

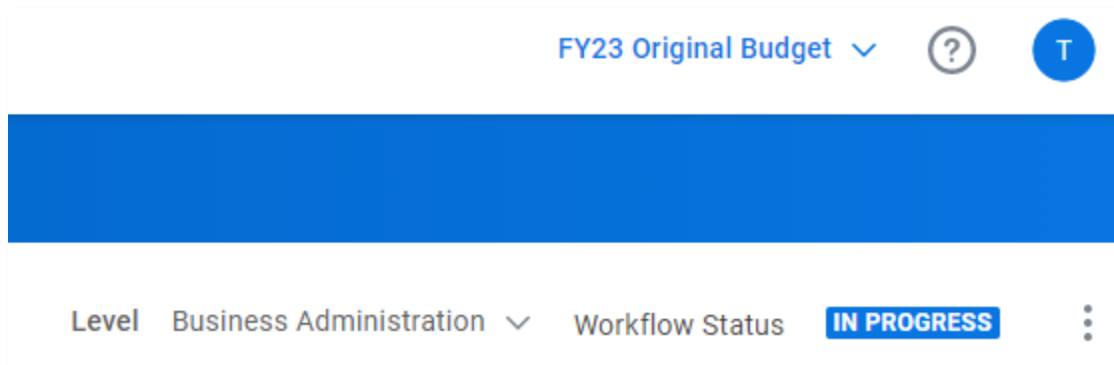
## UF BUDGET PLANNER – COMPENSATION SHEET

This guide will cover:

- Updating Employee and Position Data
- Adding/Deleting Distributions
- Assigning To Be Hired/Fill Vacant Positions
- Budgeting Additional Pay and Moving Expenses by employee or position

### UPDATING DATA

The first thing you should always check before making edits is to confirm the Version and Level you are on.



### Updating Salary

Find the employee on the sheet you wish to update, enter new salary in column **ANNUAL RATE** and save. The fringe amount and total compensation will automatically be updated.

For hourly employees, the annual rate should be calculated as 2088\*hourly rate.

To find the employee you need to edit, please review Filter, Sorting and Display Option Instruction Guide.

A new UFID created in PeopleSoft Job Data is brought over to UF Budget Planner overnight. For employees hired between the All Funds Budget deadline and 6/30, if you know the UFID in advance, please put the UFID to the NOTES column. This will allow us to include them in the raise pool calculation if a raise is given.

Levels 1701: Business Admin Office of the Dean

	ANNUAL RATE	NO...	FRINGE AMOU...	SALARY...	TOTAL COMPENSATIO...
C	180000		34,829.44	112,353.02	147,182.45
	108,211.89		34,359.27	108,211.89	145,195.60
DII	82,864.51		33,725.86	82,864.51	116,590.37

	ANNUAL RATE	NO...	FRINGE AMOU...	SALARY...	TOTAL COMPENSATIO...
	180,000.00		34,981.02	112,842.00	147,823.02
	108,211.89		34,359.27	108,211.89	145,195.60
	82,864.51		33,725.86	82,864.51	116,590.37

### Updating a Distribution

Find the desired employee on the sheet, update the ChartField string (Dept ID, Fund, Budget Ref, Program Code, Dept Flex, SOF, Project, CRIS, Cost Distribution) and save.

JOB TITLE	FUNDS	BUDGET	PROGRAM	DEPT FLEX	SOURCE OF	PROJECT	CRIS	COST DISTRIBUTION %	SAL
003911 - Data Management Analyst II	101 E&G-G...	CRRNT	6100 - GE...					100.00%	TA12
002005 - Financial Analyst II	101 E&G-G...	CRRNT	6100 - GE...					50.00%	TA12
001941 - Web Developer III	158 SUPP...	CRRNT	7700 - AU...		OTHER			50.00%	TA12
002005 - Financial Analyst II	101 E&G-G...	CRRNT	6100 - GE...					100.00%	TA12
002005 - Financial Analyst II	101 E&G-G...	CRRNT	6100 - GE...					100.00%	TA12
002001 - Accountant II	101 E&G-G...	CRRNT	6100 - GE...					100.00%	FA09

### Adding a Distribution

Find the desired employee on the sheet, right-clicking, and choosing Copy Row. The new row will appear at the bottom of the sheet.

