

Request One-Time Payment

Overview

This job aid outlines the process for an Absence Partner, Compensation Partner, HR Partner, HR Contact or Manager to request a one-time payment, or multiple one-time payments for an Employee. One-time payments can be used to issue ad hoc payments to an Employee for additional work, awards programs, reimbursements or lump sum vacation payouts

Prerequisites: N/A

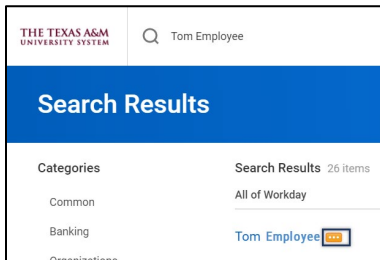
Important Information:

- One-time payments are on-cycle payments that are sometimes used to pay employees for additional work
- Managers can initiate one-time payment requests for direct reports and Employees within their management chain. Be sure to check with relevant personnel regarding budgetary concerns prior to initiating a one-time payment request
- One-time payment requests must be completely approved before payroll calculations are run, which happens typically a week before the pay day
- The Employee will receive the one-time payment on the next payroll, if the effective date is within the current pay period **before** payroll calculations are run for that pay period. For payroll calculation dates, please refer to the payroll schedule available on the Workday Help site
- Multiple one-time payments can be made simultaneously within the same business process for an Employee

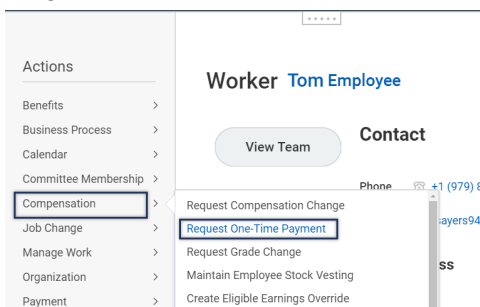
Steps

Initiate a Single One-Time Payment

1. Search for the Employee for whom you would like to request the one-time payment
2. Click on the Employee's **Related Actions**



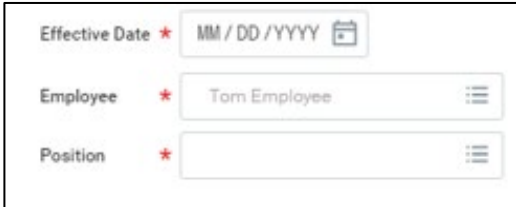
3. Select **Compensation > Request One-Time Payment**



4. On the **Request One-Time Payment** page, complete the following fields:

- **Effective Date.** Enter the date that falls within the pay period for which you would like the Employee to be paid
- **IMPORTANT:** This field determines the pay period for which the Employee will be paid. However, if the **Effective Date** occurs **after** pay calculations are initiated for the pay period, the payment will process on the following pay period

- **Employee Name** (if not auto populated)
- **Position** (if applicable). For employees who hold multiple positions you will need to select the position for which the one-time payment is related. If the Employee does NOT hold multiple positions, then this field does not appear



Effective Date * MM / DD / YYYY [calendar icon]

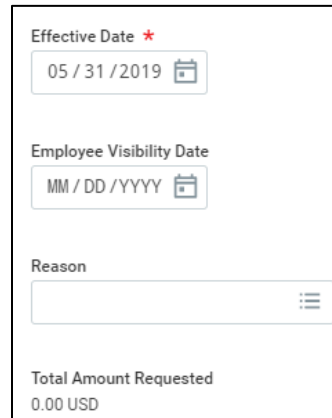
Employee * Tom Employee [dropdown arrow]

Position * [dropdown arrow]

Notes:

- You can only initiate a one-time payment request for Employees within Supervisory Organizations your security role supports
 - If you need to request a one-time payment for an Employee outside of Supervisory Organizations you support, contact an individual who supports the Supervisory Organization to initiate the business process
5. Click **OK**. The one-time payment summary page then displays
 6. In the one-time payment summary section, confirm the **Effective Date** and complete the following fields:
 - **Employee Visibility Date.** Enter the date the Employee should see their pay-related one-time payment changes in Workday
Note: If this field is left blank, the **Employee Visibility Date** defaults to the **Effective Date**. Setting a different **Employee Visibility Date** will allow Managers time to inform their Employees in person

- **Reason.** Enter the reason for the one-time payment (e.g. Supplemental > Extra Pay for Single Activity)



