



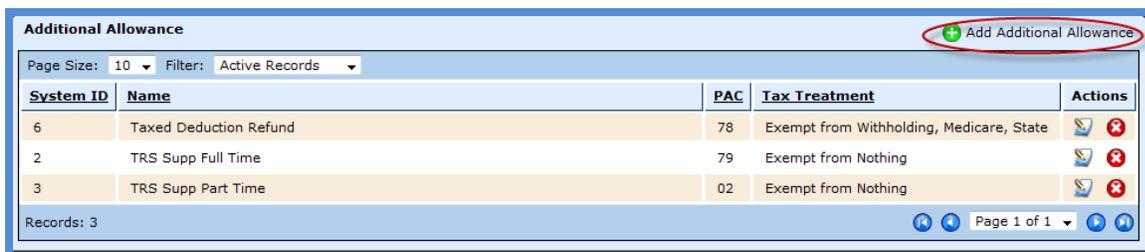
# Additional Allowances

Additional Allowances are designed to assign additional earnings and adjustments to employees either individually or conjointly. For each tax treatment a new additional allowance will need to be set up reflecting that tax treatment.

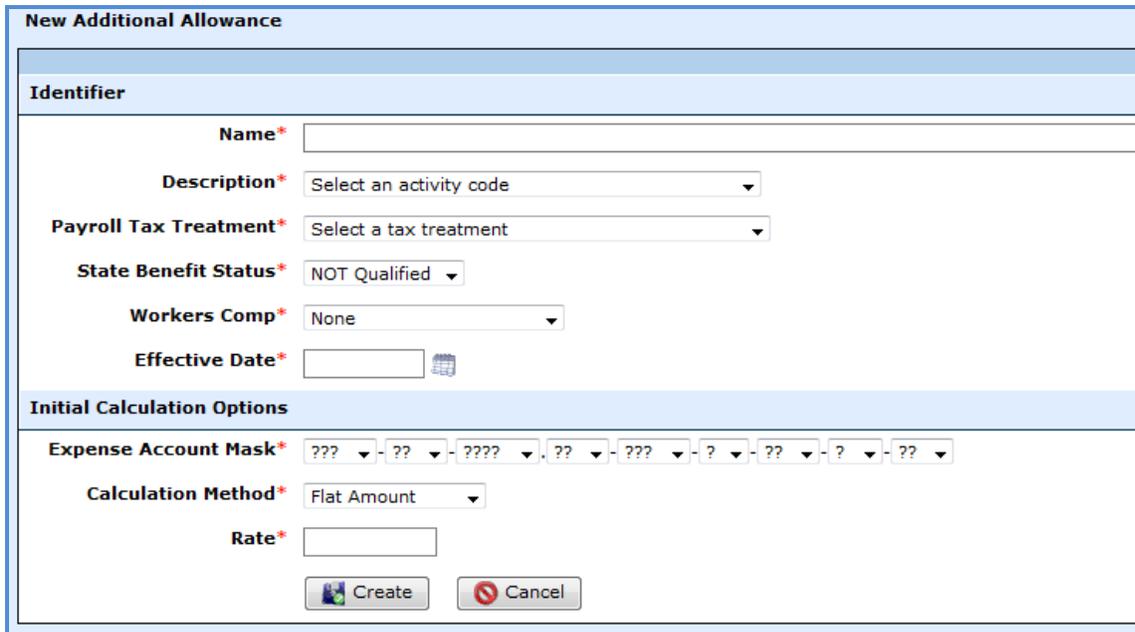
 **Set up an Additional Allowance**

Finance > Payroll > Add'l Allowances

Click  **Add Additional Allowance**



System ID	Name	PAC	Tax Treatment	Actions
6	Taxed Deduction Refund	78	Exempt from Withholding, Medicare, State	 
2	TRS Supp Full Time	79	Exempt from Nothing	 
3	TRS Supp Part Time	02	Exempt from Nothing	 



**New Additional Allowance**

**Identifier**

Name\*

Description\*

Payroll Tax Treatment\*

State Benefit Status\*

Workers Comp\*

Effective Date\*  

**Initial Calculation Options**

Expense Account Mask\*

Calculation Method\*

Rate\*

► **Name** – Enter the description of the allowance. This will be the description on check and check stub

► **Description** – Select the appropriate activity code for the allowance

► **Payroll Tax Treatment** – Select the tax treatment for the allowance

When selecting tax treatments, consider the following in your determination:

- Exempt from FICA – FICA will not be withheld
- Exempt from FICA, Medicare, State – FICA, Medicare or SUTA will be not withheld
- Exempt from FICA, State – FICA or SUTA will not be withheld
- Exempt from Nothing – no statutory amounts will be withheld
- Exempt from State – SUTA will not be withheld
- Exempt from Withholding, FICA, Medicare – Federal W/H, FICA or Medicare will not be withheld
- Exempt from Withholding, FICA, Medicare, State – Federal w/h, FICA, Medicare or SUTA will not be withheld
- Exempt from Withholding, FICA, State – Federal W/H, FICA, or SUTA will not be withheld
- Exempt from Withholding, State – Federal w/h or SUTA will not be withheld

► **State Benefit Status** – Select if the allowance is/is not qualified for TRS

► **Workers Comp** – Enter in the workers comp code for the wages

► **Effective Date** – Enter the effective date of the allowance.

