UMPlan – Compensation Budgeting and Planning

The first step in the planning process is to review the compensation for the employees being paid from the Org. You must review all employees salaries and benefits, ensure there is an account associated to each, verify if salary changes are required, add positions to be hired and additional compensation accounts if needed.

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Step 1: Review Employee GL Account Associations

The Review Employee GL Account Associations will list all employees that are being paid from your FOP at the time that an import from VIP took place. Some may not have a commitment due to them being inactive or not having a start date, in this instance you must select an account for their compensation. This step must be completed in order to continue planning activities.

1. Click the tile **Compensation Planning** then choose **Rev Empl GL Account Assoc.**
2. Verify that the Point of View is the correct one you would like to work with in this form.

3. Review the list of employees and the column titled **Difference.** The Difference column is the calculated amount of the missing commitment. Any employee that is missing a commitment will have an orange cell in the Difference column and require an account association to be added. If no cells are orange, continue to the next step in planning. Otherwise, follow the instructions below:

    a. Locate the cell highlighted in orange then right click in it and choose **View Employee Account Details.**
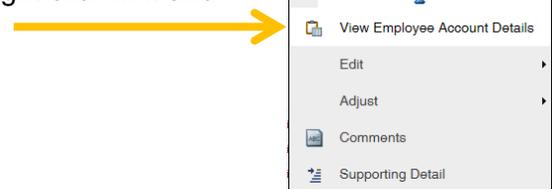
    b. You will be brought to the **Detailed Employee View – GL Accounts.** Locate the orange cell in this screen then right click in it and choose **Add Comp Account Split.**

    c. A window will open to add the GL account. Click the **Member Selector icon** to the right of the field for **Select Compensation Account** and search for the appropriate account to allocate the compensation.

    Note: You can view the account that was previously associated with the employee in FAST.

d. Click the **checkmark** to select the account then click **OK**. You will be returned to the window for adding the GL account.

e. Leave the **Comp Account Association** as 100.
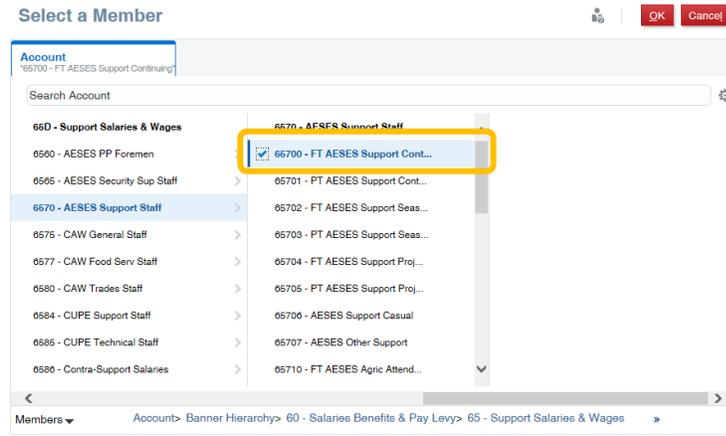f. Click **Launch** and you will be returned to the page for the **Detailed Employee View**.

Step 3 must be completed for each employee listed in the <u>Review Employee GL Account Splits (Rev Empl GL Account Assoc.)</u> that contains an orange cell in order to proceed to the next step in planning. To return to the Review Employee GL Account Splits, simply click the link at the top of the form.

4. When the Difference column no longer contains orange cells, click **Save**.

Step 2: Org Employee Review

Remaining in the tile for **Compensation Planning**, choose **Org Employee Review**.

In the Org Employee Review, you will need to identify any employees that may need to have their status changed (e.g. active or inactive), add positions to be hired, change positions, as well as review salaries and benefits. A number of forms within the Org Employee Review will be used to complete these actions.

Existing Employees and Positions
Review the list of current employees and make changes as required. This may include status, associated fund-org split percentage, FTE count, unit adjustment and benefit cap adjustment.

➢ *View Compensation Account Information*
   View the account code for each component of compensation for an employee in the Detailed Employee View – GL Codes.

