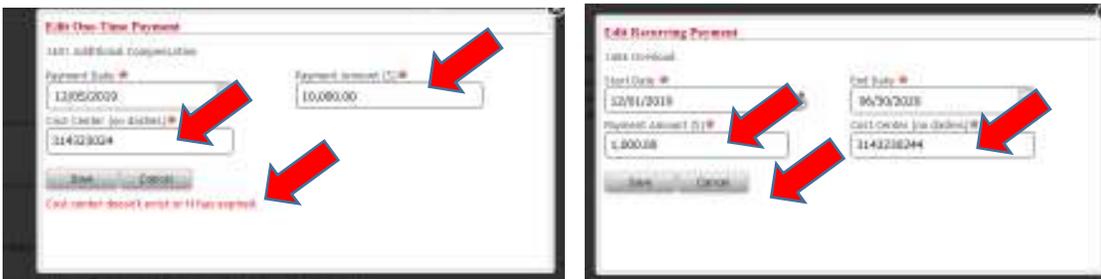
NOTE: A 'pop up' message will appear for both the One Time Payment and Recurring Payment **if the dates are past the deadline dates** as referenced in the **Payroll Schedules**. **New entry of dates will be required.**



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



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



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.

Payment Information

One-Time Payment(s)

	payment code	payment date	payment amount	cost center
	5401	11/27/2019	\$500.00	1143230094

Save Preview/PDF Proceed to Signature Page

- 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 Payment(s)

	payment code	payment date	payment amount	cost center
	5401	11/27/2019	\$500.00	1143230094

Save Preview/PDF Proceed to Signature Page

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

Payment Information

Recurring Payment(s)

	payment code	start date	end date	payment amount	cost center
	544	12/31/2019	11/31/2019	\$10.00	1140230244
	544	12/31/2019	11/31/2019	\$105.00	1140230244

Save Preview/PDF Proceed

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

Payment Information

Recurring Payment(s)

	payment code	start date	end date	payment amount	cost center
	544	12/31/2019	11/31/2019	\$10.00	1140230244
	544	12/31/2019	11/31/2019	\$105.00	1140230244

Save Preview/PDF Proceed

Recurring or Additional Payment Authorization Form

For detailed information and requirements, [click here](#).

Employee Name (Last): Miller (First): Michael Personnel #: 157634
 Position: Talent Acquisition Specialist Employee Pay Period: Monthly Bi-weekly
 Employee Business Unit: Business and Finance
 Employee Department: HR Compensatory/Staffing/HRIS
 Department Authorizing Payment: HR Compensatory/Staffing/HRIS
 Reason / Justification (Required): STUFF

Please see **Recurring/Additional Payment Procedures** for wage code type definitions.

Payroll will complete data entry

4601 Awards 09F3 Outstanding Performance Stipend (see recurring entry)

HR Compensation will review / HR Records will complete data entry

1401 Additional Compensation (see recurring entry) 1404 *Overload (see recurring entry or add salary)
 1420 July 1 In Lieu Payment Stipend (see recurring entry) 1419 New Faculty / Retention Stipend (see recurring entry)
 4605 Honorarium (see recurring entry)

*Overload assignments for Academic Administrators should not exceed 20% of base salary without the approval of the President (except summer teaching research appointments).

Unit/Department will complete data entry

1430** Supplemental Compensation Stipend 1412 Summer Instructional
 1413 Summer Research

**July stipend Supplemental Compensation Plan Terms of Employment Agreement covering the appropriate period(s) must be on file and loaded in MES to pay supplemental compensation.

Recurring Payment

Start Date	End Date	Payment Amount	Cost Center
12/31/2019	12/31/2019	12,500	3143230244
12/31/2019	12/31/2019	125,000	3143230244

Preparer's Name: Alice Weyant Phone: 402-559-5913

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



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

Select ->  to edit the information. Select ->  to remove the information.

Payment Information

Recurring Payment(s)

- 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/ADDITIONAL 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 hrrecords@unmc.edu

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

The screenshot shows a web form titled "Payment Information". Below the title is a section for "One-Time Payment(s)" containing a table with the following data:

payment code	payment date	payment amount	cost center
5401	11/27/2019	5500.00	3143230094

Below the table are three buttons: "Save", "Previous PCP", and "Proceed to Signatures Page". A red arrow points to the "Proceed to Signatures Page" button.