#	DEPT ID	EMPLOYEE ID
1	17010500: BA-BUSINESS COMMUNICATIONS	4749
2	17010800: BA-DOCTOR OF BUSINESS ADMINISTRATION	887
3	17010200: BA-MIB PROGRAM	519
4	17010100: BA-DEAN BUSINESS OFFICE	752
5	17010900: BA-MARKETING & COMMUNICATIONS	551
6	17010900: BA-MARKETING & COMMUNICATIONS	Vacant
7	17010200: BA-MIB PROGRAM	517
8	17010800: BA-DOCTOR OF BUSINESS ADMINISTRATION	666
9	17010800: BA-DOCTOR OF BUSINESS ADMINISTRATION	462
10	17010900: BA-MARKETING & COMMUNICATIONS	823
11	17010500: BA-BUSINESS COMMUNICATIONS	391
12	17010100: BA-DEAN BUSINESS OFFICE	551
13	17010900: BA-MARKETING & COMMUNICATIONS	Vacant

Enter or update the distribution information on the newly added row, the blue font will change to black when the data is saved. The accounts will automatically populate if a Sal Admin Plan is selected. Don't forget to update the previous distribution % to make sure the total distributions are 100%.

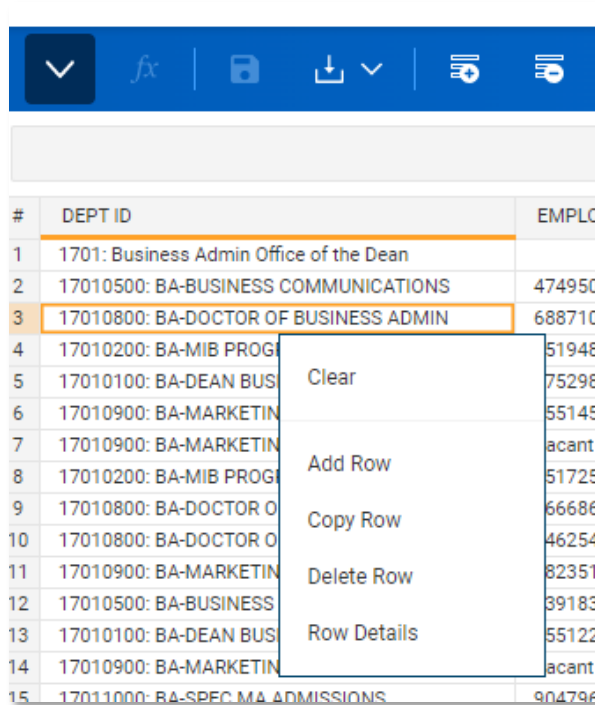
During the All Funds Budget cycle, please avoid to split distributions into different date ranges. We recommend you prorate the distribution percentage on an annual basis.

