Overview

This job aid includes the step-by-step instructions on how to:

- 1. Remove an Employee from my Compensation Plans in HCP
- 2. Remove an Employee from my Compensation Plans as well as the Position from HCP

1. Removing an Employee from my Compensation Plans

Follow these steps if you have an employee in an active position and would like to remove the employee from your Compensation Plans but retain the position in HCP.

Step	Action	Result
1	From the Manage Existing Employees and Positions form, locate the employee you want	
	to remove. Hover your cursor over the furthest right beige field, which is Entity/Planned	
	Home Department on this form. Right click Manage Employee ->Transfer/Separate ->	
	Transfer/Separate from Position.	
	HomePape CalPlan - Task List Status × Search	
	Task List Status	
	Task - Manage Existing Employees and Positions Task Instructions	
	Manage Existing Employees and Positions MyOrg: 1_BAAAF	
	Employee Name Position Title Appointment Start Date Appointment End Date Appointment Type Average FTE	
	E0: P00016278 1_1053 Manage Employee C1 Empl Details 2099 Faculty	
	E0: P00053945 1_1020 Edit Transfer / Separate (Neither can be undone)	
	E0: P00024965 1_1053 Adjust Calculate Comp	
	E0: P00039266 1_1053 * Supporting Detail G: Empl Extend Appt 2016 Faculty	
	CULCTON PUBLICASI CO CHANGE HISTORY B IN SML. //U0/2016 //S1/2016 Faculty	
2	From the Transfer or Separate Employee Runtime Prompts dialog box:	
	Enter Transfer/Separate date	
	• Select Yes from dropdown to Confirm operation	
	Runtime Prompts - Transfer or Separate Employee	
	* 1:Required: Enter the Transfer/Separate date. 05/01/2007	
	Transfer/Separate Employee Cancel	
3	Click Transfer/Separate Employee.	НСР
		Separation
	Transfer/Separate Employee Cancel	Dialog Box
		appears.

Step	Action	Result
4	Click Ok to separate/remove employee from Position. (Note: There is no "undo" option in HCP.)	
	i Information	
	HCP Transfer or Separate Emp was successful.	
5	On the Manage Existing Employee and Position form, review changes for the Separated Employee.	
	 Year End Status updates to Inactive in the year you Transfer/Separated the employee. 	
	 Average FTE reflects all months in year, even inactive months. 	
	Reg Salary Expense displays sum of all active months.	
	 Total Compensation displays sum of Regular Salary and Benefits for all active months. 	
6	For the Separated Employee, right click and navigate to Manage Employee -> Empl	
	Details.	
	Task - Hanage Existing Employees and Positions Task Instructions	
	Parage Cassing improves and Positions	
	Employee have Pooton Tile Appointment Start Date Appointment Start D	
	E012766/41_P0005946 1 Marage Endlower 51 Endlower 2027 Ceneer 0.833 Inschoe E012258/23 P00024996 1_1053 Edit C C Endlower 0.833 Inschoe E012258/23 P00024996 1_1053 Edit C Tarofer / Separate (Nether can be undore) 2099 Pacity 2 Active	
	E011772449 P00039366 1_1052 Aput. * C) Debt To be fred fingi 2016 Facily 0 Inactive E012936442 P0039366 1_1052 * C) Debt To be fred fingi 2016 Facily 0 Inactive E012936442 P0039366 1_1052 * Gaporing Death C) Tript Detrind Appt 2016 Facily 0 Inactive	
7	From the HCP Emp Distributions section at the bottom of the Empl Details page, click on	
	the HCP Empl By Period tab to review details showing that the employee status is no	
	longer active (starting in May, in this example).	
	Task List Status	
	Task - Manage Existing Employees and Positions Task Instructions	
	HCP Employee Position > HCP Empl Review Details Att perturbition Att perturbition Business Svcs Assts Image: Desition	
	HCP Final Distributions HCP Final Status HCP Final Addit Farmions HCP Final Ry Deviad HCP Final Profile	
	2016-17	
	Jul Aug Sep Q1 Oct Nov Dec Q2 Jan Feb Mar Q3 Apr May Jun Q4 PearTotal Jul Aug Monthly Spread Factor Input 0.25	
	Monthly Spread Factor 0.08 0.08 0.08 0.08 0.08 0.08 0.08 0.25 0.08 0.	
	Mo End FTE 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	
	Action Active Ac	
	Status	



