

# PROJECT INCENTIVE PLAN - INSTRUCTIONS



City of Dallas

## Overview/Purpose:

A **Project Incentive Plan (PIP)** allows departments to reward permanent, full-time employees who have served at least six months in their current position and who perform special project work that is outside of their current responsibilities in addition to those listed in their job classification specification. A PIP requires documentation between the employee and the department to provide the expertise and skill to perform special projects. PIP awards may be between \$150 and \$5000. The requested dollar amount should be equal to the level of expertise and time needed to complete the project.

**All PIP's must be entered into Workday and the Request must be initiated, entered and approvals completed prior to submitting any request for Payment.**

## Eligibility Requirements:

1. Employee must have served for at least 6 months in their current position.
2. The project duties must not be a part of their current job responsibilities.
3. The form must be submitted and approved prior to the start of the project.
4. Employees are eligible to receive PIP's only once every fiscal year.
5. Payment Request is initiated after the completion of the project.
6. PIPs performed/paid over multiple consecutive fiscal years are allowed provided the pre-existing agreement specifies time period, expected duties for each period payment is being requested.

## Part I: Project Incentive Plan Request Steps: Department Instructions:

- 1) Department submits the request in Workday, as a "**Create Request > Request Only – Performance Incentive Plan (PIP)**", including the following attachments:
  - a) **A detailed description of the project plan; including beginning and end dates.**

## Part I: Project Incentive Plan Request Steps: HR Compensation Instructions:

- 1) Review the Workday Request to ensure the department has completed/included all required attachments. Reach out to the department for follow-up regarding any incomplete documents.
- 2) Assess request in relation to all eligibility requirements listed above. Be sure that the project is **NOT** part of their current job responsibilities (day to day job operations).
- 3) Once review is completed by Compensation Analyst, the request gets routed over to the Compensation Administrator in Workday for further review/approval and then to the Director, Human Resources for final approval. PIP Request once all approvals have been captured, will go back to the initiator.

## Part II: Project Incentive Plan Request for Payment Approval Steps: Department Instructions:

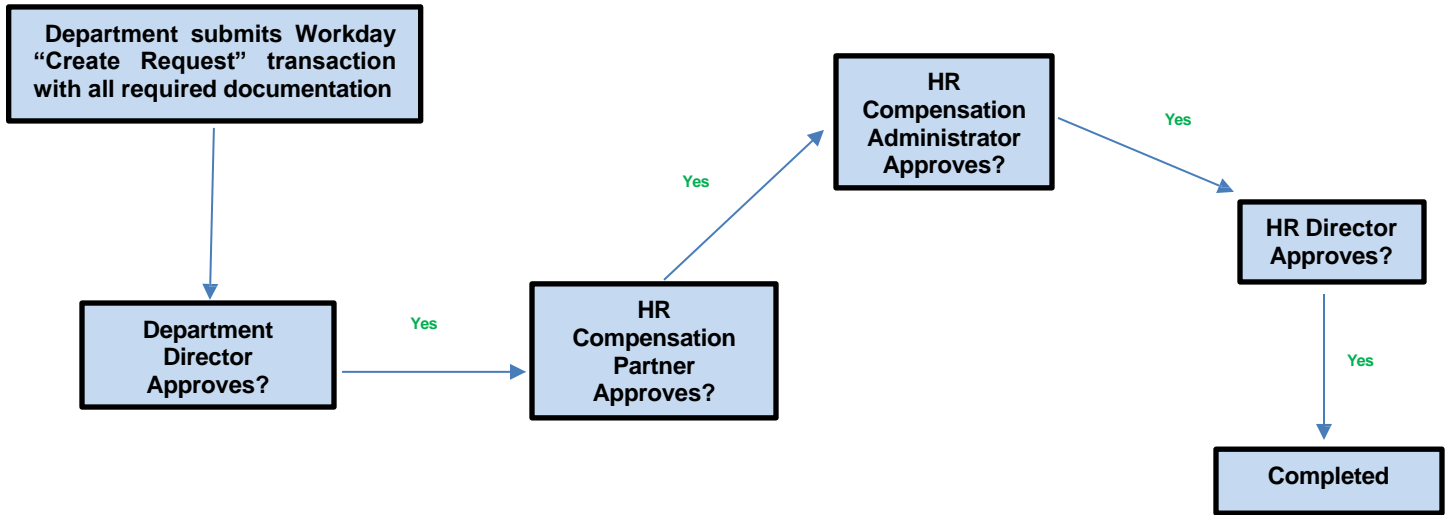
- 1) Department submits Workday Transaction for Project Monetary Approval. **Business Process Map: Actions > Compensation > Request One Time Payment > Reason > Incentive > Project Incentive Plan (PIP).**
- 2) Effective Date needs to be the beginning of the next pay period; Request should also include the exact date that the project was completed.
- 3) Amount needs to reflect the amount previously approved in the previous Project Incentive Plan Step process.
- 4) Submit **ALL** original attachments, and include a brief memo from the Department Director affirming successful **project completion.**
- 4) Submit request in Workday. Once review is completed by Compensation Analyst, the request gets routed over to the Compensation Administrator in Workday for further review/approval and then to the Director, Human Resources for final approval.