#	DEPT ID	EMPLOYEE ID	E.L.	POSITION	JOB TITLE	DISTRIBUTION %	SAL_ADMIN_PLAN *	ACCOUNTS	FRIN
27	17010100: BA-DEAN BUSINESS OFFICE	Vacant	0	00037354 - Diversity Program Manager	009098 - Diversity Pr	0.00%	TA12	621110 - EXEMPT TEAMS/USPS-EARNINGS	
28	17010900: BA-MARKETING & COMMUNICATIONS	9381761	0	00033172 - Marketing and Comm Specialist	002508 - Marketing a	100.00%	TA12	621110 - EXEMPT TEAMS/USPS-EARNINGS	
29	17010200: BA-MIB PROGRAM	8825981	0	00009126 - Academic Advisor III	004002 - Academic A	100.00%	TA12	621110 - EXEMPT TEAMS/USPS-EARNINGS	
30	17010800: BA-DOCTOR OF BUSINESS ADMINISTRATION	2770031	0	00008708 - ASSISTANT DEAN 5	001583 - ASSISTANT	25.00%	TA12	621110 - EXEMPT TEAMS/USPS-EARNINGS	
31	17010500: BA-BUSINESS COMMUNICATIONS	1517831	0	00009859 - LECTURER	000531 - LECTURER	100.00%	FA12	611110 - FACULTY-EARNINGS	
32	17010900: BA-MARKETING & COMMUNICATIONS	Vacant	0	00037181 - Marketing Assistant	002506 - Marketing A	0.00%	TU2N	631110 - NONEXEMPT TEAMS/USPS-EARNINGS	
33	17010100: BA-DEAN BUSINESS OFFICE	4911731	0	00035769 - DEAN & PROF	000449 - DEAN & PR	36.98%	FA12	611110 - FACULTY-EARNINGS	
34	17010100: BA-DEAN BUSINESS OFFICE	2770031	0	00008708 - ASSISTANT DEAN 5	001583 - ASSISTANT	50.00%	TA12	621110 - EXEMPT TEAMS/USPS-EARNINGS	
35	17010200: BA-MIB PROGRAM	4648101	0	00006105 - PRG DIR & SR ASD IN	001514 - PRG DIR & S	100.00%	FA12	611110 - FACULTY-EARNINGS	
36	17010500: BA-BUSINESS COMMUNICATIONS	4901991	0	00031313 - LECTURER	000531 - LECTURER	80.00%	FA12	611110 - FACULTY-EARNINGS	
37	17010500: BA-BUSINESS COMMUNICATIONS	4901991	0	00031313 - LECTURER	000531 - LECTURER	20.00%	FA12	611110 - FACULTY-EARNINGS	
38	17010100: BA-DEAN BUSINESS OFFICE	2275411	0	00005325 - EMIN SCHOLAR	000512 - EMIN SCHC	32.07%	FA09	611110 - FACULTY-EARNINGS	
39	17010900: BA-MARKETING & COMMUNICATIONS	2944011	0	00008511 - Public Relations Specialist I	002520 - Public Relat	100.00%	TA12	621110 - EXEMPT TEAMS/USPS-EARNINGS	
40	17010100: BA-DEAN BUSINESS OFFICE	6794141	0	00006069 - AST DIR, Academic Support Svcs	002104 - AST DIR, Ac	100.00%	TA12	621110 - EXEMPT TEAMS/USPS-EARNINGS	
41	17010900: BA-MARKETING & COMMUNICATIONS	5338791	0	00011973 - Graphic Designer II	002505 - Graphic Des	100.00%	TA12	621110 - EXEMPT TEAMS/USPS-EARNINGS	
42	17010500: BA-BUSINESS COMMUNICATIONS	Vacant	0	00030389 - LECTURER	000531 - LECTURER	0.00%	FA09	611110 - FACULTY-EARNINGS	
43	17010400: BA-DEVELOPMENT	Vacant	0	00028291 - DIR, Development	005010 - DIR, Develop	0.00%	TA12	621110 - EXEMPT TEAMS/USPS-EARNINGS	
44	17011000: BA-SPEC MA ADMISSIONS	7305981	0	00033752 - AST DIR, Admissions	002107 - AST DIR, Ac	100.00%	TA12	621110 - EXEMPT TEAMS/USPS-EARNINGS	
45	17010900: BA-MARKETING & COMMUNICATIONS	6176061	0	00033142 - Art/Creative Director	002529 - Art/Creativ	100.00%	TA12	621110 - EXEMPT TEAMS/USPS-EARNINGS	
46	17010100: BA-DEAN BUSINESS OFFICE	8096101	0	00007588 - PROF	000518 - PROF	34.69%	FA09	611110 - FACULTY-EARNINGS	
47	17010800: BA-DOCTOR OF BUSINESS ADMINISTRATION	8013111	1	00006128 - PROF	000518 - PROF	27.54%	FA09	611110 - FACULTY-EARNINGS	
48	17010500: BA-BUSINESS COMMUNICATIONS	9791741	1	00022197 - Administrative Spec I	003700 - Administrat	100.00%	TU2N	631110 - NONEXEMPT TEAMS/USPS-EARNINGS	
49	17010500: BA-BUSINESS COMMUNICATIONS	1435311	4	00011884 - LECTURER	000531 - LECTURER	75.91%	FA09	611110 - FACULTY-EARNINGS	
50	17010500: BA-BUSINESS COMMUNICATIONS	9951591	8	00036496 - DIR & LECTURER	000493 - DIR & LECT	100.00%	FA09	611110 - FACULTY-EARNINGS	
51	Total							OPSE	

S	COST DISTRIBUTION %	SAL_ADMIN PLAN
	37.31%	OPSE
	62.69%	FA09
	100.00%	FA12

### Deleting a Distribution

Select the row that needs to be deleted, right-click, and select Delete Row or click Delete Row icon on the toolbar.



