

# 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 is at a higher-level looking at 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 pulled from various sources and fed into Hyperion. Within Hyperion, the data undergoes various calculations and transformations before being used to generate reports. The data is loaded each pay period and is currently a manual process. It does not load daily.

**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 in **recurring** 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 of “E000000000” (the “E” stands for employee).

**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. Current is the more recent data and would be the recommended version for most intents and purposes of this report.

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

Criteria Selection

\* Fiscal Year

FY16

School

--Select Value--

Area

--Select Value--

Department

--Select Value--

Fund

110 - E&G General Re

Salary Admin Plan

--Select Value--

Apply Reset

## NAVIGATION

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

The default results displayed show the results for all divisions and fund types. You can refine the criteria using the criteria selection panel on the left.

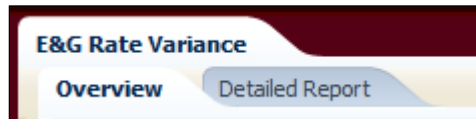
You can select criteria for Fiscal Year, hierarchical criteria like School, Area, and Department (please see above for more details about the hierarchy), Fund, and Salary Admin Plan (USPS, A&P, and Faculty).

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. In order to see all the rows, you may need to click the expand row icon (↕) at the bottom.

## 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.



Alternatively, you can use the “Drill to” links at the middle-top of the report to drill to Area and Department levels.



## REVIEWING THE DATA

The Operating Budget is loaded once each year and will remain static throughout the year<sup>1</sup>. As each new reporting period is loaded, the Previous and Current versions will be updated with new data to reflect any changes in appointments, positions, or allocations.

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.

Funding School	Salary Admin Plan	Fund Codes-Description	E&G Rate			
			Operating Budget	Previous	Current	Variance
EX - Example College	USPS	110 - E&G General Revenue	4,406,004.79	4,406,004.79	4,195,857.42	210,147.37
		121 - Tuition Differential	31,086.08	31,086.08	31,086.08	0.00
	<b>USPS Total</b>		<b>4,437,090.87</b>	<b>4,437,090.87</b>	<b>4,226,943.50</b>	<b>210,147.37</b>
	A&P	110 - E&G General Revenue	4,004,925.60	4,004,925.60	3,969,869.24	35,056.36
	<b>A&amp;P Total</b>		<b>4,004,925.60</b>	<b>4,004,925.60</b>	<b>3,969,869.24</b>	<b>35,056.36</b>
	Faculty	110 - E&G General Revenue	43,333,615.84	43,333,615.84	43,274,800.29	58,815.55
		121 - Tuition Differential	6,934,436.46	6,934,436.46	6,934,436.46	0.00
	<b>Faculty Total</b>		<b>50,268,052.30</b>	<b>50,268,052.30</b>	<b>50,209,236.75</b>	<b>58,815.55</b>

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.

Funding School	Funding Area	Funding Department ID	Salary Admin Plan	Fund Codes-Description	Position	Job Code-Description	Employee ID - Name	E&G Rate				
								Operating Budget	Previous	Current	Variance	
EX - Example College	543 - Ctr. for Adv. Examples	543210 - Ctr. for Adv. Examples	USPS	110 - E&G General Revenue	P00053421	2403 - Grants Compliance Assoc	000054321 - Russell, Bertrand	11,530.40	11,530.40	11,530.40	0.00	
			<b>USPS Total</b>						<b>11,530.40</b>	<b>11,530.40</b>	<b>11,530.40</b>	<b>0.00</b>
			A&P	110 - E&G General Revenue	P00054231	9254 - Program Coordinator	000043215 - Wittgenstein, L		54,075.50	54,075.50	54,075.50	0.00
			<b>A&amp;P Total</b>						<b>54,075.50</b>	<b>54,075.50</b>	<b>54,075.50</b>	<b>0.00</b>
	543 - Ctr. for Adv. Examples	543210 - Ctr. for Adv. Examples	USPS	110 - E&G General Revenue	P00054123	4613 - Technical/Research Designer	000032154 - Spinoza, Baruch	48,035.12	48,035.12	48,035.12	0.00	
					P00051324	4613 - Technical/Research Designer	000021543 - Mill, John Stuart	48,870.61	48,870.61	48,870.61	0.00	
					P00052134	0297 - Academic Support Assistant	000015432 - Husserl, Edmund	26,500.00	26,500.00	26,500.00	0.00	
					P00051432	4613 - Technical/Research Designer	000012345 - Shannon, Claude	41,169.13	41,169.13	41,169.13	0.00	
		P00052431	4613 - Technical/Research Designer	000023451 - Descartes, Rene		49,464.00	49,464.00	49,464.00	0.00			
<b>USPS Total</b>						<b>214,038.86</b>	<b>214,038.86</b>	<b>214,038.86</b>	<b>0.00</b>			

<sup>1</sup> The only exception will be during the budget entry window in spring of each year. Authorized individuals will have access to adjust the Operating Budget report for the subsequent fiscal year and will be able to pull the adjusted reports accordingly.

## TRACKING & BALANCING RATE

The 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 Allocation Report**, this report will help you determine how allocation changes have been allocated amongst your E&G funded positions. 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 on the E&G Allocation Report with a new position on 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”.

In the example below, E&G allocation rate report total for the department equals (with a slight rounding difference) to that of the positions. The rate reports, therefore, are in balance. Please see below:

Group	Division	School	Area	Fund Id	Fund Desc	Dept ID	Dept ID Description	Journal Date	Journal Id	Long Description	Budget A&P	Budget USPS	Total			
University	Academic Affairs	EX - Example College	543 - Ctr. for Adv. Examples	110	E&G General Revenue	543210	Ctr. for Adv. Examples	7/1/2015	0000235857	-	54,076.00	11,530.00	65,606.00			
							543210 Total									
				110 Total										54,076.00	11,530.00	65,606.00
				543 - Ctr. for Adv. Examples Total										54,076.00	11,530.00	65,606.00
				Ex - Example College Total										54,076.00	11,530.00	65,606.00
Academic Affairs Total										54,076.00	11,530.00	65,606.00				
University Total										54,076.00	11,530.00	65,606.00				

*The rate allocation for this department are \$54,076 for A&P and \$11,530 for USPS.*

Funding Department ID	Salary Admin Plan	Fund Codes-Description	Position	Job Code-Description	Employee ID - Name	Operating Budget	Previous	Current	Variance
543210 - Ctr. for Adv. Examples	USPS	110 - E&G General Revenue	P00053421	2403 - Grants Compliance Asoc	000054321 - Russell, Bertrand	11,530.40	11,530.40	11,530.40	0.00
	<b>USPS Total</b>					<b>11,530.40</b>	<b>11,530.40</b>	<b>11,530.40</b>	<b>0.00</b>
	A&P	110 - E&G General Revenue	P00054231	9254 - Program Coordinator	000043215 - Wittgenstein, L.	54,075.50	54,075.50	54,075.50	0.00
	<b>A&amp;P Total</b>					<b>54,075.50</b>	<b>54,075.50</b>	<b>54,075.50</b>	<b>0.00</b>

*The total rate allocated to positions in this department are \$54,075.50 for A&P and \$11,530.40 for USPS.*

## 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 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.