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

The screenshot shows a pop-up message box with the following text:

salary without prior app

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

At the bottom right of the message box is an "OK" button.

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



open	lock	employee	document	doc type	load date
		Palofax, Erik	PalofaxERecorAddtlPayment.Novem2019	Recurring/Additional Payments	11/14/2019

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



Signatures
document name: palofaxERecorAddtlPayment.Novem2019
Select all to apply

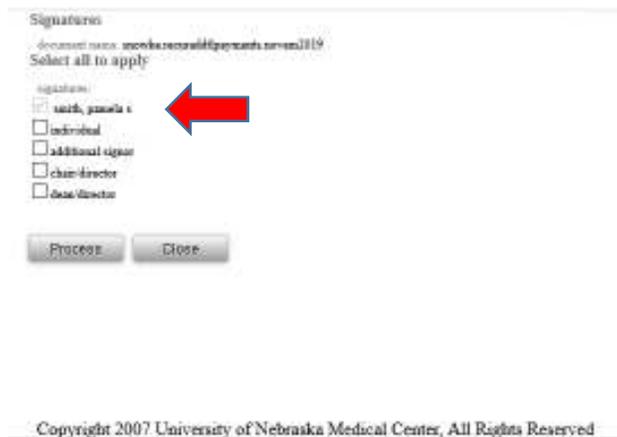
signature:
id:
Select Administrator ▼

individual
 additional signor
 chair-director
 dean-director

Process Close

Copyright 2007 University of Nebraska Medical Center, All Rights Reserved

The name selected will then populate to the field.



Signatures
document name: palofaxERecorAddtlPayment.Novem2019
Select all to apply

signature:
 mark palofax
 individual
 additional signor
 chair-director
 dean-director

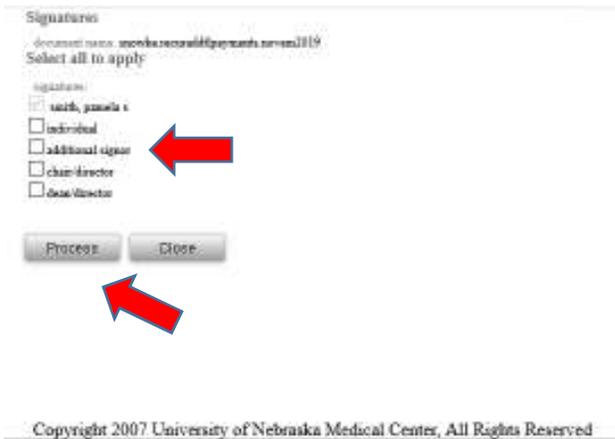
Process Close

Copyright 2007 University of Nebraska Medical Center, All Rights Reserved

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**.



The system returns to the previous screen where the **Plus icon**  changes to the

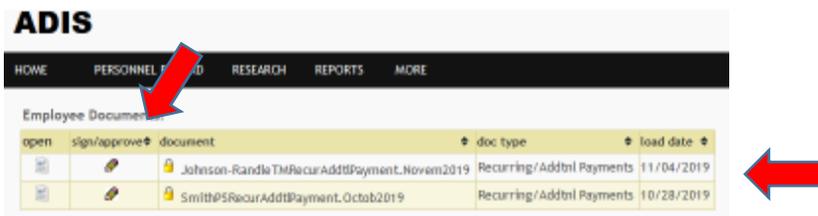
following icon . This flags that the form (request) has been submitted for signature.



