

Overview of the Employee Position Report (EPR) Tool

The **Cardinal EPR Tool** is designed to report staffing levels by Agency based on funding types across a variety of Agencies, including executive, legislative, judicial, and independent, colleges, and universities. Core users with the Cardinal V_HR_ADMINISTRATOR and/or V_HR_EPR ONLY roles have access to the EPR tool and associated queries/reports.

The EPR Tool provides a snapshot view of staff levels by factoring in several categories, as detailed in this job aid. Within this staffing rollup, it separates data into Full-Time Equivalent (FTE) and Headcount. Additionally, it separates staff levels by General Fund (GF) vs Non-General Fund (NGF) sources and Restricted vs Non-Restricted filled positions. For wage sections, restricted vs. non-restricted is not applicable, as all wage positions are considered temporary.

EPR uses retrospective monthly reporting, meaning that data used for these reports is generated for the previous month after it has ended. The EPR Tool includes a program that runs in Cardinal on the first business day of each month using an "as of" date, capturing a snapshot of active job data as of the last day of the prior month. Only jobs that are HR = Active (A), (Payroll Status= A-Active, L-Leave of Absence, P-Leave with Pay, S-Suspended) as of this date are captured and used to roll-up totals published to the EPR page.

HR Agencies' validation and certification timeframe is from the second working day thru the 25th of each month. DHRM finalizes the certification process and publishes Agency-certified totals by the last day of each month, with results from the previous month.

These public-facing, statewide reports are accessible on the DHRM website, are used by Governors' Cabinet, DPB, VITA, and other central support Agencies to determine filled position levels based on position and funding type. Therefore, Agency validation and certification that EPR totals are accurate by the 25th of each month is a critical business process.

This job aid provides guidance on the data rollup process of the tool, as well as steps for reviewing, updating, and certifying data. Most importantly, it includes the reports and queries Agencies should use to validate and troubleshoot data prior to certifying EPR results. Since these reports and queries are Agency-specific, collaboration within your Agency is essential.

For timely assistance, direct any questions to DHRM iHelp as soon they arise. Questions submitted on the reporting deadline **day may not be resolved** in time, which could lead to reporting gaps and potential impacts on Agency funding.

Table of Contents

| | |
|---|----|
| Revision History | 3 |
| How EPR Tool Generates the Counts | 4 |
| Reviewing and Validating EPR Counts for Salaried Position Data | 8 |
| Determining EPR Counts for Wage Position Data | 15 |
| Certifying the EPR Tool..... | 16 |
| Additional Resources Regarding Employee Position Report (EPR) Tool..... | 19 |



Revision History

| Revision Date | Summary of Changes |
|---------------|--|
| 2/26/2026 | Updated paragraph three and added paragraph four in the Overview section to provide more specifics on data captured by the tool. |
| 3/1/2025 | Updated the screenshots of the Search pages (Section 2 , after Step 1). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid. |

How EPR Tool Generates the Counts

There are a variety of reports and queries available to help verify EPR totals. To ensure accurate results, it is important to understand how the Cardinal EPR program calculates the counts. The chart below provides Agencies with guidance on the program's rules, helping to determine which populations of employees fall into each category:

| EPR Page Tabs | Non-Restricted (Regular) /Restricted/ Wage (Temporary) | Funding Source | Program Code Rules |
|---------------|--|------------------|--|
| Non-Faculty | Restricted Salaried | General Fund | <ul style="list-style-type: none"> • Position/Department Fund is 01000, may be a distribution percentage* • Regular/Temporary Field on JOB Data, which populates based on Position data. = Restricted (X) • Employee Class Field on JOB Data is one of the following CLS, AHD, LGS, ONC, OTO, SPR, UNV, VAL |
| | | Non-General Fund | <ul style="list-style-type: none"> • Position/Department Fund is all codes other than 01000, may be a distribution percentage* • Regular/Temporary field on JOB Data, which populates based on Position data. = Restricted (X) • Employee Class Field on JOB Data is one of the following CLS, AHD, LGS, ONC, OTO, SPR, UNV, VAL |
| | Unrestricted Salaried | General Fund | <ul style="list-style-type: none"> • Position/Department Fund is 01000, may be a distribution percentage* • Regular/Temporary field on JOB Data, which populates based on Position data = Regular (R) • Employee Class Field on JOB Data is one of the following CLS, AHD, LGS, ONC, OTO, SPR, UNV, VAL |

| | | | |
|--|-------------|-------------------------|--|
| | | Non-General Fund | <ul style="list-style-type: none"> • Position/Department Fund is all codes other than 01000, may be a distribution percentage* • Regular/Temporary field on JOB Data, which populates based on Position data = Regular (R) • Employee Class Field on JOB Data is one of the following CLS, AHD, LGS, ONC, OTO, SPR, UNV, VAL |
| | Wage | General Fund | <ul style="list-style-type: none"> • Position/Department Fund is 01000, may be a distribution percentage* • Regular/Temporary field on JOB Data, which populates based on Position data = Temporary (T) • Employee Class Field on JOB Data is one of the following GNW, EMG, RJG, SFW, SIG, SSW, STU |
| | | Non-General Fund | <ul style="list-style-type: none"> • Position/Department Fund is all codes other than 01000, may be a distribution percentage* • Regular/Temporary field on JOB Data, which populates based on Position data = Temporary (T) • Employee Class Field on JOB Data is one of the following GNW, EMG, RJG, SFW, SIG, SSW, STU |



| EPR Page Tabs | Non-Restricted (Regular) /Restricted/ Wage (Temporary) | Funding Source | Program Code Rules |
|---------------|--|------------------|--|
| Faculty | Restricted Salaried | General Fund | <ul style="list-style-type: none"> • Position Department Fund is 01000 or 03XXX <u>AND</u> Program (Chart field 2) code 10100-10799, may be a distribution percentage • Regular/Temporary field on JOB Data, which populates based on Position data = Restricted (X) • Employee Class Field on JOB Data is one of the following APF, TNR |
| | | Non-General Fund | <ul style="list-style-type: none"> • Position Department Fund is 01000 or 03XXX <u>AND</u> Program (Chart field 2) code 10800-80999, may be a distribution percentage • Regular/Temporary field on JOB Data, which populates based on Position data = Restricted (X) • Employee Class Field on JOB Data is one of the following APF, TNR |
| | Unrestricted Salaried | General Fund | <ul style="list-style-type: none"> • Position Department Fund is 01000 or 03XXX <u>AND</u> Program (Chart field 2) code 10100-10799, may be a distribution percentage • Regular/Temporary field on JOB Data, which populates based on Position data = Regular (R) • Employee Class Field on JOB Data is one of the following APF, TNR |
| | | Non-General Fund | <ul style="list-style-type: none"> • Position Department Fund is 01000 or 03XXX <u>AND</u> Program (Chart field 2) code 10800-80999, may be a distribution percentage • Regular/Temporary field on JOB Data, which populates based on Position data = Regular (R) • Employee Class Field on JOB Data is one of the following APF, TNR |



| EPR Page Tabs | Non-Restricted (Regular) /Restricted/ Wage (Temporary) | Funding Source | Program Code Rules |
|---------------|--|------------------|---|
| | Wage | General Fund | <ul style="list-style-type: none"> • Position Department Fund is 01000 or 03XXX <u>AND</u> Program (Chart field 2) code 10100-10799, may be a distribution percentage • Employee Class Field on JOB Data is one of the following GRD, FAC |
| | | Non-General Fund | <ul style="list-style-type: none"> • Position Department Fund is 01000 or 03XXX <u>AND</u> Program (Chart field 2) code 10800-80999, may be a distribution percentage • Employee Class Field on JOB Data is one of the following GRD, FAC |

