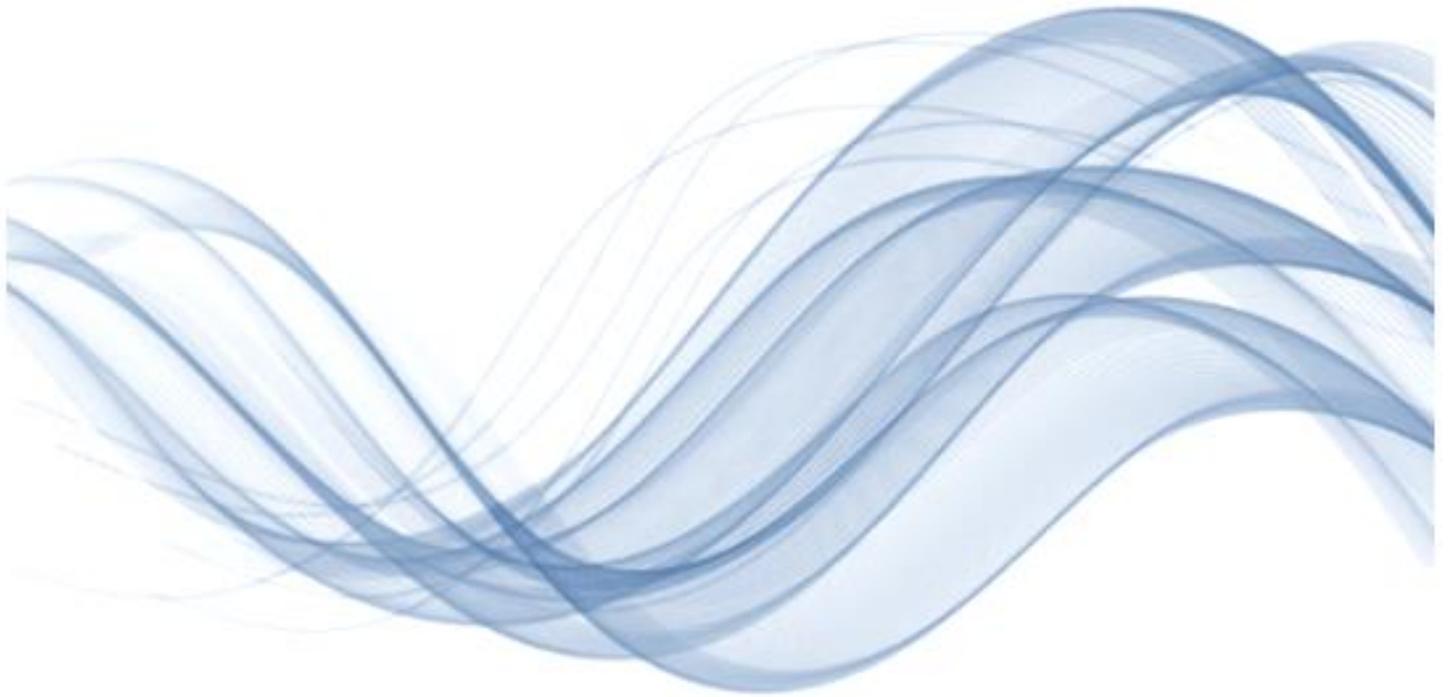


HSF ELECTRONIC SUPPLEMENTAL PAY REQUEST GUIDE



HSF Electronic Supplemental Pay Request Guide

Table of Contents

INTRODUCTION1

SINGLE ENTRY PROCESS - HSF Pay Request Input Screen (ZP20) Using Infor/Lawson2

Email Notifications Sent to the Requestor6

Report Options for Requestors (ZP600)7

PAY REQUEST APPROVERS.....10

Email Notification sent to Approver(s) Requiring Action10

Report Options for Approvers (ZP601)11

OUTLOOK CUSTOM FOLDER AND RULES SET UP (Optional for Approvers or Requestors)14

Introduction

There are two (2) methods to submit HSF Supplemental Pay Requests electronically, Single Entry and Multiple Entry/Upload. In the following, we will discuss the Single Entry method. Once submitted, the Pay Request will route electronically to the Approver(s) set up for your department, then to Physician Comp or HSF Payroll Services for approval and then on to HSF Payroll Services for processing. This process will be more efficient and will shorten the lead-time necessary for submission before each payroll cycle.

Please note: All Monthly/Salaried employee Pay Requests will be paid on the next Monthly pay date and all Biweekly/Hourly employee Pay Requests will be paid on the next Biweekly pay date (subject to the Request completing all Departmental Approval Levels by the corresponding published deadline.) Pay Requests that require an Exception to this Policy will require submission of a paper Exception Request Form. **Do not** submit the Pay Request electronically and then request an exception as this could result in a duplicate payment or no payment processed at all. (See separate Exception Request Form instructions for additional information)

SINGLE ENTRY PROCESS

HSF Pay Request Input Screen (ZP20) Using Infor/Lawson

If you are submitting only a few Pay Requests at time (less than ten), the custom screen developed within Infor/Lawson will be the best method for submission. This is the **ZP20** screen seen below:

Bookmarks ▾

Supplemental Pay (ZP20.1)

Special Actions ▾ Add ▾

Company

Employee

Pay Code

Amount

Enter Acct Unit ONLY IF you wish to OVERRIDE normal Acct Units

Acct Unit

Comment Line 1

Comment Line 2

1. The **Company** field always defaults to “1”, so no need to enter anything into this field.
2. The **Employee** field can be entered if you already know their HSF 5 digit employee number or it can be searched for by clicking the magnifying glass within that field line (see above). This will provide you a listing of all active HSF employees:

Once the pop up screen appears (shown below), click the magnifying glass to search for the employee by name.

EMPLOYEE	Full Name	Process Level	Department	Salary Class
40005	TEST, TEST L	ADM	PRC	Hourly

Search

Perform

Select "Find" to display the first occurrence of the search criteria or "Filter" to display all occurrences of the search criteria.

Conjunction	Search Field	Comparator	Value	Operations
	* Full Name	=	<input type="text"/>	<input checked="" type="checkbox"/> Case sensitive

UNCHECK the “Case sensitive” box
Full Name is the default Search Field. Type the last name into the **Value** box, and then click the **Filter** button.

Using the **Process Level**, **Department** and **Salary Class** information included to the right of each name to help ensure the correct employee is chosen, double click on the employee for whom the Request is to be processed. This will return you to the ZP20 Entry Screen.

