ENTER AN ADDITIONAL PAY

Quick Steps

To enter an Additional Pay, you will need to take the following steps in Aurora:

1) Select Create New Action > Additional Pay in the top menu.
2) Search for the employee’s appointment to open the Additional Pay Form.
3) In the Action Information section:
   a. Select the type of additional pay you want to create in the Type of Payment field.
      Options include One Time, Recurring, Gift/3rd Party, and Off Cycle Request.
4) In the Payment Information section:
   a. Enter the Date Earned for the payment.
   b. Select an appropriate Earnings Code from the drop down.
   c. Enter the Pay Period Amount for the Payment.
      i. If want to Gross Up the payment click the check box. (This option is not available for Recurring payments.)
   d. If you chose to create a Recurring payment, enter either the Goal Amount or Pay Until Date.
   e. Enter the Reason for the payment.
   f. Select the Processing Department from the drop down.
5) In the Costing section, add the costing for the payment.
6) Enter an Action Comment. If you selected Off Cycle Request or Gross Up, an Action Comment is required.
7) Submit.

The remainder of this guide contains detailed step-by-step instructions and FAS policy guidance. You can jump to specific sections using the Table of Contents, if desired.
Contents

Quick Steps ...................................................................................................................................... 1
Initiate an Additional Pay ................................................................................................................ 3
Additional Pay Form ........................................................................................................................ 4
  Employee Information .............................................................................................................. 4
  Action Information ................................................................................................................ 4
  Payment Information .............................................................................................................. 5
  Off Cycle Information ............................................................................................................ 7
Harvard Employee/External 3rd Party Details ......................................................................... 7
Costing ...................................................................................................................................... 8
Attach Document ...................................................................................................................... 9
Action Comments .................................................................................................................... 10
Save As Draft or Submit the Action ........................................................................................ 10
Action Review Screen ............................................................................................................. 11
Approval Workflow .................................................................................................................. 11
Initiate an Additional Pay

1) In your favorite browser, log in to Aurora (https://aurora.fas.harvard.edu)
2) Hover over the Create New Action tab to view the full sub-menu.
3) Select the Additional Pay option.

The Lookup Person /Appointment page will open.

4) Use any of the fields (Empl ID, Last Name, First Name) to search for an appointment on which to initiate an Additional Pay action.
5) Select an active appointment from the results displayed using the Select Button. This will open the Additional Pay form.

**Helpful Hint: Who do I search for with Gift/3rd Party payments?**

When processing a Gift/3rd Party additional pay, search for the person who received the benefit and thus will be taxed. If John bought a gift for Mary and he needs to be reimbursed, it is Mary for whom you would search, and whose name must appear on the action.

Once you are on the form, you will enter the person or company that will receive the payment in the Harvard Employee/External 3rd Party Details section.
Additional Pay Form

The Additional Pay form is divided into several sections. We will review each of the applicable sections below.

EMPLOYEE INFORMATION

The Employee Information section shows information related to the employee and the appointment being acted upon. All fields are prepopulated and are not editable.

1) Review the information in the Employee Information section to confirm you selected the correct appointment. If you selected the wrong appointment, initiate a new action following the instructions above.

ACTION INFORMATION

The Action Information section displays basic information about the Additional Pay being created.

1) Action Number will be populated once the action is saved or submitted. This number is generated by either PeopleSoft or Aurora depending on the Type of Payment.

2) Type of Payment is a dropdown, listing the following types of Additional Pay that you can initiate using this form. Select the type of payment you would like to initiate.
   a. One Time
   b. Recurring
   c. Gift/3rd Party
   d. Off Cycle Request
Helpful Hint: Payment Types

**One Time:** This option allows the user to process additional compensation for an employee as a onetime payment. Select this option for late reimbursements.

**Recurring:** This option allows for a set amount of additional compensation to be paid to an employee in every pay period, either for a set amount of time or until a goal amount has been reached.

**Gift/3rd Party:** This option allows users to process a reimbursement for a gift or payment to a third party. It also allows users to record a gift to a Harvard employee that needs to be reported as taxable income.

**Off Cycle Request:** This option should **only** be used when an employee is due additional compensation and the payment cannot wait until the next payroll.

3) **Select** the type of payment you would like to initiate and the form will display.

4) **Estimated Effective Date** and **Estimated End Date** are initially blank. When you save the Additional Pay, these fields will display the start and end dates of the pay period in which the Additional Pay will be paid. These dates are an estimate. The actual payment dates will vary based on how long it takes the action to complete the approval workflow.

