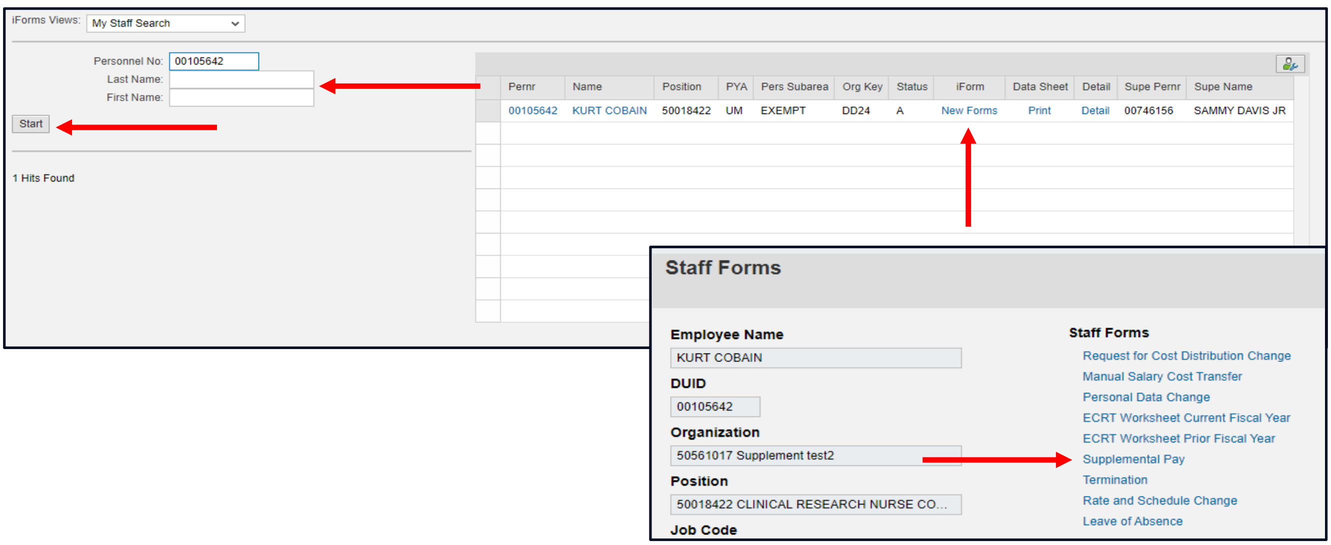
SUPPLEMENT IFORM
ADDING A SUPPLEMENTAL PAYMENT

Overview: *The **Create New Payment** action on the Supplement iForm is used to create a new supplemental payment for a Duke employee. It is used any time a new supplement is established. Keep in mind the following guidance around supplemental payments:*

- *The supplemental payments and the Supplement iForm only apply to exempt (monthly) employees.*
- *Supplemental payments should not be paid in advance of the work being performed. IForm cannot be future dated.*
- *Supplemental payments can be one-time or can be set-up for multiple months.*
- *The Supplement iForm is available from the Staff tab in iForms and on the Grants Management Tab on the Effort and Payroll Tools and Reports page under Employee Data Search.*
- *Multiple supplement iForms can be processed simultaneously. Make sure to coordinate payments as appropriate.*
- *GAP 101.6, Supplemental Payments to Exempt Employees provides guidance on processing supplemental payments.*

