UM Plan Compensation Planning Menu Options

Menu Option Name	Action Type	Description of Functionality & Use Case
Detailed Employee View	View	View the monthly budget output details for the selected employee ID. Make changes to outputs using adjustment fields: • Status • Associated Fund Org Split % • FTE • Unit Adjustment ($ adjustment) • Benefit Cap Adjustments
Detailed Employee View – GL Codes	View	View the monthly GL account budget output details for the selected employee ID. Make changes to associated GL accounts and Benefit Costs.
Add To Be Hired Employee to Selected Position	Process	Fill the selected position with a generic To Be Hired employee placeholder appointment, as of a certain effective date. The added employee row will be visible in the *New Employees and Positions* tab of the *Org Employee Review* card.
Appoint Existing Employee ID to Selected Position	Process	Fill the selected position with a specific identified UM employee ID appointment, as of a certain effective date. The added employee row will be visible in the *Existing Employees and Positions* tab of the *Org Employee Review* card.
Move Selected Employee to New Position	Process	Move the selected employee to a new position number from VIP. Select the new position number, the appropriate status and the association % to the new position. All other fields are copied from the selected position appointment.
Add Existing Employee ID and Position #	Process	Add a brand new appointment using an existing UM ID and VIP Position number. Enter all fields pertinent to the newly added appointment, including all fields which would've been imported from VIP if the employee were imported from there.
Add New TBA Position	Process	Add a brand new appointment using a generic placeholder To Be Hired employee ID and To Be Added Position number. Enter all fields pertinent to the newly added appointment, including all fields which would've been imported from VIP if the employee were imported from there. Use this option when adding a new appointment for which you do not have the UM ID or position number available.
Add Grouped Casual or Sessional Employees	Process	Add a grouped / bucket appointment to the plan. Select from a list of employee buckets available in the system. The rest of the fields are used to describe the appointment, much like adding a standard non-grouped employee appointment in other menu options.
Remove Selected Employee	Process	Remove an employee's appointment which you have added to the plan. Note that you CANNOT remove an employee's appointment if it has been imported from VIP, you can only use the adjustment fields in the employee's detailed view to remove the impacts of their compensation from your plan.
View VIP Record Details	View	View the details imported from VIP versus those which are currently being used in the plan for the selected employee in a filtered, simple view.

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Add Org Fund Split (Split Org, Fund or Both)	Process	Split an existing employee appointment to be paid from multiple funds/orgs. Note that an appointment can be split more than once. For example, split an employee's 100% appointment into two 50% appointments, then split one of the 50% appointments into two 25% appointments, leaving a 50% appointment and two 25% appointments. Splits can continue across various fund/org combinations as many times as needed.
Import Employee (Transfer)	Process	Import an employee's appointments from another Org. Identify the employee's UM ID and the source Org number, along with the transfer date. All appointments for the identified UM ID in the source Org will be imported to the target Org with a transfer date as identified.
Copy Selected Employee Group to Another Org	Process	Copy the details of a grouped / bucket employee from one Org to another Org. The details of the grouped employee can be changed in both the source and target Org at any point after the initial copy.
Move Benefit Costs to Another Fund or Position	Process	In some cases in VIP, an employee is paid benefits from a different position ID than that from where they are paid their standard compensation. In this case, the employee may appear on two rows of the Org Employee Review form, one row with their compensation information, the other row with their benefit % drivers. Because there are two different rows, the benefit $ outputs will not properly calculate. This menu option allows you to move the employee's associated benefit % drivers to the position number which contains their standard compensation.
Push Comp to Consolidated Plan	Process	In order to view the output of the compensation plan in the overall 'non-comp' view for the org/unit, this option must be run to merge the data sets. This option is run on an overnight basis across the organization as well.
Alternate Org Views • All Employee Status Review • All Employee FTE Review	View	Alternate form views which provide summaries for the identified metric for all appointments in the selected Org/Unit.
Seed Grouped Position Details From Prior Budget	Process	Roll over grouped / bucket employee details from the prior year's budget to speed up the data entry process.
Seed Benefit Funding Caps From Prior Budget	Process	Roll over the maximum benefit funding cap assignments from the prior year's budget to speed up the data entry process.
Change Appointment Association %	Process	Change the appointment association percent to the existing Org/Fund combination. This is useful if you have executed a split from the employee's original appointment, but need to reverse the impacts of that split by restoring the original appointment's association percent back to 100%.