HCP Employee Mass Update Forms Overview

The **HCP Employee Mass Update** forms simplify for planners the process of updating employee plan compensation details. With the HCP Employee Mass Update forms, planners can edit planned
- Appointment start and end dates
- Salary expense rates
- Full time equivalent (FTE)
- Distributed expenses

for multiple employees from a single form, without having to right-click on individual employees on the Manage Existing Employee and Position (MEEP) form to navigate to the employee’s detail. The MEEP form requires a Save action for each employee which launches the Re-calculate Compensation business rule behind the scenes. When making edits via the Employee Mass Update forms, planners can save multiple time and then run the Re-calculate Compensation business rule at the end, which should save time.

When using the Employee Mass Update forms planners can edit multiple employees’ details without having to run the Re-calculate Compensation business rule. We are keeping all of the current HCP forms and functionality. If you are comfortable using the current HCP functionality, there is no need for you to switch to Employee Mass Update forms.

The **HCP Employee Mass Update form** is located within the HCP Planner task list. Within the **Employee Mass Update** form there are three tabs that each display the same list of employees from the Manage Existing Employees and Positions (MEEP) form but allow for editing individual employee plan compensation details for multiple employees:

1. **Empl REG Pay** = Employee Regular Pay
2. **Empl FTE** = Employee Full Time Equivalent
3. **Empl Distributions** = Employee Distributed Expenses

Planners can still make changes to their planned Regular Pay, FTE and Distributions for individual employees from the Manage Existing Employees and Positions form. The Mass Update forms bring these employee details to the top of the form to facilitate review and making changes to multiple employees.

The following pages provide step by step directions for using the HCP Employee Mass Update forms to create and revise your compensation plans.
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1. Employee Regular Pay (Empl REG Pay)

The Empl REG Pay tab displays for the list of employees the same planning metrics from the HCP Employee Review Details form within the HCP Employee Position form but allows planners to make edits to multiple employee’s planned regular pay details directly on the form.

### Empl REG Pay Editable Fields

- **Option Start Date** – the first effective date of the employee appointment. Used to calculate the first and subsequent months of salary expense for the employee.
- **Option End Date** – the last effective date of the employee appointment. Used to calculate the last month of salary expense for the employee.
- **Input Value** – the planned annual Regular Salary Expense for the employee

2. Employee FTE (Empl FTE)

The Employee FTE tab is a read-only form of the list of employees along with the planned FTE and the Effective Start and End Dates. Planners cannot input data directly into the form but can adjust the FTE by right clicking on the Assignment for the employee and selecting Adjust FTE to edit the FTE, Effective Start Date and an optional Effective End Date.

### FTE Editable Fields via Right-Click Functionality

- **Planned FTE** – the Full Time Equivalent for the employee.
- **FTE Start Date** – the first effective date of the planned FTE assignment.
- **FTE End Date** – the last effective date of the planned FTE assignment
3. Employee Distribution (Empl Distributions)

The Employee Distributions tab of the form displays for the list of employees their planned Distributed Expenses and the percentage contribution of each to the total for the employee. The sum of all percent contributions for each employee’s distributed expenses must equal 100%.

Edits to existing Distributed Expenses can be made directly in the form. Planners can click directly into the distribution components to edit as need for an employee or multiple employees. Adding a new Distributed Expense requires a right click action.

Empl Distribution Editable Fields

- **Distribution Account Description** – Smart List of available compensation accounts
- **Distribution Fund Description** Smart List of available plan only fund members
- **Distribution Chart1 Description** - Smart List of available plan only Chart1 and individual members
- **Distribution Start Date** - the first planned effective date
- **Distribution End Date** - the last planned effective date
- **Distribution Percentage** – the percentage of an employee’s regular pay salary that is to be charged to the distribution
Making Changes with the HCP Employee Mass Update Forms

Accessing CalPlanning

1. There are two ways to access the CalPlanning Workspace, via Citrix or Internet Explorer Browser. Choose which option works best for you.

   a. Login to Citrix (citrix.berkeley.edu) and click on the CalPlanning icon or

      ![CalPlanning Workspace](image1)

   b. Copy the CalPlanning URL: [https://calpln-rptportal-berkeley.edu/workspace/index.jsp](https://calpln-rptportal-berkeley.edu/workspace/index.jsp) into an Internet Explorer browser.

