



**THE FLORIDA STATE UNIVERSITY**  
**BUDGET OFFICE**

**E&G Rate Allocation Change Form**

**FROM:**

Position	Unit	Dept ID	Fund	Bud Acct	Amount	FTE	Comments/Incumbent	Eff Date

**TO:**

Position	Unit	Dept ID	Fund	Bud Acct	Amount	FTE	Comments/Incumbent	Eff Date

Notes/References/Special Conditions:

Approval Signatures:

\_\_\_\_\_  
 Dean/Director

\_\_\_\_\_  
 President/Provost/Vice President

\_\_\_\_\_  
 Dean/Director (if between Units)

\_\_\_\_\_  
 President/Provost/Vice President (if between Divisions)

Submitted By:

\_\_\_\_\_  
 Name

\_\_\_\_\_  
 Email

\_\_\_\_\_  
 Phone

Processed by Budget Office (Journal(s)/Date):

## INSTRUCTIONS

This form is used to make changes to your E&G rate allocation. Please use the “FROM” section to indicate where you will be taking rate/budget from and the “TO” section to indicate where you are moving the budget/rate to. These sections should balance.

- Position – the position number(s) associated with the change (if applicable).
- Unit – the division, school, college, or area associated with the change.
- Dept ID – the department ID(s) associated with the change.
- Fund – the fund associated with the change. (**Note:** This form is used only for E&G funds 110, 121, 210, and 211 and cannot be used to transfer between funds. For example, you cannot transfer rate between 110 and 121.)
- Bud Acct – use the dropdown list to select the budgetary account/category.
- Amount – the amount associated with the budgetary account/category.
- FTE – the FTE associated with the rate (if applicable).
- Comments/Incumbent – any additional details regarding the rate, position, or incumbent. Please use the “Notes” area if you need more space.
- Eff Date – the effective date of the change.

## APPROVALS

The form needs to be signed by the Dean/Director and the division Executive for any change. If the allocation change affects two different Units, the form will need to be signed by each respective Dean or Director. If the units are in two different Divisions, the form will need to be signed by each division’s respective executive(s) (President, Provost, and/or Vice Presidents). All schools, colleges, and departments within Academic Affairs need the Provost’s signature.

## ESTIMATING BENEFITS

When making changes to your rate allocation, please include information regarding the estimated benefits on a separate line. Benefits need to be included for any rate change. For support and faculty positions, benefits are estimated at 33% of the rate amount. For salary increases, benefits are estimated at 17%. To summarize:

- Positions (support or faculty) – benefits are estimated at **33%**
- Salary Increases (support or faculty) – benefits are estimated at **17%**

## EXAMPLE

In the example below, a department is converting expense budget to rate and benefits for a new position:

### FROM:

Position	Unit	Dept ID	Fund	Bud Acct	Amount	FTE	Comments/Incumbent	Eff Date
	Arts & Sciences	059000	110	740000 -	\$53,200.00		Converting expense to A&P rate	Jul 1, 2020
					\$53,200.00			

### TO:

Position	Unit	Dept ID	Fund	Bud Acct	Amount	FTE	Comments/Incumbent	Eff Date
89999	Arts & Sciences	059000	110	710300 -	\$40,000.00	1.0	New grant coord position	Jul 1, 2020
89999	Arts & Sciences	059000	110	710399 -	\$13,200.00		Estimate benefits (33%)	Jul 1, 2020
					\$53,200.00			