

Human Capital Planning Scenarios

1. Employee continuing in same position
2. Employee leaving
3. New employee
4. New employee filling a To Be Hired position
5. Employee moving to another entity
6. Split appointment within same DeptID
7. Split appointment across entities for an existing employee
8. Pooled positions

Employee Continuing in Same Position

Actuals data is copied from UCPATH Human Capital Management in time for the annual budget planning process. Salaries for existing employees are increased by 3% for the following year's Operating Budget. Planner choose which data to copy into the plan. See Copy HCM Data to HCP Job Aid for details.

Task	Tab	Command
<i>Data must be copied one DeptID at a time; set your Entity (MyOrg) to a DeptID before beginning this task.</i>		
Review HCM Data to Add to Plan	HCM Monthly Pay Rate	<ul style="list-style-type: none"> • Right-click on Employee to copy one employee at a time • Right-click on a DeptID to copy all employees in DeptID at once
Review HCM Data to Add to Plan	HCM Distributions	
Review HCM Data to Add to Plan	HCM Monthly Pay and Dist	Use this option to copy Pay and Distributions at once

Employee Leaving

Task	Tab	Command
Manage Existing Employees	Monthly Pay Rate	Change pay rate to 0
Manage Existing Employees	Distributions	Change rate to 0 (optional)

New Employee

Task	Tab	Command
Manage Existing Employees	Monthly Pay Rate	Manage Employee \ Add an Existing Employee

New Employee Filling a To Be Hired Position

Task	Tab	Command
Manage Existing Employees	Monthly Pay Rate	Manage TBH \ Assign Employee to TBH

Split Appointment within Same DeptID

Task	Tab	Command
Manage Existing Employees	Distributions	Manage Employee \ Add Employee Distributions (for new Fund or Chart1)
Manage Existing Employees	Distributions	Update % in original distribution

Split Appointment Across Entities for an Existing Employee

Task	Tab	Command
Manage Existing Employees	Distributions	Update Distribution %
<i>Planner for the new entity does the following</i>		
Manage Existing Employees	Monthly Pay Rate	Manage Employee \ Add an Existing Employee
Manage Existing Employees	Distributions	Manage Employee \ Add Employee Distributions