

## Allowance: Monthly Employee, 9-Month Faculty, Hourly Employee

**Allowance** is the Workday functionality that allows the University to pay for allowance-based activities. It has a defined end date after which no additional payments will be made.

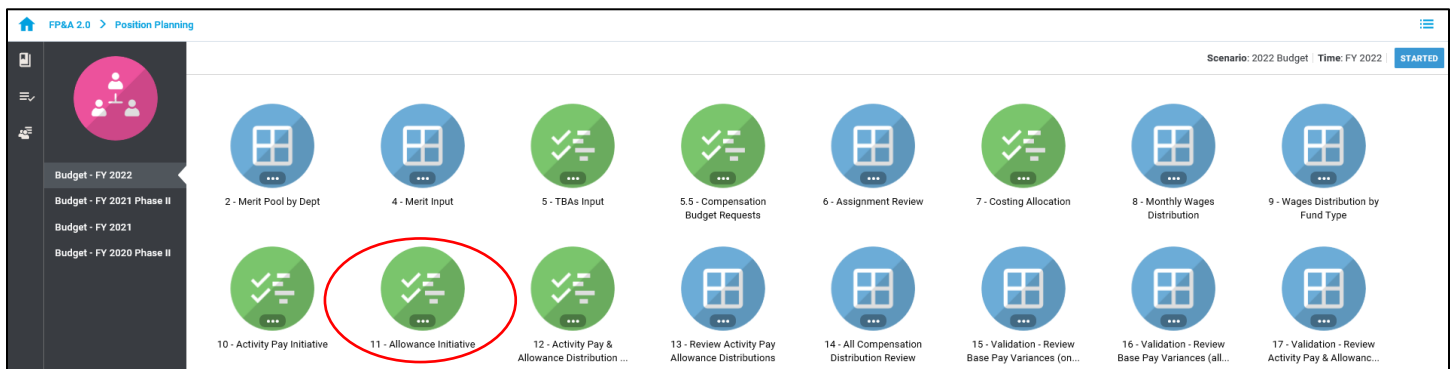
Allowance is budgeted in Tidemark for Faculty or Non-Faculty employees. The below activities are to be budgeted as Allowance:

- Mobile Phone
- Hybrid Work
- Public Safety/Police Allowance plans
- Auto
- Guarantee (Athletics)
- Others

## Allowance: **New Allowance Assignment**

Step 1) **Navigate** to the Allowance initiative

- **Path:** [Tidemark >> FP&A 2.0 >> Position Planning >> Allowance Initiative](#)



Step 2) **Select** your cost center level. Tidemark defaults your *slice* based on your security level. Users with security at the budget unit or higher have the option to narrow down to the cost center level by clicking on the *slice* and navigating down the hierarchy or searching for the desired cost center. It is recommended to add initiative records at the cost center level.

Position Planning / 2019 Test: 11 - Allowance Initiative for Level 04 - Provost's Office

BOOKMARK EXPORT CONFIGURE tidemark

+ NEW Filter

Employee	Position	Sequence	Job Profile	Start Month	End Month	Allowance Amount	Allowance Plan	Compensation Plan	Allowance Annual Ai	Start Day	End Day
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Step 3) Click +New

Position Planning / 2019 Test: 11 - Allowance Initiative for CC00372 Provost's Office

BOOKMARK EXPORT CONFIGURE tidemark

+ NEW Filter

Employee	Position	Sequence	Job Profile	Start Month	End Month	Allowance Amount	Allowance Plan	Compensation Plan	Allowance Annual Ai	Start Day	End Day
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Step 4) Complete required fields in the pop-up window

Create Initiative

Employee: Select...

Position: Select...

Job Profile: Select...

Sequence: Select...

Start Month: Select...

Start Day: Select...

End Month: Select...

End Day: Select...

Compensation Plan: Select...

Allowance Plan: Select...

