Recurring Payment Form

When to use

Use this form when the following conditions are true:

- A payment needs to be made that is above and beyond the employee's base salary,
- The employee being paid is an exempt (semi-monthly paid) employee, AND
- The payment will occur over more than one pay period.
- Delete a future or pending payment that has completed in workflow
- For faculty, CE Assignments (faculty only) to indicate amount paid for CE Assignment when additional pay is required for the appointment (especially for Administrative Assignments - i.e.: Chair, etc.)

This form should also be used when a future dated existing additional payment needs to be edited or deleted, please review step 5 for additional instructions.

Note: An additional payment can only be initiated in SAP by the department where the employee primarily works. If an additional payment is required for an employee outside of your SAP access, contact the applicable manager or payroll coordinator.

Before you begin

Ensure any necessary organization management (OM) forms have been submitted and approved before submitting the personnel actions form. See the BUworks Form Decision Guide for a complete list of forms necessary for each action type.

You will need the following information:

- Effective date of payment
- Wage type
- Amount to be paid
- Cost Distribution of payment
- End date of payment
- If processing on behalf of another department, a copy of the request from the department that made the request

Incorrect information will result in longer processing times and may cause your form to be returned or rejected.

To prevent late payment to an employee, pay careful attention to the form deadlines and plan accordingly.

References

- For payments made over one single pay period, use an **Additional Payment** form.
- To compensate a weekly paid employee for work performed for a different org unit, use the **Secondary Work Payment** form.

- To compensate a weekly paid employee for additional temporary duties, use the **Salary Change** form.
- If seeking to compensate for a scenario outside of those listed above, contact HR Compensation (hrcomp@bu.edu) for advice on next steps specific to the situation.
- Click here for the Data Dictionary

Recurring Payment Form: Step-by-Step

Step	Action
1	Initiate the **Recurring Payment** form. ***Warning:*** Forms must be completed one at a time; do not open multiple forms in multiple tabs. ***Reference:*** Initiate a Personnel Administration (PA) Form
2	In the **All Recurring Payments Active as of this Date** field, enter the date the work performed was (or will be) completed in mm/dd/yyyy format. If preferred, click the calendar lookup icon to select the effective date of hire from the calendar. ***Warning:*** To avoid potential delays in payment to the employee, take note of the assigned PA deadline for the intended pay period and plan accordingly.
3	Click the **Continue Editing Form** button. ***Result:*** The following sections of the form will appear: • **One Year History** • **Current Entries**, • **Attachments**, and • **Comments** ***Information:*** This step will make the **Start Effective Date** field become read only. Click the **Change Effective Date** button to change the effective date, if needed.
4	Review the existing data in **One Year History** to ensure the payment being entered is not a duplicate.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>
In the Current Entries section, you can add new, edit, or delete recurring payments. Use the following buttons to make changes:
<table>
<tr><th>Icon</th><th>Description</th></tr>
<tr><td>Delete</td><td>Delete a future dated additional payment: Highlight the payment to be deleted by clicking the box that begins the row of the applicable payment. Once the correct payment is selected, click the Delete button.</td></tr>
<tr><td>Restore</td><td>Restore an additional payment to how it appeared on the form prior to any changes
Note: Restore will not work on a submitted form</td></tr>
<tr><td>Create</td><td>Create or add a new additional payment and proceed to step 6</td></tr>
<tr><td>Check</td><td>Check formatting of entries for errors</td></tr>
</table>
To edit an existing payment, highlight the payment to be edited by clicking the box that begins the row of the applicable payment. Click in the applicable fields and revise as needed.
Warning: Payments that may not be edited or deleted are:

Payments that have already been processed through payroll
Payments with an effective date of today or prior to today’s date

Note: If unable to delete or edit, a PA Correction Request form must be submitted. This form will create a ticket with HR Information Systems.
</td></tr>
<tr><td>6</td><td>
Complete the following fields for the recurring payment:

Wage Type (refer to the data dictionary for more information on wage types)
Amount (this must be the amount to be paid each semi-monthly pay period, not the total amount to be paid)
Cost Center, as applicable
Order Number, as applicable

Note: Both the Start Date and End Date default to the effective date entered in Step 2.
</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7</td><td>Click the Check button within Current Entries section.

Result: If there are any errors, they will be noted at the bottom of the form. If there are no errors, an icon (descriptions below) appears next to the entries in the Current Entries section based on the action you've taken and the distribution description updates.

<table>
<tr><th>Icon</th><th>Description</th></tr>
<tr><td></td><td>Existing current recurring payment in SAP that has not been changed on this form</td></tr>
<tr><td></td><td>Existing current recurring payment in SAP that has been changed on this form</td></tr>
<tr><td></td><td>Existing current recurring payment in SAP that has been deleted on this form</td></tr>
<tr><td></td><td>New recurring payment entered on this form that does not yet exist in SAP</td></tr>
</table>
</td></tr>
<tr><td>8</td><td>Upload relevant documentation in the Attachments section. Please refer to the matrix if you need assistance determining what is required for attachments.

Note: If the payment being entered or changed is on behalf of a department outside of your org structure, approval from the home department (department being charged) must be attached.

<table>
<tr><th>IF…</th><th>THEN…</th></tr>
<tr><td>There are documents to attach</td><td>Proceed to the next step</td></tr>
<tr><td>There are no documents to attach</td><td>Proceed to Step 15</td></tr>
</table>

Warning: do not include attachments containing sensitive information such as social security number, date of birth, etc.</td></tr>
<tr><td>9</td><td>Click the Browse button in the Attachments section.

Result: The Open window appears.</td></tr>
<tr><td>10</td><td>Navigate to the appropriate file on your computer.</td></tr>
<tr><td>11</td><td>Click the title of the file.</td></tr>
<tr><td>12</td><td>Click the Open button.

Result: The filename appears in the Select File: field.</td></tr>
<tr><td>13</td><td>Click the Attach File button.

Result: The file now appears in the Attachments table.</td></tr>
<tr><td>14</td><td>Repeat steps 9-13 for each attachment.</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>15</td><td>Enter additional information in the Comments section for both future reference and to provide additional details to the approvers. This may include reason for the payment, department approver of the payment, etc.</td></tr>
<tr><td>16</td><td>Click the Review button at the bottom of the page. This will check for errors on the form.

Result: Error messages appear at the top of the form.</td></tr>
<tr><td>17</td><td>Review the form for accuracy.</td></tr>
<tr><td>18</td><td>
<table>
<tr><th>IF the form…</th><th>THEN…</th></tr>
<tr><td>Is accurate</td><td>Click the Submit button</td></tr>
<tr><td>Requires updates</td><td>• Click the Back button
• Make any necessary updates
• Return to step 16</td></tr>
</table>
Result: The form is submitted for approval via workflow. You can track the form progress through Request Tracker. You will receive an email notification when the form is approved.

Warning: Being able to submit the form does not mean the action is error free. A crash will show in the Request Tracker with the current agent “SAP” and a status of “Correction”. If an error exists, the form will crash and HR Information Systems will receive an automatic notification (ticket). No action is required on the part of the initiator; HRIS will follow up if additional information is needed. HR Information Systems will resolve the issue as soon as possible. Payroll critical items are handled first.</td></tr>
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