Overview

This Job Aid provides instructions on
1. Scenario A: Removing an Employee from my Budget (below)
2. Scenario B: Removing an Employee & Position (p.4)

Scenario A: Removing an Employee from my Budget

THIS IS FOR WHEN
You have an employee in an active position and would like to remove the employee but keep the position.

Instructions

Stage 1.
From the Manage Existing Employees and Positions form, locate the employee you want to remove. Hover your cursor over the Employee ID field. Right click Manage Employee -> Transfer/Separate -> Transfer/Separate from Position.

Stage 2
Click OK.
Stage 3
Input Effective Date.
Select Yes from dropdown to Confirm Separating operation.
Click Transfer/Separate Employee.

![Runtime Prompts - Transfer or Separate Employee](image)

Stage 4
HCP Separation Confirmed Dialog Box appears.
Click Ok to separate/remove employee from Position. (Note: There is no “undo” option in HCP.)

![Information](image)

Stage 5
On the Existing Employee and Position Form, review changes for the Separated Employee.
Year End Status updates to Inactive because “Effective date” was 5.1.2013 (viewing FY13 Forecast).

![Task List Status](image)
Stage 6
From the **HCP Employee Position > HCP Empl**, Review details to confirm that the employee status is no longer active (in April in this example).

![Image of Employee Details](image)

Stage 7
See how the **Create and Manage Vacant Positions form** now reflects the newly Vacant position (effective the period after you removed the employee from the position).

![Image of Create and Manage Vacant Positions](image)

Stage 8
Save!

**To assign a to-be-hired person to a vacant position**, refer to Navigating HCP (3D) Exercise Packet (p. 42, Exercise 6, Step 20) for **Assigning a To-Be-Hired to a Vacant Position**. (The steps are the same for assigning an existing employee to a Vacant Position.)

![Image of Assigning a To-Be-Hired to a Vacant Position](image)
Scenario B: Removing an Employee & Position

THIS IS FOR WHEN
An existing employee in an active position is leaving and I am going to remove the position.

Instructions

Stage 1
Complete Scenario A: Stages 1-6.

Stage 2
From the Manage Existing Employee and Position form, right click over the position you want to remove. Navigate to Manage Position -> Terminate Position

Stage 3
A launch confirmation message will appear.
Click OK if you want to terminate the position. (Note: There is no “undo” option in HCP.)
Stage 4  
Enter Effective Date for terminating the position.  
Click Terminate Position.

Stage 5  
You should see a box saying, “HCPEliminatePos was successful.”

Stage 6  
From the HCP Employee and Position Form, right click over the Manage Position -> Review Position Details.

Stage 7  
From the Review Details Form, check that the position end date align with the Effective Date of the Termination date entered in Stage #4.

Stage 8  
Save!

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