**PAYMENT INFORMATION**

The Payment Information section is where you enter the details of the payment:

**One Time, Gift/3rd Party, Off-Cycle Request**

<table>
<thead>
<tr>
<th>Payment Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compensation Frequency</td>
</tr>
<tr>
<td>Date Earned * t</td>
</tr>
<tr>
<td>Earnings Code * t</td>
</tr>
<tr>
<td>Pay Period Amount * t</td>
</tr>
<tr>
<td>Hours</td>
</tr>
<tr>
<td>Hourly Rate</td>
</tr>
<tr>
<td>Reason</td>
</tr>
<tr>
<td>Processing Department * t</td>
</tr>
</tbody>
</table>

**Recurring**

<table>
<thead>
<tr>
<th>Payment Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compensation Frequency</td>
</tr>
<tr>
<td>Date Earned * t</td>
</tr>
<tr>
<td>Earnings Code * t</td>
</tr>
<tr>
<td>Pay Period Amount * t</td>
</tr>
<tr>
<td>Goal Amount</td>
</tr>
<tr>
<td>Hours</td>
</tr>
<tr>
<td>Hourly Rate</td>
</tr>
<tr>
<td>Pay Until</td>
</tr>
<tr>
<td>Reason</td>
</tr>
<tr>
<td>Processing Department * t</td>
</tr>
</tbody>
</table>
1) **Compensation Frequency** will display from the selected appointment.

2) Enter the **Date Earned** for the payment, which can be any date between the start and end date of the appointment. Aurora will use this date and the payroll calendar to determine the **Estimated Effective Date** and **Estimated End Date** of the payment. If the **Date Earned** is in the past or is the current date, the effective date and end date will be set to the start and end of the next pay period. If the **Date Earned** is in the future, the effective date and end date will be the start and end date of the pay period in which the Date Earned falls.

3) Select the appropriate **Earnings Code** for the payment from the drop-down list.
   a. For guidance on which Earnings Code to select, visit the Additional Pay section of the Aurora Knowledge Center where you’ll find a list of Earnings Codes along with business definitions.

**Helpful Hint: Processing Late Reimbursements – Aurora vs. Concur**

**Aurora:** Process the late reimbursement in Aurora if it is an Out of Pocket Expense that will be paid out via an Additional Pay. Earnings code LRB (Late Reimb over 90 days) is available to select on One Time and Off Cycle additional pay requests. **Please attach any receipts over $75 to the action.**

**Concur:** Process the late reimbursement in Concur if it is for a late Corporate Card expense that will be paid through Concur. In this case, **do not enter an action in Aurora.** Instead, complete the **Additional Pay Form request** available on the FAS Finance website and attach the completed PDF form to your Concur report as documentation.

4) If you are entering a **One Time, Off Cycle Request** or **Gift/3rd Party** payment, enter the amount of the payment in the **Pay Period Amount** field.
   a. If the appointment associated with the additional pay action is for a time reporter, you will also be given the option to enter the number of **Hours** and the **Hourly Rate** associated with the payment. This allows you to capture the actual hours worked for payments such as Retro Pay. If you enter Hours, you must enter a value in the Hourly Rate field and you cannot enter a value in Pay Period Amount.
   b. If you want to gross up the payment, check the **Gross Up** box. Grossed up payments require an explanation in the **Action Comments** section of the form. **Recurring** payments cannot be grossed up.

5) If you are entering a **Recurring** payment you can either enter the **Goal Amount** or enter the **Pay Period Amount** and **Pay Until** date and Aurora will calculate the **Goal Amount**.

6) Enter the **Reason** for the Payment (Limit: 254 characters).

7) Select the **Processing Department** from the drop-down list.
OFF CYCLE INFORMATION

The Off Cycle Information section only displays if you choose Off Cycle Request. Users must acknowledge the cost associated with off cycle requests when selecting this option.

1) Select the Off Cycle Reason from the list.
2) Select the Check Disposition from the list.

HARVARD EMPLOYEE/EXTERNAL 3RD PARTY DETAILS

The Harvard Employee/External 3rd Party Details section only displays when Payment Type Gift/3rd Party is selected.

1) Check the box for No Check Required if the Gift/3rd Party is for recording taxable income only and no check is required. The checkbox will be selected by default when the Gift Taxable (GTX) earnings code is selected.
2) Enter the person or company who will receive the payment in the Harvard ID field.
   a. For Harvard employees you can enter the Harvard ID and Aurora will fill in the address automatically.
   b. If the payee is not a Harvard employee, you will need to enter the name and an address where the check should be mailed. When you print the form, you will need to enter the Tax ID Number (TIN) before sending the form to FAS Payroll for processing.