#	DEPT ID	EMPLC
1	1701: Business Admin Office of the Dean	
2	17010500: BA-BUSINESS COMMUNICATIONS	474950
3	17010800: BA-DOCTOR OF BUSINESS ADMIN	688710
4	17010200: BA-MIB PROG	51948
5	17010100: BA-DEAN BUS	75298
6	17010900: BA-MARKETIN	55145
7	17010900: BA-MARKETIN	acant
8	17010200: BA-MIB PROG	51725
9	17010800: BA-DOCTOR O	66686
10	17010800: BA-DOCTOR O	46254
11	17010900: BA-MARKETIN	82351
12	17010500: BA-BUSINESS	39183
13	17010100: BA-DEAN BUS	55122
14	17010900: BA-MARKETIN	acant
15	17011000: BA-SPEC MA ADMISSIONS	904796

**Assigning a To Be Hired/Fill Vacant Position**

To fill a vacant position, go to the vacant row and update Employee ID and other information as needed, then Save.

EMPLOYEE ID	EMP...	POSITION
474950	0	00009862 - MSTR LECTURER
688710	0	00020841 - ASO IN
551948	0	00030744 - Program DIR, Student Affairs
475298	0	00007366 - ADMINISTRATIVE AST
455145	0	00033173 - Graphic Designer II

**Update for Transferred Employee**

When an employee is transferred out to another unit, the position needs to be updated by both departments. The department that the employee is transferred out needs to remove the employee from the position. The department that the employee is transferred to needs to assign the employee to the proper position, update annual rate, distribution and other information.

For the department that the employee is transferred out, if you plan to budget the salary for future hire: Go to the employee’s row, change the Employee ID to Vacant/New Hire. Fill other fields and save.

#	DEPT ID	EMPLOYEE ID	EMPLOYEE RCD	POSITION	JOB TITLE	COST DISTRIBUTION %	SAL_ADMIN_PLAN	ACCOUNTS	FRINGE RATE	UNION_CD	FTE
1	21020100: CFO-UNIV BUDG	Vacant		Vacant	003911 - Data Management Analyst II	20.00%	TA12	621110 - EXEMPT TEAMS/USPS-EARNINGS	40.70%	00 - Out of...	1.00

Note: Remember to save anything in blue.

For the department that the employee is transferred to: refer to steps in **Assigning a To Be Hired/Fill Vacant Position**.

### Updating FTE

If an employee’s FTE is changed during mid-year, there is no need to change rate in Adaptive since the rate is reflecting what is in PeopleSoft when data is integrated into UF Budget Planner. However, the rate must be updated when the employee’s FTE will be changed for next fiscal year during the budget cycle.

For example, an employee’s current FTE is 1 and will change to 0.5 for next fiscal year. The rate will not be automatically updated to half of the current rate. It needs to be manually updated because the salary calculation in UF Budget Planner doesn’t take FTE into it.

FTE	ANNUAL RATE	NO...	FRINGE AMOU...	SALARY AMOUNT
			0.00	0.00
1.00	180,000.00		34,981.02	112,842.00
1.00	108,211.89		34,359.27	108,211.89
1.00	82,864.51		33,725.86	82,864.51

When the employee’s FTE changed to 0.5, the annual rate remains the same.

FTE	ANNUAL R...	NOTES	SALARY AMO...	FRINGE AMOU...	TOTAL CO...
0.50	108,211.89		108,211.89	33,545.69	141,757.58

### Updating Salary Admin Plan

It is rare for an employee to change salary admin plan. However, it may occur occasionally. To update Salary Admin Plan, you can type in the cell directly or select from the drop-down menu.

00.00%	FA12	611110 - FACULTY-EARNINGS
0.00%	TU2N	631110 - NONEXEMPT TEAMS/USP
36.98%	FA12	611110 - FACULTY-EARNINGS

Once you save the changes, the accounts and fringe rate will be automatically updated.

00.00%	FA12	611110 - FACULTY-EARNINGS
0.00%	TA12	621110 - EXEMPT TEAMS/USPS-EA
36.98%	FA12	611110 - FACULTY-EARNINGS
50.00%	TA12	621110 - EXEMPT TEAMS/USPS-EA

**Note:** There is one situation wherein the accounts and fringe rate are not updated. See below.

The green triangle disappeared on the first line for 621210 because this account is typed manually, not derived from Salary Admin Plan.

