



## TBAs

TBAs are defined as positions that are yet to be announced or determined.

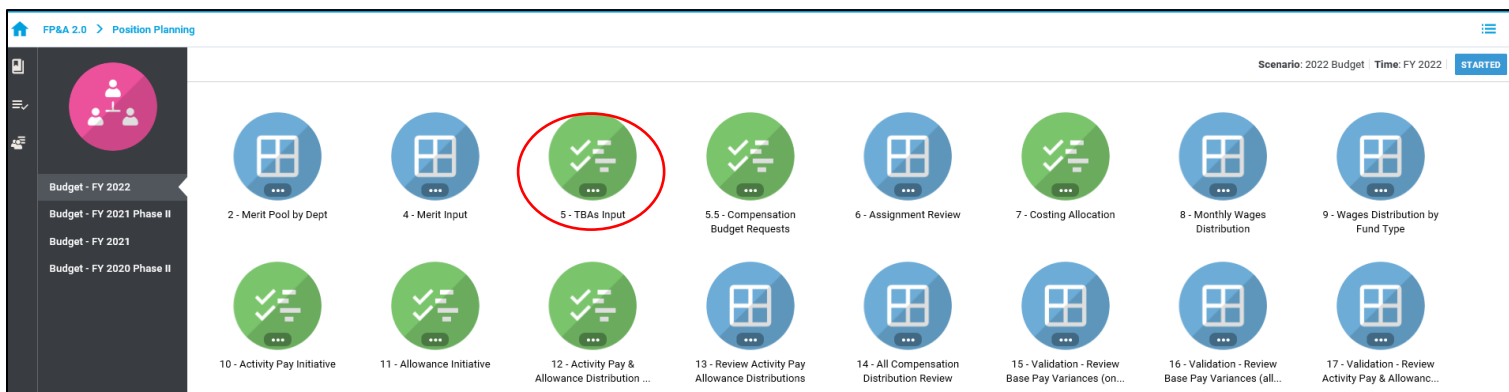
TBAs are budgeted in Tidemark for Faculty or Non-Faculty employees. The below activities are to be budgeted as TBAs:

- Employee Promotion
- Employee Reclassification
- Fill Open Position
- New Hire
- Other (Specify)

## TBA Creation: **New TBA Assignment**

Step 1) **Navigate** to the TBA input panel

- Path: [Tidemark >> FP&A 2.0 >> Position Planning >> TBAs Input](#)



Step 2) **Select** your cost center level. Tidemark defaults your *slice* based on your security level. Users with security at the budget unit level 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 2: 5 - TBAs Input for Level 04 - Provost's Office

BOOKMARK EXPORT CONFIGURE tidemark

+ NEW Filter

	Position	Job Profile	Start Month	Start Day	End Month	End Day	FTE	TBA Reason	TBA Text Description	Employee Type	Salary	Payband Minir	Payband Maxi	Salary Mul
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Step 3) Click **+NEW**

Position Planning / 2019 Test 2: 5 - TBAs Input for CC00372 Provost's Office

BOOKMARK EXPORT CONFIGURE tidemark

+ NEW Filter

	Position	Job Profile	Start Month	Start Day	End Month	End Day	FTE	TBA Reason	TBA Text Description	Employee Type	Salary	Payband Minimu	Payband Maximu	Salary Multiplier	Sequence
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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... ▾

FTE: 0

TBA Reason: Select... ▾

TBA Text Description:

