

Cellular/Mobile Device Stipend Instructions for OnBase Form

November 11, 2020

Overview: The following instructions are for the new Cellular/Mobile Device stipend form. The paper-based form has been converted to an OnBase form with workflow. The new form is nearly identical to the paper-based version but has two new queues: 1) Employee certification; and 2) Supervisor approval.

Also:

- Workflow is similar to the Additional Pay form process
- PCN must be an XPY with the 860060 (Allowance job code)

Links:

[Cellular/Mobile Device Stipend Form](#)

[Cellular/Mobile Device and Service Plan Policy](#)

The following are the two new queues to accommodate the cellular/mobile device requirements.

1. Employee certification

- Employee certification is based on the Employee ID entered in the box below

Additional Payments

Payee Information

EMPLID *

First Name

Last Name

Department Number

Department Name

Position Number

Position Title

Job Code

Pay Group

Standard Hours

Salary

FTE

Employee Status

Home Supervisor USERID

Home Supervisor Name

Additional Pay Information

Additional Pay Code

Start Date *

Additional Pay Position Status

Additional Pay Funding Source Table

- Please note that you must make a “Stipend Level” selection

The screenshot shows a web browser window with the URL <https://onbase.louisville.edu/onbase/UnityForm.aspx?key=UFKey>. A yellow banner at the top states "Additional Pay Distribution Percent This field is required." Below this, there are input fields for "Start Date*" (11/1/2020) and "End Date*" (11/2/2020). A dropdown menu for "Stipend Level*" is open, showing three options: "DYEE (NOT TO INCLUDE AVP LEVEL OR ABOVE) (UP TO \$50/MONTH)", "PER PAY PERIOD-EMPLOYEE (NOT TO INCLUDE AVP LEVEL OR ABOVE) (UP TO \$50/MONTH)", and "PER PAY PERIOD-SELECT GROUPS (ADMISSION COUNSELOR, RECRUITERS, ON CALL EMPLOYEES) (UP TO \$75/MONTH)". A red error message states "*Funding changes must be submitted via a PAR*". To the right, there is an "Additional Pay Funding Source Table" with columns for "Additional Pay Funding Source*", "Additional Pay Funding Source Descr*", and "Additional Pay Distribution Percent*", and a "Remove" button. A "Reason Code" field is visible at the bottom.

