

Modify existing or incorrect Costing Allocations on SPMS employees:

This is what should show on SPMS employees Costing Allocation Tab

The screenshot shows the 'Costing Allocations' tab with a table of 'Current and Future Costing Allocations'. A callout box points to the 'Position Restrictions' column, stating 'Position Restrictions: PIN/Position & Employee Info'. Another callout box points to the 'Distribution Percent' column, stating 'Distribution Percent: 100%'. A third callout box points to the 'Costing Allocation Level' column, stating 'Costing Allocation Level: POSITION RESTRICTIONS'.

Start Date	End Date	Costing Allocation Level	Position Restrictions	Costing	Distribution Percent
01/01/1900		Position Restrictions	075080 HR Analyst III DBM - ASHLEY LOVETT (W2015504)	Fund: 01 General	100.00%

View All Costing Allocations

If there is an incorrect Costing Allocation, it needs to be removed.

To Remove a Costing Allocation:

1. Locate employee in search field
2. Go to employee profile > Pay Tab > Costing Allocations

Depending on how the information currently appears, follow the respective steps.

Example 1:

Start Date	End Date	Costing Allocation Level	Position	Costing	Distribution Percent
05/23/2017		Worker Position	063203 HR Analyst IV DBM - Amy Angst (W1088673)	Fund: 01 General	100.00%

3. Click the **Maintain Button**

The screenshot shows the 'Pay' tab with a 'Maintain' button circled in yellow. Below the button is a table of 'Current and Future Costing Allocations'.

Start Date	End Date	Costing Allocation Level	Position Restrictions
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- The *worker* field will auto-populate, select the employee's *position* and enter that field. Click OK.

Worker Costing

Worker X Amy Angst (W1088673)

Position X 063203 HR Analyst IV DBM - Amy Angst (W1088673)

Earning

- Click the “Remove” button to completely delete this section. Click Submit.
- Select “Done” to return to the Costing Allocation Tab
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Example 2:

Start Date	End Date	Costing Allocation Level	Costing	Distribution Percent
05/23/2017		Worker 	Fund: 01 General	100.00%

- Click the **Maintain Button**

Job Contact Personal Compensation **Pay** Perform

Pay Group Results Input **Costing Allocations**

Maintain

Current and Future Costing Allocations 1 item

Start Date	End Date	Costing Allocation Level	Position Restrictions
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- The *worker* field will auto-populate. **Do not fill in the position field.** Click OK.

Worker Costing

Worker X Amy Angst (W1088673)

Position

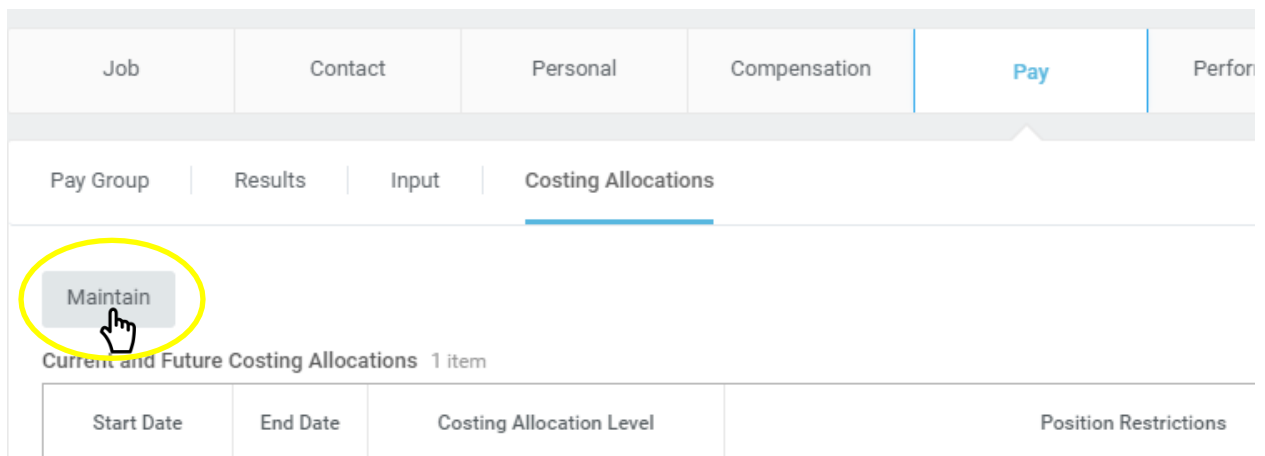
Earning

- Click the “Remove” button to completely delete this section. Click Submit.
- Select “Done” to return to the Costing Allocation Tab
- Follow the **Add Costing Allocation on SPMS Employee Job Aid** to add the correct Costing Allocation information

How to Add Costing Allocations on SPMS employees:

To Add Costing Allocation:

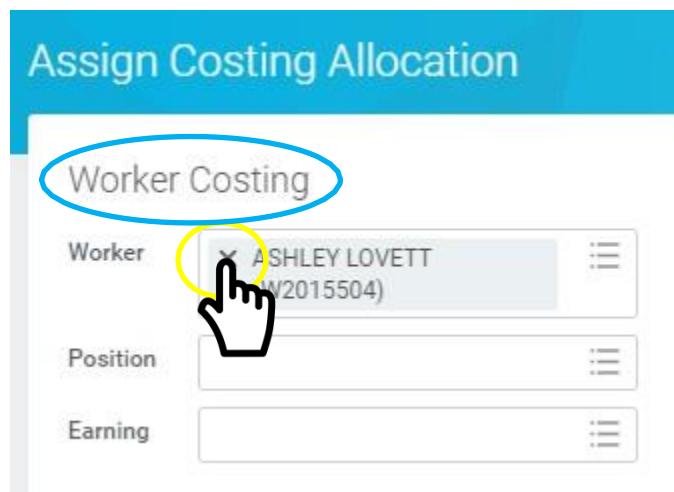
1. Locate employee in search field
2. Go to employee profile > Pay Tab > Costing Allocations
3. Click the **Maintain Button**



The screenshot shows the SPMS interface with the 'Pay' tab selected. Under the 'Costing Allocations' sub-tab, the 'Maintain' button is circled in yellow. Below the button, it says 'Current and Future Costing Allocations 1 item'. A table with columns 'Start Date', 'End Date', 'Costing Allocation Level', and 'Position Restrictions' is visible.

** If you do not see this button, you do not have security to change this information**

4. Click the X to **remove the auto filled employee and position information**



The screenshot shows the 'Assign Costing Allocation' form. The 'Worker Costing' section is circled in blue. It contains a 'Worker' field with a dropdown menu showing 'ASHLEY LOVETT (W2015504)'. A yellow circle highlights the 'X' icon next to the worker name, and a hand cursor points to it. Below the worker field are 'Position' and 'Earning' fields.

5. In the **Position Restriction** field, find the employee by name or PIN and press OK

Position Restrictions Costing

Effective Date * 05 / 12 / 2017

Position Restrictions * X 075080 HR Analyst III
DBM - ASHLEY
LOVETT (W2015504)

6. Enter Fund Code information in the **Worktags** field

Costing Allocation Attachments

1 item

	Order	Default (As of Start Date)	Required with no Default (Must have Costing Override)	Worktags	*Distribution Percent
				Fund: 01 General	100
					100.00%

Remove

You can have more than one Fund Code, but the Distribution Percent must equal 100%

7. Submit the new/updated information, then navigate back to the Costing Allocation tab and confirm that it now shows correctly