2. Log in to CalPlanning with your CalNet ID and Passphrase.

3. From the Workspace Home page, click on CalPlan from the Quick Links Applications section.

   ![CalPlan in Workspace](image2)
4. On the CalPlan tab, navigate to Preferences and the User Variable Options tab to set the Scenario, Version, Year and your Entity or MyOrg to the level you would like to review and edit.

As a reminder, when working in HCP the higher the entity or org level you select in your MyOrg variable, the more data will be displayed in the templates and the more time it can take to load, refresh and save. If the template displays more than 200 rows of data intersections, it is recommended that you set your MyOrg variable to a lower level of the org structure to improve performance time.

5. Click Save.

6. Click OK from the Information pop up box.

7. From the left-hand navigation pane, click on My Task List -> HCP Planner Task List -> Employee Mass Update -> Employee Mass Update to open the forms in the right-hand display screen.
Editing Employee Regular Pay

Planners can make changes to the Regular Pay and Effective Start and End dates to one or more employees listed on the Employee Regular Pay tab.

1. From the **Empl REG Pay** tab locate the employee you need to update the planned
   a. **Input Value = Regular Pay** for the employee for the Option dates specified
   b. **Option Start Date = Effective Start Date** of the regular pay salary input value
   c. **Option End Date = Effective End Date** of the regular pay salary input value

2. Click in that cell to be edited in that employee’s row.

3. Type in the new value. The background fill of the cell turns yellow, indicating that a **Save** is needed.

4. Repeat steps 1-3 for each employee needing edits.

5. Navigate to the **Workspace Icon Toolbar** and click on the diskette icon to **Save** the changes. Background fill reverts to white.
6. Navigate to the left-hand frame **HCP Task List** and expand the **Employee Mass Update** task.

![HCP Task List](image1.png)

7. Click on the **Re-calculate Compensation** business rule and click on the **Launch** button from the **Task - Re-calculate Compensation** tab to run business rule. 
   
   The level you have selected in your MyOrg will impact the length of time needed to complete. If you pick a really high level Entity such as L3 or L4, the business rule might take a long time to complete. L5 and lower should be completed anywhere from 1 minute to 3 minutes.

![HCP Re-calculate Compensation in Progress](image2.png)
Adding Employee Regular Pay Budget Element

Planners can also add a Regular Pay budget element to an employee listed on the Employee Regular Pay tab if the current budget elements are not sufficient.

1. From the **Empl REG Pay** tab locate the employee you would like to add a Regular Pay Salary budget element.
2. Click in the employee’s row and then right click and select **Adjust REG Salary**.

3. From the **Runtime Prompts – HCP Adjust EmpPos Salary** dialog box, input the values for
   a. **Effective Date of the Reg Salary Adjustment** = calendar date you plan for the new salary to start
   b. **Select the Salary Adjustment Operator** = Set
   c. **Enter the increment** = the Reg Salary $ Amount

4. Click **Launch** from the bottom of the **Runtime Prompts – HCP Adjust EmpPos Salary** dialog box.

5. Click **OK** from the **Information** pop up box confirming that the changes were successful.
6. Confirm that a new Budget Element with the Reg Pay Salary amount and Option Start Date entered displays for the employee edited. The Option End Date for the new Budget Element defaults to 12.31.2099 unless a Reg Pay Salary Budget Element exists with a later start date. In that case the new Budget Element Option End Date will be set to one day prior to the existing Budget Element Start Date.

Removing an Employee Regular Pay Budget Element

Once a Reg Pay Salary Budget Element is created for an employee, it cannot be deleted. Planners can change the Input Value to zero to remove the value from the Compensation plan.

