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.** 	
2	From the Transfer or Separate Employee Runtime Prompts dialog box: • **Enter** Transfer/Separate date • **Select** *Yes* from dropdown to *Confirm* operation 	
3	Click **Transfer/Separate Employee**. 	HCP Separation Confirmed Dialog Box appears.
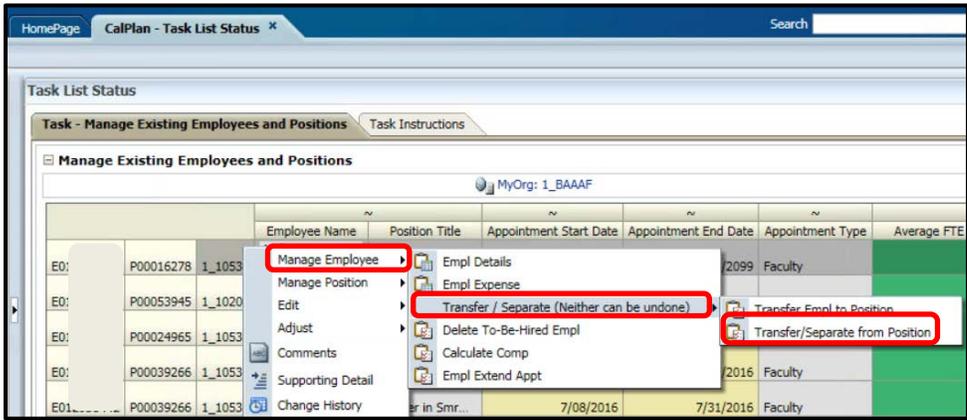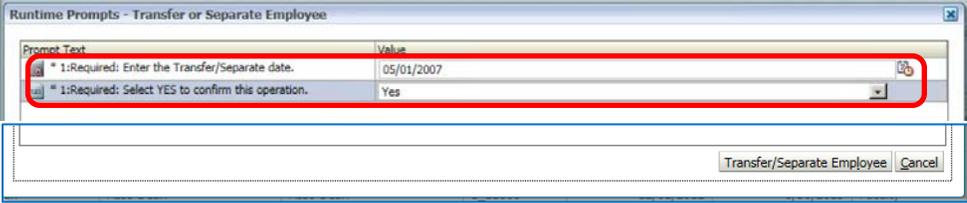
Step	Action	Result
4	Click **Ok** to separate/remove employee from Position. *(Note: There is no "undo" option in HCP.)*	
5	On the **Manage Existing Employee and Position** form, review changes for the Separated Employee. • **Year End Status** updates to **Inactive** in the year you Transfer/Separated 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.**	
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**Empl Details** page, click on the **HCP Empl By Period** tab to review details showing that the employee status is no longer active *(starting in May, in this example).*	
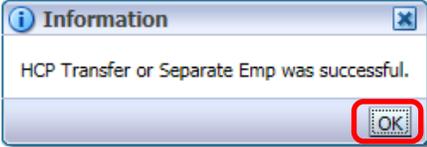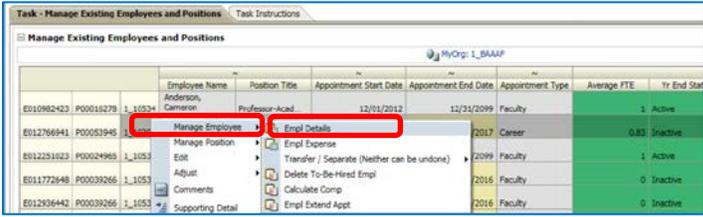
Step	Action	Result
8	Navigate to the **Create and Manage Vacant Positions** form now reflects the newly Vacant position (effective the period after you removed the employee from the position).	
9	Click the **Save** icon in the menu bar.	
10	If you need to assign a to-be-hired person or an existing employee to the now 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 existing employee to a Vacant Position.)	
