

## Overview

### Introduction

This job aid explains what to do if a particular position is not listed on the **HCP Manage Existing Employees and Positions** form for a DeptID. This is often due to the position's Plan Home Department (PHD) not being properly maintained in HCM at the time of the annual HCM snapshot of employee and position data and load to HCP.

Each position is assigned a "Level 7 Department" in HCM, and this data is loaded into HCP during the annual HCP data load as the Planned Home Department (PHD).

- PHD is the HCP DeptID field on which planner security is based.
- ONLY planners with security access to that PHD can view and edit that position's data in HCP.
- HCP offers functionality to change the Plan Home Department (PHD) of a position in HCP.

Please note that you must also submit a request to have the "Level 7 Department" updated in the HCM Position so that the correct Plan Home Department is copied from HCM to HCP the next refresh.

If you need more information on how to find a missing person that should be planned for individually, try accessing the [Planning Home Department Lookup](#) Job Aid on the CalPlanning website.

### Content Overview

- **Requirements:** Changing Plan Home Department
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### Security Access

DFLs or local CalPlanning Access Providers must request access for PHD changes via the [CalPlanning User Access Request](#) form by selecting the **Access to Change Plan Home Department (PHD) in HCP** option.

#### Type of Request: \*

Note: If Increasing / Decreasing access, please use comment box at bottom of form to add detail.

- New User
- Mirror Existing User
- Remove User
- Increase Access
- Decrease Access
- Access to Change Plan Home Dept (PHD) in HCP

Only Planners with security access to the Plan Home Department (PHD) of a position can view and edit that position's data in HCP. The DFL or "super-user" running the business rule to update the PHD has to have access to both the old and new DeptID.

### Questions

If you have any questions, please email [calplanhelp@berkeley.edu](mailto:calplanhelp@berkeley.edu).

## Requirements: Changing Plan Home Department

- In order to change the Planned Home Department (PHD) you will need:
  1. Position number
  2. Current Level 7 Department ID (HCM) or PHD DeptID (HCP)
  3. New / Destination PHD DeptID (HCP)
- The DFL or super-user running the business rule to update the PHD has to have access to both the old and new P H D DeptID. If the DFL/super user does not have access to both DeptIDs, then they must ask their unit's Portfolio Budget Officer (PBO) to run the Change PHD rule.
- If you change the PHD for a position with more than one employee, then all employees associated with the position will have their PHD's changed. If you only want to change some of the employees, then transfer the employee(s) you do not wish to update into another position. The position can be an existing position or you can create a new position from the "Create and Manage Vacant Positions" form in the HCP Planner task list.
- If you are aware that the employee was transferred into a new position, the original position number needs to be used in changing the employee's PHD. If you see the same employee in two different positions in your unit and the distribution dates start and end consecutively, then the employee was likely transferred between the positions. Select the position with the earlier appointment start date to change the PHD.

## Business Process: Changing Plan Home Department

**Situation:** A planner needs to change a list of position's PHD, either due to a re-org or the PHD was incorrect in HCM at the time the HCM data snapshot was taken and loaded to HCP.

**Solution:**

1. DFLs can request access for PHD changes via the "CalPlanning User Access Request" form in the "Questions or Comments" section at the end of the form. To access the form, navigate to the "DFLs Only" section of the CalPlanning home page or copy and paste the following link into your browser: [https://docs.google.com/a/berkeley.edu/forms/d/1\\_NYH97ZhiyNT3IVxAEDzdn4VloePz9K3dqVGgy92Eto/viewform](https://docs.google.com/a/berkeley.edu/forms/d/1_NYH97ZhiyNT3IVxAEDzdn4VloePz9K3dqVGgy92Eto/viewform)
2. The CalPlanning team grants the requested DFL or super-user access to the task list and the business rule to run the Change Plan Home Department rule. The CalPlanning team will grant access within 2-4 business days of the request.
3. The CalPlanning team will send the DFL or super-user an email notifying them that they now have access to the Change PHD task list.
  - a. The default time frame to have access to the task list is one week. After a week, the user's access will automatically be removed.
  - b. If the DFL or super-user requires more than a week to update the PHD's, they must send an email to [calplanning@berkeley.edu](mailto:calplanning@berkeley.edu) requesting an extended period of time.

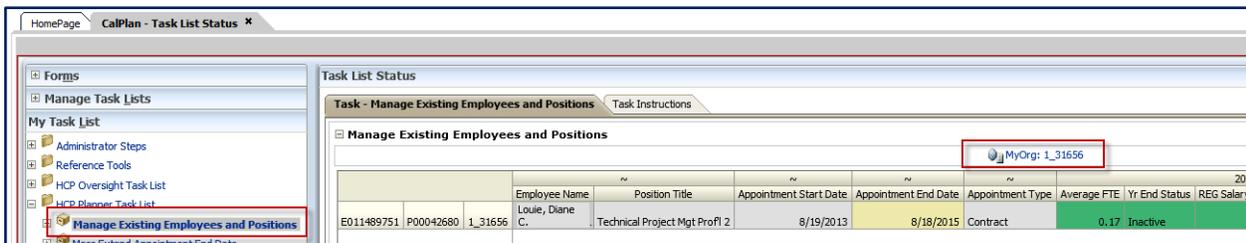
## Instructions: Changing Plan Home Department

### Log into CalPlanning and Open CalPlan

1. Log into CalPlanning using Citrix:  
<https://citrix.berkeley.edu/vpn/index.html>
2. Once in the workspace, click on **CalPlan** to open the CalPlan application.