1. From the Empl REG Pay tab locate the employee with the Regular Pay budget element you would like to remove.

2. Click your cursor into the Input cell for the employee and override the existing value with 0.

8. Click the Save icon from the Workspace toolbar.
9. Navigate to the left-hand frame HCP Task List and expand the Employee Mass Update task.

10. Click on the Re-calculate Compensation business rule and click on the Launch button from the Task- Re-calculate Compensation tab to run business rule. The level you have selected in your MyOrg will impact the length of time needed to complete. If you pick a really high level Entity such as L3 or L4, the business rule might take a long time to complete. L5 and lower should be completed anywhere from 1 minute to 3 minutes.
Editing an Employee FTE Assignment

Planner can edit existing FTE Assignments from the Employee FTE tab of the HCP Employee Mass Update form.

1. From the Empl FTE tab, right click on the row containing the employee you want to update.

2. Select Adjust FTE from the dialog box.

3. From the Runtime Prompts –Update FTE dialog box enter:
   a. FTE – the full time equivalent (100%) you are planning for the employee to work.
   b. Effective Date – the first day that the new FTE value will be used to calculate the % of the employee’s salary rate.
   c. Optional Effective End Date - the last day that the new FTE value will be used to calculate the % of the employee’s salary rate. If no end date is assigned HCP will assign the default the end date of 12/31/2099.

4. Click Add. The business rule will run for about 30 seconds.
Adding an Employee FTE Assignment

Planners can also add a FTE budget element to an employee listed on the Employee FTE tab if the current assignment(s) are no sufficient.

1. From the **Empl FTE** tab locate the employee you would like to create a new FTE Assignment.

2. Right click on that employee’s row and select **Adjust FTE**.

3. From the **Runtime Prompts –Update FTE** dialog box enter:
   
   a. **Enter the FTE** = new FTE value
   
   b. **Effective Date** = the planned start date for the new FTE
   
   c. **Optional Effective End Date** = the planned end date for the new FTE or leave blank for the default end date, 12/31/2099 to be applied

4. Click **Add**. The business rule will run for about 30 seconds.
Removing an Employee FTE Assignment

Once an FTE Assignment is created for an employee it cannot be deleted. Planners can change the FTE to zero to remove the FTE from the planned compensation calculations. Planners should note the FTE Start and End Date for the Planned FTE they are going to zero out so that they can plan the zero FTE for the same timeframe.

1. From the **Empl FTE** tab locate the employee with the FTE Assignment you would like to remove.

2. Right click on that employee’s row and select **Adjust FTE**.

3. From the **Runtime Prompts – Update FTE** dialog box enter:
   
   a. **Enter the FTE** = enter 0 (zero)
   
   b. **Enter the Effective Date** = enter the planned start date listed for the FTE you are removing
   
   c. **Optional Effective End Date** = enter the planned end date listed for the FTE you are removing

4. Click **Add**. The business rule will run for about 30 seconds.
Editing Existing Employees’ Distributions

The Employee Distribution form displays a list of employees with an HCM Planned Home Department under the MyOrg entity selected and includes their Distributed Expenses and the percentage contribution of each to the total for the employee. The sum of all percent contributions for each employee’s distributed expenses must equal 100%.

Edits to existing Distributed Expenses can be made directly in the form. Adding a new Distributed Expense requires a right click action. Planners can click directly into the distribution components to edit as need for an employee or multiple employees. Once edited the background fill of the edited field turns yellow, indication that a Save is needed.

1. From the **Empl Distribution** tab locate the employee with the Distribution you would like to edit.

2. Each of the available Distribution components have a dropdown arrow that when clicked displays a Smart List of available options. Choose each option desired option to edit the distribution as needed.
   - Distribution Account – list of Compensation Accounts
   - Distribution Entity – DeptID, L7
   - Distribution Chart1

3. If needed planners can also edit the
   - Distribution Start Date
   - Distribution End Date
   - Distribution Percentage
4. Click the **Save** icon from the **Workspace toolbar**.