Allowance Text Field: [ ]

Allowance Amount: 0

Allowance Annual Amount: 0

No unsaved changes SAVE

- a) **Employee:** select employee by searching for employee name or ID. If unknown, select the corresponding cost center / employee type (i.e. CC0000–Faculty TBA).
- b) **Position:** select position tied to allowance assignment by searching for the position number or job profile. If unknown, select a TBA for the corresponding employee type and cost center (i.e. CC0000 – Faculty TBA or CC0000 – Non-Faculty TBA).
- c) **Job Profile:** If an existing Workday position number was used in the position field, select the corresponding job profile for the position (e.g. Accountant, Financial Analyst, Professor). If a position number does not exist but the job profile is known, select the job profile for the underlying TBA (e.g. Accountant, Financial Analyst, Professor).
- d) **Sequence:** for new allowance assignments, select a sequence number in the drop-down menu, **starting on 1 - EA.**
- e) **Start Month/Day and End Month/Day:** select period corresponding to allowance assignment
- f) **Compensation Plan:** enter compensation plan corresponding to the employee type
- g) **Allowance Plan:** enter allowance activity from the drop-down menu
- h) **Allowance Text Field:**
- i) **Allowance Amount:** enter expected amount per employee pay compensation plan. **For monthly employees, enter the monthly amount. For bi-weekly employee, enter the bi-weekly amount.**
- j) **Allowance Annual Amount:** field will populate for allowance assignment
- k) Click **Save**
- l) **Costing Allocation:** enter costing allocation. Please see instructions on costing allocations for allowance.

Create Initiative ✕

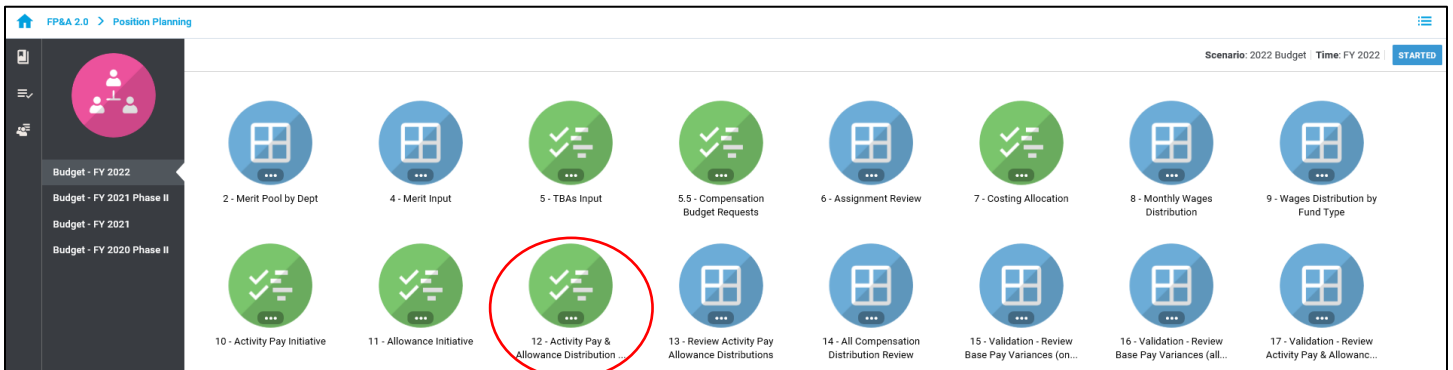
Employee	CC00019 - Non Faculty TBA <span style="float: right;">⇅</span>
Position	CC00019 - Non Faculty TBA <span style="float: right;">⇅</span>
Job Profile	Administrative Assistant <span style="float: right;">⇅</span>
Sequence	1 - EA <span style="float: right;">⇅</span>
Start Month	2019.Jun <span style="float: right;">⇅</span>
Start Day	1 <span style="float: right;">⇅</span>
End Month	2020.May <span style="float: right;">⇅</span>
End Day	31 <span style="float: right;">⇅</span>
Compensation Plan	General Salary Plan <span style="float: right;">⇅</span>
Allowance Plan	Mobile Phone Allowance <span style="float: right;">⇅</span>
Allowance Text Field	
Allowance Amount	48
Allowance Annual Amount	<b>\$576.00</b>