1. Locate the individual in the list then right click in the cell and choose **Detailed Employee View – GL Codes** then **Detailed Employee View – GL Codes – UM Employee**.

2. In the following page, you will be able to view the salary and benefits for the individual as well as the account codes associated to each.

➤ *View VIP Record Details*
View the details imported from VIP versus what is currently being used in the plan for a selected employee.

1. Right click in the cell of an employee listed and select **View VIP Record Details**.
2. You will be brought to the details of the individual selected. Click the link at the top left of the form to return to the **Existing Employees and Positions** view.

➤ *Changing the Status of an Employee*
1. Locate the employee in the list then right click in the cell and choose **Detailed Employee View** then **Detailed Employee View – UM Employee**.

2. In the Detailed Employee View, locate the row **Status Adjustment.**

3. Click the down arrow in the cell of the month that requires a change in status for the individual. In the window that appears, choose the status from the list provided.
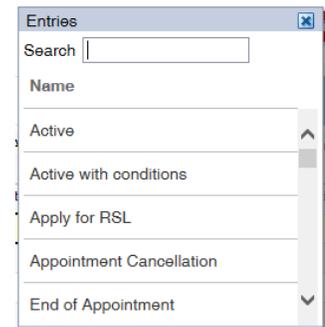
4. When complete, click **Save**.

*Note: The row **Total Comp & Benefit Amount** will be blank when marking the employee with an inactive status. **Salary Savings** and **Benefit Savings** will appear in the corresponding rows.*

5. To return to the Existing Employees and Positions, click on the link in the top left of the form for **2.01 Review Org Compensation – Existing Employees**.

➢ *Changing a Position of an Employee*

<u>Appoint an Existing Employee ID to a Selected Position</u>:

1. Locate the position in the list then right click in the cell and choose **Appoint Existing Employee ID to Selected Position.**
2. In the window that appears, enter the **Effective Date** and **Select Employee ID to Add** (the new individual's ID). Include comments if needed.

Comp_User_026_Add Existing Employee to Position				Launch Cancel
* Select Employee	"ID_005730"	* Select Employee ID to Add	"ID_005730"	
* Enter Effective Date (choose first day of month)		Enter Employee & Position Comments		

3. Once the information is complete, click **Launch**.
4. You will be returned to the **Existing Employees and Positions** page and the employee appointed to the selected position will be added to the list. Click **Save.**
5. Adjust the salary if needed using the **OVERRIDE Amount** column then click **Save** again.

<u>Move an Employee to a New Position</u>:

1. Locate the individual in the list then right click in the cell and choose **Move Selected Employee to New Position**.
2. In the window that appears, enter the required fields that have an asterisk(*).
   *Note: Target Position is the new position number and the **Fund and Org Percent Association** is for the new position. Choose the status of the employee's new position.*

Comp_User_022_Change Employees Position				Launch Cancel
* Select Source Position	"P.BA424"	* Select Status	Active	
* Select Target Position	"P.BA424"	* Enter Fund and Org Percent Association (ie.		

3. When complete, click **Launch** to be returned to the page.
4. The change in position will appear in the **Existing Employees and Positions** view**,** click **Save.**

<u>Import an Employee</u>

You can import an employee from another Org (Faculty) to your plan however, when doing this action the original Org will have that employee transferred out without notice. Ensure you speak with the Business Manager of the Org when doing this change so they can make adjustments.

1. Right click in a cell and select **Import Employee (Transfer).**
2. In the window that appears, enter the required details. *Note: Source Org is the original Org the employee belonged to in the first place.*

Comp_User_010_Transfer In Employee				Launch Cancel
* Select Employee	"ID_029267"	* Enter Transfer Date		
* Select Source Org	"O.571000"	* Select Target Org	"O.571000"	

3. Once all information is complete, click **Launch**.
4. The employee will be added to the list along with their position. Click **Save**.