► **Expense Account Mask** – Enter the expense code for the allowance.

► **Calculation Method** – Select the calculation method associated with the allowance

► **Rate** – Enter the rate of the allowance based on the calculation method entered.

The screenshot shows the 'New Additional Allowance' form with the following fields and values:

- Identifier**
  - Name\***: Cell Phone Allowance (Admin)
  - Description\***: 78 - Non-salary
  - Payroll Tax Treatment\***: Exempt from FICA
  - State Benefit Status\***: NOT Qualified
  - Workers Comp\***: Professional Employees
  - Effective Date\***: 04/01/2015
- Initial Calculation Options**
  - Expense Account Mask\***: ??? - ?? - 6149 - ??
  - Calculation Method\***: Flat Amount
  - Rate\***: 100.00

Annotations in red callouts:

- A callout pointing to the 'Payroll Tax Treatment' dropdown: "Federal W/H, Medicare and SUTA will be calculated on this Additional Allowance."
- A callout pointing to the 'State Benefit Status' dropdown: "TRS will not be calculated on this Additional Allowance."

Buttons at the bottom: Create, Cancel

Click  Create

General | Pay Rates

**Edit: Health Declination**  Return to list

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**Identifier**  Edit Identifier

**Name\*** Health Declination

**Calculation Method\*** Flat Amount

**Payroll Activity Code\*** 78 - Non-salary

**Payroll Tax Treatment\*** Exempt from Nothing

**State Benefit Status\*** NOT Qualified

**Workers Comp\*** None

 **Attach Additional Allowance to Employee**

Finance > HR > Staff Manager

Find the employee that is to receive the additional allowance click 

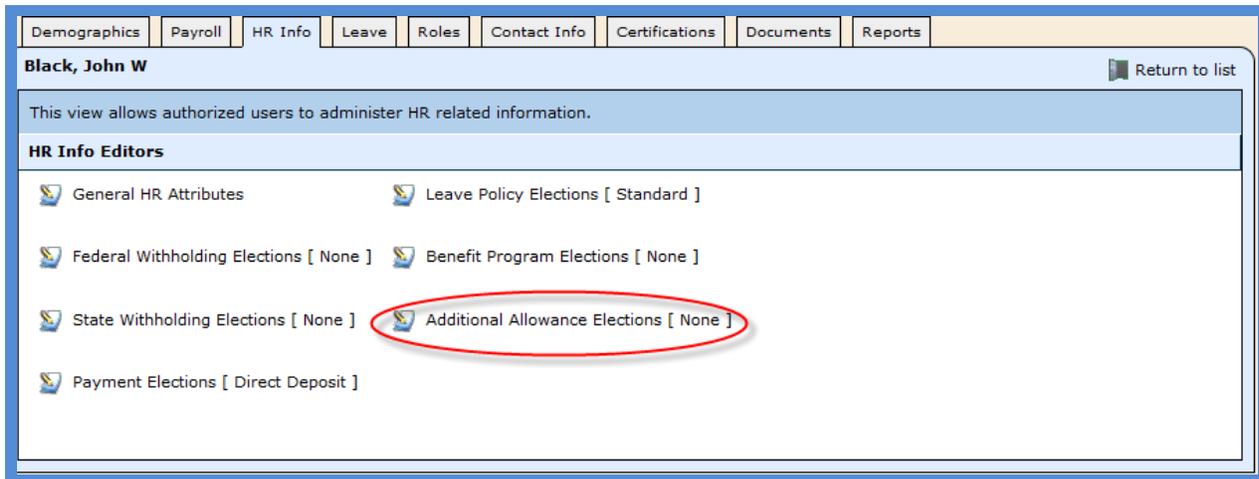
**Staff Manager**  Add/Find Staff

Page Size: 10 Filter: Active Staff

Local ID	SSN	Name	Employment Status	Facility	Actions
005476	X00-00-5476	Aamodt, Catrina	1379 - Contractual	Facility 2	
000181	X00-00-0181	Ambuehl, Howard	1385 - Non-contractual	Facility 10	
000097	X00-00-0097	Anastasia, Oretha	1379 - Contractual	Facility 2	
000113	X00-00-0113	Arabian, Shondra	1379 - Contractual	Facility 2	
000186	X00-00-0186	Artinger, Ailene	1378 - Probationary	Facility 10	
009438	X00-00-9438	Auten, Benedict	1380 - Substitute/temporary	Facility 4	
008624	X00-00-8624	Averhart, Michel	1380 - Substitute/temporary	Facility 2	
009404	X00-00-9404	Avino, Maira	1378 - Probationary	Facility 1	
000233	X00-00-0233	Azoulay, Cristopher	1385 - Non-contractual	Facility 10	
008997	X00-00-8997	Bahde, Justa	1379 - Contractual	Facility 1	