### Check the Manage Existing Employees and Positions form

1. As a check either before or after for PHD updates, navigate to the “Manage Existing Employees and Positions” form to ensure the position exists in the current PHD and to ensure that the position has been moved to the correct P H D DeptID after the rule has been run.

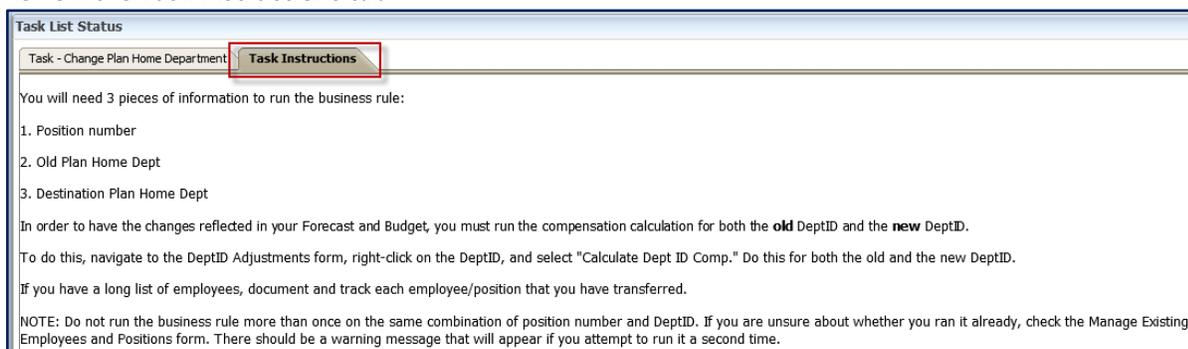


### Run the Change Plan Home Dept business rule

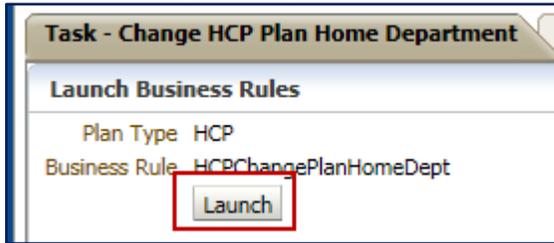
1. Navigate to My Task List > Change PHD > **Change Plan Home Department**



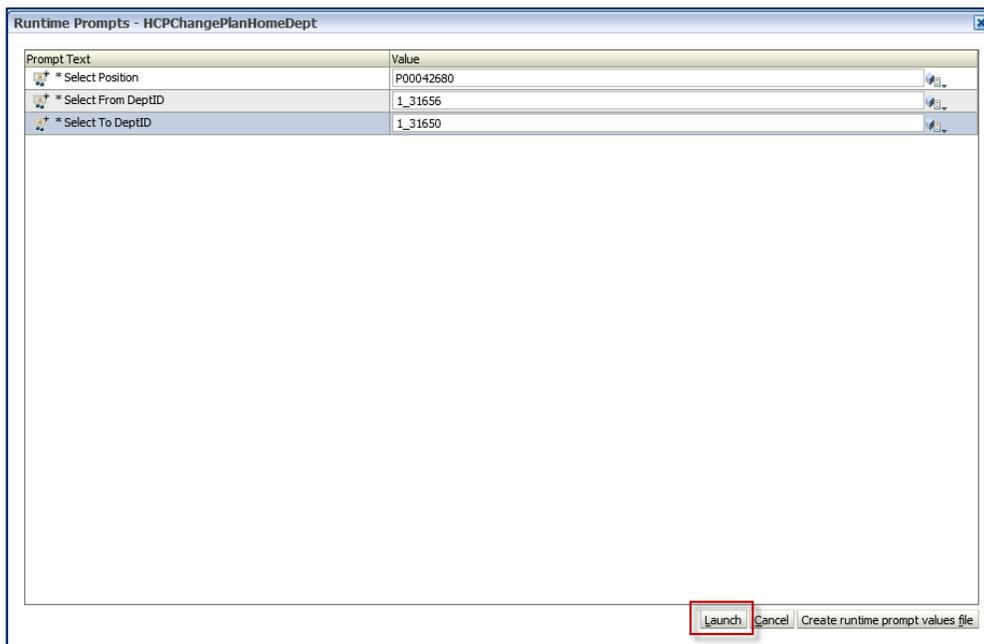
2. Review the **Task Instructions** tab:



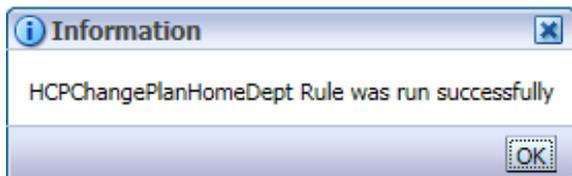
3. Navigate back to the main task list tab: **Task – Change HCP Plan Home Department** and run the Business Rule by clicking **Launch**.