➢ *Salary and Benefit Changes*

Salary Adjustment

1. Review the employees listed and verify the salary amounts in the **Total Comp Amount** column (this amount will include any increases that are expected to occur in the fiscal year, including steps and general increases). If changes are required:

   a. Enter the corrected amount in the **OVERRIDE Amount** column.
   b. Click **Save** to recalculate the total salary and benefits. View **Total Comp & Benefit Amount** column for the revised amount.
   c. If needed, include a comment by right clicking in the cell and choosing **Comments**. Enter the comment in the field provided and click **Post** then **Close.**

Adjusted Ann Sal Amount	OVERRIDE Amount
46,967	55,000
52,415	
52,295	

Change Discretionary Benefit Rate

1. Locate the individual that requires a change in benefit rate and right click in the cell then select **Detailed Employee View – GL Codes** and **Detailed Employee View – GL Codes – UM Employee**.
2. Once in this view, right click in a cell then choose **Add Benefit Cost**.

   a. Select the **Benefit Account** (use account 68BGT for lump sums), that requires a change then in the field **Enter Benefit Account Percent** input the amount.

   Comp_User_009_Add Benefit Cost To Employee   Launch Cancel

   * Select Benefit Account "A.68030"   * Enter Benefit Account Percent (ie. 10% = 10)

   b. Click **Launch** to apply change.
3. Click **Save** to keep changes that have been made.

Benefit Funding Cap

Enter a limit for benefits being paid from a particular Fund-Org.

Benefit Funding Cap	Total Comp & Benefit Amount
	57,690

1. Locate the employee in the list, and scroll to the right to the column **Benefit Funding Cap**.
2. Enter the maximum amount then click **Save**. Recalculation of benefits will be done and **Total Benefit Amount** column will be adjusted.

Move Benefit Costs to Another Fund or Position

If an employee is paid benefits from a different position than the one they are paid for their compensation, they will have two rows under their name for the two positions. One row may only contain benefits and the other with only contain their compensation. This will cause for the benefits to not be calculated properly. You must adjust the benefit costs to the appropriate fund or position.

1. Locate the individual in the list, then right click in the cell and select **Move Benefit Costs to Another Fund or Position**.
2. Enter the required information that is marked with an asterisk(*).
    ***Note**: Target Fund and Target Position is the new fund and position.*

Comp_User_020_Copy Benefits to New Fund and Position   Launch   Cancel

| * Select Fund | "F.110000" | | * Select Target Fund | "F.110000" | |
| * Select Source Position | "P.24360" | | * Select Target Position | "P.24360" | |

3. Click **Launch** when the information is complete.
4. You will be returned the previous page. Click **Save**.

Add Org-Fund split

Splitting a position between two different funding sources (e.g. between two different funds or departments).

1. Locate the individual in the list then right click in the cell and choose **Add Org Fund Split (Split Org, Fund or Both)**.
2. Change information as needed and enter Fund and Org Percent Association.
    ***Note**: Fund and Org Percent Association refers to the amount being paid by the Target Fund and Org.*

Comp_User_019_Add Org and Fund Split   Launch   Cancel

* Select Org	"O.571000"		* Select Target Fund	"F.110000"	
* Select Fund	"F.110000"		* Enter Fund and Org Percent Association (ie. 80% = 80)		
* Select Target Org	"O.571000"				

3. Click **Launch** when information is complete.
4. Click **Save**.
5. To verify the split, right click the individual and select **Detailed Employee View** then **Detailed Employee – UM Employee**. Both Funds and Orgs will appear in the view. The rows **Assoc. Percent** and **Adj. Associated %** will reflect the split.
6. Return to **Existing Employees and Positions** by clicking the link at the top left of the form.

Existing Employees and Positions | New Employees and Positions | Grouped Employ

2.02 Detailed Employee View ⓘ
2.01 Review Org Compensation - Existing Employees > 2.02 Detailed Employee View

Change Appointment Association Percentage

Change the appointment association percentage to the existing Fund/Org. This would be used to reverse a split that was already put in place.

