Managers and Compensation can create a Period Activity Pay (Goal Pay) for workers. An approval by the manager’s manager is required.

**Tasks**

- **Before You Begin**
- **Add Job**
- **Change Organization Assignments**
- **Manage Period Activity Pay Assignments**

**Before You Begin**

If the worker has multiple jobs, click the double-arrow icon, to choose the correct job.

Note the **Position (Pxxxxx) number and title**, as you will select this number from a drop-down list in a future step.

The **Effective Date** must be today’s date. For future-dated hires, the effective date should be the date of hire.

The **Activity Dates** you enter should fall within the **Academic Period** you selected. **Specifically, ONE of the dates (either the start of the Activity, or the end of the Activity) MUST fall within the Academic Period selected.** If you enter dates that are completely outside of the period you select, you will not be able to submit the Period Activity Pay.

Review the tip sheet **Dates for Academic Periods** prior to entering your period activity pay.

Review the tip sheet for **Tip Sheet: Period Activity Pay Type and Descriptions** prior to entering your period activity pay.
1. Go to the worker profile of the worker for whom you would like to add the Period Activity Pay. You can do so by searching for and clicking on their name in the search bar.

2. If the worker has multiple positions, click the double-arrow icon to choose the correct position to add the period activity pay. Note the Pxx number and title, as you will need to select this number from a drop-down list in a future step.

3. Click the Actions button under the name of the worker. Hover over the Compensation tab, then click Manage Period Activity Pay Assignments.

Note: If the person receiving the Period Activity Pay has multiple positions, you must select the correct position for which the person is receiving the pay.
4. Review the auto-filled Effective Date and Employee name to confirm that the Effective Date is today’s date, the current date. For future-dated hires, the Effective Date should be the date of hire.

5. Choose the Position to which the activity applies.

6. Enter the Academic Period to which this activity applies.

   See the Tip Sheet Dates for Academic Periods. And remember, the period you select should encompass at least one (Start or End) of the Activity Dates you’ll be entering.

7. The Period Activity Rate Matrix will auto-fill after selecting an Academic Period.

8. Click OK.
9. Using the prompt icon, select a **Reason**.
   
a. Period Activity > A – Add Activity Pay > New Activity. Would be used when you want to ADD an additional activity pay

10. Then scroll down to the Activity column. Use the prompt icon to select the **Activity**. See the Tip Sheet: Period Activity Pay Type and Descriptions.

11. Do not enter a Task.

12. Do not enter a Comment in the Activity column.

13. In the Activity Dates column, using the calendar icon, select the **Start Date**, and **End Date**. This is the date the work will be or was performed.
   
a. If the work was performed in a pay period that has passed, deselect the checkbox below Use as Payment Date Range.

b. Once the dates are entered a number will default in under the Weeks in Activity Period which is calculated by the system according to the date-range you entered.

c. Ideally the Activity Dates you enter should fall within the Academic Period you selected. **NOTE: ONE of the dates (either Start or End) MUST fall within the Academic Period or you will not be able to submit the task.**
14. In the Units column, the Quantity defaults to ‘1.’ If you are paying for an activity such as ‘Lessons’ alter the quantity to the amount of lessons taught.

15. Enter an Assigned Unit Rate (i.e. amount paid per unit).

16. In the Compensation column, the Total Amount will auto-calculate based on the quantity and rate entered in the previous column.
17. The payments column will default in the dates you entered in the Activity Dates column. If the dates you entered in the Activity Dates column are in a pay period that is retro-active (already paid out) you must enter a current or future Start and End Date in the Payments column or the pay will not pay out.

18. Click the + sign to add additional Period Activity Payments.

19. **Required**: Enter an overall comment in the comment field concerning the payment.
20. **Required**: Upload or drag and drop any back-up documentation along with EVP Approval in the attachment field.

21. Click **Submit**.

Note: An approval is required by the manager’s manager if they did not initiate the process.

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**For Medical Center / UPG Costing Allocation**

If this is for the Medical Center or UPG period activity pay AND the costing will be shared between departments, you can review the [Period Activity Pay - Edit or End](#) job aid.

1. In the compensation section of the period activity pay screen, select the number under Costing Overrides.

2. Complete the following fields:
   a. Default (As of Start Date) – Ensure the correct Organization is listed.
   b. Department – Click on the prompt icon and select Active Department Organizations by Department Hierarchy>All Legacy Departments. Select the appropriate MC or UPG Department.
   c. Accounting String – Click on the prompt icon and select Active Accounting String Organizations by Accounting String Hierarchy>All Legacy Accounting Strings. Select the appropriate MC or UPG Department. Alternately, you may search the last name of the person you are paying.
   d. *Additional Worktags – There is only one option available, Fund>Fund: Placeholder.
   e. Amount – Enter the amount of the Period Activity Pay.
f. Percent – 100%
g. Click Done.

Note: Percent is the next field to enter before Amount, but Workday wants you to enter Amount first before you enter Percent. When you enter the amount first it will default 100 into the percent field.

- You can make changes to the dates, units/amount paid, payment dates, and costing. However, if you are changing the activity, simply end the approved pay and redo the process with the correct activity.

- If amount is being split between departments, you will need to add the accounting string (PTAO). To do that, click on the number under Costing Overrides.

- To add an additional department, click the + sign under Reason and fill out all the details. The costing must add to 100% of the payment or it cannot be submitted.
  
  If there is only one department, this step is not required.

Note: To stop future payments from being paid, amend the “Total Amount” to equal the amount already paid. If you want to pay some of the balance, input that amount plus the amount already paid.