EMPLOYEE	Full Name	Process Level	Department	Salary Class
43967	SMITH, JOSEPH K.	RAD	ADD	Salaried
44039	SMITH, JOHN A.	PAT	LMD	Salaried

- The **Pay Code** is chosen from a drop-down listing found by clicking the arrow within that field. While Infor/Lawson only needs the Pay Code number to process the Request, the Pay Description is also included to make choosing the Pay Code easier. These descriptions are in alphabetical order.

Supplemental Pay (ZP20.1)

Special Actions Add

Company

Employee SMITH, JOHN A.

Pay Code

Amount

Enter Acct Unit ONLY IF you wish to O

Acct Unit

Comment Line 1

Comment Line 2

- 415 - ADD COMP-CONTRACT AGREEMENT
- 448 - ADDITIONAL COVERAGE-PHYSICIAN
- 414 - ADDITIONAL SERVICES PERFORMED
- 423 - ANNUAL INCENTIVE
- 418 - AOC ADDITIONAL COMPENSATION
- 411 - APPLICANT REFERRAL
- 437 - AUTO MILEAGE (NON CASH)

- Type the **Amount** of the Request including cents if necessary. **Do not include commas.**

Supplemental Pay (ZP20.1)

Special Actions Add

Company

Employee SMITH, JOHN A.

Pay Code ADDITIONAL SERVICES PERFORMED

Amount

Enter Acct Unit ONLY IF you wish to OVERRIDE normal Acct Units

Acct Unit

Comment Line 1

Comment Line 2

- As noted on the screen, enter an Accounting Unit override within the **Acct Unit** field **ONLY** if the Pay Request needs to be charged to a different Accounting Unit than the home Accounting Unit for the employee. *Most HSF Supplemental Pay Requests **will not** require an Accounting Unit override.* This field will only accept **active** HSF Accounting Units.

If you wish to Search for the appropriate Accounting Unit, click on the magnifying glass in the **Acct Unit** field.

Acct Unit 



This window will open. Click on the magnifying glass icon.

Close  Find Next Reset 

Posting Accounting Units

Select	Accounting Unit	Description
	101010	Cardiothoracic Div FF Dept OH
	101011	CV Program Development Cost Ct
	101020	Anes Children's CV Svcs

Choose how you wish to search from the drop-down menu under **Search Field**, enter the information you wish to search on in the **Value Field** and click on **Filter**.

Search X

Perform

Select "Find" to display the first occurrence of the search criteria or "Filter" to display all occurrences of the search criteria.

Conjunction	Search Field	Comparator	Value	Operations
	Description	=	<input type="text"/>	

- 6. Any comments for the Pay Request may be entered on the **Comment Line 1** or **Comment Line 2** lines (shown below). This is detail about the Request that would help the Approvers when reviewing.

Enter Acct Unit ONLY IF you wish to OVERRIDE normal Acct Units

Acct Unit 

 Comment Line 1

Comment Line 2

Please Note: HSF Payroll Services will not be able to see these comments during processing, therefore, **DO NOT** use this area to request an EXCEPTION. (See separate Exception Request Form instructions for additional information)

7. Once all the information is entered, click the **Add** button at the top of the screen (shown below).

The screenshot shows the 'Supplemental Pay (ZP20.1)' form. At the top, there is a toolbar with 'Special Actions', a plus icon, an 'Add' button (circled in red), and a printer icon. Below the toolbar, the form contains the following fields and values:

Company	0001	
Employee	44039	SMITH, JOHN A.
Pay Code	414	ADDITIONAL SERVICES PERFORMED
Amount		1234.56

8. A message will appear at the bottom of the **ZP20** screen to indicate the Request was **added** and the fields from the previous Request will empty so the next entry can be made.

The screenshot shows the 'Supplemental Pay (ZP20.1)' form after the 'Add' button has been clicked. The 'Add' button is now highlighted in blue. The form fields are empty, except for the 'Company' field which contains '1'. Below the form, there is a message box at the bottom circled in red:

[09:36:52 - ZP20.1] ⓘ Suppl Pay Request Added for SMITH, JOHN A.

Repeat until all Pay Requests are entered.

Email Notifications Sent to the Requestor

1. Each successful submission will generate an email *per request* to the Requestor to let them know that the Request has been submitted for review and approval:

Wed 6/28/2017 11:04 AM

 **uaahsfpayrollservices**
SUBMITTED: HSF Supplemental Pay Request - JOHN SMITH

To:

The HSF supplemental pay request for HSF Employee #44039 – JOHN SMITH has been submitted. Below you will find the detail of this submission:

Payment Type: **ADDITIONAL SERVICES PERFORMED**
Amount of Payment: **\$1,234.56**
Home Accounting Unit: **111050**
Accounting Unit Override (if any):
Co-Dept-Div-Section: **1-PAT-LMD-LABM**

Any comments concerning this pay request can be found below:

Any comments such as time frame pay request covers or any Other info helpful to the approvers would go here.

If this request requires documentation or backup (i.e. physician incentive requests), please forward to uaahsfpayrollservices@uabmc.edu

Please Note: If your Request requires documentation or backup, you must forward a copy of the **SUBMITTED** email to uaahsfpayrollservices@uabmc.edu along with the necessary attached documentation.

2. Once a Request has gone through all Departmental Approval levels and Physician Comp or HSF Payroll Services Approval and has been sent to HSF Payroll Services to process, a Final Email Notification will be sent to the Requestor to let them know the approval process has been completed:

From: uaahsfpayrollservices

To:

Cc:

Subject: APPROVED: HSF Supplemental Pay Request - JOHN SMITH

The request for HSF Employee #44039 - JOHN SMITH in the amount of \$1,234.56 for **ADDITIONAL SERVICES PERFORMED** has gone through all approvals and is ready for payroll processing.

3. There could also be occasion when an Approver has rejected a Request. In this case, the Requestor will receive an email similar to the following indicating the Approver who rejected the Request.