## Part II: Project Incentive Plan Request for Payment Approval Steps: HR Compensation Instructions:

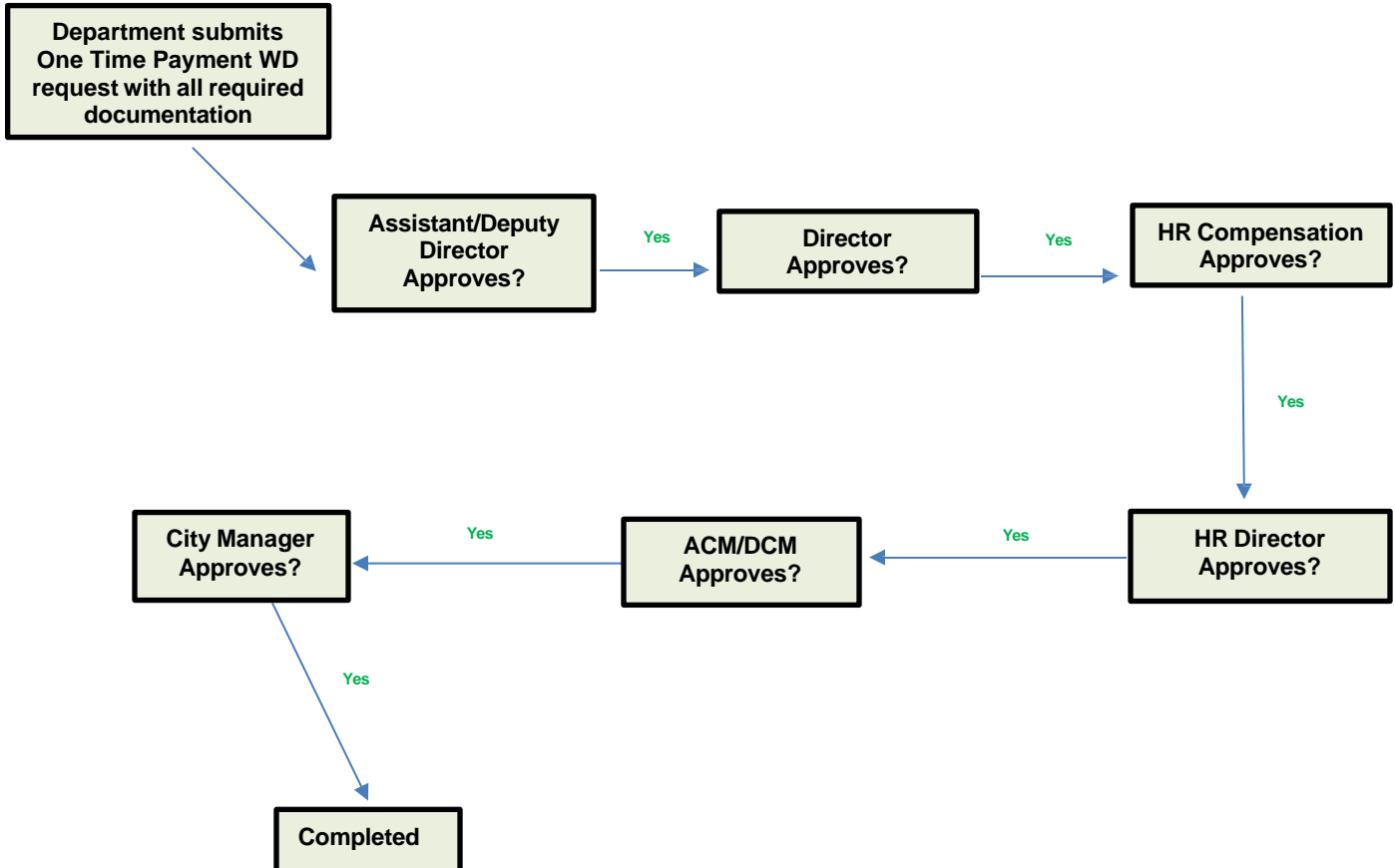
- 1) Review request and ensure that the Project Incentive Request process has been completed and approved.
- 2) Review the Workday Request to ensure the department has completed/included all required attachments. Reach out to the department for follow-up regarding any incomplete documents.
- 3) Make sure effective date for one-time payment is at the beginning of the **NEXT** pay period (**no retro**), and that the project completion date is clearly identified.
- 4) Approve request in Workday.



