2024-25 Operating Budget Training Position Budgeting

Conducted by the Budget Office

Ken Gloeckner

Training Topics

- Entry Window Dates
- Adaptive Planning
  - What's New?
- Browser Compatibility
- Basic Overview
  - Systems overview
  - Using Adaptive Planning for Position Budgeting

Budget Entry Window

- Training (Zoom only)
  - March 21st-27th
- Canvas organization
  - Recorded training sessions
  - User Manuals, Job Aids
- OB Entry Workshops
- **Entry Windows**
  - **March 25 (Tentative)**: Pre-entry window opens
  - **April 1**: Open
  - **April 14**: Position Budgeting deadline
  - **April 21**: Budget Entry deadline
  - **May 10**: Budget Office reviews completed
  - **May 13-17**: Approver window

Browser Compatibility

Recommend using Chrome (Firefox, Edge also work)

- If you encounter any issues, please contact the Budget Office (budget@fsu.edu)

Adaptive Planning

- Adaptive Planning ("ADP") by Workday
  - System used by the Budget Office for:
    - Operating Budget entry
    - Rate tracking and reporting
    - Merit entry
    - Carryforward Spending Plan
    - Future Projects

FLORIDA STATE UNIVERSITY
BUDGET OFFICE

What's New?

- Fringe Benefits Pools
- Review & Reports tab on the Position Budgeting Dashboard
- Multi-select and other UI changes

FLORIDA STATE UNIVERSITY
BUDGET OFFICE

Position Budgeting Overview

- Position Budgeting includes all details associated with positions: home department, incumbent, funding distribution, base pay, benefit selections, etc.

- Edit/adjust position budgeting details: funding distribution, salary amount, FTE, incumbent, etc.

- Totals from Position Budgeting automatically populate the budgets (faculty and staff, salary and benefits).

- Non-E&G salary/benefits can be overridden by Budget Preparers on the OB dashboard

- Position adjustments in ADP do not "write back" to HR. ADP is used for planning the Operating Budget only. You still need to complete the associated changes in HR.

FLORIDA STATE UNIVERSITY
BUDGET OFFICE

Position Budgeting Security

Home Department vs. Funding Department:

- Access to edit a position based on the Home Department associated with a position

- Salary Preparer has their assigned Home Department "designations"

- Funding Departments are the departments paying for the appointments

Budget Preparer Access

Budget Preparer view by Funding Department:

- Budget Preparers have view-only access to Position Budgeting by Funding Department

- Salary Preparers who are also Budget Preparers may notice additional, greyed-out rows related to Positions outside of their home departments

Position Budgeting Entry

- Version: **2024-25 Operating Budget** (please check!)

- Positions reflect OMNI HR data from payroll ending 3/14/2024.

- Collective bargaining will not be completed by April 1. **DO NOT** make adjustments for faculty promotions or any other collective bargaining increases that may be paid by the University Reserve.

- Benefits will be calculated with the new **Fringe Benefits Pool** rates (see next slide for details).

- Position Budgeting details are used to calculate amounts for salary and benefit budgetary accounts for Budget Entry. Those amounts automatically populate on the Budget Entry dashboard/sheet.

Fringe Benefits Pools

- Effective July 1, 2024, the University will adopt fringe benefits pools to streamline the calculation of employee fringe benefit costs.

- Fringe benefits pool percentages will be applied to salaries/wages as determined by the employee's administrative plan, job code, and/or appointment class.

- For more details: https://budget.fsu.edu/benefitspool

- See the next slide for the **draft** Fringe Benefits Pools and their identifiers.

