

## Fellow-Trainee Overpayment Adjustment - SGA Additional Pay code instructions

The SGA Add'l Pay code will be used to adjust Fellowship and Trainee compensation that may exceed a sponsor's awarded amount due to the biweekly pay schedule and appointment duration.

**Calculate the adjustment amount using the Fellow/Trainee Calculator button 'Print F/T Calc Report' in JEMS-Hire on the Job tab**

The screenshot shows the 'Job Data' form in JEMS-Hire. At the top, it says '(Validated for this Status) FINISHED - ENTERED IN HRS' with buttons for 'Save', 'Close', and 'Print'. Below this is a navigation bar with tabs: 'Find/Add Hire', 'Person', 'Person Contact', 'Position', 'Job', 'Benefits', 'HR Contact', 'Comments', and 'Status History'. The 'Job Data' section is active and contains the following fields:

- Hire / Transfer** section: 'Hire Type' (dropdown menu), 'Override' button, and 'Empl Rcd#' (dropdown menu).
- Action** dropdown menu and 'Action Reason' dropdown menu (set to 'Original/New Hire / 010').
- Effective Date\*** (08/22/2022).
- Business Title** (FELLOW).
- Expected End Date** (05/21/2023).
- Non-Service Relationship** (checkbox checked) and **NSR Job Aid** (checkbox).
- Criminal Background Check (CBC Date)** (empty).
- Position of Trust** (dropdown menu, set to 'No').
- Probation Type** (dropdown menu) and **Probation End Date** (empty).
- Seasonal Status** (dropdown menu).
- Additional Pay/Lump Sum** (empty).
- Salary Threshold Exemption** (dropdown menu, set to 'Not Subject to FLSA').

The **Compensation** section at the bottom includes:

- Pay Basis\*** (Academic dropdown menu).
- Comp Rate\*** (23,727.000).
- Conversion Calculator** button.
- Print F/T Calc Report** button.

**OR manually calculate the [Fellow-Trainee Payroll Adjustment Calculator](#)**

1. Enter the Award amount of the Fellowship/Trainee
2. Enter the Fellowship/Trainee Start date
3. Using the UW Payroll Calendar enter the pay period end date of the first biweekly period
4. Enter the Fellowship/Trainee End date
5. Confirm the Adjusted Pmt amount matches the award amount

**Enter the adjustment, if needed, in HRS**

1. Navigate to the Workflow Add'l Pay Create screen in HRS.  
*Main Menu > Payroll for North America > Employee Pay Data USA > Workflow Add'l Pay Create*
2. Select the Add a New Value tab
3. Enter the following:
  - a. Empl ID
  - b. Empl Record
  - c. Select the **SGA** earnings code
  - d. Using the calculator enter the pay period start date with the first SGA Adjustment – Note that SGA adjustments are taken on full pay periods

PP Start Date	PP End Date	PayDate	Period Rate	# days	SGA Adjustment	Adjusted Pmt
9/1/2022	9/10/2022	9/22/2022	\$ 695.58	7		\$ 695.58
9/11/2022	9/24/2022	10/6/2022	\$ 993.69	10	\$ (3.97)	\$ 989.72
9/25/2022	10/8/2022	10/20/2022	\$ 993.69	10	\$ (3.97)	\$ 989.72

e. Click Add

**UW\_WFAP\_CREATE**

Find an Existing Value    Add a New Value

Workflow Approval ID:

Empl ID: 00995424

Empl Record: 0

Earnings Code: SGA

Effective Date: 09/11/2022

Add

4. Addl Seq Nbr should be 1
5. End date will be the last day of the pay period with an SGA adjustment
6. The earnings amount will be SGA Adjustment - this is entered as a negative amount in HRS