Step 1

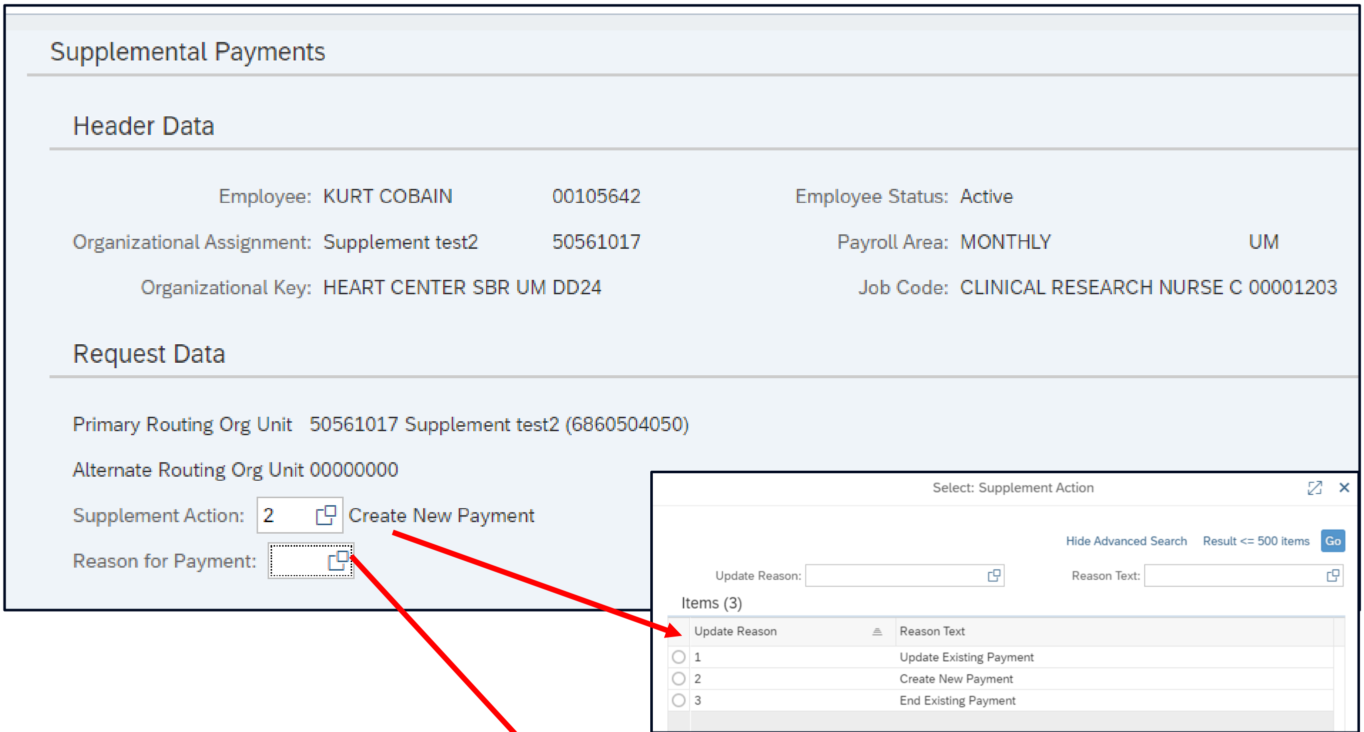
*Enter the **Name** or **DUID** of the employee receiving the supplement and select **Start.** When the employee's information is returned, select **New Forms.** From the **Staff Forms** page, select **Supplemental Pay.***

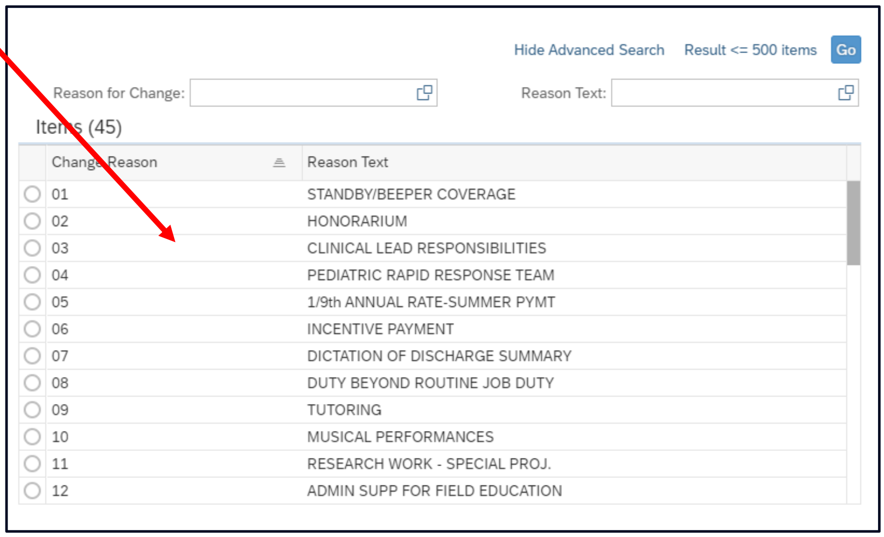


SUPPLEMENT IFORM
ADDING A SUPPLEMENTAL PAYMENT

Step 2

*From the Supplemental Payments page, in the Request Data section of the iForm, use the drop down menus to select the **Supplement Action Create New Payment** and the **Reason for Payment** using the drop-down menus.*