Fringe Benefit Pools

Pay	Group	Type	Draft 2024-2025 Rate[1]	Identifier
Base	Clinical Faculty	Salaried	26.3%	Salary Plan = 022 and Employee Class = Clinical
Base	Faculty	Salaried	30.0%	Salary Admin Plan = 022 or 022A (excluding Employee Class = Clinical)
Base	Executive Service	Salaried	30.0%	Salary Admin Plan = 024
Base	A&P	Salaried	40.5%	Salary Admin Plan = 021 (excluding Job Code = 9467, 9468, 9469, 9470)
Base	Charter School Faculty	Salaried	47.1%	Salary Admin Plan = 022B
Base	USPS	Salaried	53.0%	Salary Admin Plan = 023
Base	Athletic Coaches	Salaried	10.8%	Job Code = 9467, 9468, 9469, 9470
Base	Post Docs	OPS	19.7%	Job Code = M9189, M9189P
Base	Graduate Assistants	OPS	8.3%	Job Code = M9182, M9183, M9184, W9185, Z9185
Base	Students	OPS	1.5%	Job Codes beginning with "A"
Base	OPS & Temps	OPS	8.3%	All other OPS (excluding Job Codes M9182, M9183, M9184, M9189, M9189P, W9185, Z9185, or beginning with "A")
Non-Base	Bonuses and One-Time Pays	All	5.3%	Any non-base pay without retirement applied (See list)
Non-Base	Overtime and Supplements	All	18.2%	Any non-base pay with retirement applied (See list)

[1]Revised 3/25/2024; DHHS approval pending

FLORIDA STATE UNIVERSITY
BUDGET OFFICE

E&G

- Beginning E&G allocations in Adaptive Planning reflect recurring balances in OMNI as of 3/31/2024

- Adjustments will be made to positions/allocations by the Budget Office for E&G Faculty Position Status Reports (Fall & Spring only).

- Adjustments to your E&G allocation can be made throughout the budgeting process in April

- E&G allocation adjustments must have VP approval and be requested through Gail Friedrich or Phuong Van
  - Provost or Budget Office Amendment
  - **E&G Rate Allocation Change Form** (transfers between schools, salary created from non-salary sources, or between faculty & staff). Please continue to use **35%** (full or vacant rate) and **18%** (pay increases) for this form.

E&G (cont'd)

- **DO NOT** adjust your Positions for the following:
  - Overtime – covered by the Central Reserves
  - Additional Pays – Temporary Pays are covered by the reserves, other pay additives are "reconciled" quarterly
  - Leave Payouts – included in the Benefits Pool

Non-E&G

- Optional override of salary & benefits budgets are possible for non-E&G funds only within the Operating Budget Dashboard available to Budget Preparers.

- Considerations:
  - Overtime
  - Additional pays such as Temporary Pays, Bonuses, etc.
  - Leave payouts **do not** need to be reflected (included in the Benefits Pool)

Collective Bargaining

- Collective bargaining will not be completed before the Position Budgeting window closes

- **DO NOT** enter any across-the-board increases and/or bonuses in anticipation of collective bargaining

- The Budget Office will adjust budgets (E&G and Non-E&G) if there are any collective bargaining increases and/or bonuses

Review & Reports

- Position Budgeting Dashboard → Review & Reports
- Use this tab as a guided review process.

Reminders/Common Issues

- Version: "2024-25 Operating Budget"

- Level = Funding Department in Position Budgeting

- Use the "Review & Reports" tab to check for common errors:
  - Funding distribution add up to 100%?
  - Base pay the same across multiple funding distributions?
  - E&G rate balances with your E&G salary budget for the entire Unit (College, Area, or Dept)?
  - Invalid budget entries caused by Position Budgeting

- **DO NOT** delete entire positions. Zero out the salary instead if you want to eliminate the budgetary impact.