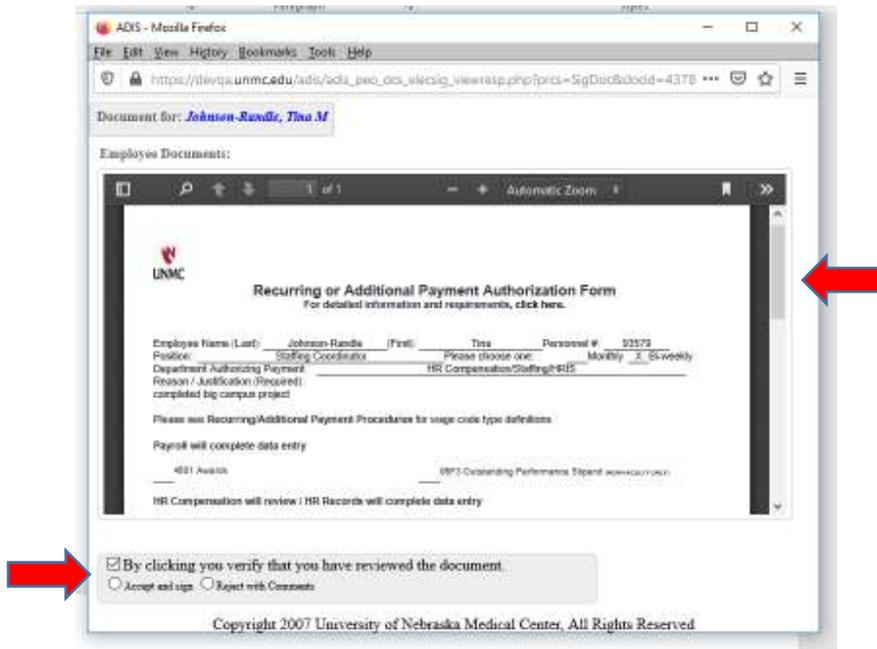
6. A **Workflow Notification email** is sent to the **Preparer** and assigned **Approver(s)** indicating that there is an item awaiting review/approval in ADIS.

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.

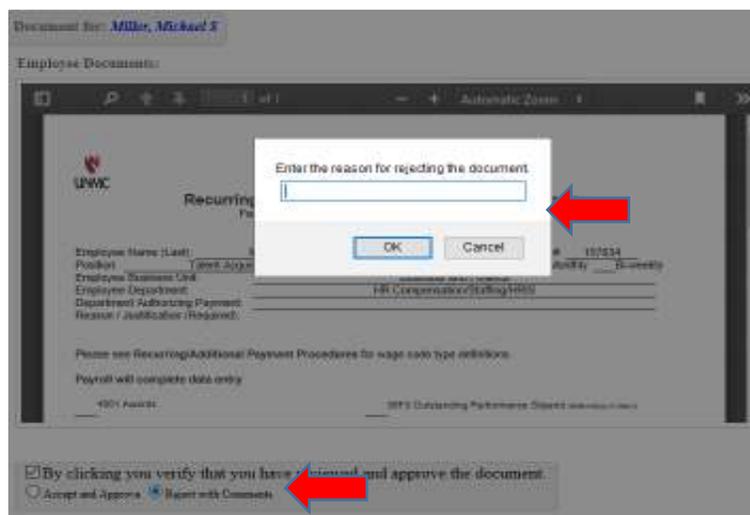
7. The **Approver(s)** logs in to ADIS; any items for review/approval will be the first item(s) that appears on the screen.



- a. The **Approver(s)** will Click -> **Pencil icon** . The Recurring/Additional payment form will appear for review.
- 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)

8. 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 complete data entry

1401 Additional Compensation (ONE-TIME PAYMENT) 1404 *Overload (NOT TO EXCEED 20% OF BASE SALARY)
 1420 July 1 In Lieu Payment Stipend (NON-ACADEMIC ONLY) 1419 New Faculty / Retention Stipend (FACULTY ONLY)
 4605 Honorarium (ONE-TIME PAYMENT)

*Overload assignments for Academic-Administrative should not exceed 20% of base salary without prior approval of the President (except summer teaching/research appointment).