From: uaahsfpayrollservices

To:

Cc:

Subject: REJECTED: HSF Supplemental Pay Request - JOHN SMITH

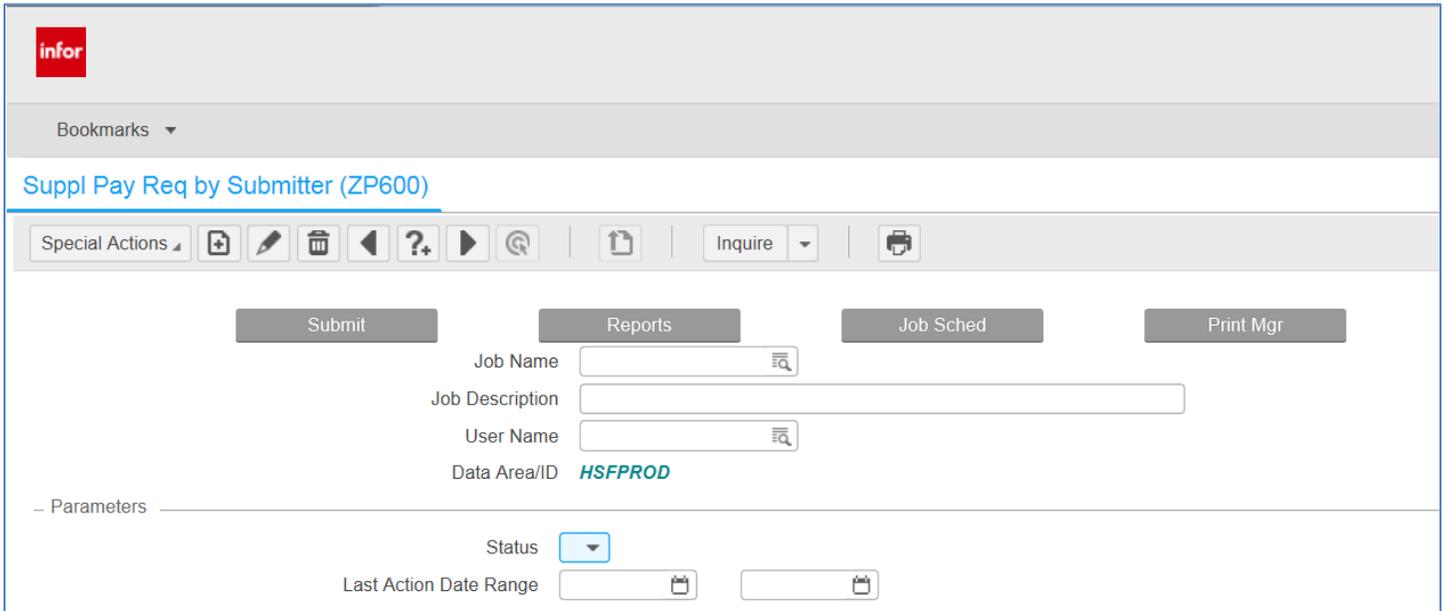
The HSF Supplemental Pay request for **HSF Employee #44039 - JOHN SMITH** in the amount of \$1,234.56 for **ADDITIONAL SERVICES PERFORMED** has been rejected. Further information can be found below:

*User Rejecting the Pay Request: **gpDavis***

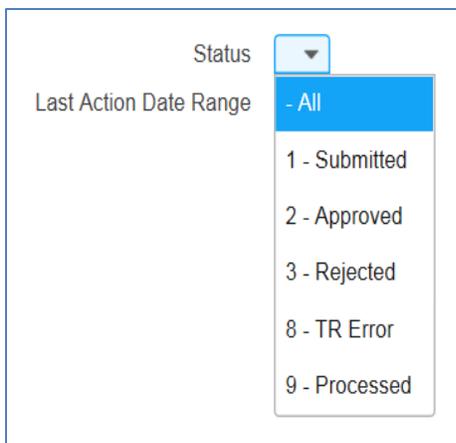
You should follow up with the person rejecting the payment regarding why it was rejected. Once any issue is resolved, you will need to submit a **new** Pay Request for this payment.

Report Options for Requestors (ZP600)

Requestors will use the Infor/Lawson report **ZP600**. Requestors will only be able to view the status of Pay Requests they personally submitted.



1. **Job Name** – Use the SEARCH  icon to search for prior versions of the report. If running for the first time, enter a Job Name you can easily identify. 10 character maximum. **All characters must be consecutive NO SPACES.**
2. **Job Description** – This field can be left blank or populated with specific information describing the report created.
3. **User Name** – Will default to the user currently logged in.
4. **Status** – Choose the Status of Pay Requests you wish to see. Leave this field BLANK to see ALL.



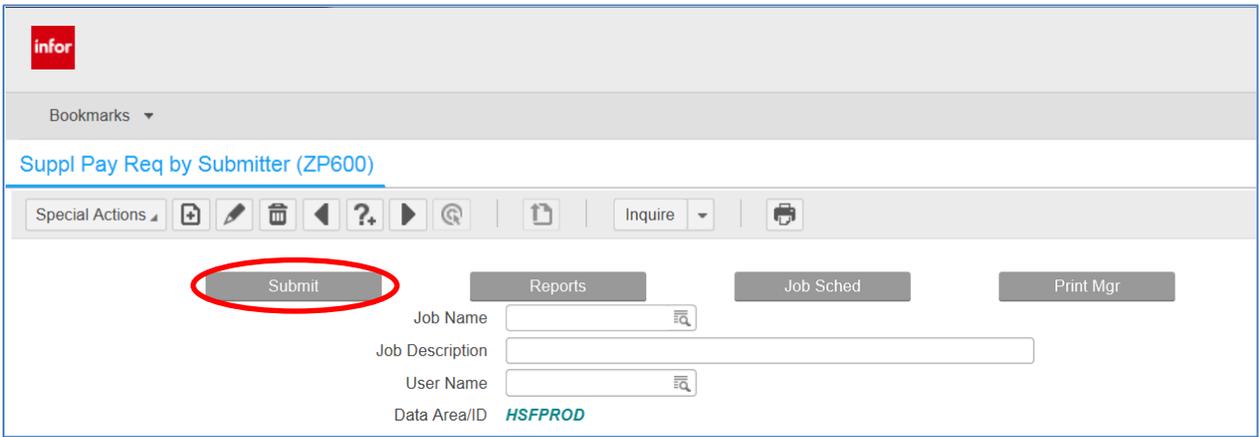
This represents the pay requests' LAST status:

- Submitted:** Only shows submitted requests with no approvals
- Approved:** Only shows requests that were submitted **and** have been through all levels of approval
- Rejected:** Only shows requests that were submitted and then rejected by an approver
- TR Error:** This status is not applicable to requestors or approvers
- Processed:** Only shows requests that have been picked up for processing by Payroll; once the payment has been processed a Check Date will show on the report
- ALL:** Shows all of the above statuses

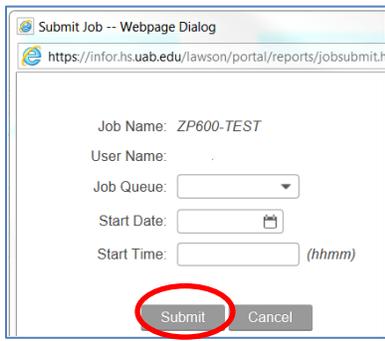
5. **Last Action Date Range** – Enter the **From** and **To** dates of the last action you wish to see.

