Before Complete a Recurring Payments form to pay an employee over-base payments over more than one pay period.

The Recurring Payments form allows you to:

- Set up new, recurring payments
- Restore original distributions after you’ve made changes
- Delete a distribution which has not yet been paid

The recurring payment you want to set up must first be approved prior to completing the Recurring Payments form.

Any back-up documentation be attached to the form (outlined on page 2 of this guide, step 10)

Note: There is no Org Management form prerequisite for a recurring payment.

Accessing the Recurring Payments Form

1. From the BUworks Central portal, based on your role, select either the Manager Self-Service or Payroll Coordinator tab.
2. Click the link labeled Personnel Actions.
3. Via Organizational Structure, click the Org Unit which the employee who is to receive the recurring payments is assigned.

Tip: Expand the display of the Org Structure by clicking the arrow next to an Org Unit (e.g. ENG Administration).

3. From the display of employees, click the Selection button to choose the specific employee that you want to set up recurring payments for. Note the row becomes yellow.
4. Click Select Form.
5. Click the radio button Recurring Payments. The form appears in a new window:

Displayed is employee information, including: personnel area and subarea, employee group and subgroup, employment date, status, percent time employed, salary, hourly and base rate, assignment duration:

1. All Recurring Payments Active as of this Date drives two features: For you to indicate the date that the recurring payments begin to take effect. For you to drive the display of any history - current (and past) recurring payments going back in up to one year from the date you’ve entered.
2. Click Continue Editing Form. The form is expanded (next column).

One Year History and Current Entries Sections

3. Under Recurring Payments two sections appear:
   - One Year History - This first section shows any existing and/or past recurring payments, going back in time (to a maximum of up to one year) from the date you’ve entered in step 1 (All Recurring Payments Active as of this Date). For example: Entering a date of 07/01/2012 means any recurring payments active up to 07/01/2012 would be displayed (and available for changes) within the 2nd section: Current Entries.
   - Note: If the End Date for a recurring payment is earlier than the date you entered in Step 1, you would not be able to change that End Date, as it would no longer be “active.” (Proceed to the next page)
**Actions within the Current Entries Section**

Within the **Current Entries** section, a few buttons appear (described below):

<table>
<thead>
<tr>
<th>Current Entries</th>
<th>Delete</th>
<th>Restore</th>
<th>Create</th>
<th>Check</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wage Type</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Amount</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cost</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Delete**
  
  Allows you to delete a FUTURE dated payment.

- **Restore**
  
  Allows you to either restore a recurring payment you may have deleted (assuming you’ve not yet submitted the form).

- **Create**
  
  Allows you to create/add a new recurring payment.

- **Check**
  
  Allows you to perform a check for formatting of entries (e.g., it will insert .00 if you entered a percentage as simply 25, so that it’s updated to a correct format of 25.00).

Take any of the above actions by clicking the **Selection** button for the specific recurring payment you wish to take the particular action on, then click the appropriate button.

**Completing the Recurring Payments form - Entering the Recurring Payments**

**Note:** We’ll proceed with using the **Create** option, allowing us to set up recurring payments:

4. Confirm the **Start Date** for the recurring payment. It will default to the date you entered in **All Recurring Payments Active as of this Date** back in Step 1 (side 1 of this guide).

5. From the dropdown menu, select the appropriate **Wage Type** from the list (e.g., 2029: Vehicle Allowance).

6. Enter the recurring payment amount within the **Amount** field. Do not use dollar signs (e.g., 200.00).

7. Enter (or search for) the **Cost Center** number (likewise, for the source/Order Number and/or WBS element, as applicable).

8. Click in the **End Date** field (which defaults to 12/31/9999) and edit it so as to enter the appropriate date that the recurring payment should stop and no longer pay out.

   **Tip:** Be aware of monthly or weekly payroll cutoff dates, so as to ensure the employee does not receive any other recurring payment within another pay period.

9. Click **Check** to double-check your entries for accuracy in their formatting.

**Additional Icons**

In addition to the icons we’ve described, other new icons appear. These are based upon actions you’ve taken (or, as we’ll see in the case of the eyeglasses icon- not taken):

- No change was made to an existing, recurring payment.
- A recurring payment was changed.
- A recurring payment was deleted.
- You created a new, recurring payment.

**Attachments, Comments and Submitting the Recurring Payments form**

10. Via **Attachments**, use **Browse...** to upload any back-up docs used for approval.

11. Via **Comments**, add any **New Comments** you may want to add, supplying additional information pertaining to the recurring payments to help expedite the Workflow approval for your form. **Note:** Your comments appear to approvers only.

12. Click **Review** to review your form entries.

13. Click **Submit**. **You’ve submitted the Recurring Payments form!** Workflow Approval can be tracked via Request Tracker.