Unit/Department will complete data entry

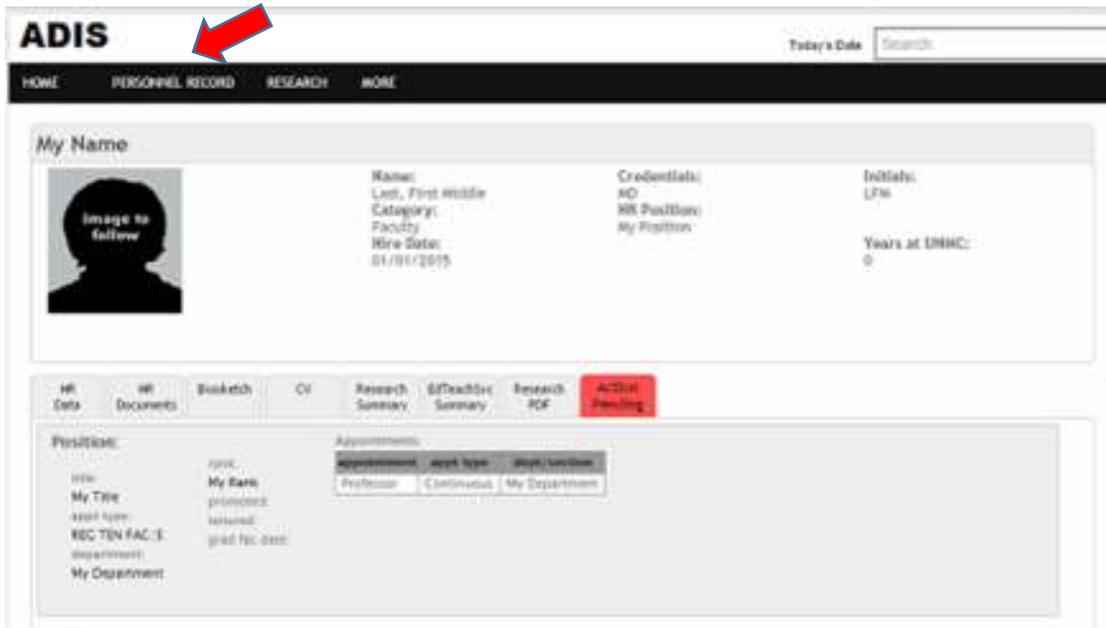
1410** Supplemental Compensation Stipend 1412 Summer Instructional
 1413 Summer Research

**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/ADDITONAL 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.**



2. Select -> HR Documents



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



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

ADIS

★ HOME HR RECORDS PERSONNEL RECORD RESEARCH REPORTS MORE QUICK MENU

Manage HR File (Documents)

Dept HR Documents

Personnel Records (Documents)

Action Templates

Dept HR Documents

HR Documents for: Palafox, Erik

Attributes

Document Name: Date Expires:
 Filename: License/Doc#:
 Document Type: State Issued:
 Content Type: Load by admin:
 Filesize: Load by Dept:
 Date Loaded: Action Template:

Add New Delete Lock UnLock

Action Templates for: Palafox, Erik

open	share	lock/use	document	doc type	date
			PalafoxE.RecurringAddlPayments.Nov2019	Recurring/Additional Payments	11/04/2019

5. In the Attributes section, Click -> **Edit**

ADIS

★ HOME HR RECORDS PERSONNEL RECORD RESEARCH REPORTS MORE QUICK MENU

Manage HR File (Documents)

Dept HR Documents

Personnel Records (Documents)

Action Templates

Dept HR Documents

HR Documents for: Palafox, Erik

Attributes

Document Name: PalafoxE.RecurringAddlPayments.Nov2019 Date Expires:
 Filename: PalafoxE.RecurringAddlPayments.Nov2019 Load by admin:
 Document Type: Recurring/Additional Payments Erik Palafox
 Content Type: application/pdf Load by Dept:
 Filesize: IT Development and Operations
 Date Loaded: 11/04/2019 Action Template:
 None

Add New Edit Delete Lock UnLock

Action Templates for: Palafox, Erik

open	share	lock/use	document	doc type	date
			PalafoxE.RecurringAddlPayments.Nov2019	Recurring/Additional Payments	11/04/2019

6. The **Saved Form** is retrieved and can continue completing the form referencing the steps in the **CREATING A RECURRING/ADDITIONAL PAYMENT FORM** section (pages 2 – 9).

Recurring or Additional Payment Authorization Form

Instructions:
For detailed information and requirements, [click here](#).

monthly
 bi-weekly

reason/justification (255 characters left)

(Please attach document to this form if you need more space)

Please see Recurring/Additional Payment Procedures for wage code definitions. Please choose one below:

- | | | |
|--|---|--|
| <p>Payroll will complete the data entry</p> <ul style="list-style-type: none"> <input type="radio"/> 0913 Outstanding Performance Stipend (Non-Faculty Only) <input type="radio"/> 4601 Awards | <p>Unit/Department will complete the data entry</p> <ul style="list-style-type: none"> <input type="radio"/> 1410 Supplemental Compensation Stipend <input type="radio"/> 1412 Summer Instructional <input type="radio"/> 1413 Summer Research | <p>HR Compensation will review/HR Records will complete the data entry</p> <ul style="list-style-type: none"> <input checked="" type="radio"/> 1401 Additional Compensation <input type="radio"/> 1404*** Overload <input type="radio"/> 1419 Hriv Faculty/Retention Stipend (Faculty Only) <input type="radio"/> 1420 July 1 In Lieu Payment Stipend (Non-Academic Only) - ONE-TIME <input type="radio"/> 1420 July 1 In Lieu Payment Stipend (Non-Academic Only) - RECURRING <input type="radio"/> 4605 Honorarium |
|--|---|--|