Optional Workshops

- All workshops are being held via either Microsoft Teams or Zoom

- By appointment only

- **PLEASE BE PREPARED!!!**

- Go to Budget Office SharePoint site and view the calendar

  https://fsu.sharepoint.com/sites/budget/

- Email/call in your appointment request based on availability

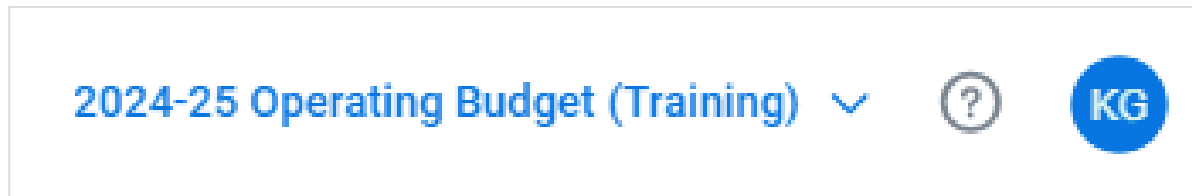FLORIDA STATE UNIVERSITY
BUDGET OFFICE
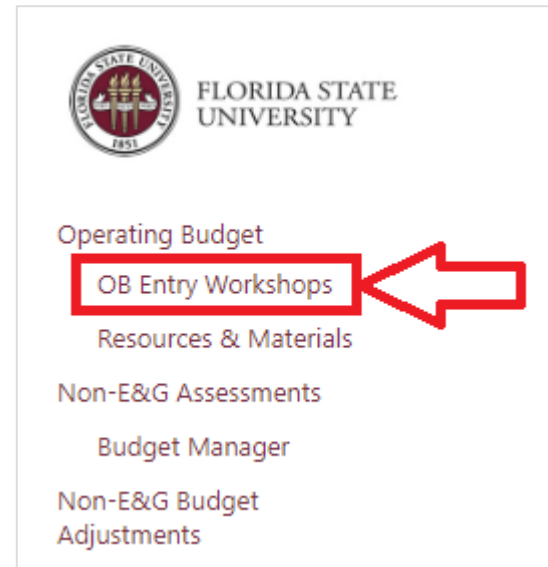
Adaptive Planning (SSO Login)

Login via the MyFSU portal:
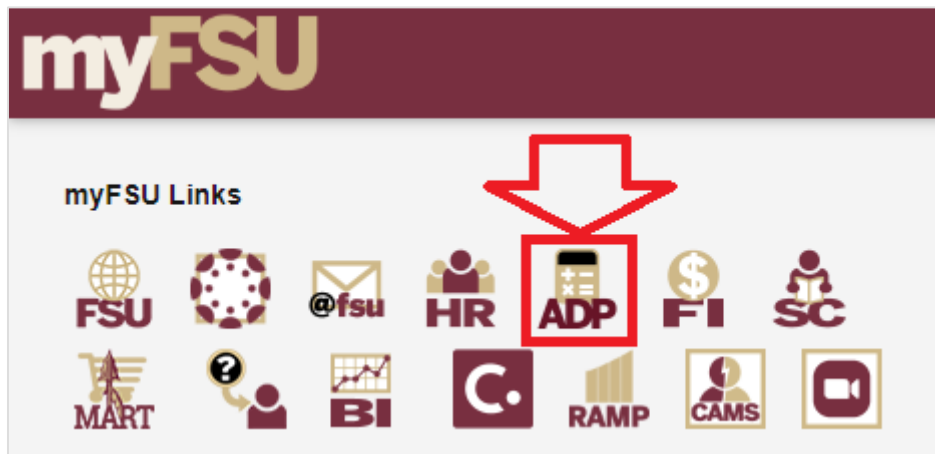
Training Version

- In the top right corner, make sure you've selected the Training version: **"2024-25 Operating Budget (Training)"**

NOTE: During the actual (non-training) entry, please use, "2024-25 Operating Budget".

FLORIDA STATE UNIVERSITY
BUDGET OFFICE

Budget Office Contacts

Gail Friedrich, Sr. Budget Analyst (Salary & Positions)

644-4245 // gfriedri@admin.fsu.edu

Phuong Van, Budget Analyst (Salary & Positions, Faculty)

644-0579 // pvan@fsu.edu

Christopher Brown, Budget Analyst (Salary & Positions, Staff)

644-0796 // crb03c@fsu.edu

Ken Gloeckner, Business Analyst (Adaptive Planning support)

645-0092 // kgloeckner@fsu.edu

FLORIDA STATE UNIVERSITY
BUDGET OFFICE