MANAGERS, HRTCs, GLOBAL MOBILITY, APPROVING SR. MANAGER, DATA MANAGEMENT JOB AID

ONE-TIME PAYMENT

While Managers with Compensation rights (Senior Associates or Chief Engineer/Technologist/Scientist and above) will be able to see multiple types of One-time Payment options in Workday, there are only a few that managers may need to initiate, such as:

- Performance Bonus
- Danger/Hazard/Extra Effort/Hardship (Excludes VP and above)

**NOTE:** Sign-on Bonus, Relocation, and Allowances (such as hazard pay) and other types of One-Time Payments will be initiated by other teams such as Recruiting, HRTCs, or Global Mobility. One-time Payments such as lump sum Merit or senior staff Annual Bonus will be handled as part of the Annual Salary Planning process.

Click on your role in the path to see your steps in the process:

Manager - SA, Chief E/T/S and above

HRTC Comp or Global Mobility*

Management Approval Chain

Data Management

MANAGER JOB AID

1. Click the **Compensation** worklet on the homepage.

2. Click **One-time Payment**.

**NOTE:** You can also search for an employee or select someone from your **Org Chart** to initiate a One-time Payment. Click on the **Actions button** next to their name for the drop-down menu.

1/26/2018
3. Enter the **Effective Date**. Effective dates for One-Time payments should be the 1\textsuperscript{st} or 16\textsuperscript{th} of the month, unless this is related to a new hire.

**NOTE**: Please consult the payroll cutoff dates, as this will affect when the employee will see the payment in his/her paycheck. If the transaction is entered with a past or current Effective Date in Workday before the payroll cutoff date, it will be paid in the current paycheck. However, if it is entered after the cutoff date, it will be paid in the next paycheck. For more information on payroll cutoff dates, please visit [https://boozallen.sharepoint.com/sites/finance/Pages/Payroll.aspx](https://boozallen.sharepoint.com/sites/finance/Pages/Payroll.aspx).

4. In the field for **Employee**, select the employee from **My Team, Employees by Manager, or Employees by Supervisory Organization**. Click **OK**.
5. Under **One-Time Payment Summary**, click the pencil icon to edit the **Employee Visibility Date**.

   - If you leave this field blank, employees will be able to see the payment on the **Effective Date**.
   - If you choose to enter a date here (i.e. if you want to have a conversation with the employee prior to the change being visible in their profile), you can choose the **Employee Visibility Date** here.

6. In the **Reason** field select **One-time Payment > One-time Payment** and then select either **Allowable** or **Unallowable**.

**NOTE:** In cases where a payment will be split between allowable and unallowable, separate one-time payments must be submitted. For example, if a $10,000 one-time payment is needed but only half of it is allowable, a one-time payment for $5,000 (allowable) should be submitted as well as a one-time payment for $5,000 (unallowable). In these scenarios, the comment section should be used to document the reason for multiple payments.
7. Under **One-Time Payment**, click **Add**.

8. In the field for **One-time Payment Plan**, select an **Amount-based Plan** or **Percent-based Plan**. Click **OK**.

**NOTE:** Managers will mostly likely only use Performance Bonus, which is in the Amount Based Plan. Discuss with your HR Talent Consultant if you are unsure of which option to choose.
9. Enter the **Amount** for the one-time payment.

   **NOTE:** Currency should reflect the currency in which the employee is paid (based on the compensation page of their profile).

10. The **Send to Payroll** checkbox should be **ignored** as we are not utilizing the Workday Payroll functionality. It does **not** matter if it is left checked or unchecked. Once approved, your request will route to Payroll.

11. In the **Additional Information** comment box, please ensure to provide any necessary details for payroll. It is very important to document any information that can be useful for payroll to process the payment. If the amount needs to be split between different charge numbers, you will want to specify the details for payroll in this open field comment box.

12. Complete the **Worktags field**
NOTE: Worktags refer to the charge number for the one-time payment. Since there are many charge codes, it is helpful to start to type in a partial code, e.g. B10 or G01E, etc. This will narrow the options.

13. Enter Comments and Attachments for your request (e.g. documentation or email approvals that you want to include with this request).