### Part I: Project Incentive Plan Request Steps: Approval Flowchart



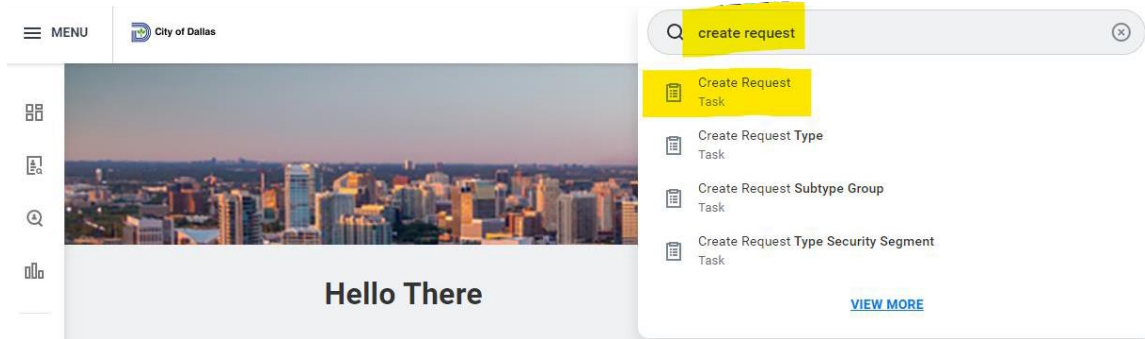
### Part II: Project Incentive Plan Payment Request Approval Steps: Approval Flowchart



## Part I: Project Proposal Request Steps:

**\*\*\*Departments MUST complete this step before submitting Part II for the monetary awarding\*\*\***

- 1) As the employee’s manager (or department designee), type in “**Create Request**” in the top Workday search bar.



- 2) A window should generate with another search bar. In this search bar, type in “**PIP**”. From there, the following selection should generate. Click “**OK**”.
- 3) The **Request Only – Project Incentive Plan (PIP) submission form** should then generate. Please complete all required information with the following attachment: **a) A detailed description of the project plan - including beginning and end dates**; and reach out to your HR Partner if you have any questions. Refer to **PIP – Step by Step Process** file on the **HR Compensation Website** for further instructions. Incomplete submissions will be sent back to the initiator. After filled in, click “**OK**”.

### Request Only - Project Incentive Plan (PIP) PIP

A Project Incentive Plan (PIP) allows departments to reward permanent, full-time employees who have served at least six months in their current position and who perform extra duties in addition to those listed in their Performance Plans or job classification specification. A PIP requires a pre-existing agreement between the employee and the department to provide the expertise and skill to perform special projects. All PIP's must be approved by the Human Resources Department prior to both execution and reward.

PIP awards may be between \$150 and \$5000. Employees are eligible to receive PIP's only once every fiscal year. PIP's performed/paid over multiple consecutive fiscal years are allowed provided the pre-existing agreement specifies time periods, expected duties and accomplishments for the project.

Employee Name (Required)


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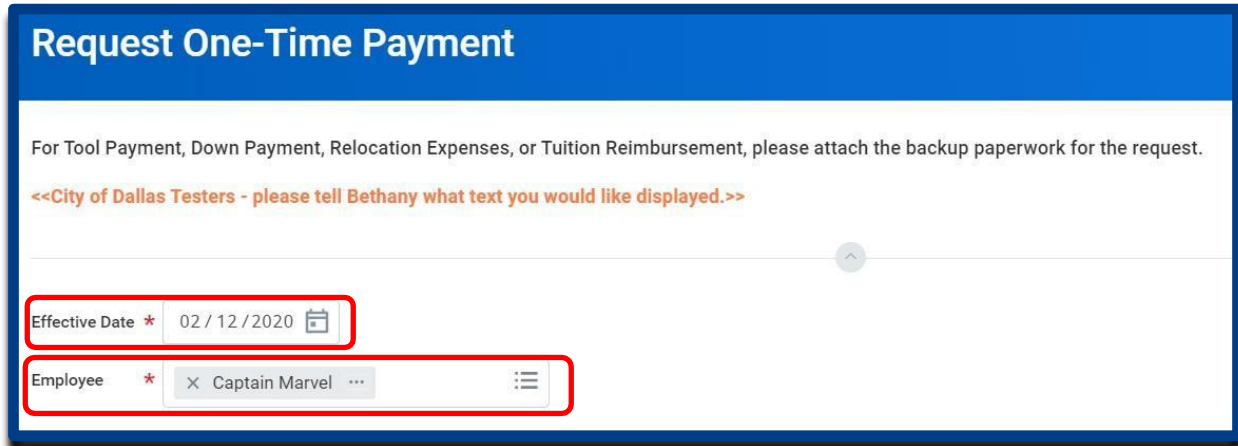
Employee Number: (Required)