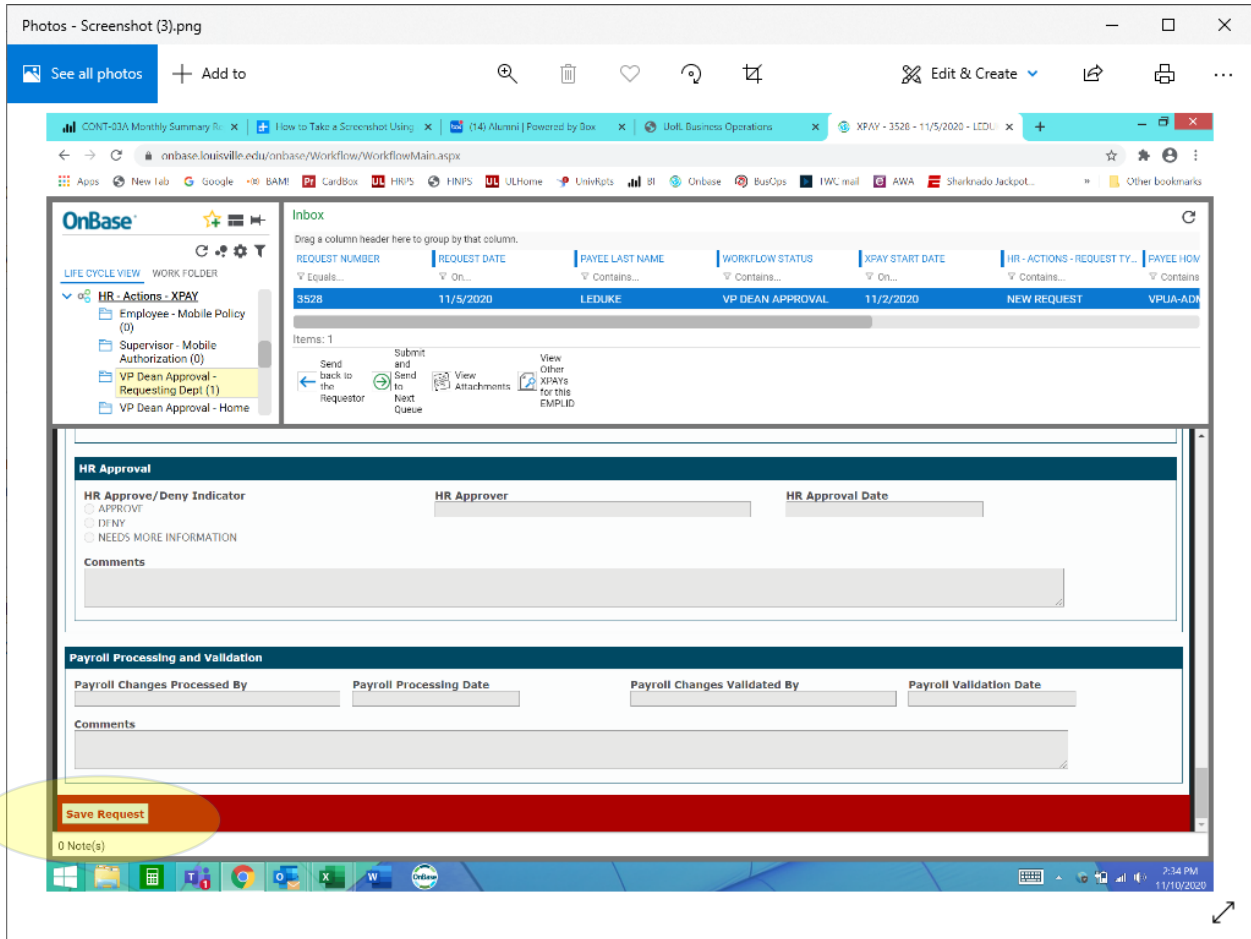
- Stipend amounts are entered as per month amounts up to an annual total. For example:
 - \$20 per month only allows for up \$240 per fiscal year
 - \$50 per month only allows for up \$600 per fiscal year
 - \$75 per month only allows for up \$900 per fiscal year
- The stipend may not cross fiscal years. We recommend that a biweekly employee’s stipend end the pay period before the split payroll and a new stipend begin in the first full pay period in the new fiscal year. The new year stipend should be prorated to include this skipped period.
- If a new payment begins in the middle of a pay period, please indicate how much should be paid during that period. Example: A new P&A employee is hired December 15, 2020, and will receive a \$50 stipend each month for a Cellular/Mobile Device, but only \$25 the first month because of her start date. On the stipend form, enter the following:
 - Period: 12/15/2020-06/30/2021;
 - Stipend amount: \$50 per month, with a goal amount of \$325
 - In the Comment box note that a \$25 stipend will be paid for the month of December.

- An employee must certify his/her understanding of the “Cellular/Mobile Device and Service Plan” policy by selecting either “Approve” or “Deny”. The “Employee Approver” and “Employee Approval Date” boxes will automatically populate once that selection has been made.

The screenshot shows a web browser window with the URL <https://onbase.louisville.edu/onbase/UnityForm.aspx?key=UFKey>. The page content includes:

- Other Supporting Documents (0)**: A section with an **Attach Other Supporting Documentation** button.
- Requestor/Submitter Comments**: A large text input area.
- Approvals**: A section header.
- Employee Mobile Approval**: A sub-section containing a certification statement: "I certify that I have read, understand and intend to comply with the University of Louisville's Cellular/Mobile Device and Service Plan Policy. I understand that I am receiving this benefit to cover business-related transactions. Should my job duties change and I no longer have a university business need to use my cellular/mobile devices and or service plan or if service to my device is terminated, I will immediately notify my supervisor."
- Employee Approve/Deny Indicator**: Two radio buttons labeled **APPROVE** and **DENY**. This area is highlighted with a yellow oval.
- Employee Approver**: A text input field.
- Employee Approval Date**: A text input field.
- Employee Comments (Optional)**: A large text input area at the bottom.

Please remember that after the employee completes the certification they must click “Save” at the bottom of the page. Wait until it completes then click on “Submit to the Next Queue”. The same “Save” process applies to each step of the workflow.



