

E&G RATE VARIANCE REPORT

GENERAL NOTES

The E&G Rate Variance report is designed to help review, track, and balance your E&G rate.

Data: The data in this report comes indirectly from OMNI HR data loaded into Adaptive Planning. Calculations and transformations are used to prepare and format the data for BI. New data is loaded after each pay period; it is not loaded daily. On the main tab, the info box at the top left identifies how up-to-date the data is. The Historical tab's prompts and headers indicate which pay periods are being compared.

Funded FTE: The "Funded FTE" equals $FTE \times \text{Funding Distribution \%}$. For example, if a position is 0.75 FTE split 60/40 on two funding sources, 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. The University's highest level (FSU) is followed by Division, School, Area, and Department. Within the hierarchy, a formal department (like Anthropology) is considered an "Area." Likewise, a formal college is considered a "School." 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.).

Historical data: The second tab ("E&G Rate Variance (Historical)") allows users to customize which pay periods are compared for variances. For consistency, please ensure that the Previous Pay End Date is before the Current Pay End Date when making selections.

Pool and Reserve Positions: Rate pool, reserve, and summer reserve positions have unique job codes and descriptions for reporting purposes only. Rate pool positions are denoted by a job code of RTPL (Rate Pool Position), reserve positions by RSRV (Reserve Position), and summer reserve positions by SUMM (Summer Reserve Position).

Rate: Rate represents the current annualized rate of pay for filled, vacant, pool, or reserved positions. Please keep in mind that E&G rate is annualized. For 12mo employees/positions, the annualized amount corresponds to 26.1 pay periods. For 9mo employees/positions, the annualized amount corresponds to 19.5 pay periods.

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.

Previous Pay End Date	06/23/2022 ▼
Current Pay End Date	07/21/2022 ▼
Fiscal Year	--Select Value-- ▼
School	--Select Value-- ▼
Area	--Select Value-- ▼
Department	--Select Value-- ▼
Fund	--Select Value-- ▼
Salary Admin Plan	--Select Value-- ▼

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 “ADP – Rate and Salary Report” header and select the “E&G Rate Variance” report.

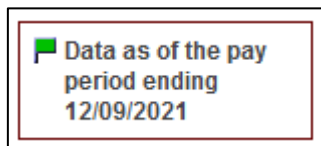
There are two tabs for the E&G Rate Variance report. The first tab (“E&G Rate Variance”) includes the two most recent rate tracking periods and their variances. The second tab (“E&G Rate Variance (Historical)”) includes additional prompts to allow you to customize which periods of data you are comparing. The historical datasets include rate tracking data beginning PPE 11/25/21.

On the first tab (“E&G Rate Variance”), 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).

On the second tab (“E&G Rate Variance (Historical)”), you have additional prompts to select the “Previous Pay End Date” and the “Current Pay End Date.” These allow users to make custom variances/comparisons between selected pay periods.

After making your selections, press “Apply.” Once 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.



PAY PERIOD END DATE

On the first tab (“E&G Rate Variance”), an info box above the prompts indicates the effective date of the data 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 indicates which datasets you are viewing.

On the second tab (“E&G Rate Variance (Historical)”), the available pay periods are listed in the prompts for “Previous Pay End Date” and “Current Pay End Date.”

E&G RATE VARIANCE

The E&G Rate Variance report provides detail at the individual funding level for each position and employee budgeted on E&G funds (funds 110, 121, 210, and 211) and variance between pay periods. The Variance amount is calculated as Previous minus Current. Please note that this report does not include benefits and does not reflect period amounts. All amounts displayed are annualized based on the appointment type (9mo or 12mo).

Funding School	Funding School Descr	Funding Area	Funding Dept ID	Funding Dept ID Descr	Salary Admin Plan	Fund Code	Funding Code Descr	Position	Jobcode	Job Code Descr	Employee ID	Empl Rcd	Employee Name	Funded FTE Previous	Funded FTE Current	Funded FTE Variance	E&G Rate Previous	E&G Rate Current	E&G Rate Variance
AS	College of Arts & Sciences	059 - Ctr Ocean Atmos Prediction Stu	059000	Ctr Ocean Atmos Prediction Stu	A&P	110	E&G General Revenue	00080785	9224	Sr Administrative Spec	000012345	0	Smith, John	1.00000	1.00000	0.00000	35,000.00	40,000.00	(5,000.00)
A&P Total														1.00000	1.00000	0.00000	35,000.00	40,000.00	0.00
					USPS	110	E&G General Revenue	00082190	2403	Grants Compliance Asoc	00023456	0	Doe, Jane	0.50000	0.50000	0.00000	40,000.00	40,000.00	0.00
USPS Total														0.50000	0.50000	0.00000	40,000.00	40,000.00	0.00

TRACKING & BALANCING RATE

The E&G Rate Variance report is designed to help review, track, and balance your E&G rate. Used in conjunction with 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 to create 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 reserve faculty positions, indicated by a job code of RSRV, in which the “unused” rate is kept throughout the year. If a new faculty member is hired, increases are given, or funding changes are made, the needed rate is taken from the reserve position to cover the changes. For support (USPS and A&P), the situation is similar to faculty in that a reserve position holds “unused” rate. However, for support, these positions are referred to as “Rate Pool” positions and are designated with a position number that starts with the number 9 (e.g., 00092020). They are also indicated by a job code of RTPL.

BALANCING PROCESS

As mentioned above, the rate allocated to your positions must equal your E&G rate allocation. The Budget Office recommends regularly reviewing your E&G Rate Variance and E&G Allocations reports. 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, please inform the Budget Office if you need to retroactively adjust your appointments to balance your rate report to your allocation.
3. **Adjust rate allocation by converting budget to/from salary** – Please use the E&G Rate Allocation Change form on the Budget Office website to submit your request. The form needs to be signed by an authorized signer. If the allocation change affects two different schools or divisions, you will need signatures from both parties approving the change.