6. Click on the **ADD**  icon.

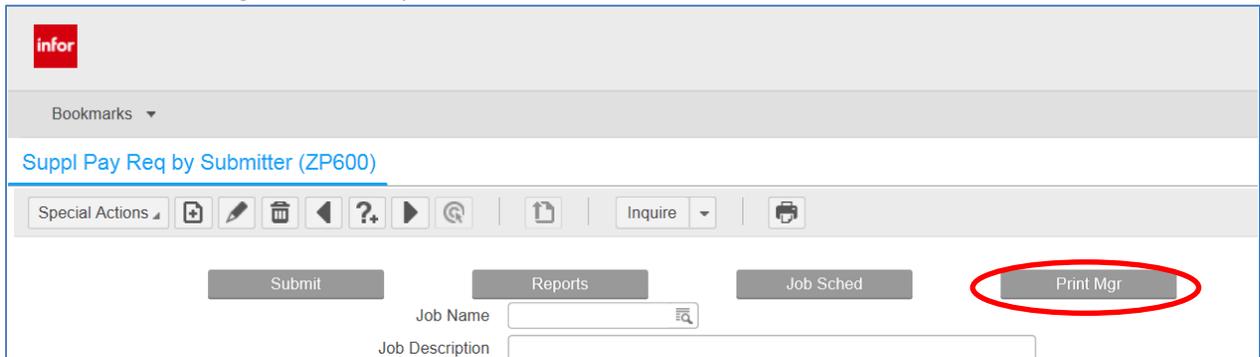
7. Click on **Submit**



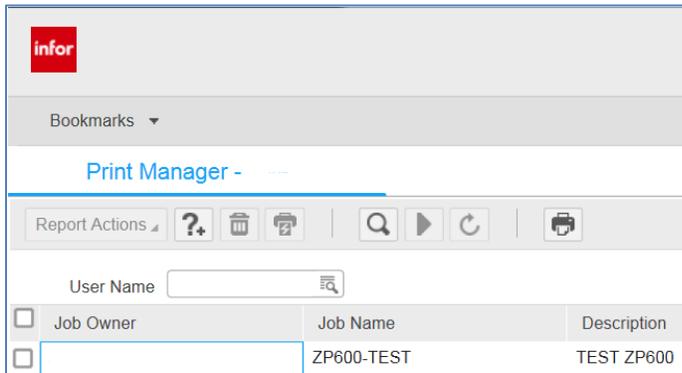
8. Click on **Submit** again in the Dialog Box



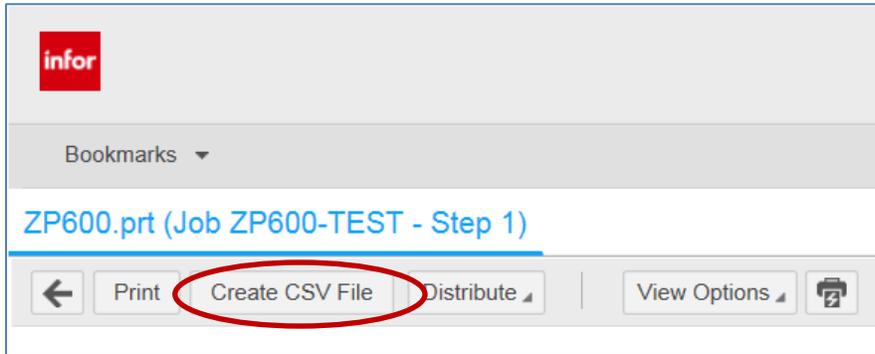
9. Click on **Print Manager** to view report created.



10. Double-Click on the Report you wish to view. The PDF version of the report will open in a separate window.



11. If you prefer a CSV file to a PDF, return to the Infor/Lawson screen shown below and click on **Create CSV File**.



Both versions of the report are shown below:

Suppl Pay Req by Submitter											
Employee	Pay Cd	Employee Name	Wage Amount	Act Date	AU Type	Act Unit	Dpt	Div	Accounting Unit Desc	Status	Chk Date
User	Pay Code Description	Task Name			Time	Action Taken					
4###1 423	YANG, CRISTINA ANNUAL INCENTIVE Annual Incentive 2017		2,500.00		SALARIED-MONTHLY OVERRIDE AU	101900	ANT	ADM	Administration FF Dept OH	APPROVED	
requestor1	Requestor			7/7/2017	7:56	Submitted					
approver1	Approver<\$2500			7/7/2017	8:28	Approve					
gpdavis	MDCompApprover			7/7/2017	3:45	Approve					
4###2 414	WEBBER, ADELE ADDITIONAL SERVICES PERFORMED Annual Incentive 2017		4,250.00		HOURLY-BIWEEKLY OVERRIDE AU	101900	ANT	ADM	Administration FF Dept OH	REJECTED	
requestor1	Requestor			7/7/2017	8:30	Submitted					
approver1	Approver<\$2500			7/7/2017	8:35	Reject					
4###3 414	TORRES, CALLIE ADDITIONAL SERVICES PERFORMED Coverage at Mercy Grace		3,300.00		SALARIED-MONTHLY OVERRIDE AU	101900	ANT	ADM	Administration FF Dept OH	REJECTED	
requestor1	Requestor			7/7/2017	8:30	Submitted					
approver1	Approver<\$2500			7/7/2017	8:35	Reject					
4###4 421	GREY, MERIDITH QUARTERLY INCENTIVE Q3 Quality Incentive		12,000.00		SALARIED-MONTHLY HOME ACCT	4###17	ANT	TPC		PROCESSED	6/30/2017
requestor1	Requestor			6/14/2017	8:30	Submitted					
approver2	Unlimited Approver			6/15/2017	12:22	Approved					
gpdavis	MDCompApprover			6/19/2017	10:41	Approve					