Employee Type: Select... ▾

Academic Appointment Tenure Status (Use NA if Not Faculty): Select... ▾

Salary Multiplier: 0.00

Salary: 0

No unsaved changes SAVE

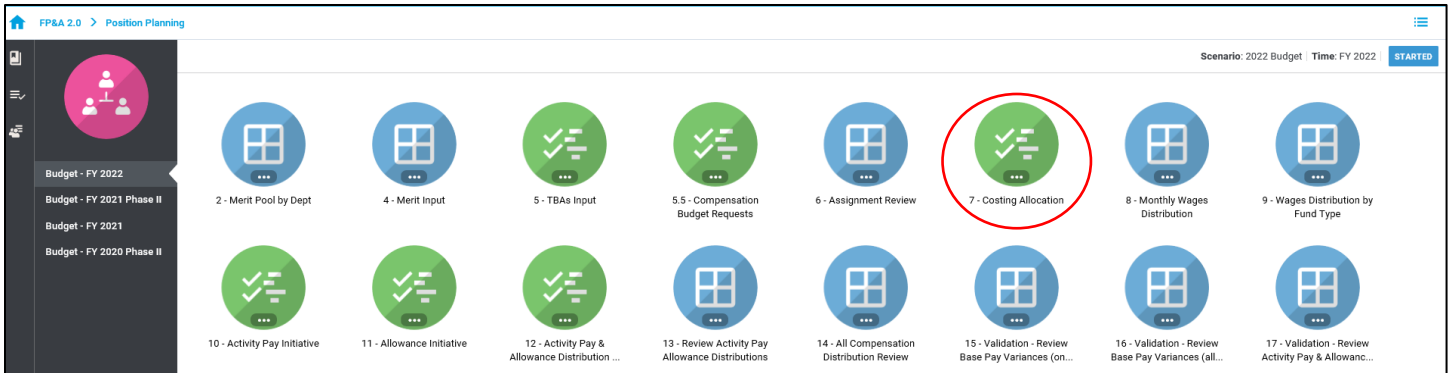
- a) **Employee:**
  - If the employee **is known**, select the employee by searching for employee name or ID.
  - If the employee **is unknown**, select the corresponding cost center / employee type (i.e. CC0000-Faculty TBA).
- b) **Position:**
  - If a Workday position number **exists** for the underlying TBA (e.g. P000000000 Accountant), select the position number tied to the TBA.
  - If a position number **is unknown** for the underlying TBA, select a corresponding employee type and cost center (i.e. **CC0000 – Faculty TBA** or **CC0000 – Non-Faculty TBA**).
- c) **Sequence:**
  - For new TBA assignments, select a sequence number in the drop-down menu, **starting on ref # 2**.
- 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. Accountant, Financial Analyst, Assoc. Professor, etc.).
  - 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, Assoc. Professor, etc.).
- e) **Start Month/Day and End Month/Day:** select period corresponding to the TBA assignment
- a) **FTE:** 1 for full-time employees and 0.5 for part-time employees
- f) **TBA Reason:** select one of the below:
  - Employee Promotion
  - Employee Reclassification
  - Fill open Position
  - New Hire
  - Other (Specify)
  - Equity Adjustment
- g) **TBA Text Description:** enter detailed description for promotion as a reference
- h) **Employee Type:** enter employee type corresponding to the position:
  - **Hourly – 75 Hrs:** 75hr Bi-weekly
  - **Hourly – 80 Hrs:** 80hr Bi-weekly
  - **Salary 12 month:** Includes 9/12 Faculty; 12 month Faculty; and 12 month Non-Faculty
  - **Salary 9 month:** 9 month Faculty
- i) **Academic Appointment Tenure Status:** select the TBA tenure status if applicable:
  - Tenured
  - Tenure track
  - Non-Tenure track
  - Not Applicable
- j) **Salary:** enter full salary or hourly total (depending on employee type)
- k) Click **Save**
- l) **Costing Allocation:** enter costing allocation. Please see instructions on costing allocations for TBAs.

## TBA: Costing Allocation

Once you have completed your **TBA assignments**, you may review all assignments with costing allocations in the “**Costing Allocation**” panel. Please make sure all assignments have a corresponding distribution that equals 100%.

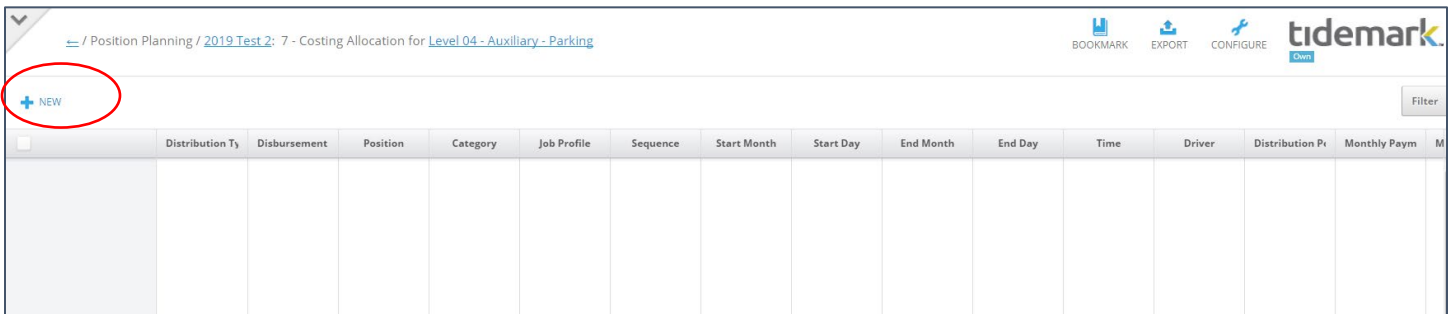
Step 1) **Navigate** to the Costing Allocation panel

Path: [Tidemark](#) >> [FP&A 2.0](#) >> [Position Planning](#) >> [Costing Allocation](#)



The screenshot shows the 'Position Planning' dashboard. The breadcrumb trail is 'FP&A 2.0 > Position Planning'. The scenario is '2022 Budget' and the time is 'FY 2022'. A 'STARTED' button is visible in the top right. The dashboard contains 17 icons representing different planning tasks. The icon for '7 - Costing Allocation' is circled in red. Other icons include '2 - Merit Pool by Dept', '4 - Merit Input', '5 - TBAs Input', '5.5 - Compensation Budget Requests', '6 - Assignment Review', '8 - Monthly Wages Distribution', '9 - Wages Distribution by Fund Type', '10 - Activity Pay Initiative', '11 - Allowance Initiative', '12 - Activity Pay & Allowance Distribution ...', '13 - Review Activity Pay Allowance Distributions', '14 - All Compensation Distribution Review', '15 - Validation - Review Base Pay Variances (on...', '16 - Validation - Review Base Pay Variances (all...', and '17 - Validation - Review Activity Pay & Allowanc...'. A left sidebar shows budget phases for FY 2022, FY 2021 Phase II, FY 2021, and FY 2020 Phase II.