CANCEL
SAVE
⇅

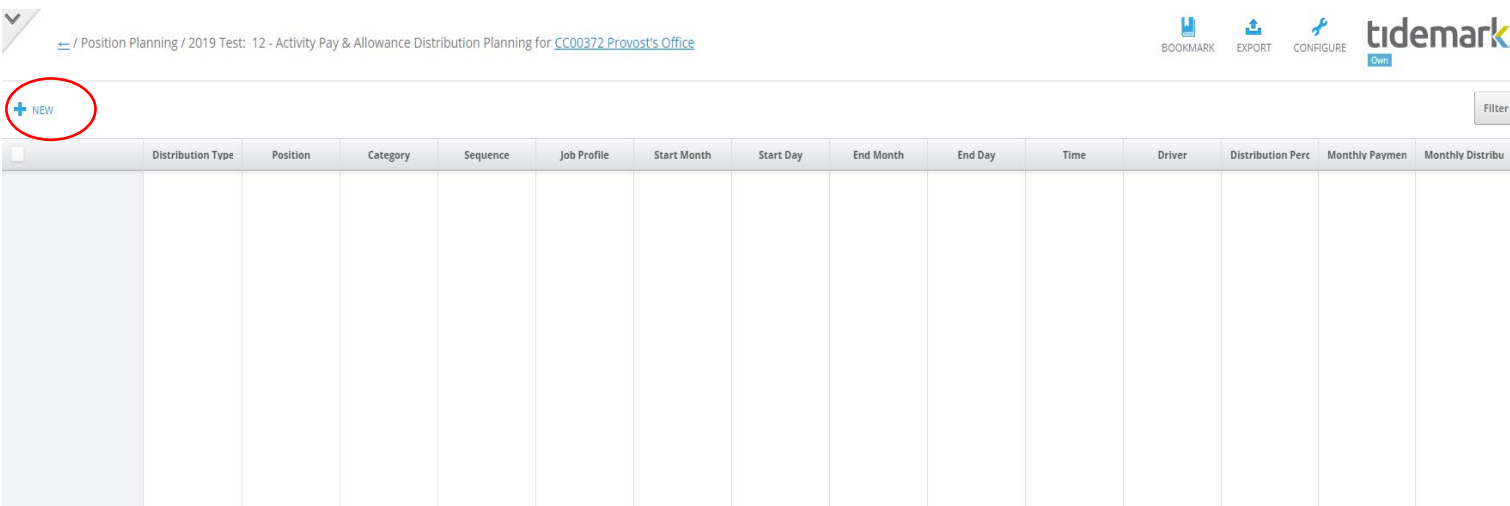
# Allowance: Costing Allocation

Step 1) **Navigate** to the Activity & Allowance Distribution Planning

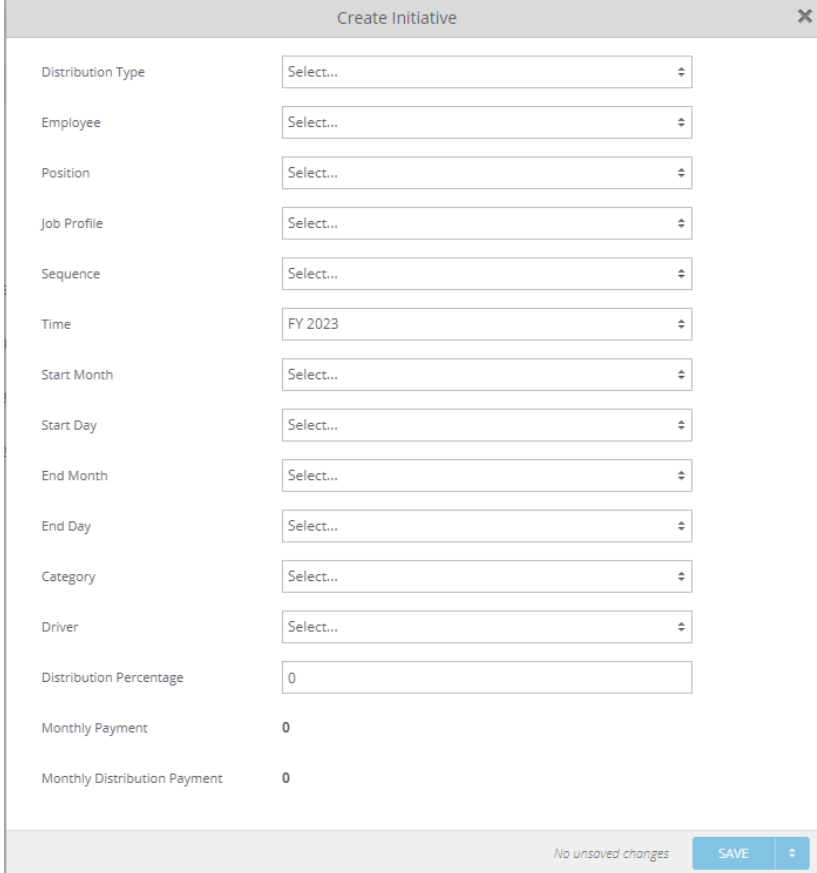
- Path: [Tidemark](#) >> [FP&A 2.0](#) >> [Position Planning](#) >> [Activity Pay & Allowance Distribution Planning](#)