Attach Document:
Supporting Documentation:
 No file chosen

Payment Information

One-Time Payment(s)	payment code	payment date	payment amount	cost center
	1401	11/27/2019	5500.00	3143230094

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:

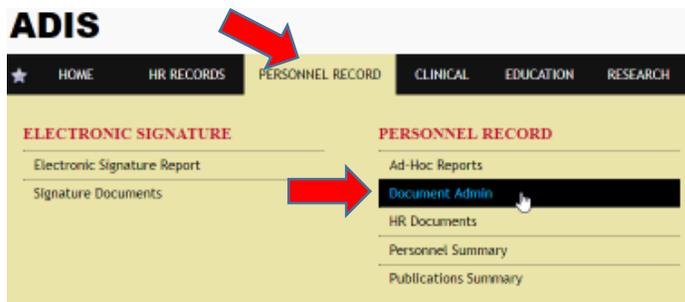
- [New/In Progress](#) > Preparer is processing the form (has started creating form and has saved).
- [Signature Routing](#) > Preparer has assigned Approver(s) and signatures are pending.
- [Pending Review](#) > Approver(s) has/have signed and HR Compensation or Payroll reviewing the form(s).
- [Reviewed](#)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

1. Login to [ADIS](#) site:

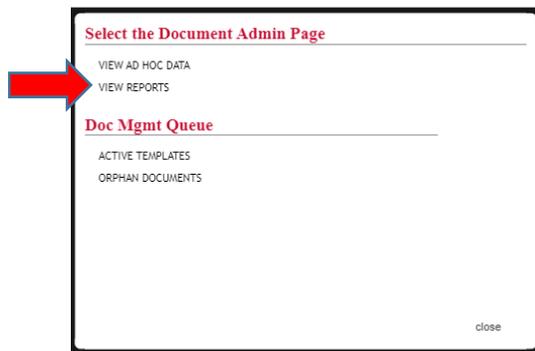


(Note: Your menu links might look different depending on your access levels)

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	report type
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	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 Reviewed > 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.**

Electronic Forms - Recurring/Additional Payment Report

Unit/Dept/Sec: Campus Status: Reviewed

Go Export to Excel

action	status	personnel	first	last	emp dept	emp business unit	dept authorizing prof	type	type desc	frequency	one-time date	start date	end date	amount	cost center	position	added by	date added
			Pereira	Smith	HR Compensation/Staffing/HRS	Business and Finance	HR Benefits	1401	Additional Compensation	Biweekly	11/21/2019			100,000	3143230264	HRIS Data/Records Technician	Huerta, Anthony J.	10/28/2019
	Reviewed	157634	Michael	Walker	HR Compensation/Staffing/HRS	Business and Finance	General Education	1404	Overload	Monthly		11/27/2019	12/31/2019	5000.000	3143230264	HRIS Data/Records Technician	Huerta, Anthony J.	11/05/2019

Example of Excel Report

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
Status	Personnel #	First	Last	Emp Dept	Emp Business Unit	Dept Authorizing Pmt	Type	Type Desc	Frequenc y	One-Time Date	Start Date	End Date	Payment Amt	Cost Center	Position	Added by
Reviewed	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
Reviewed	157634	Michael	Miller	HR Compensation/Staffing /HRIS	Business and Finance	General Education	1404	Overload	Monthly		11/27/2019	12/31/2019	5000	3143230244	Talent Acquisition Specialist	Huerta, Anthony
Reviewed	157634	Michael	Miller	HR Compensation/Staffing /HRIS	Business and Finance	General Education	1404	Overload	Monthly		11/27/2019	12/31/2019	5000	3143230244	Talent Acquisition Specialist	Huerta, Anthony
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 Specialist	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

7. 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.