Step 2) **Click +New**



The screenshot shows the 'Costing Allocation' table interface. The breadcrumb trail is '/ Position Planning / 2019\_Test 2: 7 - Costing Allocation for Level 04 - Auxiliary - Parking'. The table has columns: Distribution Ty, Disbursement, Position, Category, Job Profile, Sequence, Start Month, Start Day, End Month, End Day, Time, Driver, Distribution Pr, Monthly Paym, and M. A '+ NEW' button is circled in red in the top left corner. The table is currently empty. In the top right, there are 'BOOKMARK', 'EXPORT', and 'CONFIGURE' buttons, and the 'tidemark' logo with an 'Own' tag. A 'Filter' button is also present.

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

Create Initiative ✕

Distribution Type	<input type="text" value="Select..."/>
Disbursement Plan	<input type="text" value="Select..."/>
Employee	<input type="text" value="Select..."/>
Position	<input type="text" value="Select..."/>
Job Profile	<input type="text" value="Select..."/>
Sequence	<input type="text" value="Select..."/>
Time	<input type="text" value="FY 2023"/>
Start Month	<input type="text" value="Select..."/>
Start Day	<input type="text" value="Select..."/>
End Month	<input type="text" value="Select..."/>
End Day	<input type="text" value="Select..."/>
Category	<input type="text" value="Select..."/>
Driver	<input type="text" value="Select..."/>
Distribution Percentage	<input type="text" value="0"/>
Monthly Payment	0
Monthly Distribution Payment	0
Lump Sum Amount	\$0.00

No unsaved changes

- a) **Distribution Type:** select **Base Pay**
- b) **Disbursement Plan:** select a plan for the corresponding employee type
- c) **Employee:**
  - If the employee is known, select the employee by searching for employee name or ID.
  - If the employee is **unknown**, select the corresponding cost center / employee type (i.e. CC0000-Faculty TBA).
- d) **Position:**
  - If a Workday position number exist for the underlying TBA (e.g. P000000000 Accountant), select the position number tied to the TBA.
  - If a position number is unknown for the underlying TBA, then select a corresponding employee type and cost center (i.e. CC0000 – Faculty TBA or CC0000 – Non-Faculty TBA).
- e) **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, Assoc. Professor, etc.).
  - If a position number does not exist but the job profile is known, select the Job profile for the underlying TBA assignment (e.g. Accountant, Financial Analyst, Assoc. Professor, etc.).
- f) **Sequence:**
  - Select a sequence number in the drop-down menu, **starting on ref # 2**.
- g) **Time:** defaulted to FY 2023
- h) **Start Month/Day and End Month/Day:** select period corresponding to the TBA assignment
- i) **Category:**
  - Select applicable category

- j) **Driver:** enter corresponding Driver Worktag
- k) **Distribution Percentage:** enter the percent that will be paid from the selected Driver Worktag
- l) **Monthly Payment/Monthly Distribution Payment:** calculated field; displays % distributed in Driver Worktag
- m) Click **Save**

**\*Very important:** 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 TBA assignment information entered in the TBA input initiative.

Below are two examples for TBA costing allocation:

- **Without** a known position number and with a job profile
- **With** a known position number and Job profile \* A Job profile must always be selected unless it is unknown, in which case select "TBA" as job profile.

Edit CC00349 - Non-Faculty TBA	
Distribution Type	Base Pay
Disbursement Plan	General Salary Plan
Employee	CC00349 - Non-Faculty TBA
Position	CC00349 - Non-Faculty TBA
Category	SC06201 - Professional & Administrative Payroll
Sequence	2
Job Profile	Manager, Business Operations
Start Month	2018,Jun
Start Day	1
End Month	2019,May
End Day	30
Time	FY 2019
Driver	PG003725 Sociology
Distribution Percentage	100
Monthly Payment	5,000
Monthly Distribution Payment	5,000

1 of 1

CANCEL SAVE

Create Initiative	
Distribution Type	Base Pay
Disbursement Plan	General Salary Plan
Employee	CC00057 - Non-Faculty TBA
Position	P100008426 Parking Service Officer (Unfilled)
Category	SC06201 - Professional & Administrative Payroll
Sequence	3
Job Profile	Parking Service Officer
Start Month	2018,Jun
Start Day	1
End Month	2019,May
End Day	30
Time	FY 2019
Driver	PG003884 Parking Administration
Distribution Percentage	100
Monthly Payment	3,333
Monthly Distribution Payment	3,333

CANCEL SAVE