4. From the HCP Change Plan Home Dept dialog box enter:
  - **Select Position** = position number
  - **Select From DeptID** = the current PHD DeptID
  - **Select To DeptID** = the new PHD DeptID



5. Click on **Launch**. If you are working on a long list, it may be helpful to track completions on that list.
6. When the Change Plan Home Department business rule completes, a pop up box will appear:

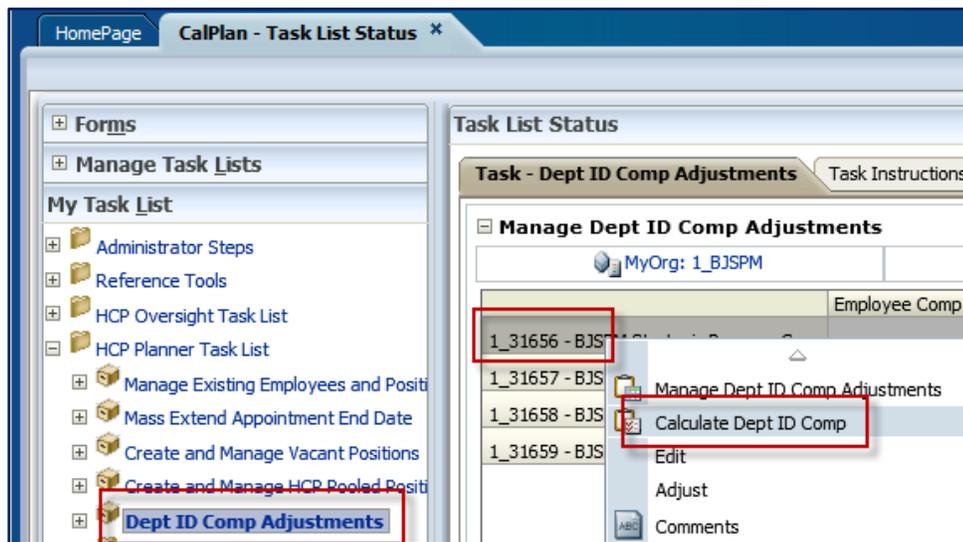


- The business rule often takes two or three minutes. When the business rule is done, you can go on to the next one. If you prefer, you can do multiple changes simultaneously in multiple tabs. If so, go back to the Home Page tab and click on CalPlan again to open one or two more CalPlan tabs, and then start the business rule in the additional tab.

**NOTE:** Do not run the business rule more than once on the same combination of Position number and DeptID. If you are unsure about whether you ran it already, you can check the Manage Existing Employees and Positions form, or be aware a warning message will appear if you attempt to run it a second time.

- In order to have the changes reflected in your Forecast and Budget, you must run the compensation calculation for both the **old** DeptID and the **new** DeptID.

To do this, navigate to the DeptID Adjustments form, right-click on the DeptID, and select "Calculate Dept ID Comp." Do this for both the old and the new DeptID.



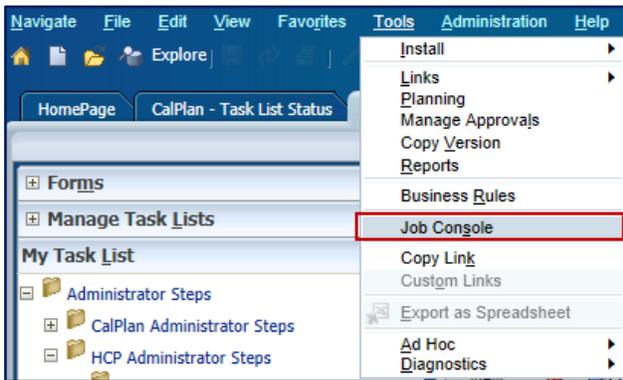
## Errors: Changing Plan Home Department

Sometimes you'll get an error message indicating that the business rule is taking a long time to run. That means that the process is running in the background. Click to get rid of the error. At that point, you can start on the next position to change or you can check the job console to see the status of the business rule process (see below).

If CalPlanning seems to be exceptionally slow, you could close the CalPlan tabs and open new CalPlan tabs. Or you can log off of CalPlanning, close the browser, re-open the browser and log back into CalPlanning.

### Optional: Check the Job Console

1. You can check the job console to see if the business rule is still processing, in error, or completed. To view the job console, click on **Tools > Job Console**. You may have to click on that two or three times (it's a known Oracle bug).



2. The job console displays all processes. You can filter on your user name or just scroll all the way to the bottom of the list for the most recent processes.