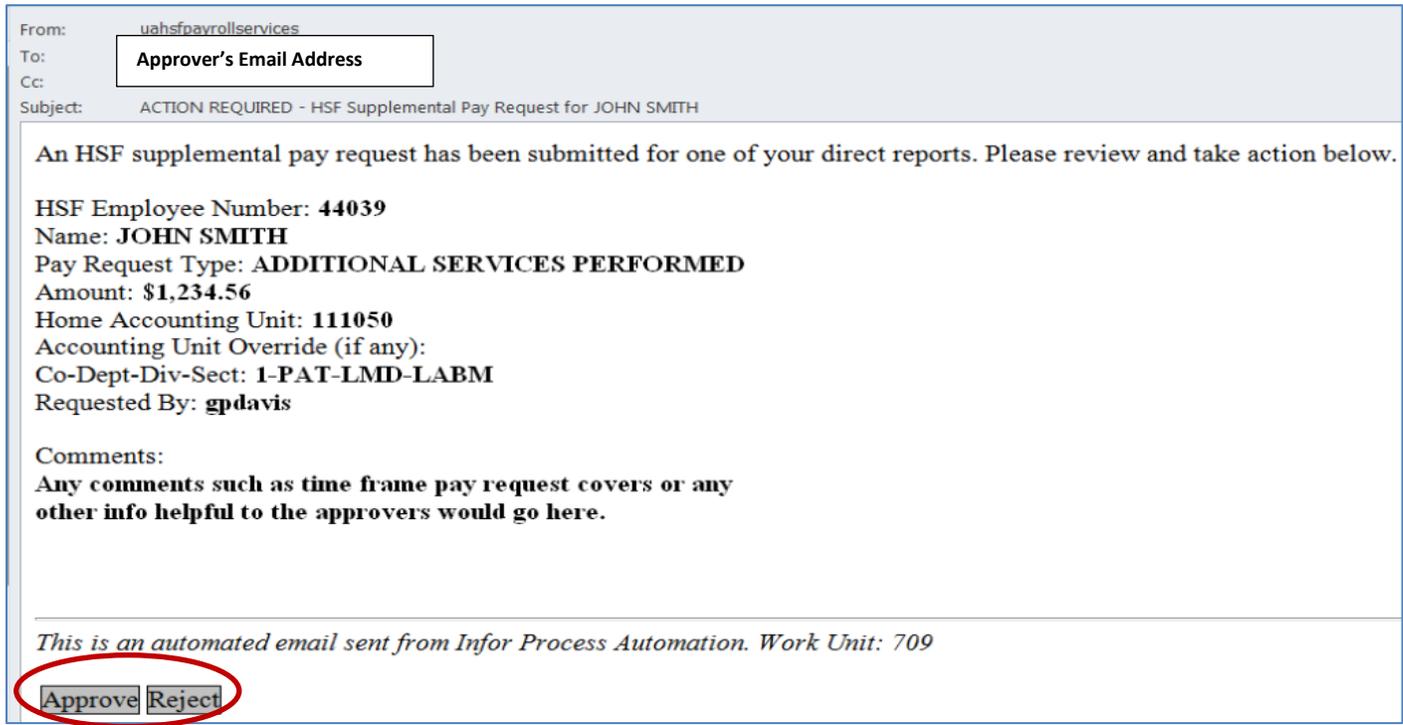
By using the CSV version of the report, you can sort/filter the results as needed

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1	EMPLOYEE	FULL-NAM	SALARY-CL	GL-DEPT	GL-DIV	PAY-CODE	PCD-DESC	WAGE-AM	ACCT-UNI	ACCT-UNI	ACCT-UNI	STATUS-DI	CHECK-DAT	COMMEN	COMMEN	ZS2-APPRC	ZS2-TASK-I	ZS2-ACTIO	ZS2-ACTIO	ZS2-ACT
2	4###1	YANG, CRI	SALARIED-ANT	ADM	423	ANNUAL II	2500	OVERRIDE	101900	Administra	APPROVED			Annual Inc flow. This	gpdavis	MDCompA	#####	16:31	APPROV	
3	4###2	WEBBER, A	HOURLY-BANT	ADM	414	ADDITION	4250	OVERRIDE	101900	Administra	REJECTED			Annual Inc Do NOT pe	approver1	Approver<	#####	15:25	REJECTE	
4	4###3	TORRES, C	SALARIED-ANT	ADM	414	ADDITION	3300	OVERRIDE	101900	Administra	REJECTED			Coverage : Do NOT pe	approver1	Approver<	#####	15:26	REJECTE	
5	4###4	GREY, MEF	SALARIED-ANT	TPC	421	QUARTER	12000	HOME AU	4###47		PROCESSE	6/30/2014		Q3 Quality Do NOT pe	gpdavis	MDCompA	#####	15:26	PROCES	
6																				

PAY REQUEST APPROVERS

Email Notification sent to Approver(s) Requiring Action

Each HSF Supplemental Pay Request will need to have its own approval. This means an email per Request will be sent to the Approver(s) set up for that department. Each Approver will receive an email similar to the following:



The screenshot shows an email interface with the following details:

- From:** uahsfpayrollservices
- To:** Approver's Email Address
- Cc:**
- Subject:** ACTION REQUIRED - HSF Supplemental Pay Request for JOHN SMITH

The main body of the email contains the following information:

An HSF supplemental pay request has been submitted for one of your direct reports. Please review and take action below.

HSF Employee Number: **44039**
Name: **JOHN SMITH**
Pay Request Type: **ADDITIONAL SERVICES PERFORMED**
Amount: **\$1,234.56**
Home Accounting Unit: **111050**
Accounting Unit Override (if any):
Co-Dept-Div-Sect: **1-PAT-LMD-LABM**
Requested By: **gpdavis**

Comments:
Any comments such as time frame pay request covers or any other info helpful to the approvers would go here.

At the bottom of the email, there is a red circle around two buttons: **Approve** and **Reject**.