   Note: If the Empl ID of the selected appointment and the Harvard ID entered in this section match, certain Earnings Code reasons are not valid and you will receive an error if you attempt to Save or Submit the action. These include:
1) **Gift Reimbursement Third Party (GTP):** This Earnings Code can only be used if the 3rd party reimbursee is different from the recipient of the gift. Please use the Gift Taxable (GTX) Earnings Code instead.

2) **Nn-qual moving to 3P (MV3):** This Earnings Code can only be used if the 3rd party reimbursee is different from the recipient of the service (e.g., to pay the moving company). If the recipient of the service is being reimbursed, please select “Type of Payment” One Time and use the **Nn-qual Mov to ee (MVN)** Earnings Code instead.

Gifts/3rd Party/Reportable Reimbursements additional pays do not require approval outside of the department. Once fully approved, you will need to print out this form and send it to FAS Payroll. (If compensating a 3rd party, rather than a Harvard Employee, enter the Tax ID Number (TIN) for the 3rd party before sending the form to FAS Payroll.) While the action may be marked as Complete in Aurora, the additional pay will not be processed until this form is submitted to Payroll. If you wish to print this out later, you may locate the action through the Action Search.

**COSTING**

The costing section of the Additional Pay form allows the user to enter costing information for the payment. **It is required. To add costing, click the Add/Modify button.** This will bring you to the **Edit Costing popup.**

1) **Enter the Tub, Org, Fund, Activity, Sub-Activity and Root for the costing.**
2) If the payment is being divided among multiple rows of costing, you can add costing rows using the Add Row button or by copying existing rows. The numbers in the % column must add up to 100%.

Helpful Hint: Costing Buttons

You can copy costing rows using the button.
You can delete costing rows using the button.
You can view the description of your costing by selecting the button.

3) Use the Save button to save your costing to the Additional Pay Form. Aurora will validate the costing string and prompt you if there are errors. If there are validation errors, you will be required to fix them prior to saving the costing.

4) Once you have saved your Costing to the Additional Pay form, you can edit the costing by selecting the edit link next to the earnings code.

ATTACH DOCUMENT

Attach Document allows users to attach files and forms related to an action.

1) For additional pay actions using the LRB earnings code, please attach any receipts over $75.

The following restrictions apply to attachments:

- All files must be in PDF format.
- Files must be smaller than 20MB. (If needed you can reduce the file size in Adobe Acrobat using the Optimized or Reduced Size tools.)
- Attached documents should never contain High Risk Confidential Information, such as an I-9 or any document that includes an SSN.
1) To attach a document, select the Attach PDF button. This will display the Attach Document popup window.

![Attach Document popup window]

2) Select the Browse button to locate the desired PDF file.

3) Select the Document Type from the list displayed and select Upload to upload and attach the document to the action.

Once the document is uploaded it can be viewed or deleted by clicking the appropriate icon displayed next to the file.

![Attach Document]

To upload another document, select the Attach PDF button and repeat the process.

**ACTION COMMENTS**

Use the Action Comments section to capture any additional information that would be helpful for approvers when reviewing the action. These notes can be modified or appended to by approvers as the action moves through the workflow approval process. Action Comments are required when Type of Payment is Off Cycle or when the Gross Up option is selected.

**SAVE AS DRAFT OR SUBMIT THE ACTION**

Save as Draft, Submit, and Cancel buttons are displayed at the bottom of the form.

1) Save as Draft saves the action and creates a draft action in Aurora. You may then edit and submit the form at a later time.

2) Submit enters the form into Aurora and advances the action to the next workflow stage for approval.

3) Cancel removes the action. Any data entered on the form is lost.
**Action Review Screen**

Once a form is successfully saved or submitted, the Action Review Screen will appear and show the following changes:

1. **Action Number** will populate in the Action Information section at the top of the page.
2. The Estimated Effective Date and Estimate End Date populate with the start and end date of the pay period that the payment is estimated to be paid. The actual payment date is dependent on how long it takes for the action to complete the approval workflow.

**Approval Workflow**

The approval workflow for Additional Pay actions varies based on the employee type. The standard workflow is Submitted > Department Approval > Back Office > Back Office Final > Awaiting PS Submission > Complete. Depending on your permissions, your action may either be in the Department Approval or Back Office stage after submission.

Note that for Additional Pay actions, Department Approval is done by the Processing Department entered on the action rather than the home department for the appointment. A user must be set up with the Additional Pay Approver role in order to approve Additional Pay actions at the Department Approval level.

Additional Pay actions using the LRB earnings code go through a Procurement Review workflow stage so that the procurement team can review these requests and ensure they are processed correctly.