



THE UNIVERSITY OF BRITISH COLUMBIA

AVP Finance and Operations
Okanagan Campus

Workday Wednesday: One Time Payments (Non-Employees, Students, Faculty, and Staff)

April 27th, 2022



RESOURCES AVAILABLE

Request One Time Payment

- https://ubc.service-now.com/selfservice?id=kb_article&sys_id=57eea5b01b8f709027278556cc4bcbac&table=kb_knowledge

Review/Approve Request for One Time Payment

- https://ubc.service-now.com/selfservice?id=kb_article&sys_id=8144cb5b1b8df4109068c992604bcbec&table=kb_knowledge

Student One Time Payment Presentation

- <https://isc.ubc.ca/sites/default/files/One-time%20payment%20Final.pdf>

Request Compensation Change

- https://ubc.service-now.com/selfservice?id=kb_article&sys_id=4ad096971b82f010ba8f539f034bcb49&table=kb_knowledge

HR Fast Track Assessment Form

- <https://finance.ubc.ca/resource/hr-fast-track-assessment>

Create Supplier Invoice Request

- https://ubc.service-now.com/selfservice/?id=kb_article&sys_id=a67210511bcf0d109068c992604bcb91&table=kb_knowledge

AGENDA

- 1 | One Time Payment Scenarios
- 2 | Paying Non-Employees
- 3 | Student One Time Payments
- 4 | Faculty and Staff One Time Payments
- 5 | Review/Approve Request for One Time Payment



ONE TIME PAYMENT SCENARIOS

ONE TIME PAYMENT SCENARIOS



One Time Honoraria – employees and non-employees

Faculty Lump Sum

Merit awards submitted during Merit process

Other Awards/Prizes

SHHS Gratuities

Student One Time Payments (Incidental, Above and Beyond)



Change to Base Salary

Ongoing Honoraria

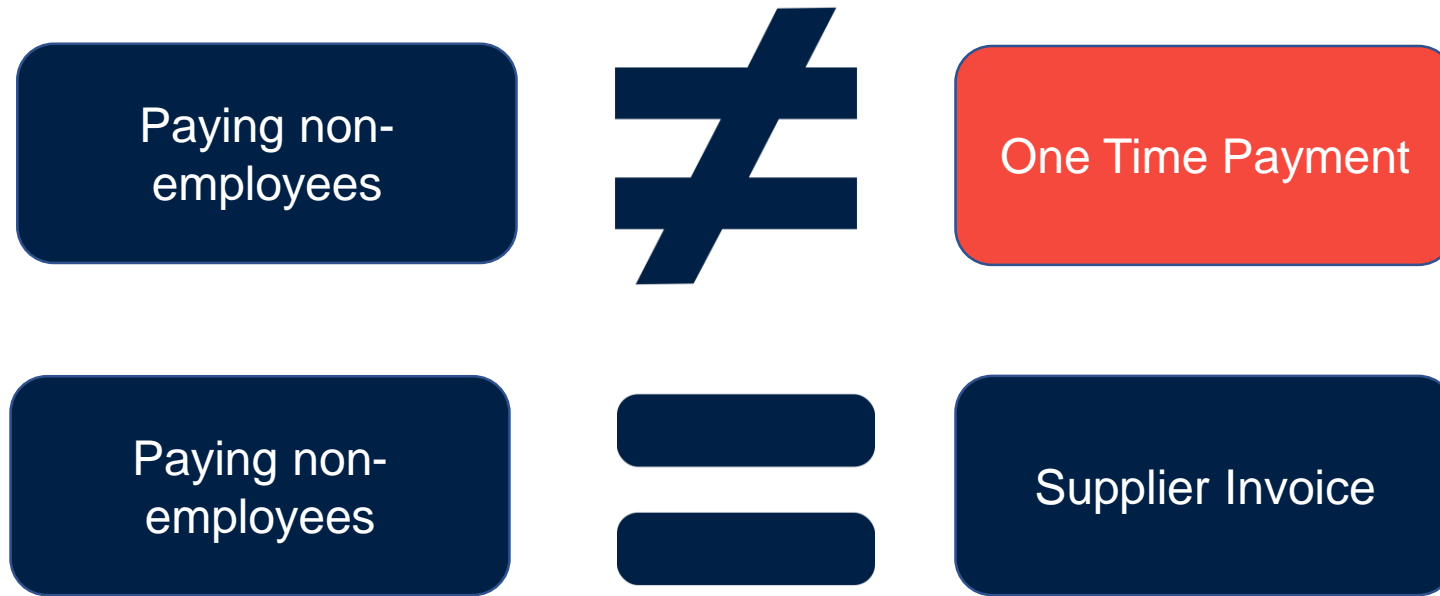
Compensation for hours worked within scope of current position

Paying supplier for goods/services rendered



PAYING NON-EMPLOYEES

PAYING NON-EMPLOYEES



Common scenarios:

Paying a guest speaker or
visiting professor

Paying a student non-
employee

CREATE SUPPLIER INVOICE REQUEST

Supplier Invoice Request (empty) Status (empty) Requester

Primary Information

Invoice Date * 2022-04-27

Invoice Received Date YYYY-MM-DD

Company * UBC The University of British Columbia ...

Supplier *

Remit-To Connection

Currency *

Control Total Amount 0

Supplier's Invoice Number

The **Create Supplier Invoice Request BP** is used to request payments to non-UBC employees where no invoice exists, such as guest speakers, visiting professors, terminated employees, and students.

The individual must first be set up as a Supplier in Workday

Currently, the invoice number is a required field. In most cases, you will not have an invoice number. **We recommend putting the date and three letters of the Supplier's last name as the invoice number.**

