Overview
Activity Pay replaces Special Service Payments in the new Workday system and will be used in place of SSPs as of January 2015. Additionally, Activity Pay will be used to pay adjunct instructors and faculty summer salary. This document is designed to supplement the official Activity Pay Form, which can be downloaded from the Finance Division’s Forms webpage. While example forms are incorporated in this document, you should always download the current form directly from the Finance Division.

Format
This document will be formatted as a field-by-field review of the sheet, with examples provided as is appropriate. A set of four examples of common Activity Pay scenarios appears at the end along with a sample of a blank Activity Pay Form (for reference purposes only).

Requestor Information
This section of the form is designed to capture information on the person preparing the Activity Pay for submission. The fields are fairly self-explanatory:

- Name: Your full name as it appears in Workday.
- Phone: Campus phone number or extension.
- Email: Preferred CMU email address.

Employee Details
This section of the form pertains to the person who will receive the Activity Pay. Much of the information in this section can be obtained by searching for the employee in Workday.

- Employee Name: The employee’s full name as it appears in Workday.
- Supervisory Org: The employee’s Workday Supervisory Organization. To obtain this information, please search for the person in Workday. When their record appears, click on “Job Details”. This section will show the “Organization” to which that person is assigned. You may copy and paste that information into the Activity Pay Form, but please omit the “Carnegie Mellon University >>” portion of the text as well as the name of the manager in parentheses.
- Position: This is the employee’s official position according to the Workday. It appears below the Organization listing in the Job Details section of the employee’s Workday record.
- Andrew ID: This is the “Employee ID” that appears in the Job Details section of the employee’s Workday record.
• **Pay Frequency:** You will need to ask the employee what his or her pay frequency is. In the case of faculty and adjunct instructors, this should be “monthly”. Staff members may be either “monthly” or “bi-weekly”. Graduate students on a stipend are paid bi-monthly, but that does not currently appear on the form. In the rare case that a graduate student is being paid via Activity Pay, you should manually enter “bi-monthly” in this field.

• **Academic Period:** Please select Fall, Spring, or Summer. If the activity or pay runs across two semesters, please select the latest semester. For example, if an executive education program runs from December 1 – January 31, you would select “Spring” as the Academic Period.

**Payment Details**
This section of the form contains the bulk of the information needed to process the Activity Pay and is, in many ways, very similar to the old SSP form.

• **Reason:** You will select either “Payment for Services” or “Payment not for Services” depending on the nature of the payment. In most cases in ISR, you will select “Payment for Services”. Examples of items that would be “Payment not for Services” are prizes/awards and payment for the use of educational materials.

• **SPA Approval Needed:** Per Rhonda Kloss in SPA: if the Activity Pay is being charged to a sponsored award (except for faculty summer salary), you will select “SPA Approval Needed”. In all other other cases, you will select “SPA Approval Not Needed”. *The vast majority of Activity Pays processed in ISR will choose “SPA Approval Not Needed”.* If you have questions about this issue, please contact the business office.

• **Activity Start and End Dates:** Please enter the dates that the activity in question has or will occur. For payments for awards, educational material use, and other non-services, you may enter the date that the award was made or when the materials were used or licensed. For payments for services, you will enter the start and end dates of the activity (i.e., the start and end date of an executive education program, the start and end dates of a class being taught by an adjunct, etc.).

• **Activity:** Please choose the appropriate category from the pick-list. ISR will most frequently use the following categories:
  o ADJ INST – Adjunct Instruction
  o AWARD – Award
  o ED MATERIALS – Compensation for Use of Educational Materials
  o FAC ADDL – Faculty Additional Assignment (often used for mentoring, for example)
  o FAC EXEC ED – Faculty Executive Education
  o FAC SUMMER SAL – Faculty Summer Salary
  o STAFF ADDL – Staff Additional Assignment (often used for mentoring, for example)
  o STAFF EXEC ED – Staff Executive Education

• **Payment Start and End Dates:** Payments must generally be made coincident with the dates of the activity. The Payment Start Date must happen on or after the Activity Start Date and the Payment End Date must happen on or before the Activity End Date. In most cases, you will want to make sure that the payment is made over a single month. For example, if an activity occurs from February 1, 201X, through March 15, 201X, and you want to pay the person in March, you would enter March 1, 201X as the Payment Start Date and March 15, 201X as the Payment End Date. For payments to be made over several months, you would adjust appropriately. Note that the academic year in Workday begins on September 1. In most cases, you will want to select only a single month and make only a single payment. Please call Nick with questions. *You may also choose to leave these fields blank; Nick will review and edit during processing.*
• **Unit/Quantity:** For ISR’s purposes, we will view this as the number of payments you wish to make. In most cases, this will be 1. If you wish to make payments over several months, please enter the appropriate number of payments (keeping in mind that folks paid bi-weekly will receive payments on that frequency).

• **Amount:** This is the amount of EACH PAYMENT to the employee. In most cases, because you will have selected a quantity of 1, this will be the amount to be paid. If you have selected a quantity of more than 1, please be sure that you modify the payment amount accordingly.