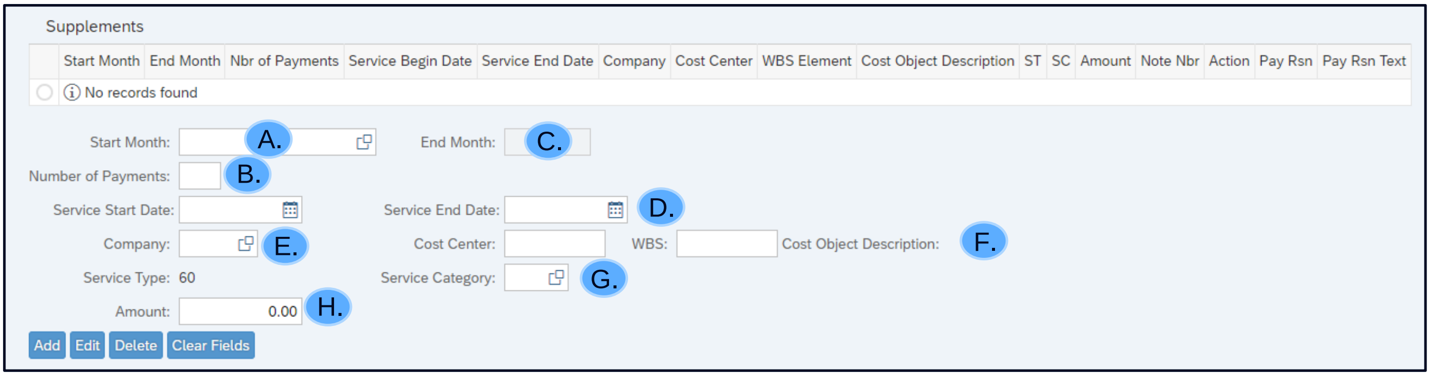
- ***Supplement Action*** *reason "2" creates a new payment.*
- *Select the most appropriate **Reason for Payment** from the available options.*

Please note: Additional information may be required based upon the Reason for Payment.

SUPPLEMENT IFORM
ADDING A SUPPLEMENTAL PAYMENT

Step 3

Enter information about the supplement.



- **A. Start Month:** *Month when supplement begins (recurring) or month when supplement is issued (one-time).*
- **B. Number of Payments:** *Number of months the payment will be issued. Enter "1" for a one-time payment.*
- **C. End Month:** *Last month the payment will be issued. Auto-populates based on the Start Month and the Number of Payments.*
- **D. Service Start/End Date:** *Provides detail on when the activity supporting the payment occurred.*
- **E. Company:** *Company Code of the entity responsible for the funding source.*
- **F. Cost Center/WBS Element/Cost Object Description:** *The Duke cost object to which the supplement will be expensed. Cost object description is the text associated with the cost object number.*
- **G. Service Type/Service Category:** *The Duke general ledger account associated with the payment. The Service Type is always 60. Users will select the Service Category from the drop-down. Drop-down options will vary based upon the position.*