Step 2) Click **+NEW**



### Step 3) **Complete** required fields in the pop-up window



- a) **Distribution Type:** select the *Allowance* distribution type
- b) **Employee:** select employee by searching for employee name or ID
- c) **Position:** select position ID entered in the allowance input panel
- d) **Job Profile:** If an existing Workday position number was used in the position field, select the corresponding job profile for the position (e.g. Executive Director, Sr. Business Analyst, Secretary). If a position number does not exist but the job profile is known, select the job profile for the underlying TBA (e.g. Executive Director, Sr. Business Analyst, Secretary).
- e) **Sequence:** for new allowance assignments, select a sequence number in the drop-down menu, **starting on ref # 1 - EA.**
- f) **Time:** defaulted to FY 2023
- g) **Start Month/Day and End Month/Day:** select period entered in the allowance input panel
- h) **Category:** select applicable category
- i) **Driver:** enter corresponding Driver Worktag
  - a. *To distribute across multiple accounts, please enter additional records using the "Clone" option and adjust the distribution % as applicable*
- j) **Distribution Percentage:** enter % to be distributed in Driver Worktag
- k) **Monthly Payment:** calculated field; displays total monthly payment
- l) **Monthly Distribution Payment:** calculated field; displays % distributed in Driver Worktag
- m) Click **Save**

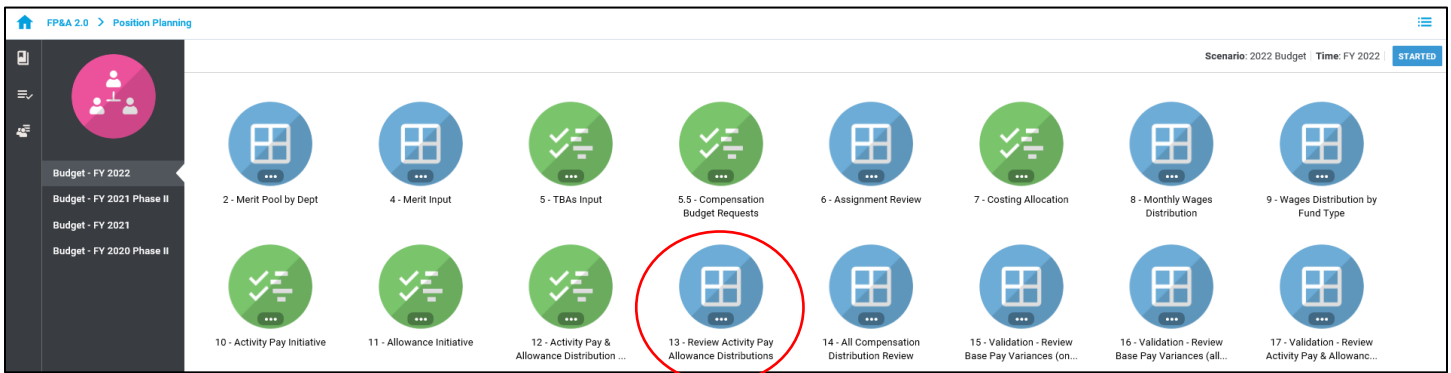
**Note:** When entering costing allocations, please make sure all applicable fields match the assignment for which you are entering a costing allocation. For example, employee, position, sequence, and start/end date **must** match the allowance assignment information entered in the allowance input initiative.

## Allowance: Review Allowance Distribution

Once you have completed your **Allowance Assignment** and **Allowance Distribution**, you may review all assignments with costing allocations in the **“Review Activity Pay & Allowance Distribution”** panel. Please make sure all assignments have a corresponding distribution that equals 100%.

Step 1) **Navigate** to the Review Activity Pay & Allowance Distributions

Path: [Tidemark >> FP&A 2.0 >> Position Planning >> Review Activity Pay Allowance Distributions](#)



Step 2) **Select** page edges (filters) you would like to display