Lines Additional Fields Attachments

+ Add

Token of Appreciation

Lines

☐ Goods Line

☒ Service Line

Item

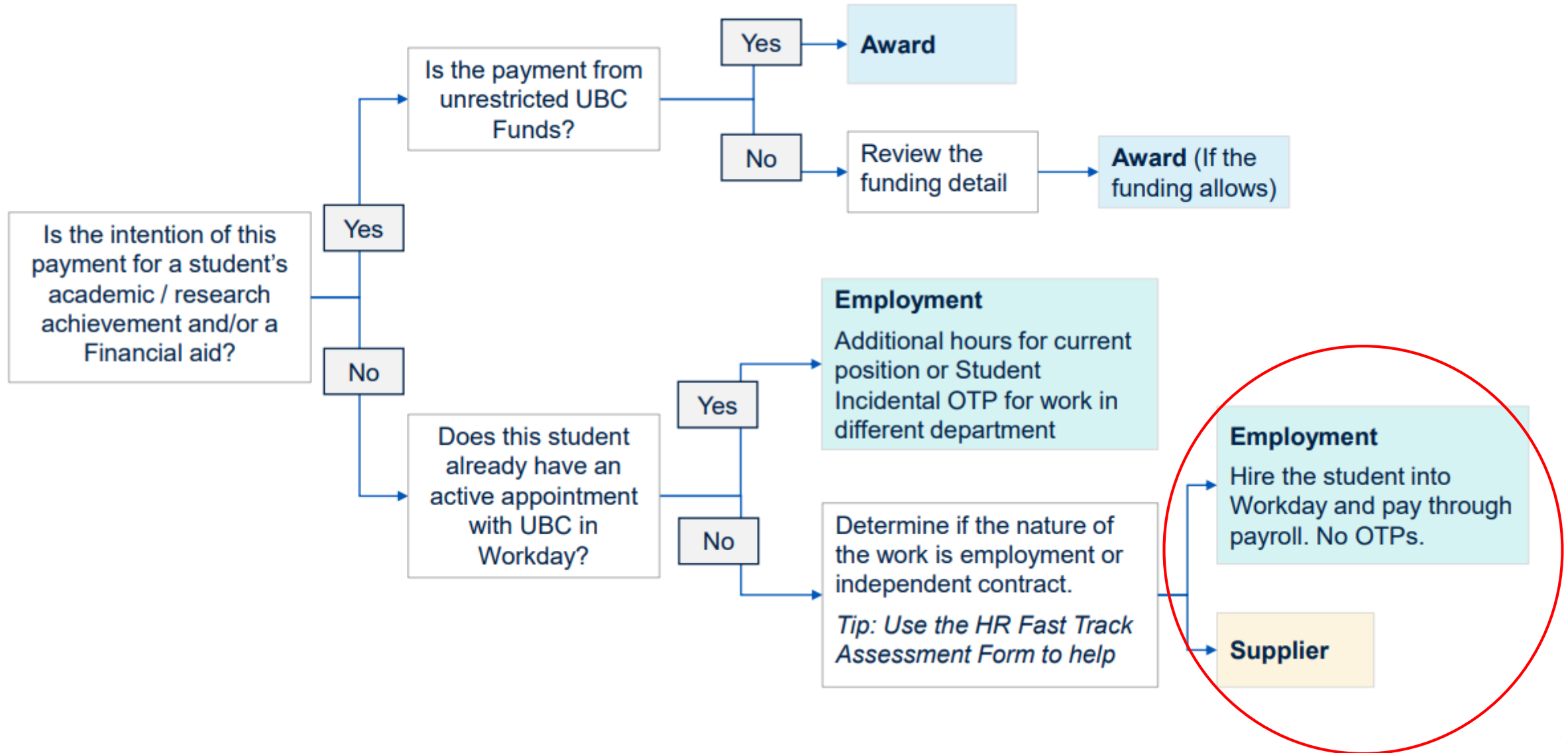
Item Description

Spend Category Token of Appreciation ...

Token of Appreciation would typically serve as the Spend Category for paying a guest speaker, student, etc.

We have submitted an enhancement request to change the requirement for the supplier invoice number on this BP

STUDENT ONE TIME PAYMENT –DECISION MAKING PROCESS





STUDENT ONE-TIME PAYMENTS

STUDENT ONE TIME PAYMENT

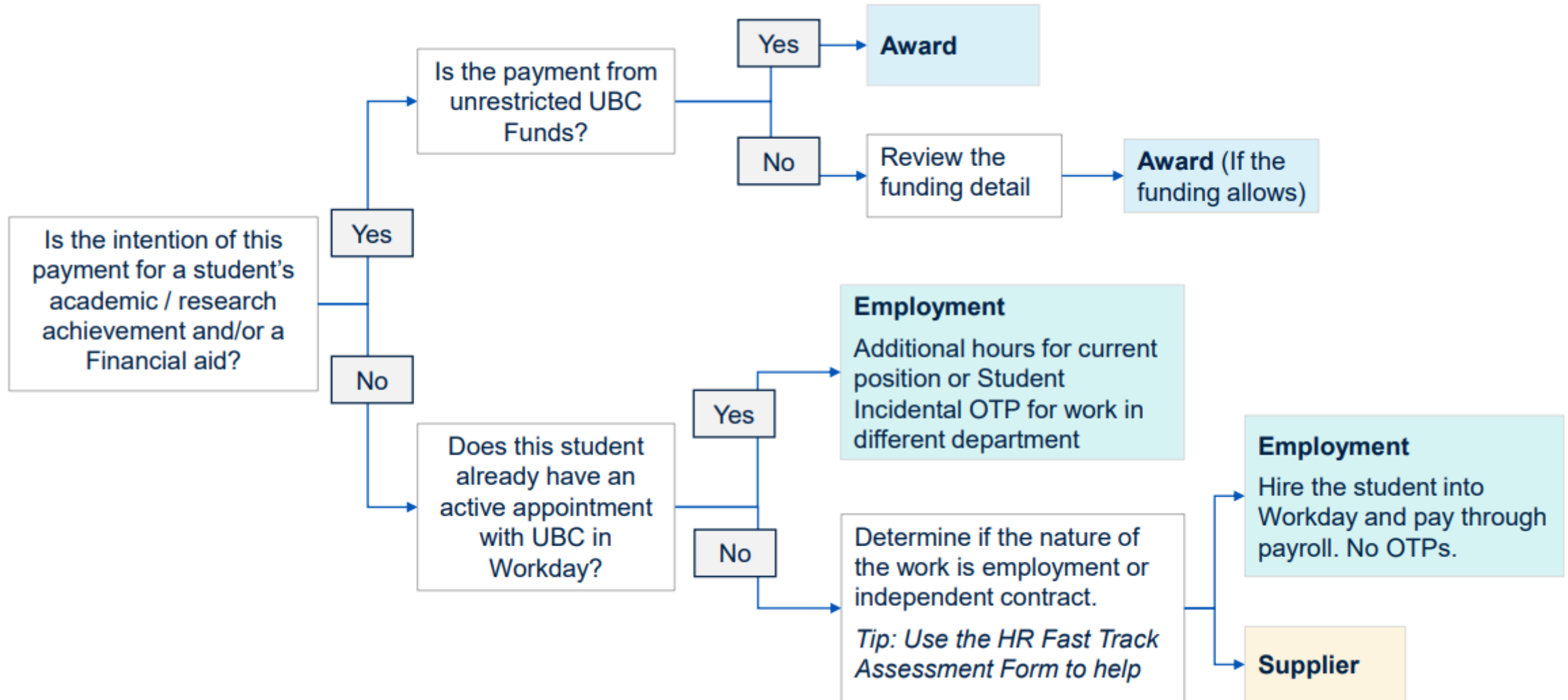
In order to select the correct one time payment for the student's specific situation, it's important to consider:



STUDENT ONE TIME PAYMENT CATEGORIES

	Award Scholarship, Bursary, Prize and Fellowship	Employment	Supplier
Payment System	SISC	Workday	Workday
Business Process	Transfer funds from Department to G+PS/Enrolment Services	OTP–Honorarium OTP - Student Incidental Payment Payroll – additional hours	Supplier Set up & Supplier Invoice processes
Processing Department	G+PS or Enrolment Services	Payroll	Financial Operations
Tax Classification; Tax slips	Scholarship/fellowship/bu rsary/prize; T4A	Employment; T4	Business income/fee for services; T4A

STUDENT ONE TIME PAYMENT –DECISION MAKING PROCESS



STUDENT ONE TIME PAYMENT

New Student Employee OTP types (available August 13th)

- **One-Time Payment > Student Honorarium – Work ‘Above and Beyond’**
A one time payment used to recognize the work a student completed in their current student appointment.
- **One-Time Payment > Student Incidental One Time Payment:**
A one time payment used to pay a student, who already has an active student employment appointment in Workday in instances when they perform employment work for another department on an ad hoc/one time basis.

Search Results

(2)

☒

One-Time Payment > Student Honorarium - Work "Above and Beyond"

☐

One-Time Payment > Student Incidental One Time Payment

student

X

Both of these Student One Time Payments are taxable and paid as regular earnings.



All student employees, including unionized students, are now eligible for the Student One Time Payments.

STUDENT ONE TIME PAYMENT - PROCESSING

One-Time Payment Summary

Summary

Effective Date *
2021-08-01

Employee Visibility Date

Reason
One-Time Payment > Student Incidental One Time Payment

Total Amount Requested
350.00 CAD

One-Time Payment

Payment Details
350.00 CAD

One-Time Payment Plan
Student Incidental One Time Payment (Taxable)

Scheduled Payment Date
2021-08-01

Ensure your
'Reason' and *'One
Time Payment
Plan'* match

One-Time Payment Summary

Summary

Effective Date *
2021-08-01

Employee Visibility Date

Reason
One-Time Payment > Student Honorarium - Work "Above and Beyond"

Total Amount Requested
400.00 CAD

One-Time Payment

Payment Details
400.00 CAD

One-Time Payment Plan
Honorarium

Scheduled Payment Date
2021-08-01

*Managers and Department HR Security roles will be required to approve these One Time Payments in Workday

STUDENT ONE TIME PAYMENT - PROCESSING

As with all *One Time Payments* in Workday, if you are processing it retro actively, ensure you use the **upcoming** or **future** pay date as the **'Scheduled Payment Date'**.

The effective date should reflect the dates they were actively in the position.

Please leave sufficient time for approvals to meet payroll deadlines.

One-Time Payment Summary

Summary

Effective Date *

2021-07-01

Employee Visibility Date

Reason

One-Time Payment > Student Incidental One Time Payment

Total Amount Requested

150.00 CAD

One-Time Payment

Payment Details

150.00 CAD

One-Time Payment Plan

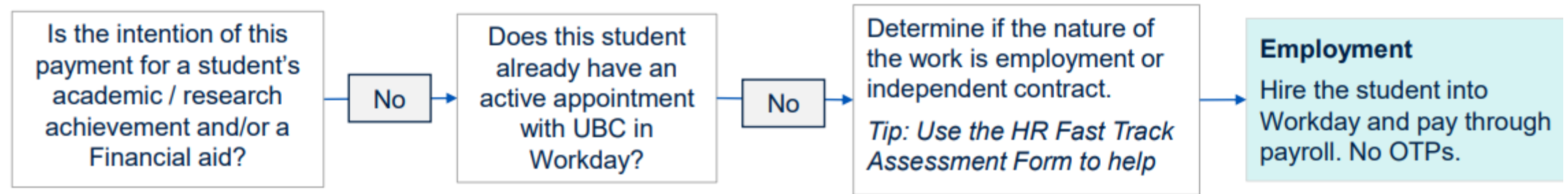
Student Incidental One Time Payment (Taxable)

Scheduled Payment Date

2021-08-31

STUDENT ONE TIME PAYMENT – SCENARIO 1

A student is hired to work in the Department of Chemistry to order lab supplies for a day or two.



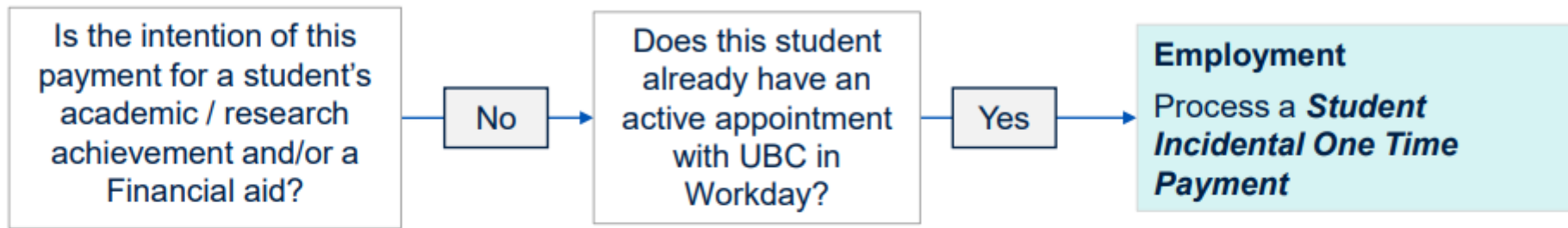
! To hire a student, follow the below Business Processes:

- a) Create Position (if no vacant positions)
- b) Hire Employee (Enter term start and end dates)
- c) If hiring hourly, the student will submit their hours worked through time tracking. If hiring salary, the initiator will need to enter the monthly amount and it will be pro-rated based on FTE

*See appendix for more information on Retro Hire

STUDENT ONE TIME PAYMENT – SCENARIO 2

A student has a primary position in the Department of Music, and has been asked by the Department of Chemistry to assist in ordering lab supplies for a day in addition to their primary job.

