

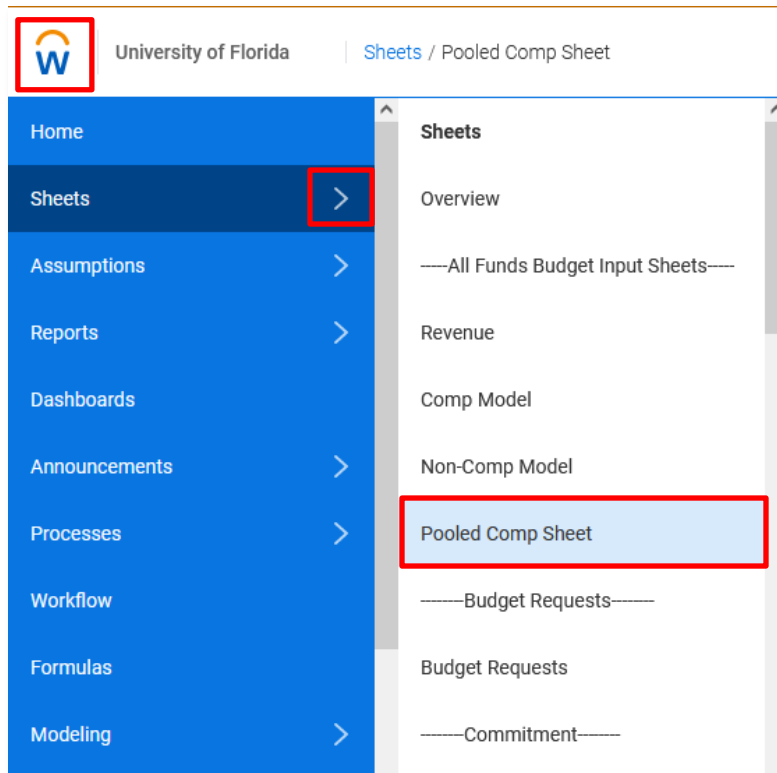
UF BUDGET PLANNER – POOLED COMP SHEET

This guide will cover:

- Enter/update pooled comp data.
- Save pooled comp data.
- Delete pooled comp data.

NAVIGATION

Click the **W** icon to open the Navigation menu. Then click the **arrow** next to Sheets. Click **Pooled Comp Sheet**.



At the top right corner, select version **FY23 Original Budget** if you are budgeting for FY23 and the appropriate **level**.



DATA ENTRY

Click **Add Row** on the toolbar.



#	DEPT ID	FUNDS *
1	16980100: LS-BEBR ADMINIST	201 C&G - FEDERAL RE
2	16980100: LS-BEBR ADMINIST	201 C&G - FEDERAL RE
3	16980100: LS-BEBR ADMINIST	201 C&G - FEDERAL RE
4	16980100: LS-BEBR ADMINIST	211 C&G - RETURNED
5	16980100: LS-BEBR ADMINIST	211 C&G - RETURNED
6	16980100: LS-BEBR ADMINIST	212 C&G - RESIDUAL F
7	16980100: LS-BEBR ADMINIST	212 C&G - RESIDUAL F
8	16980100: LS-BEBR ADMINIST	212 C&G - RESIDUAL F
9	16980200: LS-BEBR INFO/PUB	149 AUX - OTHER FUN
10	16980200: LS-BEBR INFO/PUB	149 AUX - OTHER FUN
11	16980200: LS-BEBR INFO/PUB	149 AUX - OTHER FUN
12	16980200: LS-BEBR INFO/PUB	149 AUX - OTHER FUN
13	16980200: LS-BEBR INFO/PUB	149 AUX - OTHER FUN
14	16980200: LS-BEBR INFO/PUB	149 AUX - OTHER FUN
15	16980200: LS-BEBR INFO/PUB	149 AUX - OTHER FUN

A row will be added at the bottom of the sheet. Dept ID, Funds, Program, and Sal_Admin Plan are required fields. Make sure that the SOF is selected when budgeting expenses for fund 158,171, 175, 201, 209, 213, 214, 275, and 920.

25	11120000: RESEARCHER INVESTRIT	211 C&G - RETURNED OVERHEAD	UFLOR	URRINT	2200 - IND...	00120000...	11130000...	UFSIN
26	Total UF							

When budgeting for pooled salary (for example summer salary) or reserved salary saving, select the proper salary admin plan, filled in proper ChartField string, and amount, then save. The account and fringe rate will be updated automatically. Fringe amount will also be calculated.

When budgeting OPS, lump sum pay, or overtime, etc., you must manually select the right account code from the drop-down menu or type it directly to get the correct fringe rate. If no account is selected, the populated account will be the regular earnings account which is derived by Salary Admin Plan.

#	DEPT ID	FUNDS *	BUSINESS UNIT	PROJECT	DEPT FLEX	SAL_ADMIN_PLAN	ACCOUNTS	FRINGE RATE	NOTES
1	2102: University Budget Office	101 E&G-GEN REV - MAIN CAMPUS	UFLOR			FA09	611110 - F...	31.00%	
2	2102: University Budget Office	159 RCM SUPPORT UNIT FUND	UFLOR			TA12	621110 - ...	40.70%	

Once the right account is selected, the fringe rate will update.

#	DEPT ID	FUNDS *	BUSINESS UNIT	PROJECT	DEPT FLEX	SAL_ADMIN_PLAN	ACCOUNTS	FRINGE RATE	NOTES
1	2102: University Budget Office	101 ESG-GEN REV - MAIN CAMPUS	UFOR			FA09	611310 - FACULTY-ADDL PAY	7.50%	
2	2102: University Budget Office	159 RCM SUPPORT UNIT FUND	UFOR			TA12	621210 - EXEMPT TEAMS/USPS-MOVL	7.50%	

BEST PRACTICES

- Review Salary Admin Plan, GL accounts and fringe calculations before finalizing the Pooled Comp.
- Remove all entries that are filled partially or that you don't need.
- Open the Pooled comp sheet and Operating Budget Detail report at the same time to review the financial impact in real time.
- Make sure the budget at the 8-digit level.
- For importing/exporting data, please review the Import/Export guide.

FOR ADDITIONAL ASSISTANCE

Technical Issues

The UF Computing Help Desk

352-392-HELP

helpdesk.ufl.edu

Policies and Directives

The University Budget Office

352-392-2402

[University Budget Office](#)