| EPR Page Tabs | Non-Restricted (Regular) /Restricted/ Wage (Temporary) | Program Code Rules |
|---------------|--|---|
| Totals | MEL | Entered by DHRM based upon Appropriations Act each Fiscal Year |
| | Salaried Headcount | Sum of Faculty and Non-Faculty tabs: Restricted Salaried (General Fund and Non-General Fund) and Unrestricted Salaried (General Fund and Non-General Fund) Headcounts |
| | Salaried FTE | Sum of Faculty and Non-Faculty tabs: Restricted Salaried (General Fund and Non-General Fund) and Unrestricted Salaried (General Fund and Non-General Fund) FTEs |
| | Wage Headcount | Sum of Faculty and Non-Faculty tabs: Wage (General Fund and Non-General Fund) Headcounts |
| | Wage FTE | Sum of Faculty and Non-Faculty tabs: Wage (General Fund and Non-General Fund) FTEs |
| | Overall Headcount | Totals Tab: Sum of Salaried Headcount and Wage Headcount |
| | Overall FTE | Totals Tab: Sum of Salaried FTE and Wage FTE |

Reviewing and Validating EPR Counts for Salaried Position Data

If uncertain how the calculations are derived, please see the chart – [How EPR Tool Generates the Counts.](#)

| Step | Action |
|--|---|
| 1. | Navigate to the EPR Tool page using the following path: NavBar > Menu > Workforce Administration > EPR Tool |
| <p>The EPR Tool Find and Existing Value page displays.</p> <div data-bbox="240 638 1398 989" style="border: 1px solid black; padding: 10px;"> <p>EPR Tool</p> <p>Find an Existing Value</p> <p>▼ Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <div style="border: 1px solid #ccc; padding: 5px;"> <p>🕒 Recent Searches Choose from recent searches ▼ ✎</p> <p>🔖 Saved Searches Choose from saved searches ▼ ✎</p> <p>Business Unit begins with ▼ <input type="text"/> 🔍</p> <p>^ Show fewer options</p> <p>Search Clear</p> </div> </div> | |
|  | <p>For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled Overview of the Cardinal HCM Search Pages. This Job Aid is located on the Cardinal website in Job Aids under Learning.</p> |
| 2. | Enter the Business Unit . <div data-bbox="293 1209 1037 1276" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Business Unit begins with ▼ <input style="border: 2px solid red;" type="text"/> 🔍</p> </div> |
| 3. | Click the Search button. <div data-bbox="293 1362 1003 1463" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Search Clear</p> </div> |

| Step | Action |
|------|--------|
|------|--------|

The **EPR Tool** page displays with the **Non-Faculty** tab displayed by default.

Non-Faculty

Faculty

Totals

Business Unit 23400 Coop Extension & Agr Research

Employee Position Reports

Non-Faculty 1-3 of 36 [View All](#)

| *Effective Date | | Restricted Headcount | Restricted FTE | Non-Restrict Headcount | Non-Restrict FTE | Wage Headcount | Wage FTE |
|-------------------------------------|---------------|----------------------|----------------|------------------------|------------------|----------------|----------|
| 09/30/2024 | General Fund | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| <input type="checkbox"/> Certified? | Non-Genl Fund | 15.00 | 15.00 | 21.00 | 21.00 | 104.00 | 74.21 |

| *Effective Date | | Restricted Headcount | Restricted FTE | Non-Restrict Headcount | Non-Restrict FTE | Wage Headcount | Wage FTE |
|--|---------------|----------------------|----------------|------------------------|------------------|----------------|----------|
| 08/31/2024 | General Fund | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| <input checked="" type="checkbox"/> Certified? | Non-Genl Fund | 15.00 | 15.00 | 21.00 | 21.00 | 105.00 | 75.73 |

| *Effective Date | | Restricted Headcount | Restricted FTE | Non-Restrict Headcount | Non-Restrict FTE | Wage Headcount | Wage FTE |
|--|---------------|----------------------|----------------|------------------------|------------------|----------------|----------|
| 07/31/2024 | General Fund | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| <input checked="" type="checkbox"/> Certified? | Non-Genl Fund | 14.00 | 14.00 | 22.00 | 22.00 | 109.00 | 84.53 |

[Save](#)

[Return to Search](#)

[Previous in List](#)

[Next in List](#)

[Notify](#)

Non-Faculty | Faculty | Totals

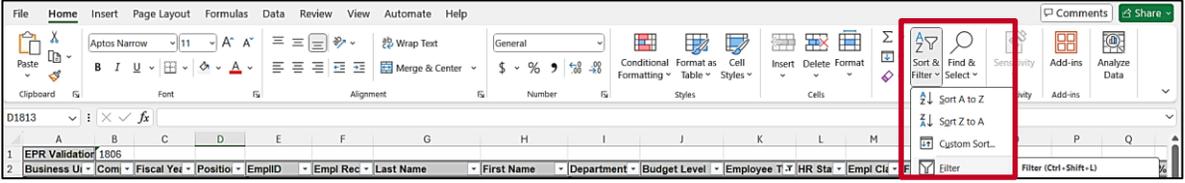
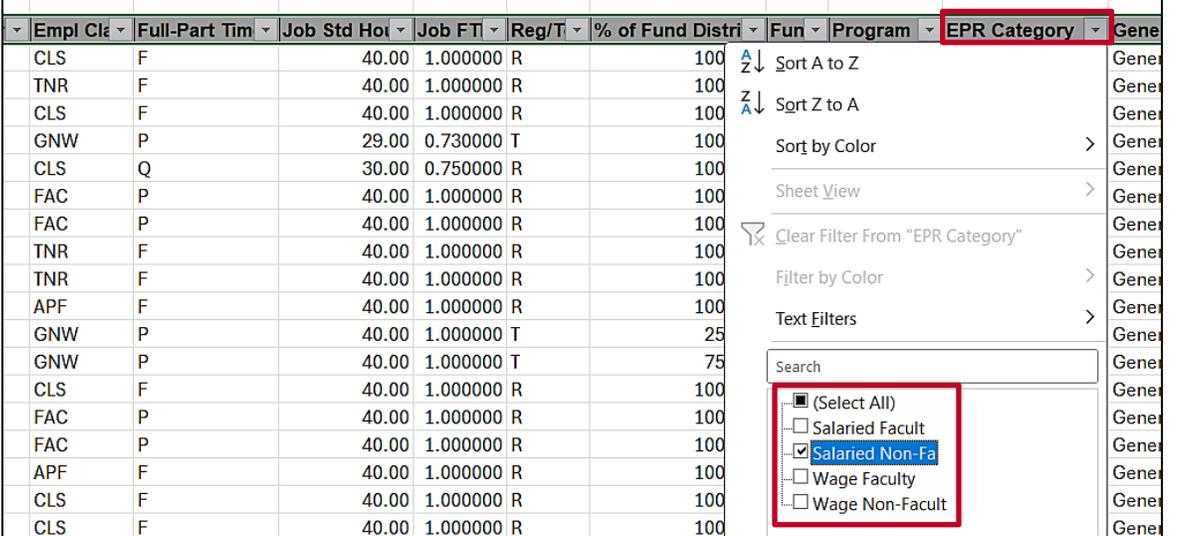
- Validate that the expected reporting month is displayed as the top row of data, and that the certified box is not yet checked.