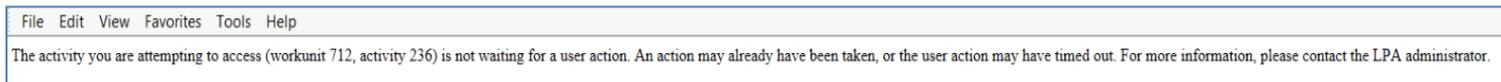
This is an automated email sent from Infor Process Automation. Work Unit: 709

After reviewing the request, either click on the **Approve** or **Reject** button at the bottom of the email. An internet screen similar to this will appear:

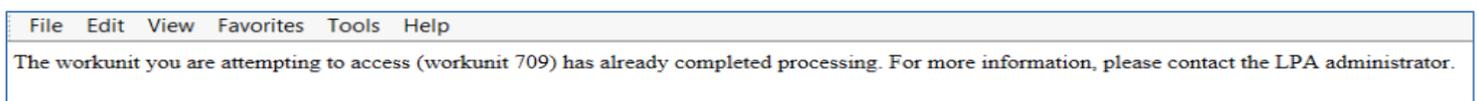


The screenshot shows a window with a menu bar (File, Edit, View, Favorites, Tools, Help) and a message box that reads: **Your action (Approve) has been processed.**

If there are multiple Approvers set up for the department with the same approval dollar limit, each will receive the pay request but only one will need to approve it. One departmental Approver may not know if the other has already taken action on a Request. This is not an issue because Process Flow will know an action has already been taken and a WARNING MESSAGE similar to one of these shown below may be received if you approve a request that has already been approved by another Approver in your department:



The screenshot shows a window with a menu bar (File, Edit, View, Favorites, Tools, Help) and a message box that reads: **The activity you are attempting to access (workunit 712, activity 236) is not waiting for a user action. An action may already have been taken, or the user action may have timed out. For more information, please contact the LPA administrator.**



The screenshot shows a window with a menu bar (File, Edit, View, Favorites, Tools, Help) and a message box that reads: **The workunit you are attempting to access (workunit 709) has already completed processing. For more information, please contact the LPA administrator.**

Once action (Approve or Reject) has been taken by all departmental Approvers, the request moves to the following:

- If the payee is a non-physician, requests are sent to the Manager of Payroll Services for Final Approval.
- If the payee is a Physician, requests are sent to the HSF Physician Compensation Representative for Final Approval.
- Any Requests exceeding \$100,000 will automatically be sent to the HSF President for additional approval.

Once all approval actions have been taken, the request is sent to HSF Payroll Services for processing.

Report Options for Approvers (ZP601)

APPROVERS will use the Infor/Lawson report **ZP601**. Approvers are able to view the status of Pay Requests for anyone within their department.

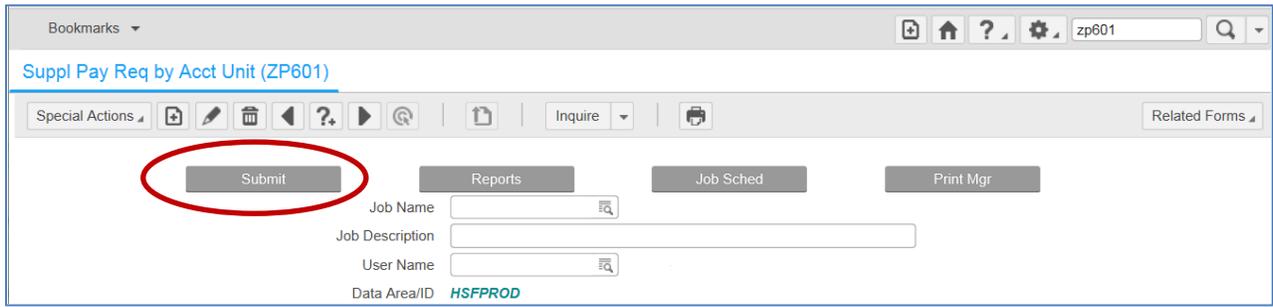
1. **Job Name** – Use the SEARCH  icon to search for prior versions of the report. If running for the first time, enter a Job Name you can easily identify. **All characters must be consecutive NO SPACES.**
2. **Job Description** – This field can be left blank or populated with specific information describing the report created.
3. **User Name** – will default to the user currently logged in.
4. **Company** – will default to Company 1 (UAHSF)
5. **Accounting Unit** - Select the Summary or Posting Accounting Unit to be included in the report (required field)
6. **Status** – Choose the Status of Pay Requests you wish to see. Leave this field BLANK to see ALL.

This represents the pay requests' LAST status:

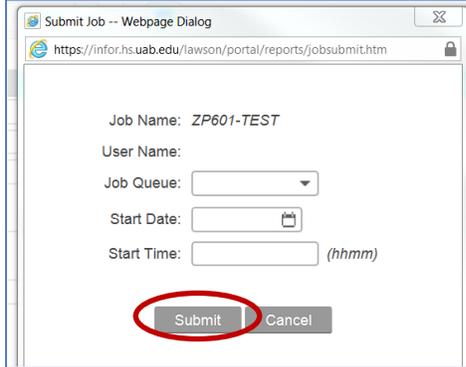
- Submitted:** Only shows submitted requests with no approvals
- Approved:** Only shows requests that were submitted **and** have been through all levels of approval
- Rejected:** Only shows requests that were submitted and then rejected by an approver
- TR Error:** This status is not applicable to requestors or approvers
- Processed:** Only shows requests that have been paid
- All:** Shows all of the above statuses

7. **Last Action Date Range** – Enter the **From** and **To** dates of the last action you wish to see.
8. Click on the **ADD**  icon.

