Compensation: Request One-Time Payment

One-time payments, such as referral bonuses, can be requested for a direct report directly through the Workday system.

**Tasks**

- **Request a One-Time Payment**
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**Request a One-Time Payment**

1. From the worker’s profile page, click on the Actions button. Hover over Compensation, then click on **Request One-Time Payment**.

2. Enter the **Effective Date**.

3. Note that the **Effective Date** must fall within the pay period you want the payment paid.

4. Click **OK**.

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5. Click the pencil editor in the Summary section.

6. The Employee Visibility Date is an optional field. If you are unable to speak with the worker concerning this payment until after the effective date, enter the date you will meet with them in this field.

7. Use the prompt icon in the Reason field to display a list of reasons and select the appropriate one, making changes if needed. See the tip sheet for a list of reasons.

8. Click the Save button.

Note: The employee’s related information window displays. Here, you can review Bonus History or other relevant details. To open a window manually, click the View Related Information icon in the upper-right corner of the screen.

Note: If the person receiving the one-time payment has multiple positions, you must select the correct position for which the person is receiving the pay.
9. Click the Add button in the One-Time Payment section.

10. Use the prompt icon in the One-Time Payment Plan box to display a list of plans and select the appropriate one, making changes, if needed.

11. The Scheduled Payment Date will default to the same date you entered in the Effective Date field.
12. Enter the **Amount**.

13. Do **not** uncheck the **Send to Payroll** option or the payment will not pay.

14. Click the **Save** icon.

15. Enter additional information in the comment field, such as PTAO, split funded or not, if compensation is budgeted or not, and any other information to assist with compensation transaction approval/review.

   **Note:** Information entered in the comment field does not actually apply the payment to a PTAO. It’s strictly informational. If a PTAO is being used for the payment, then the costing allocation entry, including department and accounting string (PTAO) will be required or the payment will default to the costing allocation of the MC or UPG primary job. See costing allocation entry in the next section.

16. In the attachments field, upload the letter or memorandum of understanding you plan to present to the employee.

17. Click **Submit**.

**Note:** If this payment is for Medical Center or UPG worker, continue with the Costing Allocation section below.

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**Note:** Approval by multiple roles may be required including budget manager, compensation partner, HR partner, and manager’s manager.
Before You Begin

If you are in the Medical Center and charging a worker’s one-time payment to an Academic PTAO, search for and run the ‘Department PTAO Detail (Medical Center)’ report to validate that the PTAO exists in Workday.

Note: If you know all or part of the codes for the items listed, enter the corresponding prompts at runtime to limit the results.

If the PTAO does not exist in Workday, you must contact to request setup of the custom department and accounting string (PTAO) combination. The following information should be included:

- **Email Subject Line**: Setup New MC Department and Accounting String – Assign to Workday & Technology Queue
- **Department Name**: The department name must be unique and should align in some way with the work being done (i.e., grant name)
- **Accounting String (PTAO)**: Project.Task.Award.Organization
- **Start Date**: This will be the effective date of the newly created Department and Accounting String in Workday.

Once created, the Workday & Technology team will provide you with an 8xx or 9xx MC department number that corresponds to the new Accounting String (PTAO).

If you are in University of Virginia Physicians Group (UPG) and charging a worker’s payroll expense to an Academic PTAO, search for and run the ‘UPG Accounting String – Organizations’ report to validate that the PTAO exists in Workday.

Note: If you know all of part of the PTAO, you can filter using the Organization Code column within the report.
If the PTAO does not exist in Workday, you must contact AskHR@virginia.edu to request setup of the custom department and accounting string (PTAO) combination. The following information should be included:

- **Email Subject Line:** Setup New UPG Department and Accounting String – Assign to Workday & Technology Queue
- **Department:** e.g., UPG-41025 UPG-MD-PEDT Pediatrics Admin
- **Accounting String Name:** e.g., UPG-Pediatrics Kellams
  - **Note:** You can develop this name using the same convention used for others in the same department by looking at the report, but it’s typically UPG-DeptName EmpLastName.
- **ACD PTAO to be Charged:** e.g., 103673.ALK9C0.YY00072.41025
- **Start Date:** This will be the effective date of the newly created Department and Accounting String in Workday.

Contact the Academic division research or department administrator responsible for the funds (ACD PTAO) to ensure appropriate percentages and date ranges are utilized in the worker’s costing allocation setup.

### Assign Costing Allocation

For Medical Center and UPG employees, there is an additional requirement to add a costing allocation for the payment. If you do not complete this section, the pay will default to the costing allocation of the MC or UPG primary job. You will receive an alert if this is not completed.
1. Using the prompt, enter the **Department**. A shortcut here would be to enter the name of the department. (E.g. Urology, Accounting, etc.)

2. If Medical Center department code starts with an 8 or 9, the Accounting String is also required.
   
   For UPG if the Department is greater than 5 characters, then the Department and Accounting String is required.

3. **Fund** only has one value, which is Placeholder.

4. Click **Submit**.