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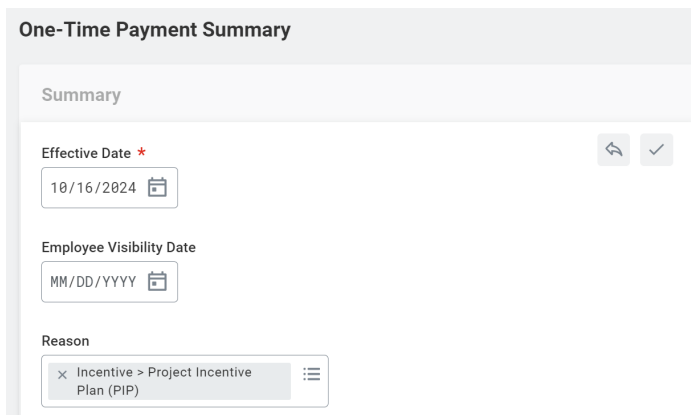
## Part II: Project Payment Approval Steps:

**\*\*\*DO NOT complete UNLESS Part I has been reviewed/completed by HR Compensation\*\*\***

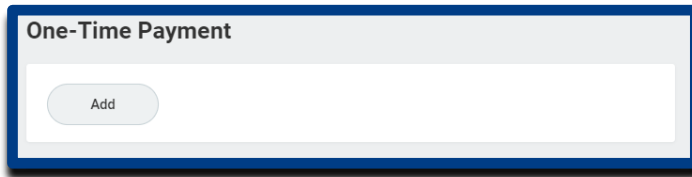
1. From the Workday main page, enter worker’s name in the search bar.
2. Select  button and hover over the **Compensation** option, then select **Request One-Payment**.



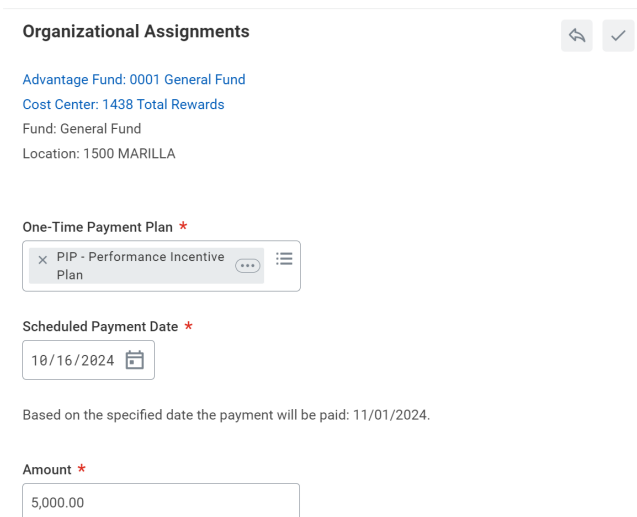
3. Enter **Effective Date** for the request and ensure the appropriate **employee’s name** is in the box. Click **OK**.
4. In the **“Reason”** selection area, type **“PIP”**. The following reason code should automatically generate: **“Incentive > Project Incentive Plan (PIP)”**.



5. Add the **One-Time Payment Plan** by clicking on the **Add** button under the **One-Time Payment** section.



6. In the “**One Time Payment Plan**” field, type in “**PIP**”. The following payment plan should then generate: **PIP – Project Incentive Plan**.



**Organizational Assignments** ↶ ✓

Advantage Fund: 0001 General Fund  
Cost Center: 1438 Total Rewards  
Fund: General Fund  
Location: 1500 MARILLA

**One-Time Payment Plan \***

× PIP - Performance Incentive Plan ⋮

**Scheduled Payment Date \***

10/16/2024 📅

Based on the specified date the payment will be paid: 11/01/2024.

**Amount \***

5,000.00

7. Enter the any applicable comments and **Amount** previously reviewed/approved by HR Compensation as indicated in **Part I** and make sure that the “Send to Payroll” option is checked. Click “**OK**”.

8. Select . The **One-time Payment** page closes. A summary screen displays.

9. **Up Next:** Indicates the next step in the request process and who owns the step.

10. To review one-time payment requested, select **Details and Processes**: Click on the to view the details associated with the request (**Details** tab), or to view all of the steps in the workflow (**Process** tab).

11. Select . Refer to **PIP – Step by Step Process** file on the **HR Compensation Website** for further instructions and routing preview.