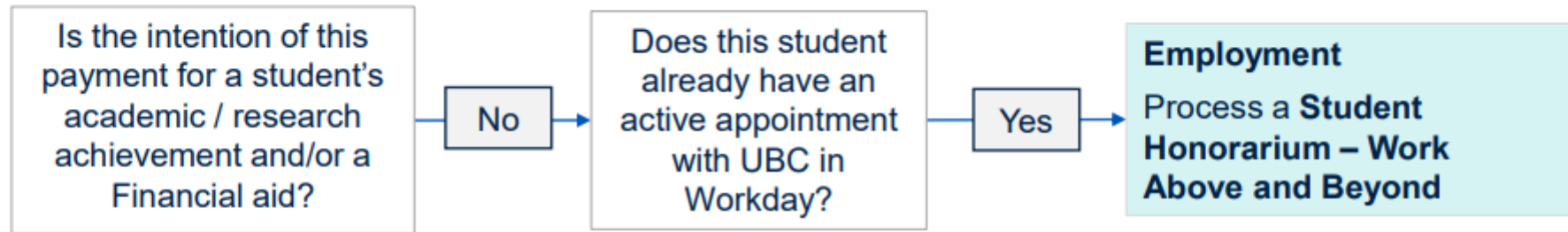


!

- As with all One Time Payments, the employee's home department (in this instance Music) must initiate the OTP. The Department of History can provide the Department of Music with the appropriate worktags to charge the OTP to.
- Student OTPs beyond \$500 will route to Central HR for review and approval.
- If the additional work is ad hoc or one off, a *One Time Payment* is appropriate. If the work is ongoing or recurring, the additional department should process an *Add Additional Job* and pay the student through time tracking/payroll.

STUDENT ONE TIME PAYMENT – SCENARIO 3

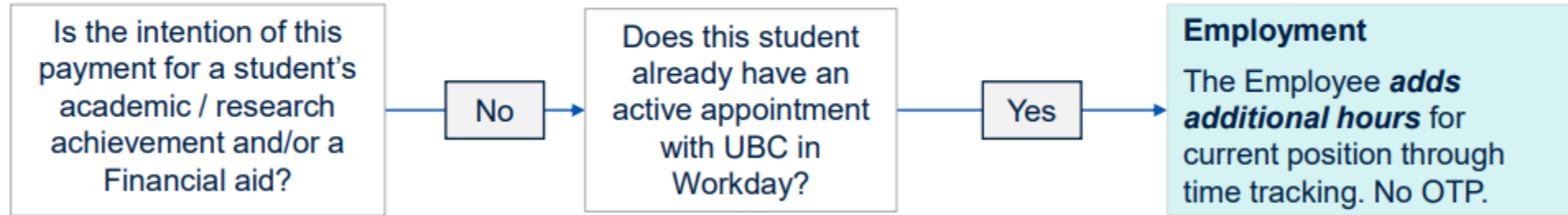
A student employee in the Department of Music has a Manager who would like to offer additional compensation to the student for going above and beyond in their current role.



Student OTPs beyond \$500 will route to Central HR for review and approval.

STUDENT ONE TIME PAYMENT – SCENARIO 4

A student employee in the Department of Music works extra hours in current role.



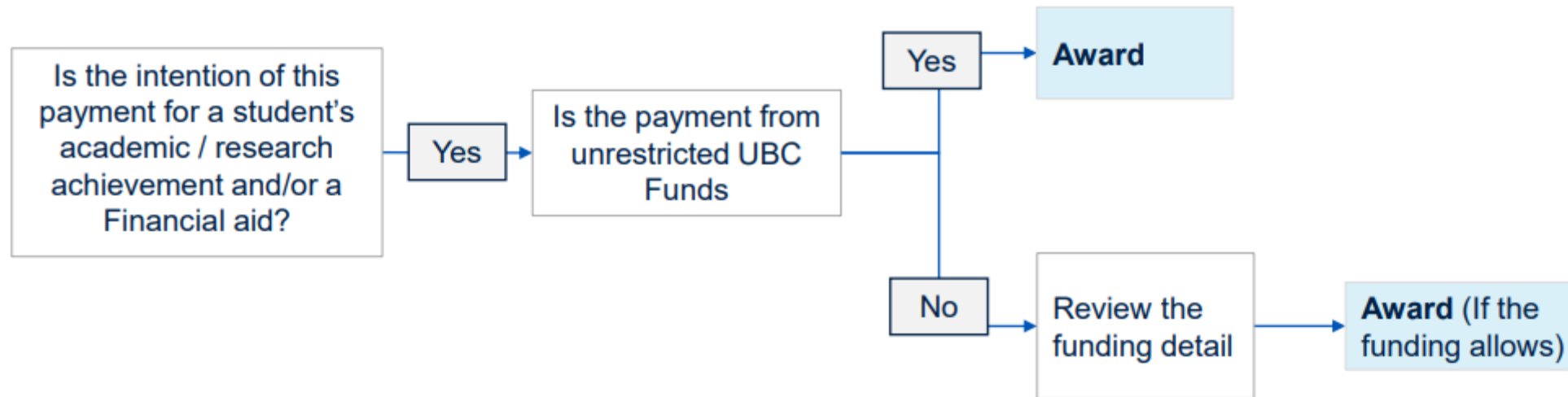
! Overtime rates will apply inline with Employment Standards and include hours worked for all positions. The order of the time entry determines which job triggers the overtime.

Considerations:

- Managers are aware that their student employee has multiple jobs as overtime maybe triggered.
- Students should be transparent about their total working hours and time entry to ensure their managers are aware of any overtime in advance.