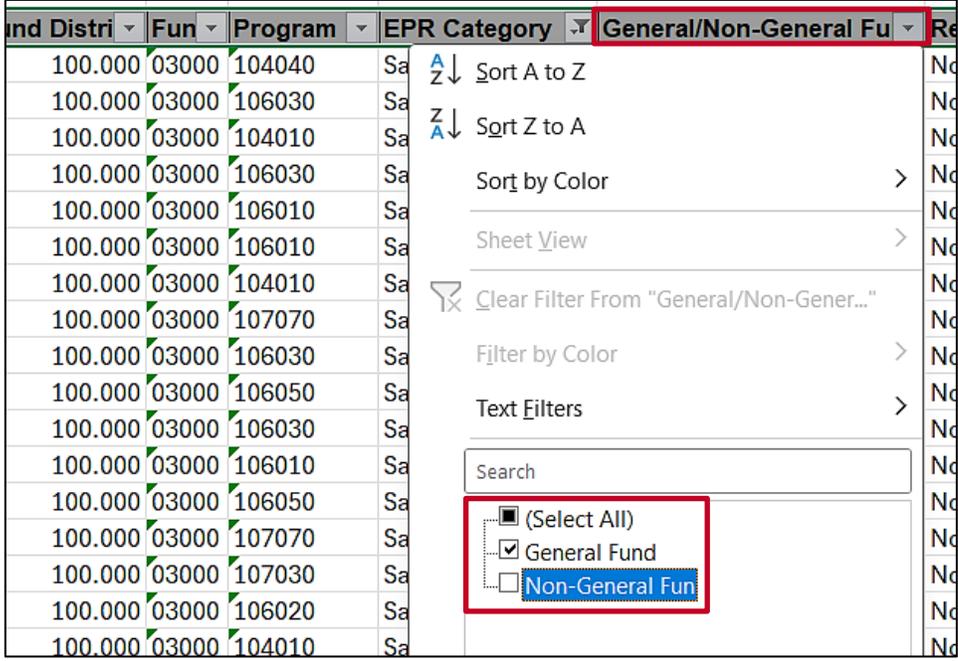
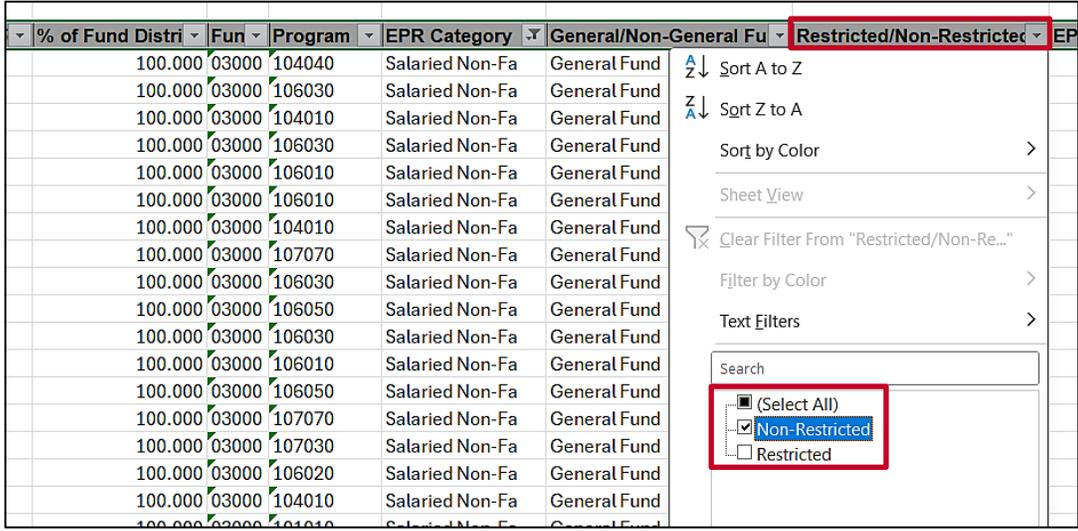
Non-Faculty

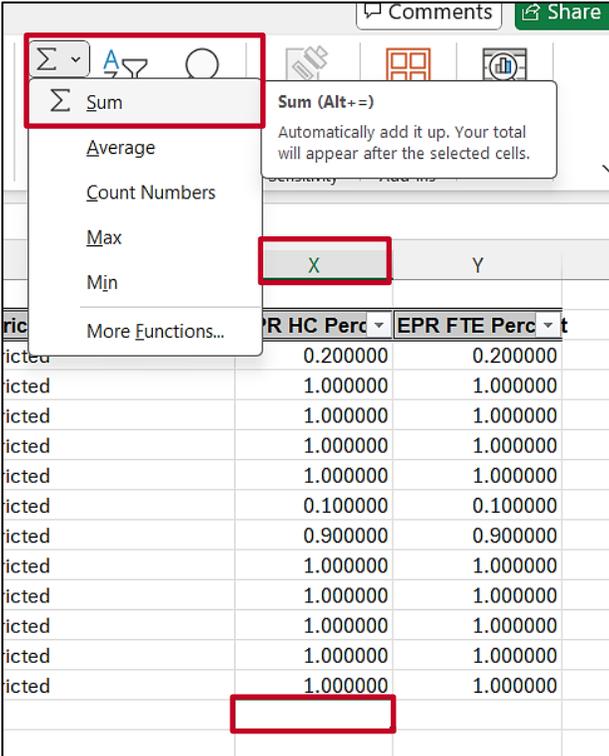
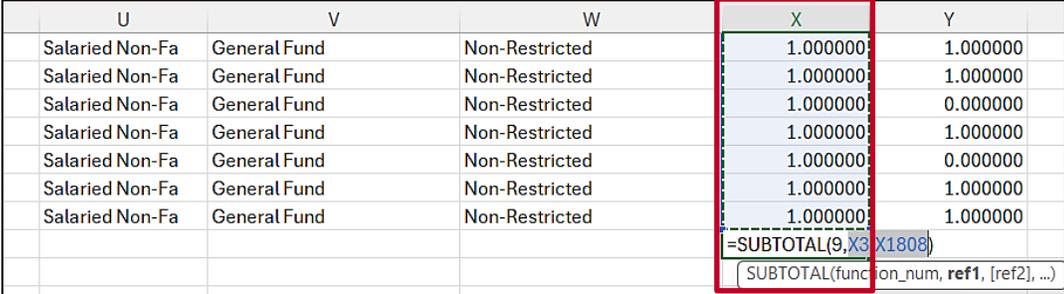
| *Effective Date | | Restricted Headcount |
|-------------------------------------|---------------|----------------------|
| 09/30/2024 | General Fund | 0.00 |
| <input type="checkbox"/> Certified? | Non-Genl Fund | 15.00 |



Important! Do not click the **Certified** checkbox option until all three tabs have been reviewed and validated.