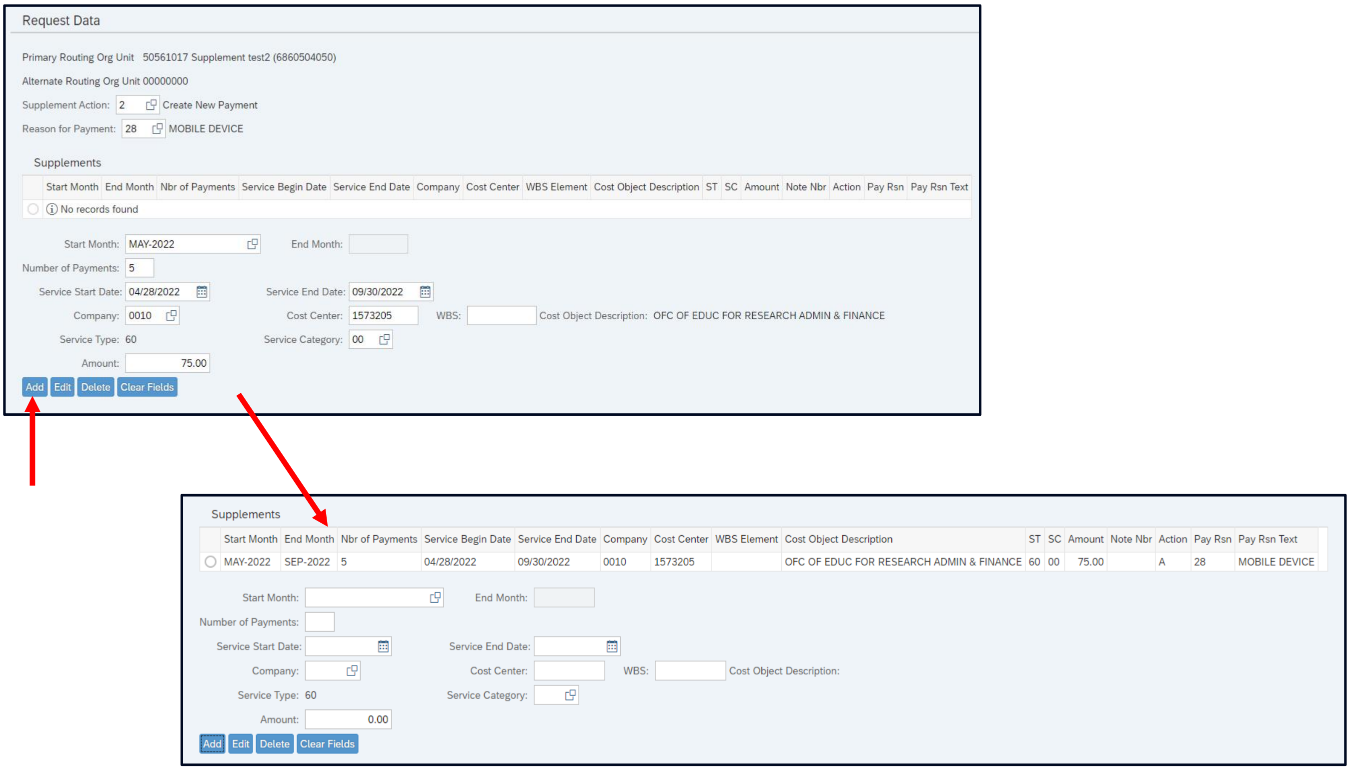
  Please note: Service Category is not required for health system positions.

- **H. Amount:** *Monthly amount of the supplemental payment.*

SUPPLEMENT IFORM
ADDING A SUPPLEMENTAL PAYMENT

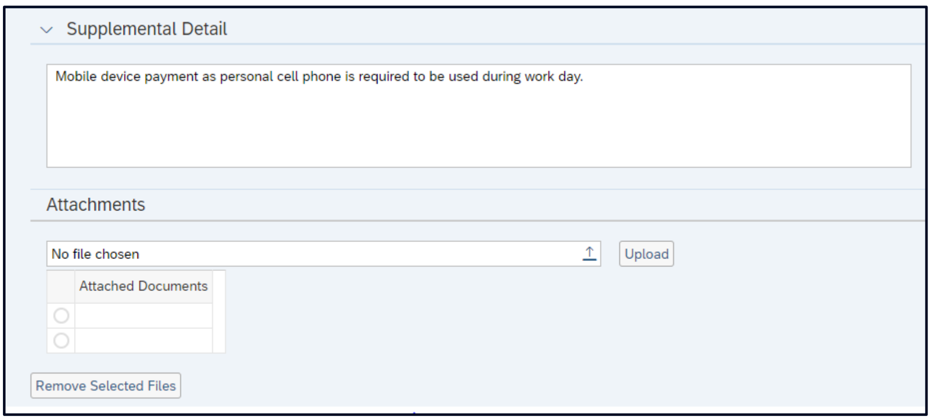
Step 4

*Once information is entered about the supplement, select **Add.** The supplement payment displays in the **Supplements** grid.*



Step 5

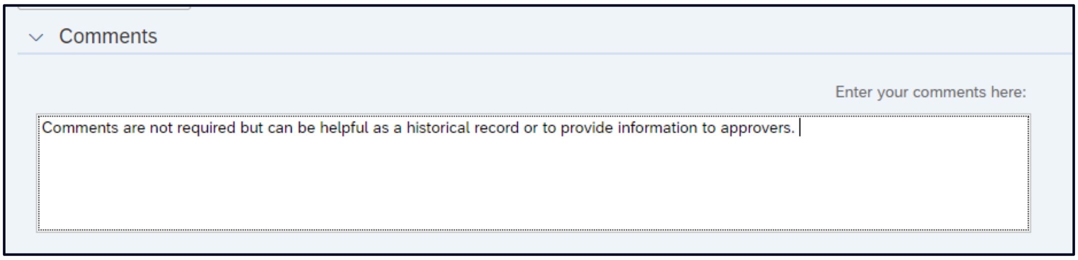
*Using the free text field, provide the **Supplemental Detail** to describe the payment. This field is required and subject to internal and external audit. Add **Attachments** to support the payment as necessary. Do not include any personal or protected information.*