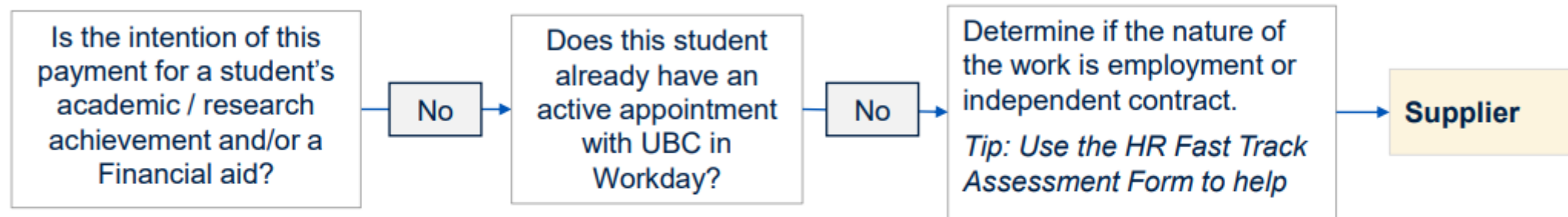
STUDENT ONE TIME PAYMENT – SCENARIO 5

A Professor in the Department of Music would like to provide an award to one of their students for their academic work.



STUDENT ONE TIME PAYMENT – SCENARIO 6

A student participated in a psychology study and is to receive \$40 compensation.



Accounts Payables is only able to **reimburse** an employee or **pay** a supplier.



**SECURITY REQUIRED TO
REQUEST ONE TIME
PAYMENTS**

Request One Time Payment - EMPLOYEE

ROLES

- HR Analyst
- Manager
- Senior HR Partner (Central HR)

Department Initiator



Request One Time Payment

Manager



Approve

Finance



Approve

HR Roles



Other HR Steps and Approvals

Complete

ROLES

- FR Executive
- Central HR Partner (UBCO)
- Compensation Partner
- SR HR Partner
- SR FR Partner
- Dean Executive

ROLES

- FIN HCM Partner

Knowledge Required

- Reason for One Time Payment (e.g. honorarium, awards/prizes, etc).

- Awareness of why the one time payment is occurring.


- Budgeting requirements.

- Awareness of why the one time payment is occurring.

SECURITY REQUIRED TO REQUEST ONE TIME PAYMENTS

Department A HR Analyst or
Manager

Can request
One Time Payment for



Employee from Department A

SECURITY REQUIRED TO REQUEST ONE TIME PAYMENTS

School of Nursing



Anthony, a faculty member from the School of Nursing was a guest speaker for the [Department of Biology](#).

Department of Biology



Sue is the HR Analyst for the Department of Biology. She wants to request a One Time Payment for Anthony's services.

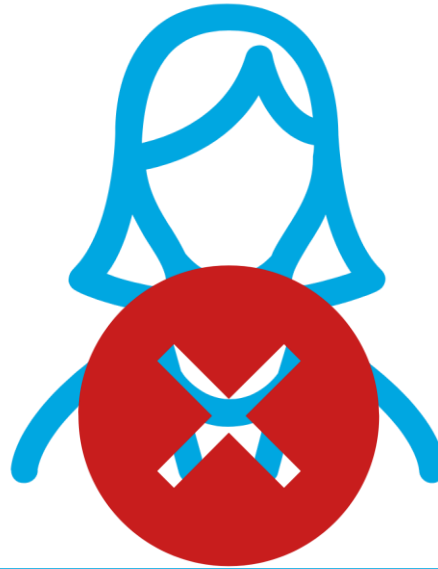
SECURITY REQUIRED TO REQUEST ONE TIME PAYMENTS

School of Nursing



Anthony's home department/unit is the School of Nursing.

Department of Biology



Sue cannot initiate the One Time Payment because she is not the HR Analyst for the School of Nursing.

School of Nursing



Trish is the HR Analyst for the School of Nursing. Trish has the security required to request a One Time Payment for Anthony's services.

SECURITY REQUIRED TO REQUEST ONE TIME PAYMENTS

Department of Biology



Sue needs to contact Trish in order to request the One Time Payment for Anthony.

School of Nursing



Trish will need information from Sue in order to request the One Time Payment for Anthony.

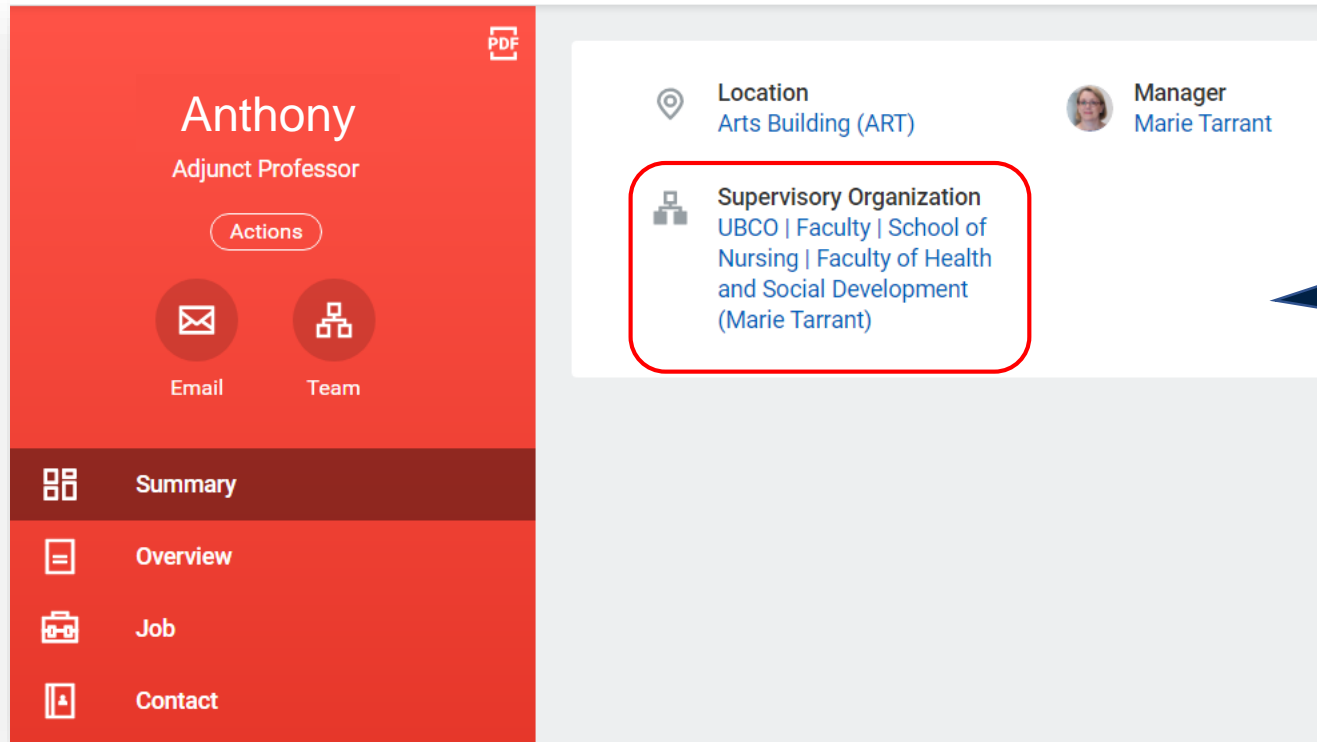
SECURITY REQUIRED TO REQUEST ONE TIME PAYMENTS



How does Sue know who to contact in Anthony's department/unit in order to request the One Time Payment?