| Step | Action | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|---|-------------|---------------|-------------|------------------|-------|------------------|--------------|---------|--------------|------|-----|---|-------|----------|---|-----|--|--|--|------|-----|---|-------|----------|---|-----|--|--|--|------|-----|---|-------|----------|---|-----|--|--|--|------|-----|---|-------|----------|---|-----|--|--|--|------|-----|---|-------|----------|---|-----|--|--|--|------|-----|---|-------|----------|---|-----|--|--|--|------|-----|---|-------|----------|---|-----|--|--|--|------|-----|---|-------|----------|---|-----|--|--|--|------|-----|---|-------|----------|---|-----|--|--|--|------|-----|---|-------|----------|---|-----|--|--|--|------|-----|---|-------|----------|---|----|--|--|--|------|-----|---|-------|----------|---|----|--|--|--|------|-----|---|-------|----------|---|-----|--|--|--|------|-----|---|-------|----------|---|-----|--|--|--|------|-----|---|-------|----------|---|-----|--|--|--|------|-----|---|-------|----------|---|-----|--|--|--|------|-----|---|-------|----------|---|-----|--|--|--|------|-----|---|-------|----------|---|-----|--|--|--|------|
| 5. | <p>Verify that the information displayed is correct by navigating to Query Viewer and generate the V_HR_EPR_DATA_VALIDATION query in the Excel format. This query provides the detailed filled position data generating the EPR totals and should be used to confirm accuracy.</p>  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | <p>The query will populate as an Excel spreadsheet on the user's desktop.</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 6. | <p>Filter the column headers, beginning with the first EPR category to be validated, such as Salaried Non-Fac.</p>  <table border="1" data-bbox="292 892 1477 1428"> <thead> <tr> <th>Empl Clz</th> <th>Full-Part Tim</th> <th>Job Std Hol</th> <th>Job FT</th> <th>Reg/T</th> <th>% of Fund Distri</th> <th>Fun</th> <th>Program</th> <th>EPR Category</th> <th>Gene</th> </tr> </thead> <tbody> <tr><td>CLS</td><td>F</td><td>40.00</td><td>1.000000</td><td>R</td><td>100</td><td></td><td></td><td></td><td>Gene</td></tr> <tr><td>TNR</td><td>F</td><td>40.00</td><td>1.000000</td><td>R</td><td>100</td><td></td><td></td><td></td><td>Gene</td></tr> <tr><td>CLS</td><td>F</td><td>40.00</td><td>1.000000</td><td>R</td><td>100</td><td></td><td></td><td></td><td>Gene</td></tr> <tr><td>GNW</td><td>P</td><td>29.00</td><td>0.730000</td><td>T</td><td>100</td><td></td><td></td><td></td><td>Gene</td></tr> <tr><td>CLS</td><td>Q</td><td>30.00</td><td>0.750000</td><td>R</td><td>100</td><td></td><td></td><td></td><td>Gene</td></tr> <tr><td>FAC</td><td>P</td><td>40.00</td><td>1.000000</td><td>R</td><td>100</td><td></td><td></td><td></td><td>Gene</td></tr> <tr><td>FAC</td><td>P</td><td>40.00</td><td>1.000000</td><td>R</td><td>100</td><td></td><td></td><td></td><td>Gene</td></tr> <tr><td>TNR</td><td>F</td><td>40.00</td><td>1.000000</td><td>R</td><td>100</td><td></td><td></td><td></td><td>Gene</td></tr> <tr><td>TNR</td><td>F</td><td>40.00</td><td>1.000000</td><td>R</td><td>100</td><td></td><td></td><td></td><td>Gene</td></tr> <tr><td>APF</td><td>F</td><td>40.00</td><td>1.000000</td><td>R</td><td>100</td><td></td><td></td><td></td><td>Gene</td></tr> <tr><td>GNW</td><td>P</td><td>40.00</td><td>1.000000</td><td>T</td><td>25</td><td></td><td></td><td></td><td>Gene</td></tr> <tr><td>GNW</td><td>P</td><td>40.00</td><td>1.000000</td><td>T</td><td>75</td><td></td><td></td><td></td><td>Gene</td></tr> <tr><td>CLS</td><td>F</td><td>40.00</td><td>1.000000</td><td>R</td><td>100</td><td></td><td></td><td></td><td>Gene</td></tr> <tr><td>FAC</td><td>P</td><td>40.00</td><td>1.000000</td><td>R</td><td>100</td><td></td><td></td><td></td><td>Gene</td></tr> <tr><td>FAC</td><td>P</td><td>40.00</td><td>1.000000</td><td>R</td><td>100</td><td></td><td></td><td></td><td>Gene</td></tr> <tr><td>APF</td><td>F</td><td>40.00</td><td>1.000000</td><td>R</td><td>100</td><td></td><td></td><td></td><td>Gene</td></tr> <tr><td>CLS</td><td>F</td><td>40.00</td><td>1.000000</td><td>R</td><td>100</td><td></td><td></td><td></td><td>Gene</td></tr> <tr><td>CLS</td><td>F</td><td>40.00</td><td>1.000000</td><td>R</td><td>100</td><td></td><td></td><td></td><td>Gene</td></tr> </tbody> </table> | Empl Clz | Full-Part Tim | Job Std Hol | Job FT | Reg/T | % of Fund Distri | Fun | Program | EPR Category | Gene | CLS | F | 40.00 | 1.000000 | R | 100 | | | | Gene | TNR | F | 40.00 | 1.000000 | R | 100 | | | | Gene | CLS | F | 40.00 | 1.000000 | R | 100 | | | | Gene | GNW | P | 29.00 | 0.730000 | T | 100 | | | | Gene | CLS | Q | 30.00 | 0.750000 | R | 100 | | | | Gene | FAC | P | 40.00 | 1.000000 | R | 100 | | | | Gene | FAC | P | 40.00 | 1.000000 | R | 100 | | | | Gene | TNR | F | 40.00 | 1.000000 | R | 100 | | | | Gene | TNR | F | 40.00 | 1.000000 | R | 100 | | | | Gene | APF | F | 40.00 | 1.000000 | R | 100 | | | | Gene | GNW | P | 40.00 | 1.000000 | T | 25 | | | | Gene | GNW | P | 40.00 | 1.000000 | T | 75 | | | | Gene | CLS | F | 40.00 | 1.000000 | R | 100 | | | | Gene | FAC | P | 40.00 | 1.000000 | R | 100 | | | | Gene | FAC | P | 40.00 | 1.000000 | R | 100 | | | | Gene | APF | F | 40.00 | 1.000000 | R | 100 | | | | Gene | CLS | F | 40.00 | 1.000000 | R | 100 | | | | Gene | CLS | F | 40.00 | 1.000000 | R | 100 | | | | Gene |
| Empl Clz | Full-Part Tim | Job Std Hol | Job FT | Reg/T | % of Fund Distri | Fun | Program | EPR Category | Gene | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| CLS | F | 40.00 | 1.000000 | R | 100 | | | | Gene | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| TNR | F | 40.00 | 1.000000 | R | 100 | | | | Gene | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| CLS | F | 40.00 | 1.000000 | R | 100 | | | | Gene | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| GNW | P | 29.00 | 0.730000 | T | 100 | | | | Gene | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| CLS | Q | 30.00 | 0.750000 | R | 100 | | | | Gene | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| FAC | P | 40.00 | 1.000000 | R | 100 | | | | Gene | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| FAC | P | 40.00 | 1.000000 | R | 100 | | | | Gene | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| TNR | F | 40.00 | 1.000000 | R | 100 | | | | Gene | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| TNR | F | 40.00 | 1.000000 | R | 100 | | | | Gene | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| APF | F | 40.00 | 1.000000 | R | 100 | | | | Gene | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| GNW | P | 40.00 | 1.000000 | T | 25 | | | | Gene | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| GNW | P | 40.00 | 1.000000 | T | 75 | | | | Gene | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| CLS | F | 40.00 | 1.000000 | R | 100 | | | | Gene | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| FAC | P | 40.00 | 1.000000 | R | 100 | | | | Gene | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| FAC | P | 40.00 | 1.000000 | R | 100 | | | | Gene | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| APF | F | 40.00 | 1.000000 | R | 100 | | | | Gene | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| CLS | F | 40.00 | 1.000000 | R | 100 | | | | Gene | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| CLS | F | 40.00 | 1.000000 | R | 100 | | | | Gene | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| Step | Action |
|------|---|
| 7. | <p>Add another filter to focus only on the fund type to be validated.</p>  <p>The screenshot shows a data table with columns: Fund Distri, Fun, Program, EPR Category, General/Non-General Fu, and Re. A dropdown menu is open for the 'General/Non-General Fu' column. The menu options include: Sort A to Z, Sort Z to A, Sort by Color, Sheet View, Clear Filter From "General/Non-Gener...", Filter by Color, and Text Filters. At the bottom of the menu, there is a search box and a list of filter options: (Select All), General Fund (checked), and Non-General Fun (unchecked).</p> |
| 8. | <p>Filter on the Restricted/Non-Restricted column.</p>  <p>The screenshot shows a data table with columns: % of Fund Distri, Fun, Program, EPR Category, General/Non-General Fu, Restricted/Non-Restricted, and EP. A dropdown menu is open for the 'Restricted/Non-Restricted' column. The menu options include: Sort A to Z, Sort Z to A, Sort by Color, Sheet View, Clear Filter From "Restricted/Non-Re...", Filter by Color, and Text Filters. At the bottom of the menu, there is a search box and a list of filter options: (Select All), Non-Restricted (checked), and Restricted (unchecked).</p> |