SUPPLEMENT IFORM
ADDING A SUPPLEMENTAL PAYMENT

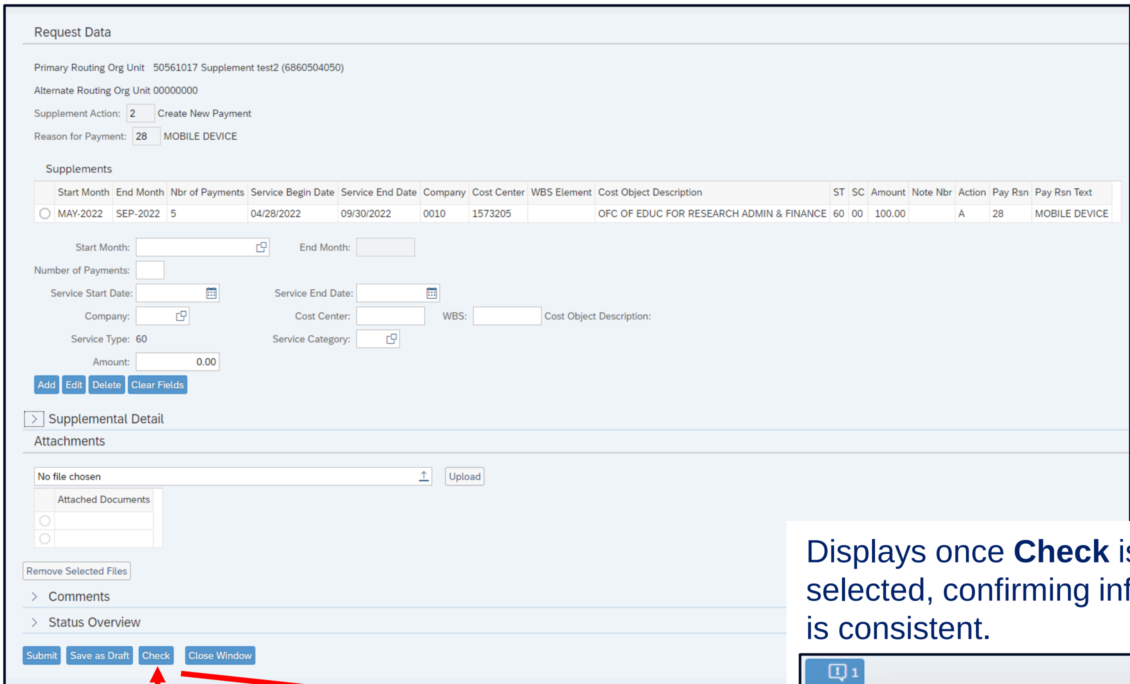
Step 6

*Provide **Comments** as appropriate to assist with approval or to serve as a reference for others who may look at the payments. Comments are not required. Please remember that comments become part of the permanent SAP record. Ensure comments do not include any personal or protected information.*

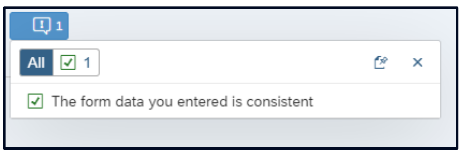


Step 7

*Select **Check** to validate that information contained in the iForm is consistent and to trigger error or warning messages.*