What steps does Sue need to take in order to know she needs to contact Trish?

SECURITY REQUIRED TO REQUEST ONE TIME PAYMENTS



Sue will need to go to Anthony's employee profile in Workday to identify the supervisory organization he belongs to

SECURITY REQUIRED TO REQUEST ONE TIME PAYMENTS

UBCO | Faculty | School of Nursing | Faculty of Health and Social Development (Marie Tarrant) 

Type	Supervisory	Superior Organization	UBCO Leadership Dean's Office Faculty of Health and Social Development (Gordon James Binsted)
Organization ID	S013774	Subordinates (first 5)	UBCO Clinical Teaching Epp School of Nursing Faculty of Health and Social Development (Jacqueline Denison, Sheila Epp) UBCO Research Bottorff School of Nursing Faculty of Health and Social Development (Joan Bottorff) UBCO Research Caxaj School of Nursing Faculty of Health and Social Development (Claudia Caxaj) UBCO Research Keys School of Nursing Faculty of Health and Social Development (Elizabeth Keys) UBCO Research Kurtz School of Nursing Faculty of Health and Social Development (Donna Kurtz)

Details

Members

Roles

Security Groups

Organization Assignments

Then, click on the 'Roles' tab to see who holds the HR Analyst security role for this supervisory org

SECURITY REQUIRED TO REQUEST ONE TIME PAYMENTS

UBCO | Faculty | School of Nursing | Faculty of Health and Social Development

Type ↑ Sort Ascending
Org ↓ Sort Descending

Filter Condition *

is

Value *

× HR Analyst (Supervisory) ⋮

Filter

Assignable Role

Assigned To

Organization Assignments

UBCO | Leadership | Dean's Office | Faculty of Health and Social Development

5) UBCO | Clinical Teaching | Epp | School of Nursing

UBCO | Research | Bottorff | School of Nursing

UBCO | Research | Caxaj | School of Nursing

UBCO | Research | Keys | School of Nursing

UBCO | Research | Kurtz | School of Nursing

From there, click on the 'Assignable Role' column and filter the value to HR Analyst. Click Filter.

SECURITY REQUIRED TO REQUEST ONE TIME PAYMENTS

7 of 105 items

Assignable Role	Assigned To
HR Analyst (Supervisory)	Trish

Sue can see Trish is the HR Analyst for Anthony's Sup Org and can proceed with contacting her about the One Time Payment.



It is common for there to be multiple HR Analysts assigned to a Sup Org. Use your discretion in determining who to contact.

SECURITY REQUIRED TO REQUEST ONE TIME PAYMENTS

Department of Biology



Sue provides Trish with the necessary information to initiate the One Time Payment for Anthony.

Information required:

- ✓ Anthony's name
- ✓ Amount
- ✓ Date
- ✓ Worktag to charge
 - This could be a program, grant, project, etc.
 - Do not charge to the Cost Center

School of Nursing



Using the information provided, Trish can proceed with requesting the One Time Payment.



**REQUEST ONE TIME
PAYMENT**

REQUEST ONE TIME PAYMENT

Changing base salary or initiating ongoing honoraria? Stop here and instead...

[Request
Compensation
Change](#)

REQUEST ONE TIME PAYMENT



REQUEST ONE TIME PAYMENT

Request One-Time Payment

"Scheduled Payment Date" is the requested future regular payday for the payment. Please leave sufficient time for approvals to meet payroll deadlines.

IMPORTANT: Scheduled Payment Date must be an upcoming payday with sufficient time for approvals.

(e.g.) Trish is completing the Request One Time Payment task on November 26th. She selects December 15th as the Scheduled Payment Date, not November 30th.

One-Time Payment Plan *

× Honorarium



Scheduled Payment Date *

2021-12-15



Amount *

500.00

Currency *

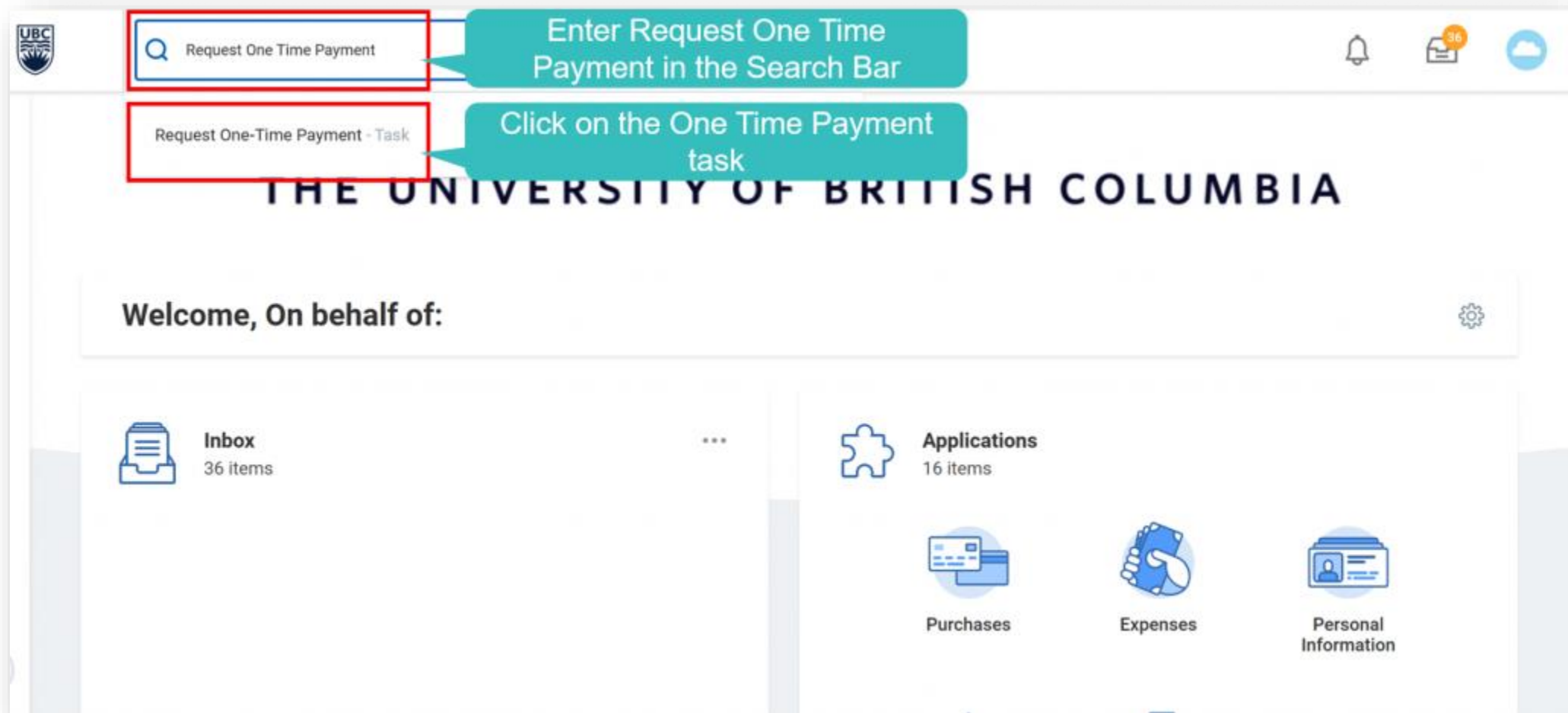
× CAD ...