| Step | Action |
|------|--|
| 9. | <p>Scroll over to column “X” and then to the bottom of the dataset, click on the first empty cell, and then click the SUM button.</p>  |
| 10. | <p>Sum the filtered column to retrieve the total Headcount for this category, fund, and position type, shown in this example as the “X” column.</p>  |

| Step | Action | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|--|--------------|----------------|---|----------|---|---|--|-----------------|--------------|----------------|----------|----------|--|-----------------|--------------|----------------|----------|----------|--|-----------------|--------------|----------------|----------|----------|--|-----------------|--------------|----------------|----------|----------|--|-----------------|--------------|----------------|----------|----------|--|-----------------|--------------|----------------|----------|----------|--|-----------------|--------------|----------------|----------|----------|--|--|--|--|-----------------------|--|--|--|--|--|---|--|
| 11. | <p>Move to next column, shown in this example as the “Y” column, to sum FTE.</p> <table border="1"> <thead> <tr> <th></th> <th>U</th> <th>V</th> <th>W</th> <th>X</th> <th>Y</th> </tr> </thead> <tbody> <tr> <td></td> <td>Salaried Non-Fa</td> <td>General Fund</td> <td>Non-Restricted</td> <td>1.000000</td> <td>1.000000</td> </tr> <tr> <td></td> <td>Salaried Non-Fa</td> <td>General Fund</td> <td>Non-Restricted</td> <td>1.000000</td> <td>1.000000</td> </tr> <tr> <td></td> <td>Salaried Non-Fa</td> <td>General Fund</td> <td>Non-Restricted</td> <td>1.000000</td> <td>0.000000</td> </tr> <tr> <td></td> <td>Salaried Non-Fa</td> <td>General Fund</td> <td>Non-Restricted</td> <td>1.000000</td> <td>1.000000</td> </tr> <tr> <td></td> <td>Salaried Non-Fa</td> <td>General Fund</td> <td>Non-Restricted</td> <td>1.000000</td> <td>0.000000</td> </tr> <tr> <td></td> <td>Salaried Non-Fa</td> <td>General Fund</td> <td>Non-Restricted</td> <td>1.000000</td> <td>1.000000</td> </tr> <tr> <td></td> <td>Salaried Non-Fa</td> <td>General Fund</td> <td>Non-Restricted</td> <td>1.000000</td> <td>1.000000</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td>=SUBTOTAL(9,X3:X1808)</td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td colspan="2">SUBTOTAL(function_num, ref1, [ref2], ...)</td> </tr> </tbody> </table> | | U | V | W | X | Y | | Salaried Non-Fa | General Fund | Non-Restricted | 1.000000 | 1.000000 | | Salaried Non-Fa | General Fund | Non-Restricted | 1.000000 | 1.000000 | | Salaried Non-Fa | General Fund | Non-Restricted | 1.000000 | 0.000000 | | Salaried Non-Fa | General Fund | Non-Restricted | 1.000000 | 1.000000 | | Salaried Non-Fa | General Fund | Non-Restricted | 1.000000 | 0.000000 | | Salaried Non-Fa | General Fund | Non-Restricted | 1.000000 | 1.000000 | | Salaried Non-Fa | General Fund | Non-Restricted | 1.000000 | 1.000000 | | | | | =SUBTOTAL(9,X3:X1808) | | | | | | SUBTOTAL(function_num, ref1, [ref2], ...) | |
| | U | V | W | X | Y | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Salaried Non-Fa | General Fund | Non-Restricted | 1.000000 | 1.000000 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Salaried Non-Fa | General Fund | Non-Restricted | 1.000000 | 1.000000 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Salaried Non-Fa | General Fund | Non-Restricted | 1.000000 | 0.000000 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Salaried Non-Fa | General Fund | Non-Restricted | 1.000000 | 1.000000 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Salaried Non-Fa | General Fund | Non-Restricted | 1.000000 | 0.000000 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Salaried Non-Fa | General Fund | Non-Restricted | 1.000000 | 1.000000 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Salaried Non-Fa | General Fund | Non-Restricted | 1.000000 | 1.000000 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | =SUBTOTAL(9,X3:X1808) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | SUBTOTAL(function_num, ref1, [ref2], ...) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 12. | Compare the totals with the EPR Tool and, if correct, move back up to header column and change filters. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 13. | Filter each fund and position type for both categories (if applicable) and compare with totals in EPR Tool. The data in the spreadsheet and EPR Tool should match. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | If the data does not match, analyze the details, and look for incorrect job or position funding data populated to the spreadsheet. Review the table under the How the EPR Tool Generates the Counts section of this job aid to ensure that the data is analyzed correctly. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 14. | <p>Click the Faculty tab.</p>  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| Step | Action |
|------|--------|
|------|--------|

The Faculty page displays.

Non-Faculty
Faculty
Totals

Business Unit 23400 Coop Extension & Agr Research

Employee Position Reports

Faculty 1-3 of 36 | View All

| Effective Date | | Restricted Headcount | Restricted FTE | Non-Restrict Headcount | Non-Restrict FTE | Wage Headcount | Wage FTE |
|-------------------------------------|---------------|----------------------|----------------|------------------------|------------------|----------------|----------|
| 09/30/2024 | General Fund | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| <input type="checkbox"/> Certified? | Non-Genl Fund | 13.00 | 13.00 | 27.00 | 25.00 | 0.00 | 0.00 |

| Effective Date | | Restricted Headcount | Restricted FTE | Non-Restrict Headcount | Non-Restrict FTE | Wage Headcount | Wage FTE |
|--|---------------|----------------------|----------------|------------------------|------------------|----------------|----------|
| 08/31/2024 | General Fund | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| <input checked="" type="checkbox"/> Certified? | Non-Genl Fund | 15.00 | 14.98 | 32.00 | 27.66 | 0.00 | 0.00 |

| Effective Date | | Restricted Headcount | Restricted FTE | Non-Restrict Headcount | Non-Restrict FTE | Wage Headcount | Wage FTE |
|--|---------------|----------------------|----------------|------------------------|------------------|----------------|----------|
| 07/31/2024 | General Fund | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| <input checked="" type="checkbox"/> Certified? | Non-Genl Fund | 15.00 | 14.98 | 29.00 | 28.66 | 0.00 | 0.00 |

Save
Return to Search
Previous in List
Next in List
Notify

Non-Faculty
Faculty
Totals



Further analysis of General and Non-General funds, as well as positions with split funding, can be conducted by adjusting the filters accordingly. This query also provides the Program (Chartfield2) code for Faculty fund analysis purposes.