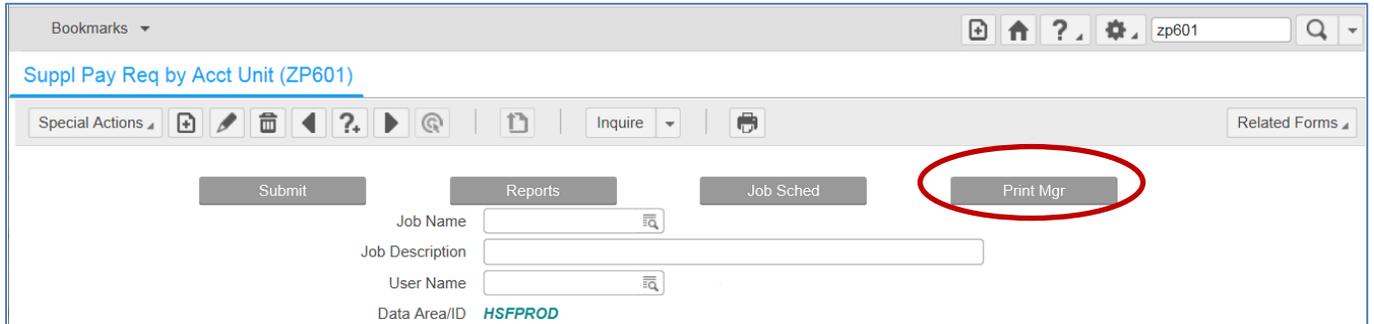
9. Click on **Submit**



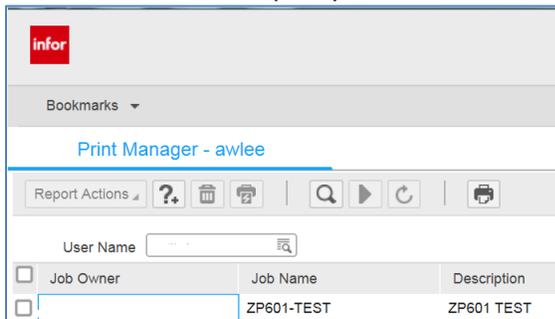
10. Click on **Submit** again in the Dialog Box



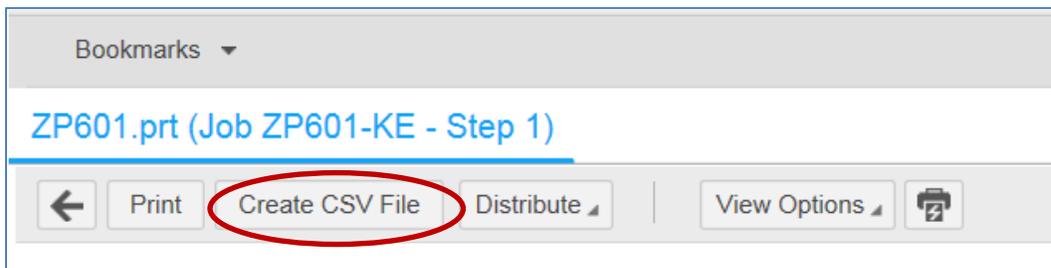
11. Click on **Print Manager** to view report created.



12. Double-Click on the Report you wish to view.



13. If you prefer a CSV file to a PDF, click on **Create CSV File**. Both versions of the report are shown below:



Both versions of the report are shown below:

Suppl Pay Req by Submitter										
Employee Pay Cd	Employee Name Pay Code Description		Wage Amount	AU Type	Act Unt	Dept	Div	Accounting Unit Desc	Status	Chk Date
User	Task Name		Act Date	Time	Action Taken					
4###1 423	YANG, CRISTINA ANNUAL INCENTIVE Annual Incentive 2017		2,500.00	SALARIED-MONTHLY OVERRIDE AU	101900	ANT	ADM	Administration FF Dept OH	APPROVED	
	requestor1	Requestor	7/7/2017	7:56	Submitted					
	approver1	Approver<\$2500	7/7/2017	8:28	Approve					
	gpdavis	MDCCompApprover	7/7/2017	3:45	Approve					
4###2 414	WEBBER, ADELE ADDITIONAL SERVICES PERFORMED Annual Incentive 2017		4,250.00	HOURLY-BIWEEKLY OVERRIDE AU	101900	ANT	ADM	Administration FF Dept OH	REJECTED	
	requestor1	Requestor	7/7/2017	8:30	Submitted					
	approver1	Approver<\$2500	7/7/2017	8:35	Reject					
4###3 414	TORRES, CALLIE ADDITIONAL SERVICES PERFORMED Coverage at Mercy Grace		3,300.00	SALARIED-MONTHLY OVERRIDE AU	101900	ANT	ADM	Administration FF Dept OH	REJECTED	
	requestor1	Requestor	7/7/2017	8:30	Submitted					
	approver1	Approver<\$2500	7/7/2017	8:35	Reject					

By using the CSV version of the report, you can sort/filter the results as needed.

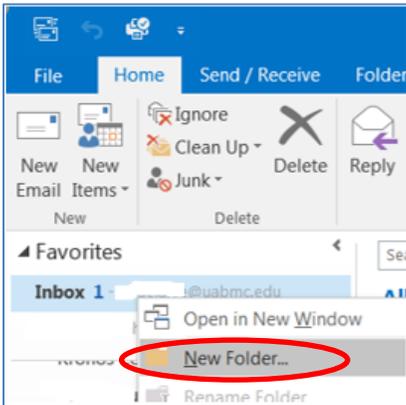
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	
1	EMPLOYEE FULL-NAM	SALARY-CL	GL-DEPT	GL-DIV	PAY-CODE	PCD-DESC	WAGE-AM	ACCT-UNI	ACCT-UNI	ACCT-UNI	STATUS-DI	CHECK-DA	COMMEN	COMMEN	ZS2-APPRC	ZS2-TASK-I	ZS2-ACTIO	ZS2-ACTIO	ZS2-ACTION-TA		
2	4###1	YANG, CRI	SALARIED-ANT	ADM	423	ANNUAL II	2500	OVERRIDE	101900	Administra	APPROVED		Annual Inc flow. This	gpdavis	MDCComp	#####	16:31	APPROVED			
3	4###2	WEBBER, J	HOURLY-B-ANT	ADM	414	ADDITION	4250	OVERRIDE	101900	Administra	REJECTED		Annual Inc Do NOT pe	approver1	Approver<	#####	15:25	REJECTED			
4	4###3	TORRES, C	SALARIED-ANT	ADM	414	ADDITION	3300	OVERRIDE	101900	Administra	REJECTED		Coverage i Do NOT pe	approver1	Approver<	#####	15:26	REJECTED			
5	4###4	GREY, MEF	SALARIED-ANT	TPC	421	QUARTER	12000	HOME AU	4###47		PROCESSE	#####	Q3 Quality Do NOT pe	gpdavis	MDCComp	#####	15:26	PROCESSED			
6																					

OUTLOOK CUSTOM FOLDER AND RULES SET UP

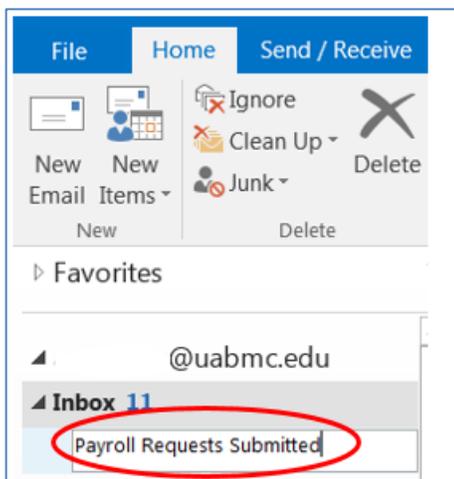
(Optional for Approvers or Requestors)

To prevent all automated emails generated by the HSF Pay Request process from being comingled with other daily emails, we recommend you create a separate **Outlook Folder** and a **Rule** to automatically move and store the emails.