• **Justification/Comments:** Please use this portion of the form to enter a detailed description of the nature of the activity pay. You may attach additional sheets if needed (e.g., award documentation). In most cases, this will be the same type of description that was entered on the old SSP forms. Provide as much detail as is possible.

**Charging Instructions**

This section is very similar to the equivalent section on the old SSP form. You will enter charging instructions for the total amount of the activity pay here. ISR Activity Pay will almost always be charged to a GL string; please contact the business office if you believe that you need to charge a GM string/PTA to obtain guidance.

• **GL AMT or %:** In ISR, we will always enter the TOTAL AMOUNT to be paid to the employee in this field.

• **FUNDING:** This is the funding source associated with the GL string. It will usually be 000001.

• **FUNCTION:** This is the funding source associated with the GL string. It will usually be 001 or 003.

• **ACTIVITY:** This is the activity code associated with the GL string. It will be a three digit number that will follow the function code.

• **COST CTR (ORG):** This is the organization associated with the GL string, e.g., 270351, 270361, 270364, etc.

• **BUS UNIT (ENTITY):** This is the entity associated with the GL string. It will usually be 01.

**Requesting Organization Approvers (If Needed)**

If the employee receiving the activity pay works in ISR (i.e., their Supervisory Organization looks something like “Carnegie Mellon University >> SCS – ISR-XXXXXXXXX”, you do not need to complete this section of the form.

If the employee receiving this activity pay works outside of ISR, please enter the following values:

• 1<sup>st</sup> Level Approver: Nick Frollini

• 2<sup>nd</sup> Level Approver: [Leave Blank]

• ALG Member: Walt Scheerer

**Processing**

This form should be completed and sent via email to Nick Frollini. Do NOT send the form to the CMUWorks Service Center. Please send the original, editable PDF file to Nick – do not send a scanned copy of the form as this makes it impossible for him to edit the document.
Example Forms – Scenario 1: Executive Education

Faculty Member Bob Smith is to receive $5,000 for teaching an executive education program in February 2015. He expects to be paid in March 2015. The program is for GL Electronics. Bob is a professor in ISR and charged part of his labor to sponsored projects during February. The expense is to be charged to the following GL string: 000001.001.101.270350.01.

Note that despite the fact that Bob charged labor to sponsored projects in February, SPA approval is noted as “Not Needed” because the activity pay is not being charged to a sponsored award. Note also that because Bob works in ISR, the “Requesting Organization Approvers” section has not been completed.
Example Forms – Scenario 2: Adjunct Instruction

ISR Contingent Employee (the new name for adjuncts without paid appointments) James Bond is teaching a course in ISR during the Spring Semester. He is to be paid a total of $10,000 over the five-month period of January 2015 – May 2015, on a monthly basis. The course is 17-007 “Software for Spies”. Expenses are to be charged to .000001.002.103.270350.01.

Note that the Justification/Comments field indicates that an offer letter will be attached to the Activity Pay Form when it is sent to Nick for processing. This may require coordination with Helen Higgins in the business office.
Example Forms – Scenario 3: Staff Additional Assignment (Non-ISR)

SEI Staff Member Nikola Tesla is mentoring a student team in an ISR academic program during the summer semester on the topic of “Alternating Current-Based Internet Apps”. He is to be paid $3,000 in August for this work. 100% of his salary is charged to sponsored awards. The activity pay is to be charged to .000001.003.200.270350.01.

Note that SPA Approval has been marked as “Not Needed” because the activity pay is not being charged to a sponsored award and information has been entered into the Requesting Organization Approvers section.
Example Forms – Scenario 4: Use of Educational Materials

ISR Faculty Member Jane Doe developed a course called “Software, Services, and More Software” that has been licensed by the department to another university as of April 1, 2015. Her share of the transaction is $4,235 and is to be charged to .000001.001.000.270351.01.
Sample Activity Pay Form
For Reference Purposes Only

Activity Pay Form

Requestor Information

Name: ____________________
Phone: ____________________
E-mail: ____________________

Employee Details

Employee Name: ____________
Supervisory Org: ____________
Position: ____________
Andrew ID: ____________
Pay Frequency: ____________
Academic Period: ____________

Payment Details

Reason: ____________________
SPA Approval Needed: ____________
Activity: ____________
Activity Start Date: ____________________
Activity End Date: ____________________
Payment Start Date: ____________
Payment End Date: ____________
Unit/Quantity: ____________________
Amount: ____________________
Justification/
Comments: 

Charging Instructions

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<th>GLAMT OR %</th>
<th>FUNDING</th>
<th>FUNCTION</th>
<th>ACTIVITY</th>
<th>COST CTR (ORG)</th>
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Requesting Organization Approvers (If Needed)

The employee's primary position's Approvers will review this transaction. If the employee does not hold a Position in your organization, please supply any Approvers from your department that you would like to have review this Activity Pay information before it is paid.

1st Level Approver: ____________________
2nd Level Approver: ____________________
AG6 Member: ____________________

Return completed form to the CMUWorks Service Center

Updated: 1/5/2015