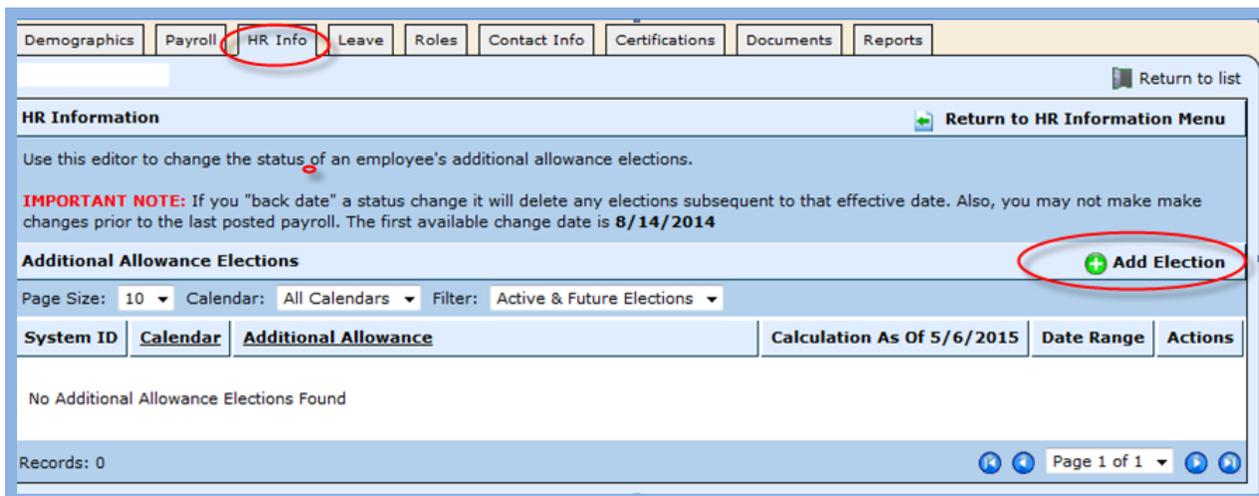
Records: 215 Page 1 of 22

Click  **Additional Allowance Elections**



The screenshot shows the 'HR Info Editors' section for 'Black, John W'. It contains several links for editing different types of elections: General HR Attributes, Leave Policy Elections [ Standard ], Federal Withholding Elections [ None ], Benefit Program Elections [ None ], State Withholding Elections [ None ], **Additional Allowance Elections [ None ]** (circled in red), and Payment Elections [ Direct Deposit ].

Click  **Add Election**



The screenshot shows the 'Additional Allowance Elections' editor. It includes a navigation bar with 'HR Info' circled in red. Below the navigation bar, there is a 'Return to HR Information Menu' link. A red circle highlights the '+ Add Election' button. Below this, there are filters for Page Size (10), Calendar (All Calendars), and Filter (Active & Future Elections). A table header is visible with columns: System ID, Calendar, Additional Allowance, Calculation As Of 5/6/2015, Date Range, and Actions. The table content shows 'No Additional Allowance Elections Found'. At the bottom, it indicates 'Records: 0' and 'Page 1 of 1'.

Demographics | Payroll | HR Info | Leave | Roles | Contact Info | Certifications | Documents | Reports

Return to list

**HR Information** [Return to HR Information Menu](#)

Use this editor to change the status of an employee's additional allowance elections.

**IMPORTANT NOTE:** If you "back date" a status change it will delete any elections subsequent to that effective date. Also, you may not make make changes prior to the last posted payroll. The first available change date is **8/14/2014**

**additional Allowance Elections**

**Allowance\*** Select a program.....

**Calendar\*** Select a calendar.....

**Effective Date\***

**Expiration Date**

- ▶ **Allowance** – Select the additional allowance from drop down box
- ▶ **Calendar** – Select the calendar from the drop down box
- ▶ **Effective Date** – Enter the effective date the allowance should begin
- ▶ **Expiration Date** – Enter the last date the allowance should be effective

Demographics | Payroll | HR Info | Leave | Roles | Contact Info | Certifications | Documents | Reports

Return to list

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**additional Allowance Elections**

**Allowance\*** Health Declination

**Calendar\*** Monthly

**Effective Date\*** 01/01/2015

**Expiration Date** 08/31/2015

Click **Save**

Demographics | Payroll | HR Info | Leave | Roles | Contact Info | Certifications | Documents | Reports

[Return to list](#)

**HR Information** [Return to HR Information Menu](#)

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**Additional Allowance Elections** [Add Election](#)

Page Size: 10 | Calendar: All Calendars | ns

System ID	Calendar	Additional Allowance	Calculation As Of 5/6/2015	Date Range	Actions
430	Monthly	Health Declination	\$100.00	1/1/2015 - 8/31/2015	

Records: 1 [Page 1 of 1](#)