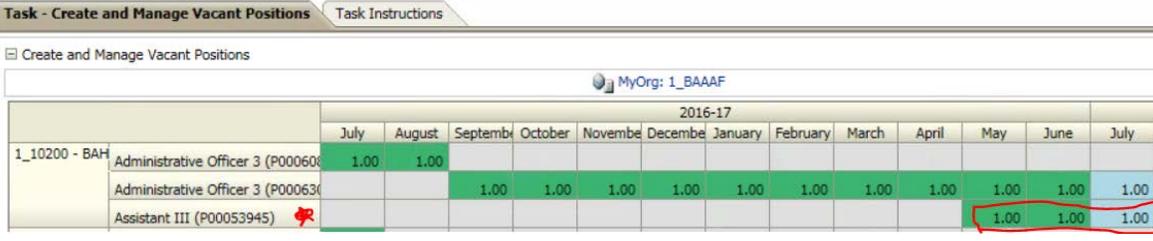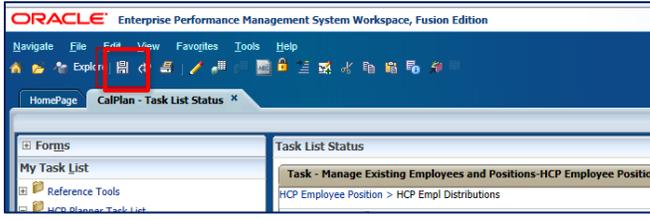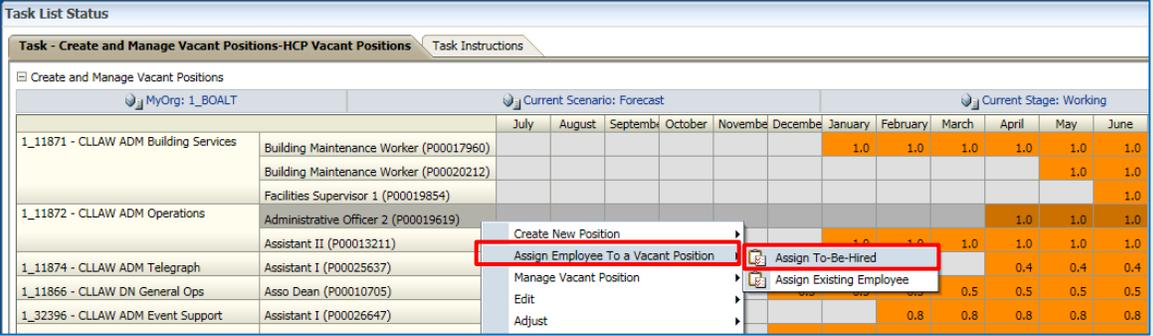
2. Removing an Employee from my Compensation Plans & the Position from HCP

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 Position** form, click in the beige entity cell for the position you want to remove and right-click. Navigate to **Manage Position ->Terminate Position.**	A launch confirmation message will appear.
3	Enter **Effective Date** for terminating the position.	
4	Click **Terminate Position** for terminating the position.	
5	Click **OK** to terminate the position. *(Note: There is no "undo" option in HCP.)*	
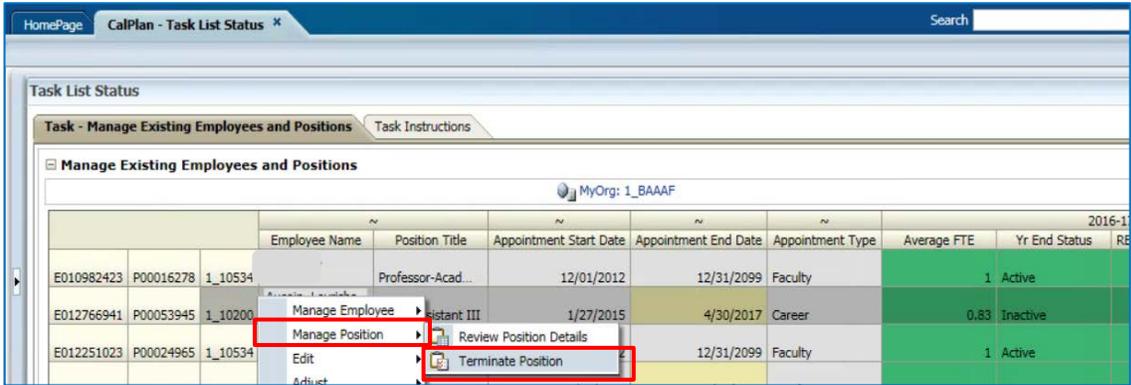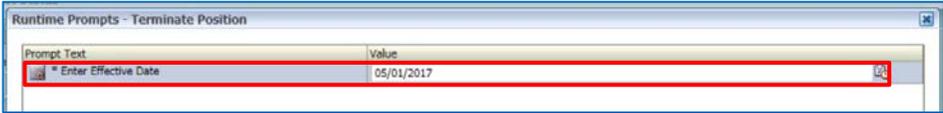
Step	Action	Result
6	Click **OK** from the Information popup box, **HCPEliminatePos was successful.** Information HCPEliminatePos was successful. OK	
7	From the **HCP Employee and Position** form, right click over the **Manage Position -> Review Position Details**.	
8	From the **Review Details Form**, check that the **Position End Date** aligns with the **Effective Date of the Termination date** entered in **step #3**.	
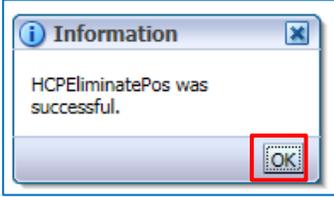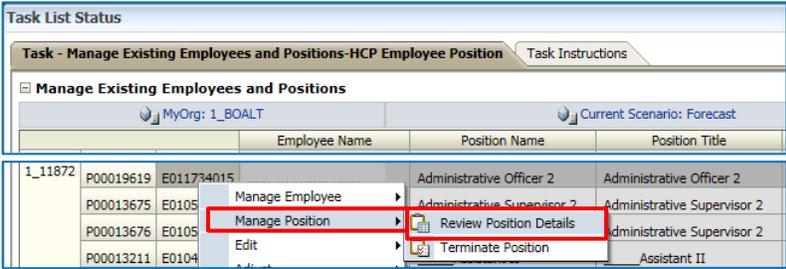
Questions

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