![Workspace toolbar](image1.png)

5. Navigate to the left-hand frame **HCP Task List** and expand the **Employee Mass Update** task.

![HCP Task List](image2.png)

6. Click on the **Re-calculate Compensation** business rule and click on the **Launch** button from the **Task- Re-calculate Compensation** tab to run business rule.

   *The level you have selected in your MyOrg will impact the length of time needed to complete. If you pick a really high level Entity such as L3 or L4, the business rule might take a long time to complete. L5 and lower should be completed anywhere from 1 minute to 3 minutes.*

![Re-calculate Compensation in Progress](image3.png)
Creating an Employee Distribution

Planners can also add a Distributed Expense to an employee listed on the Employee Distribution tab if the current distribution(s) are not sufficient.

1. From the Empl Distribution tab locate the employee you would like to create a new Distribution.

2. Click in the row and then right click and select Change/Adjust -> Add Distribution.

3. Click OK from the Launch Confirmation Message pop up box.

4. In the Runtime Prompts – Add Distribution dialog box add:
   - Enter the start date of the Distribution
   - Enter the Distribution percentage (0 to 100)

5. Click Add.

6. Click OK from the Information pop up box to confirm the distribution was successfully added.
7. In the newly added distribution row, select the Plan Only Fund Member and Chart1 from the drop down Smart Lists.

8. Click the Save icon from the Workspace toolbar.

10. Navigate to the left-hand frame HCP Task List and expand the Employee Mass Update task.
11. Click on the **Re-calculate Compensation** business rule and click on the **Launch** button from the **Task- Re-calculate Compensation** tab to run business rule. *The level you have selected in your MyOrg will impact the length of time needed to complete. If you pick a really high level Entity such as L3 or L4, the business rule might take a long time to complete. L5 and lower should be completed anywhere from 1 minute to 3 minutes.*

![HCP Re-calculate Compensation in Progress...](image)

### Removing an Employee Distribution

Once a new Distribution is created for an employee it cannot be deleted. Planners can change the Distribution Percentage to zero (0) to remove the salary expense from the account.

1. From the **Empl Distribution** tab locate the employee with the Distribution you would like to edit.

![Empl Distribution tab](image)

2. Click your cursor into the **Distribution Percentage** cell for the employee and enter 0.

![Distribution Percentage cell](image)

3. Click the **Save** icon from the **Workspace toolbar**.

![Workspace toolbar](image)
4. Navigate to the left-hand frame **HCP Task List** and expand the **Employee Mass Update** task.

5. Click on the **Re-calculate Compensation** business rule and click on the **Launch** button from the **Task - Re-calculate Compensation** tab to run business rule. 

   *The level you have selected in your MyOrg will impact the length of time needed to complete. If you pick a really high level Entity such as L3 or L4, the business rule might take a long time to complete. L5 and lower should be completed anywhere from 1 minute to 3 minutes.*
Re-calculate Compensation Business Rule

What is the purpose of the Re-calculate Compensation business rule?

Every time a planner makes a direct data input into an HCP Employee Mass Update on the Employee Reg Pay or the Employee Distribution forms, they need to run the Re-calculate Compensation business rule. HCP recalculates the compensation plan for every employee with edits on that form. The MEEP form is then updated with the recalculated compensation values.

The direct input into an HCP template includes:

- Changing existing Regular Pay amount, effective dates
- Changing existing distribution effective dates, percentages
- Adding chart field values after adding a new distribution

How often should I run the Re-calculate Compensation business rule?

We recommend that you run the business rule throughout your editing process but you do not have to run it after each update. Planners should Save their work often as once saved, your data is safe.
## Where Do I Make This Change in HCP?