1. Locate the employee in the list then right click in the position cell and choose **Change Appointment Association %.**

2. Enter Fund and Org Percent Association then click **Launch**.

Comp_User_027_Change Appointment Association Percent   Launch Cancel

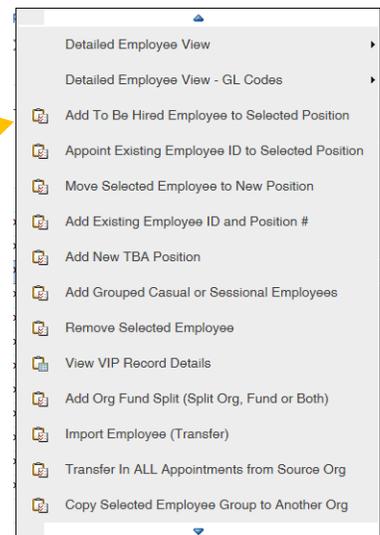* Enter Fund and Org
Percent Association (ie.
80% = 80)

3. Click **Save** when returned to the previous page.
4. To verify changes, right click in the cell of the individual and choose **Detailed Employee View** then **Detailed Employee View – UM Employee** to view the calculated adjustments.

➢ *Adding to Be Hired Positions*
You have the option to add positions while in any view within the **Org Employee Review** form. However, the positions will only be visible in the **New Employees & Positions** view if it is an individual position or **Grouped Employees and Positions** if it is for a grouped position. *Note: If the position begins in the current Fiscal Year, the start date will still remain as April 1. You must override the salary amount to include the step increase that will occur in the Fiscal Year you are planning.*

To Add a to Be Hired Employee to an Existing Position

1. Right click in the row of the position you wish to add as a to be hired position then select in the drop down **Add To Be Hired Employee to Selected Position**.

| Detailed Employee View ▸ |
| Detailed Employee View - GL Codes ▸ |
| Add To Be Hired Employee to Selected Position |
| Appoint Existing Employee ID to Selected Position |
| Move Selected Employee to New Position |
| Add Existing Employee ID and Position # |
| Add New TBA Position |
| Add Grouped Casual or Sessional Employees |
| Remove Selected Employee |
| View VIP Record Details |
| Add Org Fund Split (Split Org, Fund or Both) |
| Import Employee (Transfer) |
| Transfer In ALL Appointments from Source Org |
| Copy Selected Employee Group to Another Org |

2. **Enter Effective Date** (start date) and **Employee & Position Comments** if needed then click **Launch**.

Comp_User_015_Add TBH Employee to Existing Position   Launch Cancel

* Enter Effective Date
(choose first day of month)   Enter Employee & Position
Comments

3. The position will be added as a "TBH Employee" and only visible in the **New Employees and Positions** view.
4. Click **Save** and review the salary amount. If changes are required, enter the corrected salary in the **OVERRIDE Amount** column and click **Save**.

To Add a To Be Announced Position or a Position Currently Not Existing

1. Right click in any cell of the form and select **Add New TBA Position.**

2. In the window that appears, fill the required fields marked with an asterisk(*).

Note: Drop down menus are available for Rate Type, Pay Frequency and Compensation Group.

3. Click **Launch** when all required fields are filled. The new position will be added and only visible in the **New Employees & Positions** view.
4. Click **Save** and view **Total Comp & Benefit Amount** column for results. If needed, adjust the salary in the **OVERRIDE Amount** Column and click **Save** once more.

➢ *Removing an Employee/Position*
You can remove an employee or position that was recently added into the plan.

1. Right click in the cell of the individual/position to be removed and choose **Remove Selected Employee**.
2. The individual will no longer appear in the list along with the position they were associated with in the plan.
3. Click **Save**.

New Employees and Positions
Verify the information for the to be hired positions including salaries and benefits. Additions of employees with and without positions can also be made in this view.

Grouped Employees and Positions
Add positions here such as sessionals or grader/markers and review the salaries and benefits.

➢ *Adding Grouped Employees or Positions*

To Add a Group of Casual or Sessional Employees

1. Right click in a cell on the page and choose **Add Grouped Casual or Sessional Employees.**
2. A window will appear, fill the required fields that have been marked with an asterisk (*).

To **Select Grouped Employee Type,** click on the **Member Selector icon**. In the window that appears, click the arrow to the right of All Employees then click on the arrow next to Grouped Employees, you will then be able to select the category for the employee type.