Step	Action	Result
8	Navigate to the Create and Manage Vacant Positions form now reflects the newly Vacant	
	nosition (offective the period ofter you removed the employee from the peritien)	
	position (effective the period after you removed the employee from the position).	
	Task - Create and Manage Vacant Positions Task Instructions	
	Create and Manage Vacant Positions	
	WyOrg: 1_BAAAF	
	2016-17	
	July August Septemb October Novembe Decembe January February March April May June July	
	1_10200 - BAH Administrative Officer 3 (P000600 1.00 1.00	
	Administrative Officer 3 (P00063) 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.0	
	Assistant III (P00053945) 🧖	
9	Click the Save icon in the menu har	
-		
	🔥 💕 🖉 Explor 📳 🥊 🖴 📝 🚚 🖓 📓 🎽 🧟 🐇 🚯 📾 🐻 👘 🗐	
	HomePage CalPlan - Task List Status ×	
	E Forms Task List Status	
	My Task List Task - Manage Existing Employees and Positions-HCP Employee Positio	
	HCP Employee Position > HCP Em	
10	If you need to assign a to-be-bired person or an existing employee to the now vacant	
_	n you need to ussign a to be fined person of an existing employee to the new vacant	
	position, refer to Navigating HCP Exercise Packet FY2017-18(p. 48, Exercise 8, Step 21)	
	for Assigning a To-Be-Hired to a Vacant Position. (The steps are the same for assigning an	
	evisting employee to a Vacant Position)	
	Tank Link Okahur	
	Task - Create and Manage Vacant Positions-HCP Vacant Positions	
	Create and Manage Vacant Positions	
	Gigmyorg:oociLi Gigmyorg:oociL	
	1_11871 - CLLAW ADM Building Services Building Maintenance Worker (P00017960)	
	Building Maintenance Worker (P00020212)	
	Facilities Supervisor 1 (P00019854)	
	Administrative Officer 2 (P00019619)	
	Assistant II (PUUU15211) Assign Employee To a Vacant Position	
	1 111866 - CLLAW DN General Ops Asso Dean (P00010705) Manage Vacant Position Image Vacant PositiPosition Image Vacant PositiPosition	
	Lit Lit <thlit< th=""> <thlit< th=""> <thlit< th=""></thlit<></thlit<></thlit<>	



2. Removing an Employee from my Compensation Plans & the Position from HCP

An existing employee in an active position is leaving and you are going to eliminate the employee and the position from HCP.

Step	Action	Result
1	Completes steps # 1 through 6 from the 1. Removing an Employee from my Compensation	
	Plan instructions.	
2	Once you have removed the employee, navigate to the Manage Existing Employee and	A launch
	Position form, click in the beige entity cell for the position you want to remove and right-	confirma
	CICK. Navigate to Manage Position ->Terminate Position.	tion
	HomePage CalPlan - Task List Status × Search	will
		appear.
	Task List Status	appean
	Task - Manage Existing Employees and Positions Task Instructions	
	Manage Existing Employees and Positions	
	Employee Name Position Title Appointment Start Date Appointment End Date Appointment Type Average FTE Yr End Status RE	
	E010982423 P00016278 1_10534 Professor-Acad 12/01/2012 12/31/2099 Faculty 1 Active	
	E012766941 P00053945 1_10200 Manage Employee > sistant III 1/27/2015 4/30/2017 Career 0.83 Inactive	
	E012251023 P00024965 1_10534 Edit Carlos Carlos Edit 2 12/31/2099 Faculty 1 Active	
	Adiuset	
3	Enter Effective Date for terminating the position.	
	Runtime Prompts - Terminate Position	
	Value Value 05/01/2017	
4	Click Terminate Position for terminating the position.	
	Terminate Position Qancel	
5	Click OK to terminate the position. (Note: There is no "undo" option in HCP.)	
	Launch Confirmation Message	
	Do you want to terminate this position?	



Updated 03/03/17

Step	Action	Result
6	Click OK from the Information popup box, HCPEliminatePos was successful.	
	1 Information	
	HCPEliminatePos was successful.	
7	From the HCP Employee and Position form, right click over the Manage Position ->	
	Review Position Details.	
	Task List Status	
	Task - Manage Existing Employees and Positions-HCP Employee Position Task Instructions	
	Manage Existing Employees and Positions	
	MyOrg: 1_BOALT Current Scenario: Forecast Employee Name Position Name Position Title	
	1_11872 P00019619 E011734015 Administrative Officer 2 Administrative Officer 2	
	P00013675 E0105 Manage Employee Administrative Supervisor 2 Administrative Supervisor 2	
	P00013675 E0105 Edit Edit P00013211 E0104	
8	From the Review Details Form , check that the Position End Date aligns with the Effective	
0	Date of the Termination date entered in sten #3	
	Task List Status	
	Task - Manage Existing Employees and Positions-HCP Employee Position Task Instructions HCP Employee Position > HCP Position Review Details Task Instructions	
	□ Position Profile	
	multiple multiple CLLAW ADM Operations Position: Administrative Officer 2 (P00019619)	
	Position Profile Position Employees Position REG Pay Position Oth Earnings Position FTE Position Status Position By Period Position Distributions	
	Position Number Position Name Position Title Position Type Pay Type Salary Account Position Start Date Position End Date P00019619 Administrative Officer 2 Administrative Officer 2 Single Incumbent Staff-Non Student (AS1210) 12/01/2012 3/31/2013	

Questions

If you have any questions regarding this document, please email <u>calplanning@berkeley.edu</u>.