<table>
<thead>
<tr>
<th>Action</th>
<th>HCP Form to Complete</th>
<th>Employee Mass Update Form</th>
<th>Reminders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add an employee distribution</td>
<td>Manage Existing Employees &amp; Positions, RC to -&gt; Manage Employee -&gt; Change/Adjust -&gt; Add Distribution</td>
<td>Empl Distribution</td>
<td><em>Once distribution is created, complete step of selecting the Fund and Chart1.</em></td>
</tr>
<tr>
<td>Removing an employee distribution</td>
<td>Manage Existing Employees &amp; Positions, RC to -&gt; Manage Employee -&gt; Empl Expense –RC on Distribution -&gt; Navigate -&gt; Go To Review Empl Details and zero out Distribution Percentage for the distribution</td>
<td>Empl Distribution</td>
<td></td>
</tr>
<tr>
<td>Adding or editing Reg Salary for an employee</td>
<td>Manage Existing Employees &amp; Positions, RC to -&gt; Employee Details</td>
<td>Empl Reg Pay</td>
<td></td>
</tr>
<tr>
<td>Adding or editing employee FTE</td>
<td>Manage Existing Employees &amp; Positions, RC to -&gt; Manage Employee -&gt; Change/Adjust -&gt; Empl FTE</td>
<td>Empl FTE</td>
<td></td>
</tr>
<tr>
<td>Change the status of an employee (LOA)</td>
<td>Manage Existing Employees &amp; Positions, RC to -&gt; Manage Employee -&gt; Change Empl Status</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Add an Additional Earning to an employee</td>
<td>Manage Existing Employee &amp; Positions - -&gt;</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Transfer / Separate an employee</td>
<td>Manage Existing Employees &amp; Positions, RC to -&gt; Manage Employee -&gt; Transfer/Separate</td>
<td>N/A</td>
<td><em>Once Transferred or Separated these actions cannot be undone.</em></td>
</tr>
<tr>
<td>Assign an employee to a vacant position</td>
<td>Create and Manage Vacant Positions, RC to -&gt; Assign Employee to a Vacant Position - -&gt; Assign Existing Employee</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Action</td>
<td>HCP Form to Complete</td>
<td>Employee Mass Update Form</td>
<td>Reminders</td>
</tr>
<tr>
<td>--------</td>
<td>----------------------</td>
<td>---------------------------</td>
<td>-----------</td>
</tr>
<tr>
<td>Assign a To-Be-Hired (TBH) employee to a vacant position</td>
<td>Create and Manage Vacant Positions, RC to -&gt; Assign Employee to a Vacant Position -&gt; Assign To Be Hired</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Create a To-Be-Hired (TBH) employee</td>
<td>Create and Manage Vacant Positions, RC to -&gt; Create New Position -&gt; 1. Create Position</td>
<td>N/A</td>
<td>Once position is created, complete step 2. Add Distribution.</td>
</tr>
<tr>
<td>Create a New Position (Vacant)</td>
<td>Create and Manage Vacant Positions, RC to -&gt; Create New Position -&gt; 1. Create Position</td>
<td>N/A</td>
<td>Once position is created, complete step 2. Add Distribution and then assign either a TBH or Existing Employee to the position.</td>
</tr>
<tr>
<td>Mass Extend Appointment End Date of employee(s)</td>
<td>Mass Extend Appointment End Dates</td>
<td>N/A</td>
<td>The process of Mass Extending cannot be undone, please review your work before Launching.</td>
</tr>
<tr>
<td>Create a Vacant Position</td>
<td>See creating a New Position</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Edit the Distribution on an existing Pooled Position</td>
<td>Create &amp; Manage Pooled Positions RC to -&gt; Manage Pooled Position -&gt; Change/Adjust -&gt; Position Distribution</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Edit FTE &amp;/or Headcount on an existing Pooled Position</td>
<td>Create &amp; Manage Pooled Positions RC to -&gt; Manage Pooled Position -&gt; Change/Adjust -&gt; Position FTE &amp; Headcount</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Edit the Regular Salary on an existing Pooled Position</td>
<td>Create &amp; Manage Pooled Positions RC to -&gt; Manage Pooled Position -&gt; Change/Adjust -&gt; Position Rate</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Adding a DeptID Adjustment</td>
<td>Dept ID Comp Adjustments</td>
<td>N/A</td>
<td>HCP spreads value evenly into 12 months of Fiscal Year</td>
</tr>
</tbody>
</table>