Send to Payroll



REQUEST ONE TIME PAYMENT



REQUEST ONE TIME PAYMENT

The screenshot displays a web application interface with a blue sidebar on the left containing various navigation icons and labels. The main content area is divided into several sections. A red box highlights the 'Actions' menu in the sidebar, which is open, showing a list of options. The 'Compensation' option is highlighted with a red box. A red box also highlights the 'Request One-Time Payment' option within the 'Compensation' submenu. A teal speech bubble points to this option with the text: 'Click Employee's Related Actions > Compensation > Request One-Time Payment'. The background shows employee details including Location, Manager, Employee ID, Supervisory Organization, Job Details, Job Family, Employee Type, Time Type, FTE, Location, Hire Date, Original Hire Date, Continuous Service Date, End Employment Date, and Length of Service.

Actions

- Academic Faculty >
- Benefits >
- Business Asset >
- Business Process >
- Calendar >
- Committee Membership >
- Compensation** >
- Job Change >
- Manage Work >
- Organization >
- Payment >
- Payroll >

Request Compensation Change

- Request One-Time Payment**
- View Compensation
- View Compensation History
- View Compensation History - All Past and Present Positions
- View Compensation Basis Details
- View Estimated Compensation for a Period
- View Reimbursable Allowance Plan Activity
- View Total Rewards

Job

- Organization
- Business Title
- Manager

Job Details

Employee ID

Job Family

Employee Type: Term (Fixed Term)

Time Type: Part time

FTE: 100.00%

Location: University Centre

Hire Date: 2019-08-19

Original Hire Date: 2015-10-20


Continuous Service Date: 2019-08-19




End Employment Date: 2021-05-01

Length of Service: 0 year(s), 8 month(s), 14 day(s)

REQUEST ONE TIME PAYMENT

Request One-Time Payment

Effective Date * 2020- 07 - 01  Enter Effective Date

Employee *   

Click OK

OK Cancel

If the employee has more than one position, you can select the position that is receiving the One Time Payment.

REQUEST ONE TIME PAYMENT

Request One-Time Payment

Actions

Actions

One-Time Payment Summary

Summary

Effective Date *

2020- 07 - 01

Employee Visibility Date

YYYY- MM - DD

Reason

× One-Time Payment > Staff
Honorary - Work "Above and
Beyond"

Select reason for
the One-Time
Payment

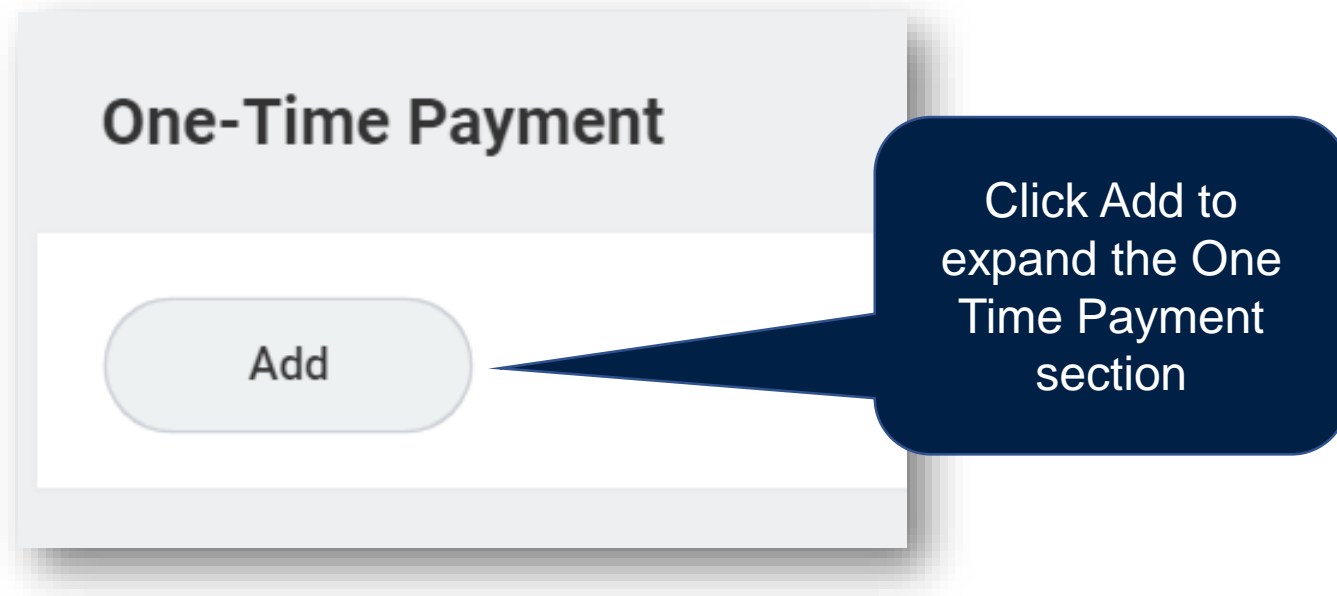
Total Amount Requested

0.00 CAD

An Employee Visibility Date can be chosen if you would prefer that the employee can only see the compensation change when the change has taken effect. If left blank, the change will show on the employee's record as soon as it is complete. This field only affects when the employee can start seeing the compensation change on their record

Make sure your 'Reason' and 'One Time
Payment Plan' match

REQUEST ONE TIME PAYMENT



REQUEST ONE TIME PAYMENT

One-Time Payment Plan *

× Honorarium



Select type of One Time Payment (should match the Reason)

Scheduled Payment Date *

2021-12-15



Select future payday

Amount *

500.00

Enter amount

Currency *

× CAD ...