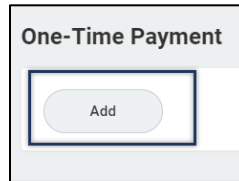
Effective Date * 05 / 31 / 2019 [calendar icon]

Employee Visibility Date MM / DD / YYYY [calendar icon]

Reason [dropdown arrow]

Total Amount Requested 0.00 USD

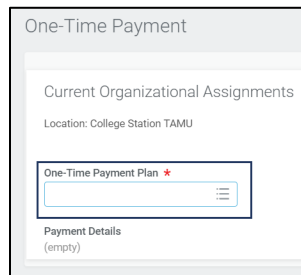
7. In the **One-Time Payment** section, click the **Add** button



One-Time Payment

Add

8. Select the appropriate **One-Time Payment Plan**



One-Time Payment

Current Organizational Assignments

Location: College Station TAMU

One-Time Payment Plan * [dropdown arrow]

Payment Details (empty)

Note: After selecting a one-time payment plan, additional fields will populate

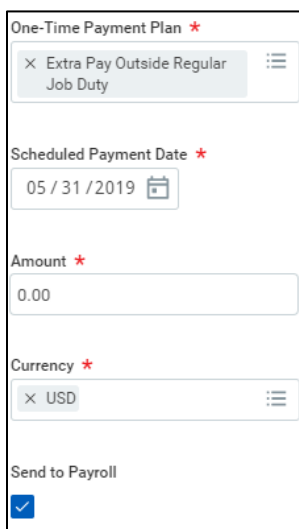
9. Review and / or complete the following information:

- **Scheduled Payment Date.**
IMPORTANT: Do NOT adjust the Scheduled Payment Date

Notes:

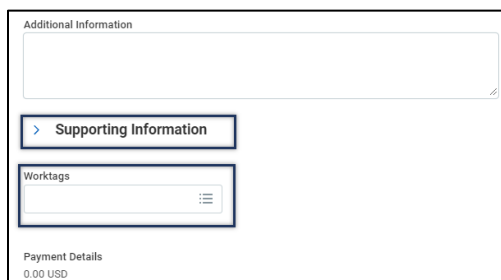
- This field is only applicable when making multiple one-time payments

- **The Scheduled Payment Date DOES NOT** represent the date the Employee will be paid.
- **The Scheduled Payment Date** field will override the Effective Date you first selected and may push the one-time payment into the next payroll period
- **Amount.** Enter the amount of the payment
- Click the **Send to Payroll** checkbox if not already checked



10. Type in any Additional Information

11. IMPORTANT: Select the appropriate TAMUS Cost Center or Project in the **Worktags** field



Notes:

- **IMPORTANT:** The payment will be made against the Employee’s costing allocations for salary if no TAMUS Cost Center or Project is entered in the **Worktags** field

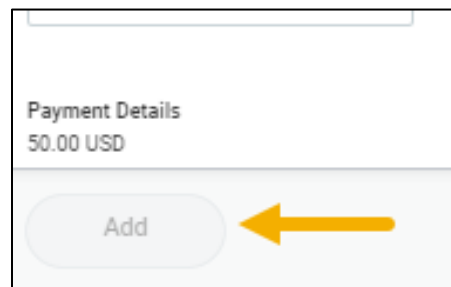
- This process does not route based on a Worktag like the Assign Costing Allocations business process. Any approvals to use a specific account must be obtained outside of Workday
- To see payment guidelines, click the right arrow next to **Supporting Information**; the fields in this section may not be editable

If you have no additional one-time payments to request, skip to Step 17 and continue

Initiate Multiple One-Time Payments

If you have multiple one-time payments to request for the Employee, you can do so within the same business process. After completing the steps above for initiating a one-time payment, continue as follows:

12. Click on the Add button below the first one-time payment



13. Select the appropriate One-Time Payment Plan

14. Review and / or complete the following information:

- **Scheduled Payment Date.** Enter the effective date for this additional one-time payment. **REMEMBER**, this is not the date the Employee will be paid. The Employee will be paid on the next payroll, *if* the **Scheduled Payment Date** is within the pay period of that date **before** payroll calculations are run
- **Amount.** Enter the amount of the payment
- Check the **Send to Payroll** checkbox if not already checked

15. Type in any **Additional Information**

16. Update the **Worktags** field accordingly

17. Enter any comments as needed

18. Click **Submit**

19. Click **Done**

Up Next

The request will be routed to the relevant individuals for additional approval steps

This completes the **Request One-Time Payment** business process