Quick Reference Guide: *Period Activity Pay Assignment*

**Keep in mind**

- **Period Activity pay** is used to pay a lump-sum over a period of time. It is administered outside of the formal Compensation Package. Examples include 4th quarter payments and temporary academic positions (lecturers).
- Period Activity Pay is a stand-alone process and is also part of the **Hire** and **Add Job** processes. When used in **Hire** and **Add Additional Job**, the Propose Compensation sub-process should be submitted with no values in the salary plan unless the Period Activity Pay is in addition to a regular monthly salary.
- In order to compensate an employee who does not already have a job in a supervisory organization you support, the **Add Additional Job** business process will need to be completed first.
- The student employment policy and FLSA primary duty considerations need to be adhered to when assigning period activity pay.
- The lump sum payment will be **equally distributed** over the pay cycles included in the payment timeframe.

**Information Needed**

- Employee Name
- Activity category
- Time period over which the activity is occurring
- Dates of payment for work
- Payment Amount

**Add Period Activity Pay Steps:**

1. From the Home Page, enter the employee’s name in the Search Box

2. Click the **Related Actions** button next to the name of the desired employee.
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Select Compensation > Manage Period Activity Pay Assignments
3. Enter the **Effective Date**.

4. The Employee name should be prefilled from previous screen, else use the **Prompt Icon** 📋 to select an Employee.

5. Select an **Academic Period** by using the **Prompt Icon** 📋

6. The **Period Activity Rate Matrix** will default to **UChicago**. This should not be changed.

7. The **Quick Entry Choices** are optional and, if entered, will populate on the next screen.

8. Click **OK**.

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**Manage Period Activity Pay Assignments**

*Please note:* The Affordable Care Act requires accurate documentation of an employee's hours.

*To pay an employee for an additional job, you will need to perform the **Add Additional Job** process before submitting a new period activity pay assignment.*

*****The Effective Date entered must be today's date or greater. To enter retroactive Period Activity Pay, the **Academic Period**, **Activity Dates**, and **Payment Dates** will be in the past.*****

### Employee Selection

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective Date</td>
<td>11/11/2014</td>
</tr>
<tr>
<td>Employee</td>
<td>Robert Park</td>
</tr>
</tbody>
</table>

### Assignment Details

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Period</td>
<td>2014-2015 Academic Year</td>
</tr>
<tr>
<td>Period Activity Rate Matrix</td>
<td>UChicago</td>
</tr>
</tbody>
</table>

### Quick Entry Choices

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Activities</td>
<td>search</td>
</tr>
<tr>
<td></td>
<td>Research - Research</td>
</tr>
<tr>
<td>Start Date</td>
<td>11/01/2014</td>
</tr>
<tr>
<td>End Date</td>
<td>12/15/2014</td>
</tr>
</tbody>
</table>

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Click **OK** or **Cancel**.
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9. Select a Reason by using the Prompt Icon.
   * If adding period activity pay either for the first time, or as an additional assignment, select Add Activity Pay and select the appropriate reason.
   * If correcting a previously entered period activity pay, select Correction and select the appropriate reason.
   * If ending a previously entered period activity pay prior to the original end date of the payment, select End Activity Pay and select the appropriate reason. End the period activity pay and adjust the total amount accordingly.

Note: If deleting a previously entered Period Activity Pay that has not yet paid out any of the total use the End Period Activity Pay reason, and select the minus icon next to the row that needs to be deleted. If the only Period Activity Pay entry assigned to the worker needs to be deleted, contact the Workday Knowledge Center so that they may rescind the payment.

If there is a need to adjust the amount owed to the employee while the Period Activity Pay assignment is ongoing, use a Correction reason. Adjust the assigned unit rate so that the total amount is reflective of the new amount due to the employee over the payment dates. Workday will automatically prorate the amounts so that the new total is paid out to the employee over the indicated payment dates.

10. Enter the Quantity and the Assigned Unit Rate.

11. Verify the Total Amount is correct in both the Compensation column and in the upper right hand corner.
12. When adding period activity pay, adjust the **Payments** dates if needed.

The **Activity Dates** denote the dates the work was actually done. The **Payment Dates** reflect when the payments should be effective. **Activity Dates** will prepopulate in to the **Payment Dates** fields. Uncheck the **Use as Paydates** check box to use different pay dates. **Note:** The **Activity and Activity Dates** will be prefilled if selected on the previous screen.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Start Date</th>
<th>End Date</th>
<th>Use as Payment Dates</th>
<th>Quantity</th>
<th>Default Quantity</th>
<th>Assigned Unit Rate</th>
<th>Default Unit Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research - Research</td>
<td>11/01/2014</td>
<td>12/15/2014</td>
<td>✓</td>
<td>1</td>
<td>0</td>
<td>7,000.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

**Note:** The **Total Amount** is 7,000.00 USD.

**Please note:** The Affordable Care Act requires accurate documentation of an employee's hours.

**To pay an employee for an additional job, you will need to perform the Add Additional Job process before submitting a new period activity pay assignment.**

***The Effective Date entered must be today's date or greater. To enter retroactive Period Activity Pay, the Academic Period, Activity Dates, and Payment Dates will be in the past.***

13. If FAS Account and FAS Subaccounts other than those specified on the position will be used, click on the icon in the **Costing Overrides** column. Use the **Prompt Icon** to select a **Costing Override** option. Select the appropriate **FAS Account or FAS Subaccount** and add distributions as appropriate.
14. Enter either a **Percent** or an **Amount**. *Note:* An error will appear if all rows do not total to 100%, check the upper right hand corner for **Amount Remaining** which should be 0.00 when complete.

15. Click **Done**.

16. You can add multiple period activity pay assignments by clicking on the plus sign **+** at the top left corner of the period activity pay grid.

17. Click **Submit** to complete this task.

18. You will see that this task is routed to the **Budget Partner** for review.

19. Click **Done**.

💡 The employee’s payment information will not reflect this update until the business process is complete.
20. To view Period Activity Assignments for an employee, navigate to the worker's name and click on the related action icon next to their name. Hover over the Compensation available action and click on either View Period Activity Pay Assignments to view what has been entered for an employee, or View Period Activity Payment Details, to view what is scheduled to be paid and what has been paid in the past.