Electronic Forms - Recurring/Additional Payment Report

Unit/Dept/ Sect: Campus Status: Reviewed

Export to Excel

action	status	personnel #	first	last	emp dept	emp business unit	dept authorizing pmt	type	type desc	frequency	one-time date	start date	end date	payment amt	cost center	position	added by	date added
	Reviewed	187853	Pamela	Smith	HR Compensation/Staffing /HRIS	Business and Finance	HR Benefits	1401	Additional Compensation	Biweekly	11/21/2019			100.000	3143230264	HRIS Data/Records Technician	Huerta, Anthony J.	10/28/2019
	Reviewed	157634	Michael	Miller	HR Compensation/Staffing /HRIS	Business and Finance	General Education	1404	Overload	Monthly		11/27/2019	12/31/2019	5000.000	3143230244	Talent Acquisition Specialist	Huerta, Anthony J.	11/05/2019

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

Update Recurring/Additional Payment Status

Update recurring/additional payment status for:
Smith, Pamela S
11/21/2019

Current Status:
Reviewed

Set Status:

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, **and**
 - 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:



[\(Note: Your menu links might look different depending on your access levels\)](#)

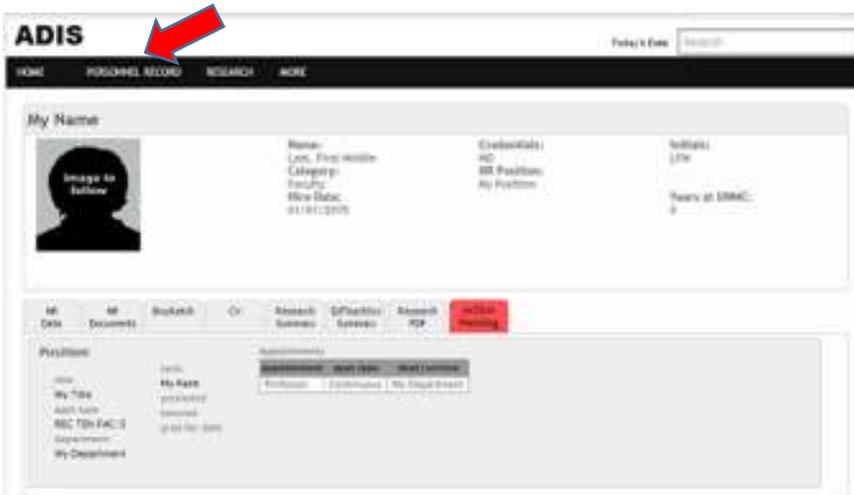
2. Retrieve the Personnel Record, Enter -> **Last Name of Employee.**



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



4. Select -> **Personnel Record.**



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



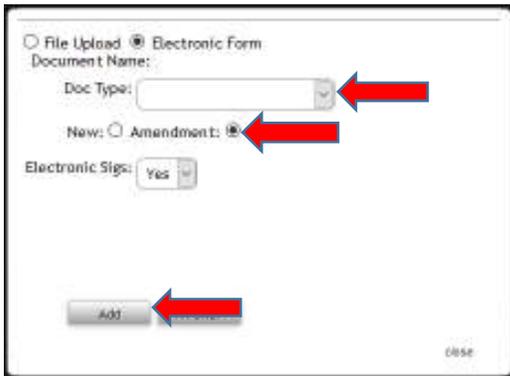
6. Once in the employee document list, Click -> **Add New.**



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.



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



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: *
Miller, Geoffrey

employee personal number (sap id): *
00060466

employee position: *
Integration: default posi

employee business unit: *
Business and Finance

employee department: *
General Supply

department authorizing payment: *
Select



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

Recurring or Additional Payment Authorization Form

Instructions:
For detailed information and requirements, [click here](#).

employee name: *
Miller, Geoffrey

employee personal number (sap id): *
00060466

employee position: *
Integration: default posi

employee business unit: *
Business and Finance

department authorizing payment: *
HR Compensation/Staffing/HRIS

employee's pay period: monthly bi-weekly *

reason/justification (1979 characters left): *
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

0623*** Moving / Relocation

4601 Awards

HR Comple entry

1401 Ad

1420 Ju

Attach Document: 

Supporting Documentation:

Choose File No file chosen 

Please see [Payroll Schedules](#)

[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 > **Wage Types/Payment Types** for wage code definitions and payment types.



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.



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



- 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'.

Add One-Time Payment

1401 Additional Compensation

Payment Date * 11/27/2019

Payment Amount (\$) *

Cost Center (no dashes) *

Save Cancel

DATE > Recurring Payment -> Must enter a “Start Date” and “End Date”
Start Date: Click -> **the calendar** and search for **date** and **select**.
End Date: Select -> **date** from the ‘dropdown’.