Send to Payroll



REQUEST ONE TIME PAYMENT

Program

Grant

Project

Gift

Cost Center

Additional Worktags

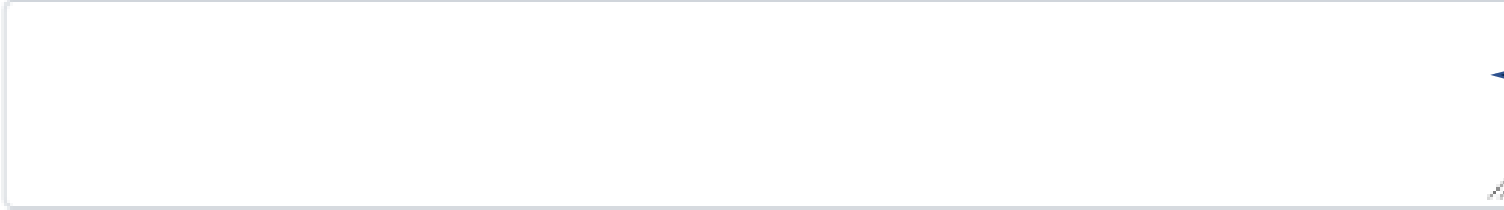
Enter
Program/Grant
etc. where One
Time Payment is
to be charged

Cost Center will
auto-populate based
on Program/Grant
etc. Do not change.

Gift
Initiatives/Activities
can be found under
Additional Worktags

REQUEST ONE TIME PAYMENT

Additional Information



Enter the purpose for the One Time Payment and any other relevant information approvers will need to know.

Click
Submit

Submit

Save for Later

Cancel

Honoraria for staff will have additional approvals by the Compensation Partner (HR) if:

- the proposed amount is over \$5,000
- the 12-month cumulative amount is over \$5,000
- the reason is Merit
- the honorarium is for a Senior Executive



**REVIEW/APPROVE
REQUEST FOR ONE TIME
PAYMENT**

REVIEW/APPROVE REQUEST FOR ONE TIME PAYMENT

Review

One-Time Payment:

56 second(s) ago - Due 2020-05-26; Effective 2020-07-01

For

P000064065 Sound Designer -

Overall Process

One-Time Payment: - P000064065 Sound Designer

Overall Status

In Progress

Due Date

2020-05-28

Details to Review

One-Time Payment

Employee

Position

P000064065 Sound Designer

Effective Date

2020-07-01

Employee Visibility Date

(empty)

Reason

One-Time Payment > Staff Honorarium - Work "Above and Beyond"

Payment Details 1 item

Plan Type	Plan	Amount	Currency	Scheduled Payment Date	Compensation Element	Send to Payroll	Worktags	Supporting Information
One-Time Payment	Honorarium	100.00	CAD	2020-07-01	Honorarium	<input checked="" type="checkbox"/>		<div>Supporting Information</div> <div>Gross Up</div> <div>Currency</div> <div>CAD</div> <div>Target Amount</div> <div>0.00</div> <div>Target Currency</div> <div>CAD</div> <div>Recommended Minimum</div> <div>0.00</div> <div>Recommended Maximum</div> <div>0.00</div>

> Bonus & One-Time Payment History

enter your comment

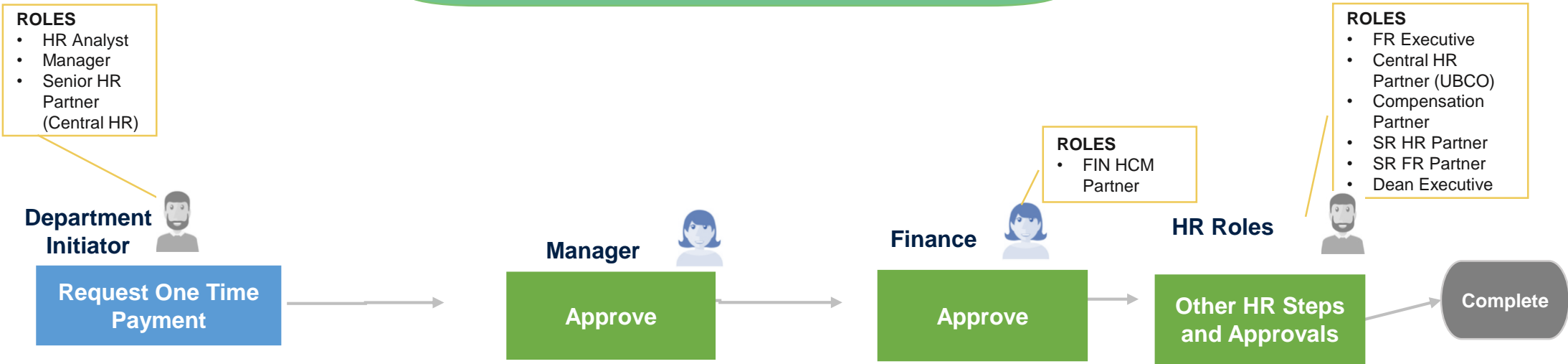
Approve

Send Back

Add Approvers

...

Request One Time Payment



Knowledge Required

- | | | | |
|--|---|---|---|
| <ul style="list-style-type: none">• Reason for One Time Payment (e.g. honorarium, awards/prizes, etc). | <ul style="list-style-type: none">• Awareness of why the one time payment is occurring. | <ul style="list-style-type: none">• Budgeting requirements. | <ul style="list-style-type: none">• Awareness of why the one time payment is occurring. |
|--|---|---|---|



Next Workday Wednesday: May 11th from 10:00 – 11:00am

Topic: Leaves of Absence

[Registration link](#)

