E&G RATE VARIANCE REPORT

GENERAL NOTES

This report includes an Overview and a Detailed Report of E&G salary rate and variances between reporting periods. The Overview includes totals by school, salary admin plan, and fund code. The Detailed Report includes rate and variances at the position level. Overall, the E&G Rate Variance report is designed for reviewing, tracking, and balancing how your E&G rate is being used.

**Data:** The data in this report comes indirectly from OMNI HR data. Data from OMNI HR is loaded into Hyperion where various calculations and transformations are completed in order to create the reports in BI. New data is loaded after each payperiod and is currently a manual process. It does not load daily. The “Last Run Information” box identifies how up-to-date the data is.

**Funded FTE:** The “Funded FTE” is equal to FTE × Funding Distribution %. For example, if an employee has a 0.75 FTE and is split 60/40 on two different budgets, the resulting Funded FTE would be 0.45 and 0.30, respectively.

**Hierarchy:** A hierarchy is used to define and organize the data for the University. At the highest level is the University followed by Division, School, Area, and Department. Be careful not to confuse a formal department (such as the Department of Anthropology) with a specific “Department” ID (e.g., 072000, 072001, 072006, etc.). Within the hierarchy, a formal department (like Anthropology) is considered an “Area”. Likewise, a formal college is considered a “School”.

**Rate:** Rate represents the current annualized rate (not including benefits) of pay for filled, vacant, or reserved positions. Please keep in mind that rate is annualized dollars.

**Salary Admin Plan:** The salary admin plans used for the report help distinguish positions between USPS, A&P, and Faculty.

**Vacant Positions:** Vacant positions have a placeholder incumbent: “000000000” for the Employee ID and “Vacant” for the Employee Name.

**Versions and Variances:** There are three primary “versions” of the data: Operating Budget, Previous, and Current. Each version contains a distinct data set. There is also a Variance version which is calculated by Hyperion as Previous minus Current versions. An increase of rate, therefore, appears as a negative amount.

- **Operating Budget** – data is from the operating budget and remains static throughout the year until the next operating budget is loaded.
- **Previous** – data roughly mirrors that of the Current version from the previous reporting period (with the addition of new positions or manual adjustments since the last reporting period).
- **Current** – data is based on the Previous version in the current reporting period but includes various programmatic and manual adjustments made in OMNI HR. The data is as of the pay period ending date indicated in the top left corner of the report (“Last Run Information”).

If you have any questions, please contact Gail Friedrich (gfriedri@admin.fsu.edu, 4-4245) or Ken Gloeckner (kgloeckner@fsu.edu, 5-0092).

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NAVIGATING AND SELECTING DATA

You can navigate to the E&G Rate Variance report in BI by first accessing BI. Select the “Dashboards” drop down menu, under the “HYP – Rate and Salary Reports” header, select the “E&G Rate Variance” report.

You can select criteria for Fiscal Year, hierarchical criteria like School, Area, and Department (please see above for more details about the hierarchy), Fund, Salary Admin Plan (USPS, A&P, and Faculty), and Version Types (Operating Budget, Previous, Current, and Variance).

Once you have made your criteria selections, press “Apply”. Depending on your selection criteria, your results may take a few moments to display. Once they have been displayed, you may use the links at the bottom to Refresh, Print, and Export to various formats.

Depending on your criteria selection, your results may include more than 25 rows. Use the scroll bar to the right of your results to scroll through more data.

LAST RUN INFORMATION

Above the criteria selection options, the “Last Run Information” indicates the effective date of the data being displayed. As mentioned above, the Current version is always as of a pay period end date. Since the rate reports are updated incrementally based on this date, this information is useful for determining how old the data is.

OVERVIEW AND DETAILED REPORTS

At the top left are two tabs which switch the report between a higher level “overview” and a lower level “detailed report”. Please see the following section (“Reviewing the Data”) for more details about these tabs and the results shown for each.
E&G Allocations Variance

To help with balancing and reconciling your E&G rate, a variance of your E&G rate allocation is provided above the E&G Rate Variance report. The E&G Allocations Variance does not provide complete details – only summarized allocation amounts based on the selection criteria you have entered. If you need complete details for your E&G allocation changes, please review the E&G Allocations (Recurring) report in BI.