Note: If there is an overall amount to be allocated to a group, enter the following in these specific fields:

Effective Date: April 1
Effective Rate: (Overall amount)
Rate Type: Yearly
***Weekly Hours**: 1
*FT Weekly Hours: 1

> **To get an accurate FTE count, in the weekly hours field enter the total amount of Weekly Hours for all employees of that position. (e.g. 35 hours x 10 employees = 350)*
> *For the FT Weekly Hours enter the total weekly hours per employee (i.e. 35).*

3. Click **Launch** when complete.
4. Click **Save** and review the **Total Comp & Benefit Amount** column for results.

Copy Selected Group to Another Org
Copy a selected employee group to another Org.

1. Right click the cell of the employee group you wish to copy and select **Copy Selected Employee Group to Another Org**.

Comp_User_024_Copy Employee Group

Launch Cancel

* Select Org "O.571000"   * Select Target Org "O.571000"
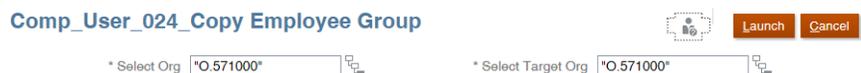
2. Enter the **Target Org** which is the new Org to copy the employee group to, then click **Launch**.
3. You will be returned to your previous page, click **Save**. Verify changes by going to the Point of View of the Org you copied the grouped employees over to.

Seed Grouped Position Details From Prior Budget
Seeding will copy over the details from the prior year's budget for grouped positions into the new budget.

1. Right click in a cell then choose **Seed Grouped Position Details From Prior Budget**.
2. The page will update and the grouped positions from prior year will appear. Click **Save**.

Employee Fund Org Association Review
Review the employees listed and their benefits percentage in each month.

1. Locate any orange cells which will contain a benefits percentage of above 100% then right click in the cell and select **View Employee Details**.
2. The employee may have two positions associated with them and one position may not have a status selected which will cause double the benefits percentage. In the Status Adjustment row of one of the positions, click on the triangle that appears in the cell to open the window for a choice of status. Select the correct status from the list that displays.
3. Click **Save** when finished. To return to the previous view, click on the **2.14 Check Employee Position Assoc. Percent** link at the top of the form.

Employee Benefit Maximum Review

Displays any employees that have reached a maximum benefit amount in a particular Fund Org and require the remaining benefits to be allocated to another Fund Org.

1. Right click in the orange cell and choose **Detailed Employee View**.
2. In the Detailed Employee View, right click in a cell and choose **Place Required Benefit Adjustments On Another Org Fund**.
3. Select Fund, Org, Position and Target Fund, Org, Position then click **Launch** when complete.

4. Click **Save.**
5. To return to Employee Benefit Maximum Review, click on the link at the top left for **Review Benefit Maximum Adjustments**.

6. Once returned to the page, the individual should no longer appear on the list.

All Employee Output

View the end result of all employee and position changes with the current and past budgeted salary. If changes are required, you must return to Existing Employees and Positions complete them.

All Employee Details

Detailed summary of the final list of all employees and positions that have been added. This will include salaries and benefits for each. If changes are required, you must return to the corresponding view to complete them. You can also view the previous years Compensation.
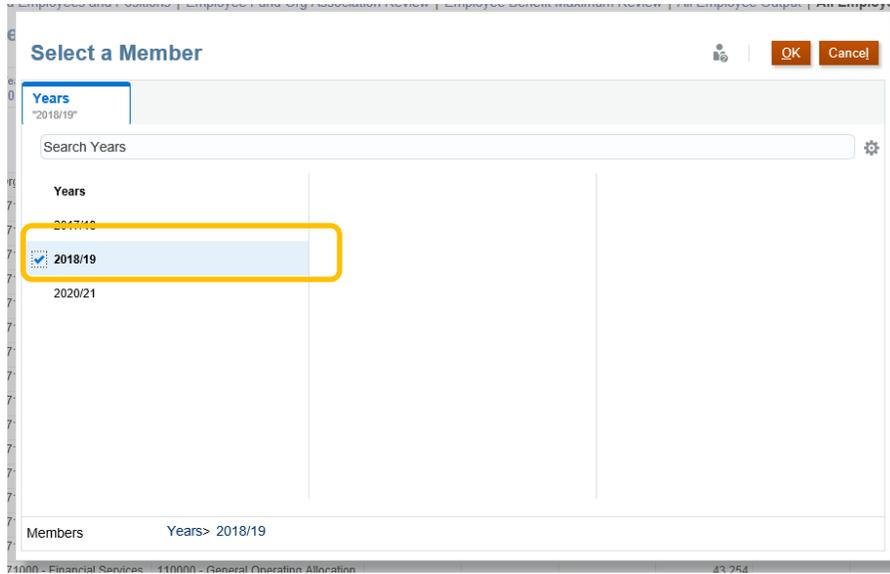
To view a previous year's Compensation Plan:

1. Click **Years** at the top left of the form.

2. A window will open. Choose the Fiscal Year you wish to view by clicking on the checkmark beside it then click **OK**.

3. Click on the **Go** button to update the information in the page to your selection.


Step 3: Non-Employee Aligned Costs

In the **Non-Emp Aligned Costs** tile, you can review the list of compensation accounts, add more if needed and enter an overall amount for an account. Follow the instructions below to add accounts. ***Note****: If there were no actuals or budget in the previous year, the account listing will be blank.*

Add Accounts

1. Right click in a cell within the form and select **Add Accounts to List**.
2. A new window will appear. Click the **Member Selector icon** beside the field for **Select Compensation Accounts** to search through the hierarchy for the account code of your choice.
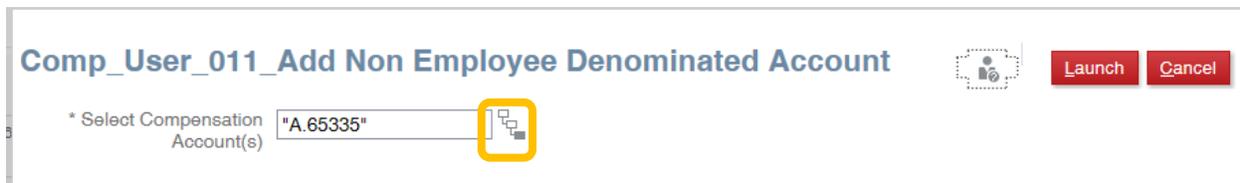
3. Click **Launch** when a selection is made.
4. Continue adding accounts as needed by following step 1 to 3.
5. When satisfied, click **Save**.

Budgeting an Overall Amount for an Account

For accounts such as Overtime, you can enter an overall amount for the fiscal year or choose to budget for each month. This can only be done at the 6 digit level of a Fund Org. To enter an amount for each month, click on the plus icon to expand the column **Fiscal Tot Yr.**

⊞Fiscal Tot Yr

Additional Informational Tiles

Below are some forms that can help with determining the salary for positions and reviewing the overall budgeted amount.

View Comp Grids: This form is based on the union contracts on campus and can help with planning salary amounts. Click on the position title to choose an alternate position to view and click **Go** to update.

Comp – Hierarchy View: This form displays high levels views of total salaries. Options to view the collapsed accounts, expanded, and full hierarchy view.

Check Comp. Increases: The form will show the changes in salaries. You can view who is getting an increase and when.

Step 4: Promoting Data to Budget Development

Once all compensation planning has been completed, you can promote the data to be viewable in Budget Development or wait for the overnight update of the system. Promotion of the data to the Budget Development will allow you to view all the compensation planning that has occurred at the same time as you continue to the non compensation planning. If Step 1: Review Employee GL Account Associations was not completed, the data will not be promoted to Budget Development.

The following instructions are to promote the data manually:

1. Return to one of the following views in the **Org Employee Review** tile:
   - Existing Employees and Positions
   - New Employees and Positions
   - Grouped Employee and Positions
2. Once in one of the views above, right click in a cell and choose **Push Comp. To Consolidated Plan**.
3. A window will appear and the process will automatically run. When complete, you will be returned to the your previous view.