PP Start Date	PP End Date	PayDate	Period Rate	# days	SGA Adjustment	Adjusted Pmt
9/1/2022	9/10/2022	9/22/2022	\$ 695.58	7		\$ 695.58
9/11/2022	9/24/2022	10/6/2022	\$ 993.69	10	\$ (3.97)	\$ 989.72
9/25/2022	10/8/2022	10/20/2022	\$ 993.69	10	\$ (3.97)	\$ 989.72

7. The goal amount will be the total of the SGA Adjustment - this is entered as a negative amount in HRS

10	\$ (3.97)	\$ 989.72
10	\$ (3.97)	\$ 989.72
10	\$ (3.97)	\$ 989.72
4		\$ 397.48
	\$ (99.37)	\$ 25,836.00
		\$ -

8. Make sure that the Applies to Pay Periods has First, Second and Third checked.

**Applies to Pay Periods**

First     
 Second     
 Third

9. Enter the Description  
*[NAME] is receiving biweekly negative adjustments on their fellowship/trainee appointment due to a payroll discrepancy between the amount awarded by their funding sponsor and UW's biweekly payroll schedule.*
10. Click Submit

## 11. Add'l Pay adjustment requires approval by the level 1 and level 2 approvers

**Workflow Add'l Pay Create**

**Create Additional Pay** Workflow Approval ID

IVY OHR Empl ID 00995424 Empl Record 0 A02

\*Earnings Code   Stipend-Grant Adjustment-No IC

Effective Date

**Payment Details** Find | View All First 1 of 1 Last

*Add'l Seq Nbr <input type="text" value="1"/>	End Date <input type="text" value="08/31/2023"/> <input type="button" value="Calendar"/>
Earnings <input type="text" value="-3.97"/>	Reason <input type="text"/>
Hours <input type="text"/>	Hourly Rate <input type="text"/>
Goal Amount <input type="text" value="-99.37"/>	
Sep Check Nbr <input type="text" value="0"/>	

OK to Pay

**Applies to Pay Periods**

First  Second  Third  Fourth  Fifth

\*Description

Created By: UWMAD2 Workflow Status

UWMADISON ADDL PAY

### Solution for Underpayments

- Underpayment - amount being paid is below the stipend rate – sometimes see this with one semester payments
- Lump sum payment at or near the end of the semester – we recommend on the last pay period
- Paid through Add'l Pay
- Earnings Code – STL
- Explanation of payment in Description field should include explanation of the stipend award amount, amount paid through biweekly, and that this is the amount to reach the stipend award amount

## Best Practice Reminders

- Add'l Pays should be fully approved before the pay sheet creation of the first pay period with the add'l pay
- HRS cannot do retro add'l pays as a series
  - SGA adjustment amounts should be adjusted to be spread out over the appointment
- Review the Payroll Edit or Review Paycheck to verify adjustments are processing as expected
  - Remember these will be negative amounts
- When appointments are terminated early, the total paid and adjustment will need to be reviewed
  - Add'l Pay entry should be updated to reflect the final adjustment or stopped if no additional adjustments are needed
- Periodic auditing is recommended using the Fellow/Trainee Audit report in JEMS-Hire.
  - Use Department field and Job Date Range to set report parameters

JEMS Search Screen

JEM System Search Close

Quick Search **Advanced Search** Advanced Search Results

**Advanced Search**

Department: contains | A48

Empl Class: contains

Job Code: contains

Hire Type: =

Pay Basis: =

Continuity Code: =

PVL Number From: To:

Job Date Range: To:

Status Date Range: 04/27/2022 To: 10/27/2022

JobApply Ind (Y/N):

Search Clear

**Fellow/Trainee Audit**

**Multiple Selection Criteria**

You may make more than one selection for this Criteria.  
Use Shift-Click for contiguous selection. Control-click for selecting non-contiguous elements.

Current Status

- Cancelled
- Department Approved
- Division Approved
- Division Approved-Sent To Hrs
- Division Hold
- Draft
- Entered
- Finished - Entered In Hrs

Clear