NOTE: The E&G Allocations Variance only displays current fiscal year allocation data. If you select another fiscal year, the allocation details will still be for the current fiscal year and reporting period.

Overview

The Overview report totals rate by school, salary admin plan, and fund code for each version (please see first page for more details about versions). It may be useful as a preliminary report to review to see if any changes have happened overall. However, it is recommended that you also review the Detailed Report as the Overview may not show any variance in spite of changes that may have happened within a school, salary admin plan, and fund.
Detailed Report

The Detailed Report provides detail at the position level. In addition to providing details included in the Overview report, it also includes specific funding details (Area and Department ID) as well as job code, job description, and incumbent. This is particularly helpful when reviewing position and incumbent specific information such as appointment changes and new or abolished positions.

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<tr>
<th>Funding School</th>
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<th>Funding Area</th>
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<th>Funding Dept Descr</th>
<th>Salary Admin Prin</th>
<th>Fund Code</th>
<th>Total Code Descr</th>
<th>Position</th>
<th>Job Code</th>
<th>Job Code Descr</th>
<th>Employee ID</th>
<th>Employment Status</th>
<th>E&amp;G Rate</th>
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| E&G Rate Variance report is designed for reviewing, tracking, and balancing how your E&G rate is being used. Used in conjunction with the E&G Allocations Variance (available on top of the E&G Rate Variance report) or the E&G Allocations report (available as a separate BI report), this report will help you identify changes to positions and allocation details related to salary. For instance, if you have converted non-salary budget to salary for the purposes of a new position, you will be able to reconcile that change in your E&G rate allocations with your E&G Rate Variance report.

Balancing your E&G rate requires that the rate allocated to your positions equals your E&G rate allocation. For faculty, many schools have vacant faculty positions in which “unused” rate is kept throughout the year. In the event a new faculty member is hired, increases are given, or funding changes are made, the needed rate is taken from the vacant position to cover the changes. For support (USPS and A&P), the situation is similar to faculty in that vacant positions hold “unused” rate. However, many schools have positions specifically intended to hold unused rate throughout the year. These positions are called “rate pool positions” and are designated with a position number that starts with the number 9 (e.g., 00092020).

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In the example below, E&G Allocation Variance report shows that, within this department, there was an allocation adjustment of $147.75. Looking at the E&G Rate Variance report, we can see this adjustment was related to position 00094910. If you recall from the previous section, positions which start with the number 9 are rate pool positions. Therefore, we know that there was an adjustment to the rate pool and an associated adjustment to the budget. The E&G Allocation and Rate Report for this department is in balance. Please see below:

The E&G Allocation Variance for this department shows a change of $147.75.

The E&G Rate Variance report for this department shows a variance in p.94910 of $147.75.
BALANCING PROCESS

As mentioned above, the rate allocated to your positions needs to equal your E&G rate allocation. It is recommended that you review both the Overview and Detailed Report to determine whether your rate is balanced. If the rate allocated to your positions does not equal your E&G rate allocation, you likely have three options:

1. **Adjust rate in vacant positions** – If you need to adjust the rate in a vacant position to balance your rate to your allocation, you can request this by contacting the Budget Office. Please indicate the vacant position number, the amount it needs to be adjusted to, and any details you may feel necessary or relevant to the adjustment (ex: “Reducing vacant position 00012345 by $2,000 to fund increase for position 00054321.”).

2. **Adjust appointments of filled positions** – You should be tracking your E&G appointments and be proactive in ensuring your appointments are adjusted as necessary to avoid exceeding your allocation. However, if you need to retroactively adjust your appointments to balance your rate report to your allocation, please inform the Budget Office.

3. **Adjust rate allocation by converting budget to/from salary** – Please use the E&G Rate Allocation Change form located on the Budget Office website to submit your request. The form needs to be signed by an authorized signer. If the allocation change is affecting two different schools or divisions, you will need signatures from both parties approving the change.