| | D | R | S | T | U | V | W | X | Y |
|-----|----------|---------|-------|--------|-----------------|-----------------|------------|----------|----------|
| 215 | LWUF0284 | 100.000 | 03000 | 101010 | Salaried Facult | General Fund | Restricted | 1.000000 | 1.000000 |
| 278 | LWUF0299 | 100.000 | 03000 | 101010 | Salaried Facult | General Fund | Restricted | 1.000000 | 1.000000 |
| 317 | LWUF0286 | 100.000 | 03000 | 101010 | Salaried Facult | General Fund | Restricted | 1.000000 | 1.000000 |
| 350 | LWUGA075 | 90.000 | 03020 | 110004 | Salaried Facult | Non-General Fun | Restricted | 0.900000 | 0.900000 |
| 351 | LWUGA075 | 10.000 | 03000 | 101010 | Salaried Facult | General Fund | Restricted | 0.100000 | 0.100000 |



Agencies need to see data where position funding is split, therefore employee data will be duplicated based on that split funding as shown above. The Agency Budget Processor understands these funding differences and is a resource, if necessary.

| | | | | | | | | | |
|-----|----------|--------|-------|--------|-----------------|-----------------|------------|----------|----------|
| 350 | LWUGA075 | 90.000 | 03020 | 110004 | Salaried Facult | Non-General Fun | Restricted | 0.900000 | 0.900000 |
| 351 | LWUGA075 | 10.000 | 03000 | 101010 | Salaried Facult | General Fund | Restricted | 0.100000 | 0.100000 |

Determining EPR Counts for Wage Position Data

The EPR Tool generates the Wage headcount and FTE exactly the same way that Salary results are generated. However, with Wage/Temporary workforce, headcount and FTE are to be determined by and reported based on hours actually worked. Therefore, generate the Employee Position Summary Report (RHR019) in both detail and summary formats to determine actual FTE and Headcount totals based on hours worked for wage employees. Please refer to the **Cardinal HCM Human Resources Reports Catalog** which is located on the Cardinal website in **Reports Catalogs** under **Resources**.

| Step | Action | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--|--|----------------------|----------------|------------------------|------------------|------------------------|------------------|----------------|----------|------------|--------------|------|------|------|------|------|------|-------------------------------------|---------------|-------|-------|-------|-------|--------|-------|-----------------|--|----------------------|----------------|------------------------|------------------|----------------|----------|------------|--------------|------|------|------|------|------|------|--|---------------|-------|-------|-------|-------|--------|-------|-----------------|--|----------------------|----------------|------------------------|------------------|----------------|----------|------------|--------------|------|------|------|------|------|------|--|---------------|-------|-------|-------|-------|--------|-------|
| 1. | <p>After determining the Wage EPR counts, overwrite the system generated results with the true counts from the Employee Position Report.</p> <div data-bbox="289 709 1352 1549" style="border: 1px solid black; padding: 10px;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid black; margin-bottom: 10px;"> Non-Faculty Faculty Totals </div> <p>Business Unit 23400 Coop Extension & Agr Research</p> <p>Employee Position Reports</p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>Non-Faculty 1-3 of 36 View All</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>*Effective Date</th> <th></th> <th>Restricted Headcount</th> <th>Restricted FTE</th> <th>Non-Restrict Headcount</th> <th>Non-Restrict FTE</th> <th>Wage Headcount</th> <th>Wage FTE</th> </tr> </thead> <tbody> <tr> <td>09/30/2024</td> <td>General Fund</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> </tr> <tr> <td><input type="checkbox"/> Certified?</td> <td>Non-Genl Fund</td> <td>15.00</td> <td>15.00</td> <td>21.00</td> <td>21.00</td> <td>104.00</td> <td>74.21</td> </tr> </tbody> </table> </div> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>08/31/2024</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>*Effective Date</th> <th></th> <th>Restricted Headcount</th> <th>Restricted FTE</th> <th>Non-Restrict Headcount</th> <th>Non-Restrict FTE</th> <th>Wage Headcount</th> <th>Wage FTE</th> </tr> </thead> <tbody> <tr> <td>08/31/2024</td> <td>General Fund</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> </tr> <tr> <td><input checked="" type="checkbox"/> Certified?</td> <td>Non-Genl Fund</td> <td>15.00</td> <td>15.00</td> <td>21.00</td> <td>21.00</td> <td>105.00</td> <td>75.73</td> </tr> </tbody> </table> </div> <div style="border: 1px solid black; padding: 5px;"> <p>07/31/2024</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>*Effective Date</th> <th></th> <th>Restricted Headcount</th> <th>Restricted FTE</th> <th>Non-Restrict Headcount</th> <th>Non-Restrict FTE</th> <th>Wage Headcount</th> <th>Wage FTE</th> </tr> </thead> <tbody> <tr> <td>07/31/2024</td> <td>General Fund</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> </tr> <tr> <td><input checked="" type="checkbox"/> Certified?</td> <td>Non-Genl Fund</td> <td>14.00</td> <td>14.00</td> <td>22.00</td> <td>22.00</td> <td>109.00</td> <td>84.53</td> </tr> </tbody> </table> </div> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> Save Return to Search Previous in List Next in List Notify </div> <p style="font-size: small; margin-top: 5px;">Non-Faculty Faculty Totals</p> </div> | *Effective Date | | Restricted Headcount | Restricted FTE | Non-Restrict Headcount | Non-Restrict FTE | Wage Headcount | Wage FTE | 09/30/2024 | General Fund | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | <input type="checkbox"/> Certified? | Non-Genl Fund | 15.00 | 15.00 | 21.00 | 21.00 | 104.00 | 74.21 | *Effective Date | | Restricted Headcount | Restricted FTE | Non-Restrict Headcount | Non-Restrict FTE | Wage Headcount | Wage FTE | 08/31/2024 | General Fund | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | <input checked="" type="checkbox"/> Certified? | Non-Genl Fund | 15.00 | 15.00 | 21.00 | 21.00 | 105.00 | 75.73 | *Effective Date | | Restricted Headcount | Restricted FTE | Non-Restrict Headcount | Non-Restrict FTE | Wage Headcount | Wage FTE | 07/31/2024 | General Fund | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | <input checked="" type="checkbox"/> Certified? | Non-Genl Fund | 14.00 | 14.00 | 22.00 | 22.00 | 109.00 | 84.53 |
| *Effective Date | | Restricted Headcount | Restricted FTE | Non-Restrict Headcount | Non-Restrict FTE | Wage Headcount | Wage FTE | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 09/30/2024 | General Fund | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> Certified? | Non-Genl Fund | 15.00 | 15.00 | 21.00 | 21.00 | 104.00 | 74.21 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| *Effective Date | | Restricted Headcount | Restricted FTE | Non-Restrict Headcount | Non-Restrict FTE | Wage Headcount | Wage FTE | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 08/31/2024 | General Fund | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input checked="" type="checkbox"/> Certified? | Non-Genl Fund | 15.00 | 15.00 | 21.00 | 21.00 | 105.00 | 75.73 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| *Effective Date | | Restricted Headcount | Restricted FTE | Non-Restrict Headcount | Non-Restrict FTE | Wage Headcount | Wage FTE | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 07/31/2024 | General Fund | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input checked="" type="checkbox"/> Certified? | Non-Genl Fund | 14.00 | 14.00 | 22.00 | 22.00 | 109.00 | 84.53 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

Certifying the EPR Tool

The final step after validating and making any necessary changes is to ensure that the **Totals** tab is accurate and certify the EPR totals for the month.