NOTE: Some One-time payments require an attachment; you will not be able to submit without one. Performance Bonuses require documentation.

14. Click Submit or Save for Later.

UP NEXT: HRBP to approve, then management approval chain, and then will route to payroll. For Danger/Hazard/Extra Effort/Hardship (Excludes VP and above), HRBP does not need to approve but the Principal and VP will need to approve.

HRTC COMP SECURITY JOB AID

15. HRTC Compensation Security receives an action in their Inbox to review One-Time Payment.

16. Review Details and either Approve, Send Back, Add Approver, Deny, Cancel or Save for Later.

UP NEXT: Approval Chain by Manager.

GLOBAL MOBILITY JOB AID

17. Global Mobility will receive an action in their Inbox to review One-Time Payment for the types of One Time Payments listed below.

<table>
<thead>
<tr>
<th>TYPES OF PAYMENTS:</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>Auto Allowance</td>
<td>Foreign Service Premium Gross Up</td>
<td>In Kingdom Bonus</td>
<td>Puerto Rico Christmas Bonus</td>
</tr>
<tr>
<td>Car Allowance Gross Up</td>
<td>Housing Advance Paid to Employee</td>
<td>LQA/Housing Allowance</td>
<td>Salary Differential Earnings</td>
</tr>
<tr>
<td>COLA</td>
<td>Housing Advance Vendor Direct Pay</td>
<td>Mobility Premium</td>
<td>Utilities Allowance</td>
</tr>
<tr>
<td>COLA Gross Up</td>
<td>Indonesia 13th Month</td>
<td>Post Allowance</td>
<td>Utilities Allowance Gross Up</td>
</tr>
</tbody>
</table>
18. Review Details and either Approve, Send Back, Add Approver, Deny, Cancel or Save for Later.

UP NEXT: Approval Chain by Manager.

APPROVING SENIOR MANAGER JOB AID

19. Approving Senior Manager receives an action in their Inbox to review One-Time Payment.

20. Review Details and either Approve, Send Back, Deny, Cancel or Save for Later.

**NOTE:** Some One-Time Payments may require senior staff and exceptions approval, and if this is the case it will route there. If the One-Time Payment is for VP or above, it will route to Executive Services and the Executive Services Comp Partner to review and approve.

**NOTE:** Once the payment has final approval, it will route to data management or directly to payroll to enter the One-Time Payment into ADP Pro Business.

DATA MANAGEMENT JOB AID

ONE-TIME PAYMENT (INTEGRATION) PROCESS

1. For any One-time Payment, if the initiator did not choose the start date as the 1st or 16th of the month, Data Management will receive the request to review and must ensure that the date is either the 1st or 16th of the month.

2. On all Inbox requests, review Details and you can Approve, Send Back, Add Approver, Deny, Cancel or Save for Later. Once Data Management approves it, it will route to the HRTC or for Management Approval.

**NOTE:** For certain types of one-time payments listed below, Data Management is responsible for submitting these to payroll.

UP NEXT: The approved request routes to payroll, who will enter the One-Time Payment into ADP Pro Business.

<table>
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<tbody>
<tr>
<td>Administrative</td>
<td>Contract Award</td>
<td>Performance Bonus 2</td>
<td>Standby/On Call Pay</td>
</tr>
<tr>
<td>Professional Day Bonus</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adoption Assistance</td>
<td>International Anniversary (5 yrs.)</td>
<td>Performance Bonus 3</td>
<td>Straight-time/OT Dollars</td>
</tr>
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<td>---------------------</td>
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</tr>
<tr>
<td>Advisor Program</td>
<td>International Business Traveler</td>
<td>Performance Bonus – Offer (No Pay)</td>
<td>Surge Pay</td>
</tr>
<tr>
<td>Performance Bonus</td>
<td>International VIP</td>
<td>Referral Bonus</td>
<td>Tuition-Academic Assistance</td>
</tr>
<tr>
<td>Anniversary (10+ years)</td>
<td>Performance Bonus 1</td>
<td>Shift Pay</td>
<td>Tuition-Tech &amp; Professional Certification</td>
</tr>
</tbody>
</table>

Awards