EMPLOYEE RCD	POSITION	PROJECT	PROJECT STAT..	CRIS	COST DISTRIBUTION %	SAL_ADMIN_PL..	ACCOU	FRINGE RA..	UNION...	FTE	ANNUAL R..
0	00030785 - Admissions Officer II				100.00%	TA12	621210 - F...	7.50%	00 - Out of...	1.00	62,000.00
4	00011884 - LECTURER				75.91%	TASU	611210 - F...	7.50%	200 - E&G...	1.00	50,505.00
0	00099859 - LECTURER				100.00%	FA12	611110 - F...	31.00%	200 - E&G...	1.00	82,400.00
0	00055325 - EMIN SCHOLAR				32.07%	FA09	611110 - F...	31.00%	200 - E&G...	0.50	841,307.40
0	00033352 - Web Designer II				100.00%	TA12	621110 - F...	40.70%	00 - Out of...	1.00	56,550.00

The accounts and fringe rate are not updated when SAP changes from TA12 to FA09

EMPLOYEE RCD	POSITION	PROJECT	PROJECT STAT..	CRIS	COST DISTRIBUTION %	SAL_ADMIN_PL..	ACCOU	FRINGE RA..	UNION...	FTE	ANNUAL R..
1454 - H 0	00030785 - Admissions Officer II				100.00%	FA09	621310 - F...	7.50%	00 - Out of...	1.00	
1311 - T 4	00011884 - LECTURER				75.91%	TASU	611210 - F...	7.50%	200 - E&G...	1.00	
1313 - S 0	00099859 - LECTURER				100.00%	FA12	611110 - F...	31.00%	200 - E&G...	1.00	
1100 - R 0	00055325 - EMIN SCHOLAR				32.07%	FA09	611110 - F...	31.00%	200 - E&G...	0.50	

To fix this, we need to delete 621210 from the Accounts column, then Save. The correct accounts and fringe rate will be updated. The green triangle shows up again which means the account is derived from SAP.

EMPLOYEE RCD	POSITION	PROJECT	PROJECT STAT..	CRIS	COST DISTRIBUTION %	SAL_ADMIN_PL..	ACCOU	FRINGE RA..	UNION...	FTE	ANNUAL R..
14454 - H 0	00030785 - Admissions Officer II				100.00%	FA09	611110 - F...	31.00%	00 - Out of...	1.00	
13131 - T 4	00011884 - LECTURER				75.91%	TASU	611210 - F...	7.50%	200 - E&G...	1.00	
78313 - S 0	00099859 - LECTURER				100.00%	FA12	611110 - F...	31.00%	200 - E&G...	1.00	

### Budgeting Additional Pay by Position

To budget additional pay, click Copy Row on the toolbar, the copied row will show at the bottom of the sheet. Change the account code to the additional pay account, then Save. The fringe rate will automatically be updated. The green triangle in the account field disappears.

12345678 - Galor, All	0	00007588 - PROF	000518 - PROF	FA09	611310 - FACULTY-ADDL PAY	7.50%
12345678 - Galor, All	0	00007588 - PROF	000518 - PROF	FA09	611110 - FACULTY-EARNINGS	31.00%

### Budgeting Moving Expenses by Position

This process is the same as budgeting additional pay by position. The only difference is that you must select the account code Moving Expense. The fringe rate will automatically be updated when the sheet is saved.

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## BEST PRACTICE:

- Always check the version you are in before beginning any edits.
- Use the original budget version during the All Funds Budget cycle.
- Use the working version as your mid-year ongoing budget.
- Download a copy of the original data if you want to compare the changes (this also serves as a reference just in case you need it).
- Always check the level you are in before making any edits.
- Make sure the budget is at the 8-digit level.
- Make sure SOF is added for required funds.
- Review the salary admin plan, GL account and fringe rates.

## FOR ADDITIONAL ASSISTANCE

### Technical Issues

The UF Computing Help Desk  
352-392-HELP  
[helpdesk.ufl.edu](http://helpdesk.ufl.edu)

### Policies and Directives

University Budget Office  
352-392-2402  
[University Budget Office](#)