| Step | Action | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--|--|----------------------|----------------|------------------------|------------------|------------------------|------------------|----------------|----------|------------|--------------|------|------|------|------|------|------|-------------------------------------|---------------|-------|-------|-------|-------|------|------|----------------|--|----------------------|----------------|------------------------|------------------|----------------|----------|------------|--------------|------|------|------|------|------|------|--|---------------|-------|-------|-------|-------|------|------|----------------|--|----------------------|----------------|------------------------|------------------|----------------|----------|------------|--------------|------|------|------|------|------|------|--|---------------|-------|-------|-------|-------|------|------|
| 1. | <p>If there is updated information on the Non-Faculty and/or Faculty tabs, click the Save button to populate the page to update counts accordingly on the Totals page.</p> <div data-bbox="292 556 1312 1354" style="border: 1px solid black; padding: 5px;"> <div style="display: flex; border-bottom: 1px solid black; margin-bottom: 5px;"> Non-Faculty Faculty Totals </div> <p>Business Unit 23400 Coop Extension & Agr Research</p> <p>Employee Position Reports</p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;"> <p>Faculty 1-3 of 36 View All</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Effective Date</th> <th></th> <th>Restricted Headcount</th> <th>Restricted FTE</th> <th>Non-Restrict Headcount</th> <th>Non-Restrict FTE</th> <th>Wage Headcount</th> <th>Wage FTE</th> </tr> </thead> <tbody> <tr> <td>09/30/2024</td> <td>General Fund</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> </tr> <tr> <td><input type="checkbox"/> Certified?</td> <td>Non-Genl Fund</td> <td>13.00</td> <td>13.00</td> <td>27.00</td> <td>25.00</td> <td>0.00</td> <td>0.00</td> </tr> </tbody> </table> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Effective Date</th> <th></th> <th>Restricted Headcount</th> <th>Restricted FTE</th> <th>Non-Restrict Headcount</th> <th>Non-Restrict FTE</th> <th>Wage Headcount</th> <th>Wage FTE</th> </tr> </thead> <tbody> <tr> <td>08/31/2024</td> <td>General Fund</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> </tr> <tr> <td><input checked="" type="checkbox"/> Certified?</td> <td>Non-Genl Fund</td> <td>15.00</td> <td>14.98</td> <td>32.00</td> <td>27.66</td> <td>0.00</td> <td>0.00</td> </tr> </tbody> </table> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Effective Date</th> <th></th> <th>Restricted Headcount</th> <th>Restricted FTE</th> <th>Non-Restrict Headcount</th> <th>Non-Restrict FTE</th> <th>Wage Headcount</th> <th>Wage FTE</th> </tr> </thead> <tbody> <tr> <td>07/31/2024</td> <td>General Fund</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> </tr> <tr> <td><input checked="" type="checkbox"/> Certified?</td> <td>Non-Genl Fund</td> <td>15.00</td> <td>14.98</td> <td>29.00</td> <td>28.66</td> <td>0.00</td> <td>0.00</td> </tr> </tbody> </table> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> Save Return to Search Previous in List Next in List Notify </div> <p style="font-size: small; margin-top: 5px;">Non-Faculty Faculty Totals</p> </div> | Effective Date | | Restricted Headcount | Restricted FTE | Non-Restrict Headcount | Non-Restrict FTE | Wage Headcount | Wage FTE | 09/30/2024 | General Fund | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | <input type="checkbox"/> Certified? | Non-Genl Fund | 13.00 | 13.00 | 27.00 | 25.00 | 0.00 | 0.00 | Effective Date | | Restricted Headcount | Restricted FTE | Non-Restrict Headcount | Non-Restrict FTE | Wage Headcount | Wage FTE | 08/31/2024 | General Fund | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | <input checked="" type="checkbox"/> Certified? | Non-Genl Fund | 15.00 | 14.98 | 32.00 | 27.66 | 0.00 | 0.00 | Effective Date | | Restricted Headcount | Restricted FTE | Non-Restrict Headcount | Non-Restrict FTE | Wage Headcount | Wage FTE | 07/31/2024 | General Fund | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | <input checked="" type="checkbox"/> Certified? | Non-Genl Fund | 15.00 | 14.98 | 29.00 | 28.66 | 0.00 | 0.00 |
| Effective Date | | Restricted Headcount | Restricted FTE | Non-Restrict Headcount | Non-Restrict FTE | Wage Headcount | Wage FTE | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 09/30/2024 | General Fund | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> Certified? | Non-Genl Fund | 13.00 | 13.00 | 27.00 | 25.00 | 0.00 | 0.00 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Effective Date | | Restricted Headcount | Restricted FTE | Non-Restrict Headcount | Non-Restrict FTE | Wage Headcount | Wage FTE | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 08/31/2024 | General Fund | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input checked="" type="checkbox"/> Certified? | Non-Genl Fund | 15.00 | 14.98 | 32.00 | 27.66 | 0.00 | 0.00 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Effective Date | | Restricted Headcount | Restricted FTE | Non-Restrict Headcount | Non-Restrict FTE | Wage Headcount | Wage FTE | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 07/31/2024 | General Fund | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input checked="" type="checkbox"/> Certified? | Non-Genl Fund | 15.00 | 14.98 | 29.00 | 28.66 | 0.00 | 0.00 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2. | <p>Click the Totals tab.</p> <div data-bbox="292 1438 841 1617" style="border: 1px solid black; padding: 5px;"> <div style="display: flex; border-bottom: 1px solid black; margin-bottom: 5px;"> Non-Faculty Faculty Totals </div> <p>Business Unit 23400 Coop Extension & Agr Research</p> <p>Employee Position Reports</p> </div> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| Step | Action |
|------|--------|
|------|--------|

The **Totals** page displays.

Non-Faculty
Faculty
Totals

Business Unit 23400 Coop Extension & Agr Research

Employee Position Reports

Totals 1-3 of 36 View All

| Effective Date | MEL | Salaried Headcount | Salaried FTE | Wage Headcount | Wage FTE | Overall Headcount | Overall FTE |
|--|--------|--------------------|--------------|----------------|----------|-------------------|-------------|
| 09/30/2024 <input type="checkbox"/> Certified? | 144.75 | 76 | 74.00 | 104 | 74.21 | 180 | 148.21 |
| 08/31/2024 <input checked="" type="checkbox"/> Certified? | 144.75 | 83 | 78.64 | 105 | 75.73 | 188 | 154.37 |
| 07/31/2024 <input checked="" type="checkbox"/> Certified? | 144.75 | 80 | 79.64 | 109 | 84.53 | 189 | 164.17 |

Save
Return to Search
Previous in List
Next in List
Notify

Non-Faculty | Faculty | Totals



The counts from previous tabs should sum accurately in these totals. Agencies cannot certify or make updates to the **Totals** tab. Counts in this tab are automatically summed based on the counts in the previous two tabs.

3.