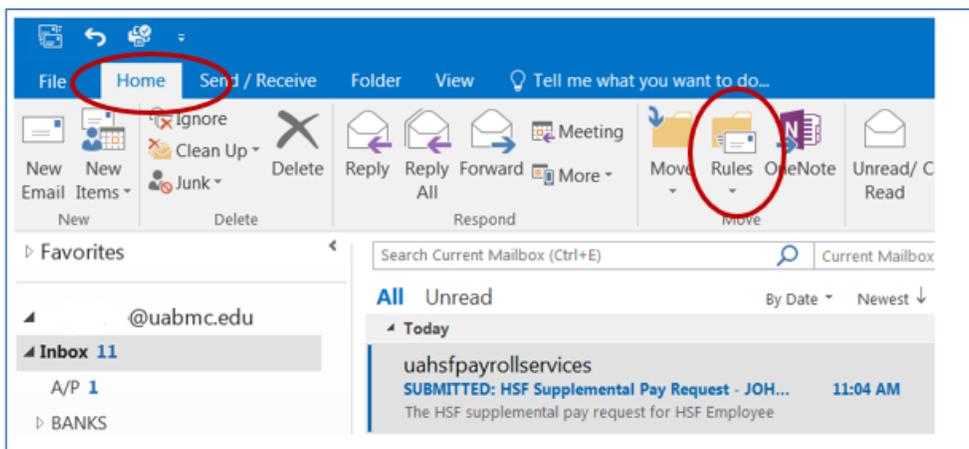
1. Open Outlook. Right-click on the INBOX where you wish to add a folder and chose **NEW FOLDER**



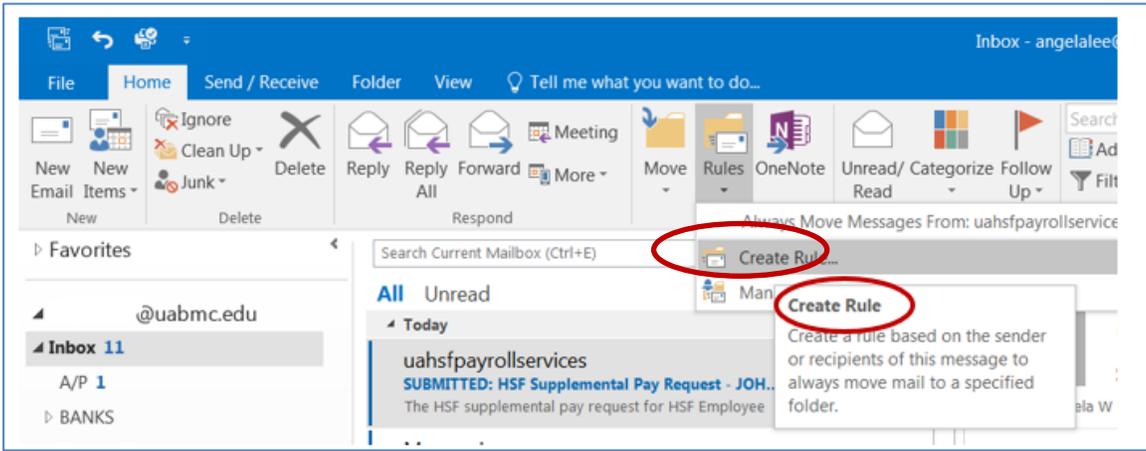
2. Name your new folder whatever you choose. In this example, we have named the folder 'Payroll Requests Submitted'



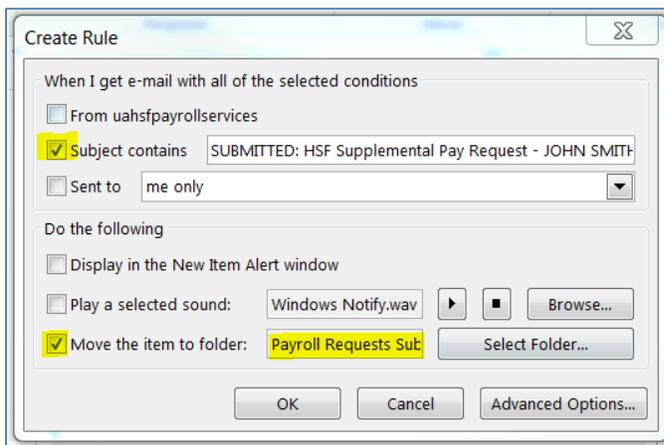
3. Once you have received an email you wish to store in your newly created folder, you will create a **Rule** to automatically move the automated emails to this new folder. While the newly received email is open; click on the **HOME** tab and click on **Rules**:



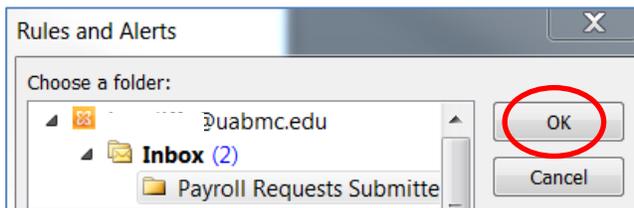
4. Choose **Create Rule**



5. This will open the **Create Rules** box. Check the **'Subject Contains'** box (see below). In this example, we want to store any email with the phrase *'SUBMITTED: HSF Supplemental Pay Request'* in this folder so we will remove the employee name that appears after the word *'Request'* so that ALL emails with this Subject Line will be included in the Rule. Then check the **'Move the item to Folder'** box.



6. Choose the newly created Folder from the pop up window that will display (see below) and click **OK**.



7. Checking the box marked **"Run this rule now...."** will immediately move all items in your Inbox that meet these criteria to the selected folder when you click on **OK**. You can repeat the process for any Subject Line you choose.

