## 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.
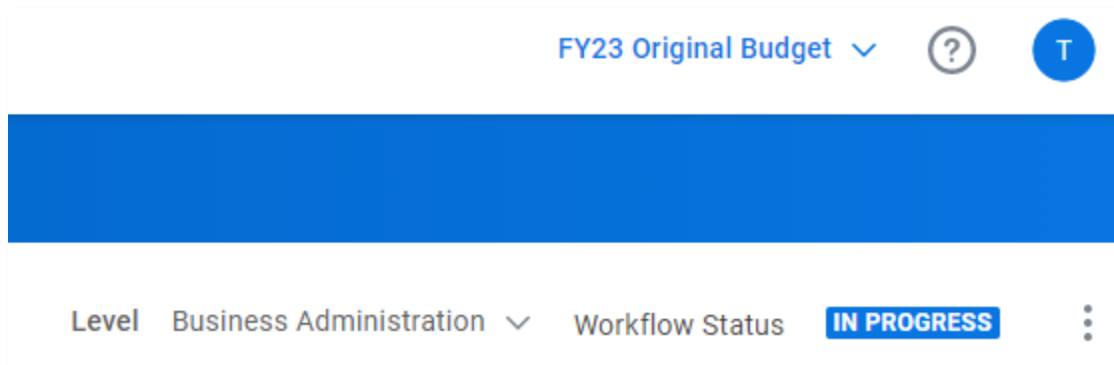


**Updating Salary**

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.

| | 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 |
| DI | 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.

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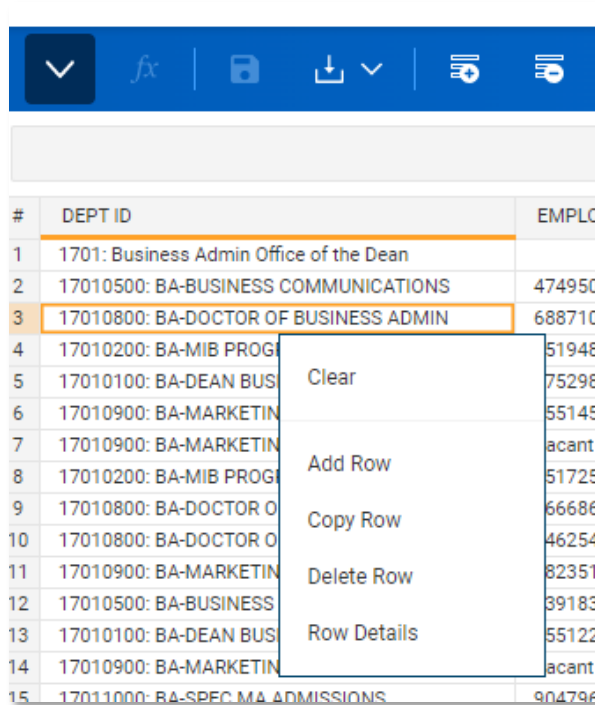
During the All Funds Budget cycle, please avoid to split distributions into different date ranges. We recommend you prorate the distribution percentage on an annual basis.





**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 | EMPLO |
|---|---------|-------|
| 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 BUSI | Clear | 75298 |
| 6 | 17010900: BA-MARKETIN | | 55145 |
| 7 | 17010900: BA-MARKETIN | | acant |
| 8 | 17010200: BA-MIB PROG | Add Row | 51725 |
| 9 | 17010800: BA-DOCTOR O | Copy Row | 66686 |
| 10 | 17010800: BA-DOCTOR O | | 46254 |
| 11 | 17010900: BA-MARKETIN | Delete Row | 82351 |
| 12 | 17010500: BA-BUSINESS | | 39183 |
| 13 | 17010100: BA-DEAN BUSI | Row Details | 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 BUDGE | 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 |
| T | 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.



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



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.



## 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.



## 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.

## 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** | **Policies and Directives** |
| --- | --- |
| The UF Computing Help Desk | University Budget Office |
| 352-392-HELP | 352-392-2402 |
| helpdesk.ufl.edu | University Budget Office |