Validate the EPR data to ensure everything is correct.

| Step | Action | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|---|----------------------|----------------|------------------------|------------------|------------------------|------------------|----------------|----------|------------|--|------|------|------|------|------|------|-------------------------------------|---------------|-------|-------|-------|-------|--------|-------|-----------------|--------------|----------------------|----------------|------------------------|------------------|----------------|----------|------------|--|------|------|------|------|------|------|--|---------------|-------|-------|-------|-------|--------|-------|-----------------|--------------|----------------------|----------------|------------------------|------------------|----------------|----------|------------|--|------|------|------|------|------|------|--|---------------|-------|-------|-------|-------|--------|-------|
| 4. | <p data-bbox="289 325 1120 361">Return to the Non-Faculty tab and click the Certified checkbox.</p> <div data-bbox="292 378 1429 1270" style="border: 1px solid black; padding: 5px;"> <div style="display: flex; border-bottom: 1px solid black; margin-bottom: 5px;"> Non-Faculty Faculty Totals </div> <p data-bbox="300 466 771 489">Business Unit 23400 Coop Extension & Agr Research</p> <p data-bbox="300 514 560 537">Employee Position Reports</p> <div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;"> <p data-bbox="332 598 446 621">Non-Faculty</p> <div style="display: flex; justify-content: space-between; align-items: center;"> <input type="text" value=""/> 1-3 of 36 View All </div> <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr> <th style="width: 15%;">*Effective Date</th> <th style="width: 10%;">General Fund</th> <th style="width: 10%;">Restricted Headcount</th> <th style="width: 10%;">Restricted FTE</th> <th style="width: 10%;">Non-Restrict Headcount</th> <th style="width: 10%;">Non-Restrict FTE</th> <th style="width: 10%;">Wage Headcount</th> <th style="width: 10%;">Wage FTE</th> </tr> </thead> <tbody> <tr> <td>09/30/2024</td> <td></td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> </tr> <tr> <td><input type="checkbox"/> Certified?</td> <td>Non-Genl Fund</td> <td>15.00</td> <td>15.00</td> <td>21.00</td> <td>21.00</td> <td>104.00</td> <td>74.21</td> </tr> </tbody> </table> <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr> <th style="width: 15%;">*Effective Date</th> <th style="width: 10%;">General Fund</th> <th style="width: 10%;">Restricted Headcount</th> <th style="width: 10%;">Restricted FTE</th> <th style="width: 10%;">Non-Restrict Headcount</th> <th style="width: 10%;">Non-Restrict FTE</th> <th style="width: 10%;">Wage Headcount</th> <th style="width: 10%;">Wage FTE</th> </tr> </thead> <tbody> <tr> <td>08/31/2024</td> <td></td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> </tr> <tr> <td><input checked="" type="checkbox"/> Certified?</td> <td>Non-Genl Fund</td> <td>15.00</td> <td>15.00</td> <td>21.00</td> <td>21.00</td> <td>105.00</td> <td>75.73</td> </tr> </tbody> </table> <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr> <th style="width: 15%;">*Effective Date</th> <th style="width: 10%;">General Fund</th> <th style="width: 10%;">Restricted Headcount</th> <th style="width: 10%;">Restricted FTE</th> <th style="width: 10%;">Non-Restrict Headcount</th> <th style="width: 10%;">Non-Restrict FTE</th> <th style="width: 10%;">Wage Headcount</th> <th style="width: 10%;">Wage FTE</th> </tr> </thead> <tbody> <tr> <td>07/31/2024</td> <td></td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> </tr> <tr> <td><input checked="" type="checkbox"/> Certified?</td> <td>Non-Genl Fund</td> <td>14.00</td> <td>14.00</td> <td>22.00</td> <td>22.00</td> <td>109.00</td> <td>84.53</td> </tr> </tbody> </table> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> Save Return to Search Previous in List Next in List Notify </div> <p data-bbox="292 1243 552 1266">Non-Faculty Faculty Totals</p> </div> </div> | *Effective Date | General Fund | Restricted Headcount | Restricted FTE | Non-Restrict Headcount | Non-Restrict FTE | Wage Headcount | Wage FTE | 09/30/2024 | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | <input type="checkbox"/> Certified? | Non-Genl Fund | 15.00 | 15.00 | 21.00 | 21.00 | 104.00 | 74.21 | *Effective Date | General Fund | Restricted Headcount | Restricted FTE | Non-Restrict Headcount | Non-Restrict FTE | Wage Headcount | Wage FTE | 08/31/2024 | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | <input checked="" type="checkbox"/> Certified? | Non-Genl Fund | 15.00 | 15.00 | 21.00 | 21.00 | 105.00 | 75.73 | *Effective Date | General Fund | Restricted Headcount | Restricted FTE | Non-Restrict Headcount | Non-Restrict FTE | Wage Headcount | Wage FTE | 07/31/2024 | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | <input checked="" type="checkbox"/> Certified? | Non-Genl Fund | 14.00 | 14.00 | 22.00 | 22.00 | 109.00 | 84.53 |
| *Effective Date | General Fund | Restricted Headcount | Restricted FTE | Non-Restrict Headcount | Non-Restrict FTE | Wage Headcount | Wage FTE | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 09/30/2024 | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> Certified? | Non-Genl Fund | 15.00 | 15.00 | 21.00 | 21.00 | 104.00 | 74.21 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| *Effective Date | General Fund | Restricted Headcount | Restricted FTE | Non-Restrict Headcount | Non-Restrict FTE | Wage Headcount | Wage FTE | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 08/31/2024 | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input checked="" type="checkbox"/> Certified? | Non-Genl Fund | 15.00 | 15.00 | 21.00 | 21.00 | 105.00 | 75.73 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| *Effective Date | General Fund | Restricted Headcount | Restricted FTE | Non-Restrict Headcount | Non-Restrict FTE | Wage Headcount | Wage FTE | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 07/31/2024 | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input checked="" type="checkbox"/> Certified? | Non-Genl Fund | 14.00 | 14.00 | 22.00 | 22.00 | 109.00 | 84.53 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | <p data-bbox="289 1312 1421 1348">Selecting the “Certified” checkbox will update the certified checkboxes on all three tabs.</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 5. | <p data-bbox="289 1423 576 1459">Click the Save button.</p> <div data-bbox="292 1470 966 1606" style="border: 1px solid black; padding: 5px;"> <div style="display: flex; border-bottom: 1px solid gray; margin-bottom: 5px;"> Save Return to Search Previous in List Next in List Notify </div> <p data-bbox="292 1570 552 1593">Non-Faculty Faculty Totals</p> </div> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | <p data-bbox="289 1640 1494 1738">Once the data is certified and saved, the page cannot be uncertified or changed. Validate that all data is correct before clicking the Save button. If totals are certified incorrectly, please contact DHRM via iHelp@dhrm.virginia.gov.</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

Additional Resources Regarding Employee Position Report (EPR) Tool

Details to run each of the following reports and queries are included in the Cardinal Human Resources Reports Catalog. The Cardinal Reports Catalogs are available on the Cardinal website under **Resources**.

- **V_HR_EPR_DATA_VALIDATION Query** – Use this query to validate that the EPR counts are accurate by category, position type, and funding type. This query provides the details and simply requires Agencies to generate, filter, sum, and compare results to the counts on the EPR Tool
- **V_HR_EPR_AUDIT Query** – Provides changes that were made to the counts within the EPR Tool. Also provides User and DATE/TIME changes were made
- **Employee Position Summary Report (RHR019)** – Hourly employees only. Used by Cardinal Payroll Agencies to determine true hourly FTE and headcount based upon actual hours wage employees work in the month. This report pulls data from paid time based on funding codes used on wage employees' timesheets. **Menu > Workforce Administration > Job Information > Reports > Employee Position Report**
- **V_HR_JOB_DATA Query** – Additional resource used to verify restricted vs. non-restricted filled positions. Used to verify salaried FTE based on FTE/Standard hours in Job Data.
- **V_HR_POSN_DFLT_EMPL_DATA Query** – Additional resource used to verify the funding sources of salaried and wage employees (general vs non-general funded at department or position level).
- **Position Summary Report (RHR471)** – May assist Agencies with verifying total filled positions at a point in time (as of xx/30/xxxx)
- **HR351_Employee Class Overview** – Provides details regarding Employee Class and interpreting Acronyms
- **HR351_Position Chart field Assignment and Update** – To assist with understanding budget fund codes and Chart fields
- **Cardinal HCM Human Resource Reports Catalog** – Provides details regarding how to generate reports and queries and when to use them