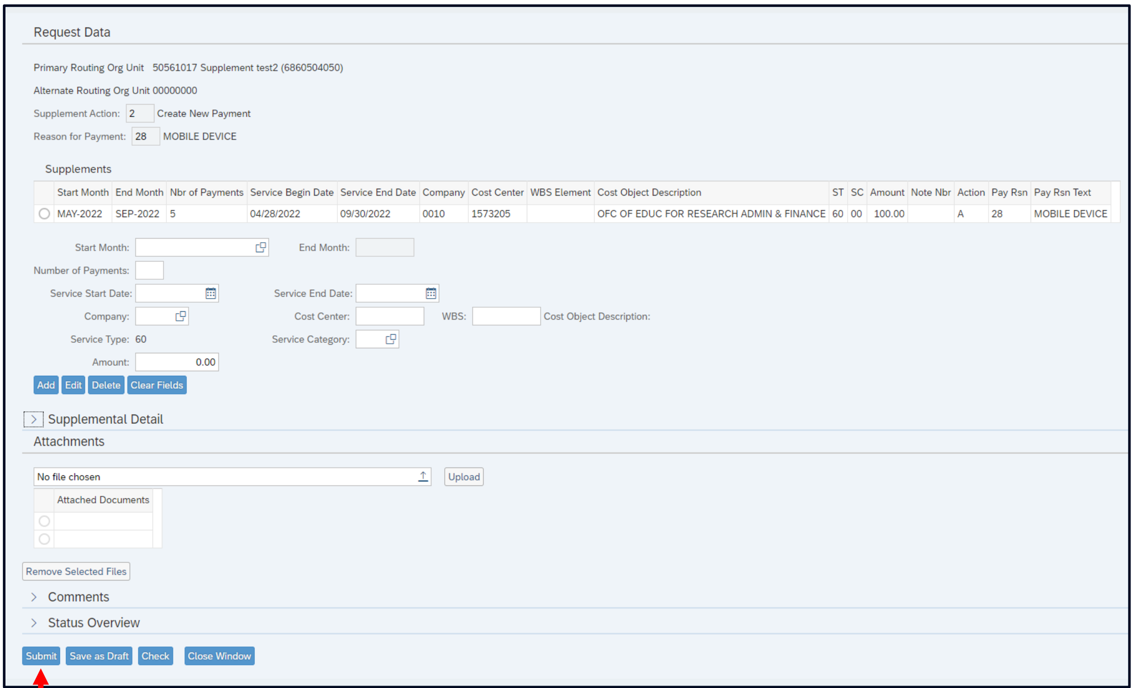
Displays once **Check** is selected, confirming information is consistent.



SUPPLEMENT IFORM
ADDING A SUPPLEMENTAL PAYMENT

Step 8

Once data is confirmed, select ***Submit*** *to send the iForm through your business unit's approval process.*



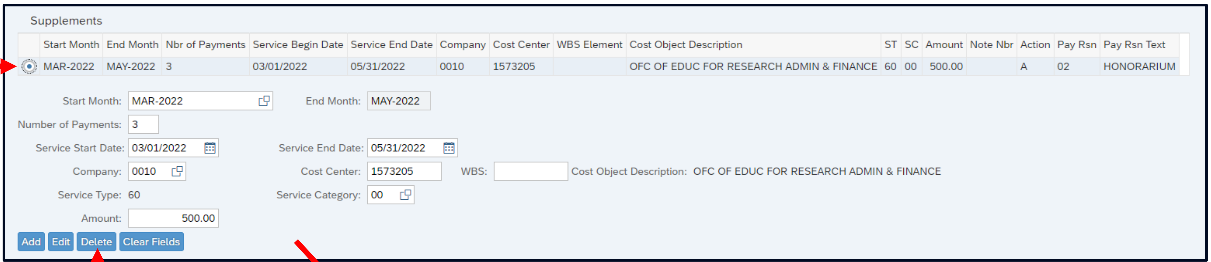
Displays once **Submit** is selected and iForm enters the approval workflow.

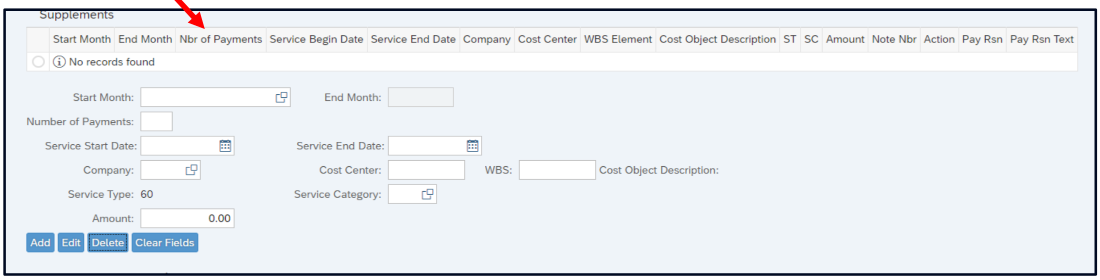
SUPPLEMENT IFORM
ADDING A SUPPLEMENTAL PAYMENT

Additional Guidance

When creating a new supplemental payment, additional action buttons are available and may be helpful when establishing a payment.

*If users add new payment information in error and need to erase the line, select the radio button beside the line to be removed and select **Delete.***





*If users add new payment information and want to edit information once it is added to the grid, select the line and update the information in the data fields as appropriate. Select **Edit** to update the line in the grid.*