“Submit to Next Queue” is normally located midway down the page depending on the browser. (Client version of the software will be at the top of the page)

The screenshot displays the OnBase HR system interface. At the top, there is a browser tab bar with various open tabs including 'Apps', 'New Tab', 'Google', 'BAWI', 'Caribou', 'HRFS', 'HRFS', 'ULHome', 'UnivKpls', 'BI', 'Onbase', 'BusOps', 'IWC Mail', 'AWA', and 'Sharknado Jackpot...'. The main interface is divided into several sections:

- OnBase Header:** Includes the OnBase logo, a star icon, and a hamburger menu icon.
- Navigation:** 'LIFE CYCLE VIEW' and 'WORK FOLDER' are visible. A tree view on the left shows folders for 'HR - Actions - XPAY', 'Employee - Mobile Policy (0)', 'Supervisor - Mobile Authorization (0)', 'VP Dean Approval - Requesting Dept (1)', and 'VP Dean Approval - Home'.
- Inbox Table:** A table with columns: REQUEST NUMBER, REQUEST DATE, PAYEE LAST NAME, WORKFLOW STATUS, XPAY START DATE, and HR - ACTIONS - I. A single row is highlighted with a blue background: 3528, 11/5/2020, LEDUKE, VP DEAN APPROVAL, 11/2/2020, NEW REQUES.
- Item Actions:** Below the table, there are icons for 'Send back to the Requestor', 'Submit and Send to Next Queue' (highlighted with a yellow circle), 'View Attachments', and 'View Other XPAYS for this EEMPLID'.
- VP/Dean Approvals Section:**
 - Requesting VP/Dean Aprv/Deny Indicator:** Radio buttons for APPROVE (selected), DENY, and NEEDS MORE INFORMATION.
 - Requesting VP/Dean Approver:** Text field containing 'Clark, Alicia Watts'.
 - Requesting VP/Dean Approval Date:** Text field containing '11/10/2020 02:22:47 PM'.
 - Requesting VP/Dean Comments:** A text area containing the comment: 'Employee must be available at all times to take calls from donors, alumni and other staff, check email and access donor database. Position requires frequent travel and extended time away from the office.'
- Sponsored Programs Approval Section:** A header for the next section, which is currently empty.

2. Supervisor approval queue

- Supervisor may be changed by submitter
- Enter employee user ID (which is not the same as “EmplID”) when a change is needed. (Please note that a permanent supervisor must be completed via the PAR.)

Select Action			
HR Action List MOBILE PAY	Request Type <input checked="" type="radio"/> NEW REQUEST <input type="radio"/> STOP EXISTING (EMAIL PM)		
Additional Payments			
Payee Information			
EMPLID * 1028185	Department Number 1240000156	Pay Group P12	Home Supervisor USERID ROGRAY02
First Name LINDA	Department Name OFFICE OF PLANNING AND BUDGET	Standard Hours 37.500000	Home Supervisor Name RICK GRAYCAREK
Last Name WILSON	Position Number 00006234	Salary \$91,630.00	
	Position Title	FTE	

- Supervisor approving the form must detail why the Cellular/Mobile Device payment is needed in the “Supervisor Comments” box.
- The next-to-last step is to indicate “Approve”, “Deny” or “Needs More Information”.

Please describe in detail the business reason the stipend is necessary for this employee and attach any necessary supporting documentation to this form (use attachment button above):

Supervisor Comments (Required)

I certify that the requested allowance is needed by the employee for business-related purposes:

Supervisor Approve/Deny Indicator	Supervisor Approver	Supervisor Approval Date
<input type="radio"/> APPROVE <input type="radio"/> DENY <input type="radio"/> NEEDS MORE INFORMATION	<input type="text"/>	<input type="text"/>

- Last step: “Save and Submit” to move the request along in the workflow process.
- Approvals will follow the standard Additional Pay request path:
 - Dean’s Approval
 - Position Management
 - Payroll for entry and payment

Cancelling a Cellular/Mobile Device Stipend

- To cancel a cellular/mobile device stipend please send an email to the Additional Pay service account: addpay@louisville.edu and copy the Payroll Service Account: payroll@louisville.edu. Please include the form number, employee's name and the date of the cancellation in your email. For cancellations that occur in the middle of a pay period, please include the dollar amount to be paid in that final period.
- Submission deadlines for a Cellular/Mobile Device stipend request are the same as those for Additional Pay requests which are set by the Payroll Office calendar.

Contact Info

If there are questions about this form, please contact either the Position Management Office (Linda Wilson: ljwils01@louisville.edu) or the Additional Pay service account (addpay@louisville.edu).