Add Recurring Payment

1404 Overload

Start Date #

End Date #

Payment Amount (\$) *

Cost Center (no dashes) *

Save Cancel

Add Recurring Payment

1404 Overload

Start Date #

End Date #

Payment Amount (\$) *

Cost Center (no dashes) *

Save Cancel

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

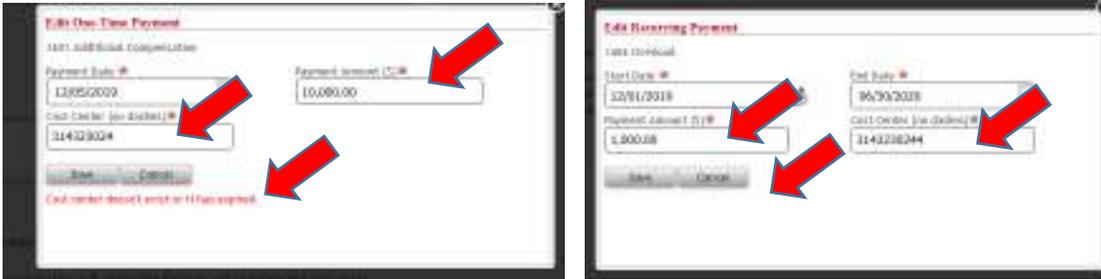
There are errors:
 -You are past the deadline date of 11/18/2019 for the payment date of .

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

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

OK

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



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

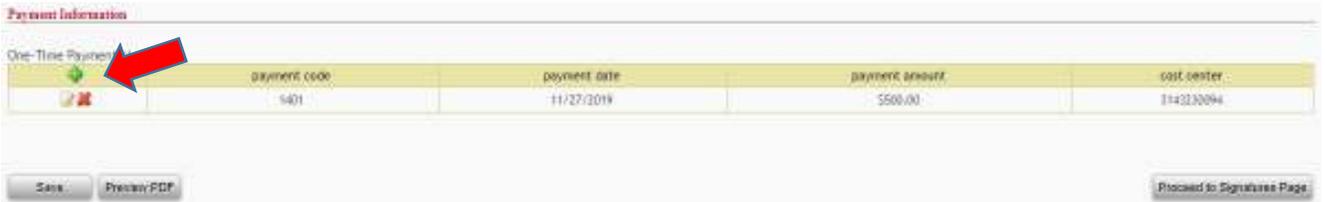
Once saved, the system returns to the 'form' page and displays the entries completed.



- 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.



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



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

Payment Information

Recurring Payment(s)	payment code	start date	end date	payment amount	cost center
	504	12/31/2019	12/31/2019	512.50	314229244
	504	12/31/2019	12/31/2019	512.50	314229244

Buttons: Save, **Preview PDF**, Proceed

UNMC

Recurring or Additional Payment Authorization Form
For detailed information and requirements, click here.

Employee Name (Last): Miller (First): Michael Personnel #: 157034
 Position: Talent Acquisition Specialist Employee Pay Period: Monthly Bi-weekly
 Employee Business Unit: Business and Finance
 Employee Department: HR Compensation/Staffing/HRIS
 Department Authorizing Payment: HR Compensation/Staffing/HRIS
 Reason / Justification (Required): STUFF

Please see **Recurring/Additional Payment Procedures** for wage code type definitions.

Payroll will complete data entry

4001 Awards 09F3 Outstanding Performance Stipend (see recurring memo)

HR Compensation will review / HR Records will complete data entry

1401 Additional Compensation (see recurring memo) 1404 *Overload (see recurring memo) 1410 New Faculty / Retention Stipend (see recurring memo)
 1420 July 1 In Lieu Payment Stipend (see recurring memo) 4025 Honorarium (see recurring memo)

*Overload assignments for Academic Administrators should not exceed 20% of base salary without prior approval of the President (except summer teaching/research appointments).

Unit/Department will complete data entry

1410** Supplemental Compensation Stipend 1412 Summer Instructional 1413 Summer Research

**Fully signed Supplemental Compensation Plan Terms of Employment Agreement covering the payment period(s) must be on file and loaded in MS3 to pay supplemental compensation.

Recurring Payment	Start Date	End Date	Payment Amount	Cost Center
	12/31/2019	12/31/2019	12,500	314329244
	12/31/2019	12/31/2019	125,000	314329244

Preparer's Name: Alice Weyant Phone: 402-550-5913

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



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

Select -> to edit the information. Select -> to remove the information.

Payment Information

Recurring Payment(s)		

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

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