Tutorial: How Supervisors can (Opt Out) Workers from Work Planning and Control

Purpose: To show how a supervisor can use Activity manager to (1) determine which direct reports (have) and (Have not) been assigned to an Activity, (2) determine whether direct reports have met all requirements associated with their Activity(s), and (3) determine how to opt out a direct report and the reasons for doing so.

Background:
All workers in Berkeley Lab's Human Resources Information System (HRIS) database are represented in Activity Manager. As a supervisor you need to ensure that all of your staff are either (1) assigned to one or more activities in Activity Manager, or (2) opted out of the work planning and control (WPC) process. This must be done on or before the closure of the JHA database on March 15, 2016.

Step 1: login to Activity manager https://wpc-am.lbl.gov/

Step 2: From your Home page choose Workers / My Workers as shown.
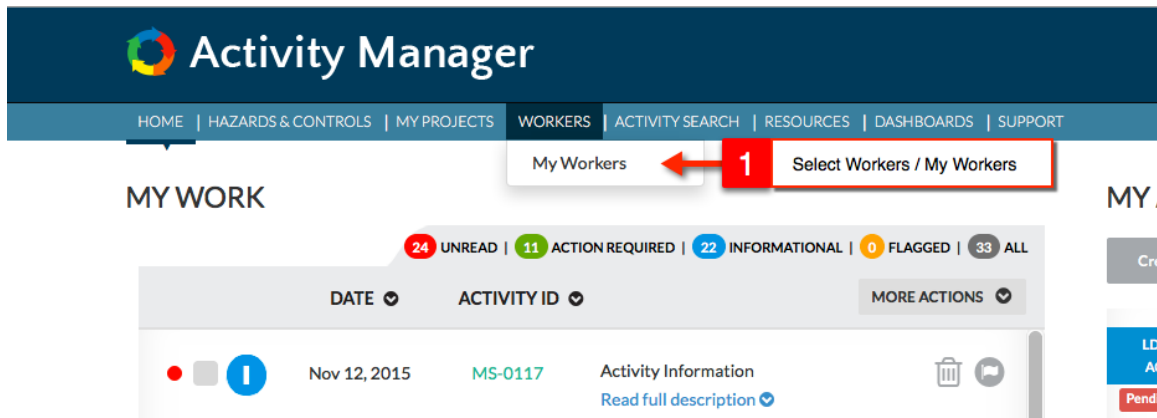
Step 3: Determine the status of each of your direct reports.
The My Workers page (below) lists all of your direct reports. The left column indicates status. A green checkmark ✅ indicates the worker has satisfied all requirements associated with their Activity(s). A red 🚫 icon indicates the worker has one or more requirements that have not been satisfied. If there is no icon (blank) it means the worker has not been assigned to an Activity.

Step 4: Opt out workers from work planning and control process.
If a worker has not been assigned to an Activity, they can be opted out of the work planning and control process. If they are assigned to an Activity, they cannot be opted out.

To opt out a worker, (1) use the dropdown menu to select an opt-out reason. (2) Select the opt out checkbox. (3) Click save, as shown below.

Reasons for opting out workers:

1. **No Work Performed**

   This opt out category is for workers who are affiliated with Berkeley Lab but who do not perform "hands on" work at Berkeley Lab. For example, workers from another institution may collaborate on a research project with Berkeley Lab scientists and never actually visit Berkeley Lab. These workers are held to the work authorization requirements of their host institution and should be opted out of Activity Manager.

   These workers may occasionally visit Berkeley Lab, but if they are only performing activities commonly performed by the general public such as attending meetings or making presentations, they should be opted out of Activity Manager. However, if they perform hands on work while at Berkeley Lab, they must be authorized through Activity Manager.

2. **UCB Campus Work Only**

Some workers have joint appointments with Berkeley Lab and UC Berkeley and never physically perform hands on work at Berkeley Lab. Their work is conducted solely at UC Berkeley, and they are covered by UC Berkeley EHS requirements. These workers should be opted out of Activity Manager. (Note: The Donner Building on UC Berkeley campus is considered Berkeley Lab and workers performing work in Donner must be authorized in WPC.)

3. **Equivalent Authorization System Used**

Some workers do perform hands on work at Berkeley Lab but there work is authorized through an equivalent authorization system. Examples include:

- Experimental Safety Sheet used at the ALS
- Subcontractors Job Hazard Analysis (SJHA) for subcontractors
- Construction Job Hazard Analysis (CJHA) for construction workers.

Those individuals covered by these alternate authorization systems should be opted out of Activity Manager. As a supervisor you should ensure that the entirety of the individual's work must be covered by these equivalent systems NOTE: This also applies to Berkeley Lab workers who only work at separate institutions. These workers are covered by the host institution's work authorization systems.