

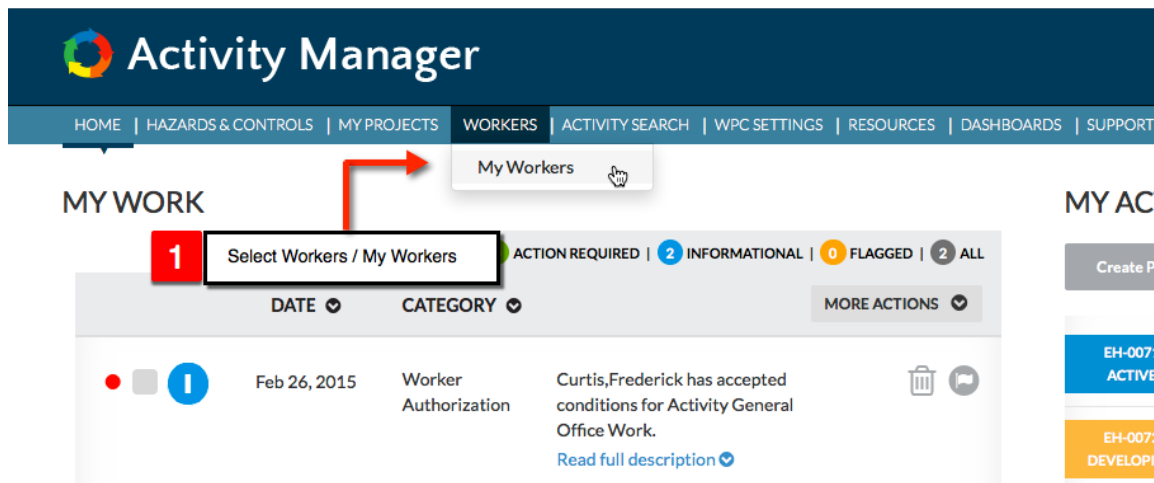
## Tutorial: How to opt out a worker from Work Planning and Control

This step-by-step shows is for a supervisor or Activity Lead. It shows how to:

1. Page 1: Opt-out workers from the activity authorization process
2. Page 2: Put a worker "On Hold"
3. Page 3: View workers Activity and Training Status

**Step 1: Login to Activity Manager** <https://wpc-am.lbl.gov/>

**Step 2: Select "Workers / My Workers."**



**Step 3: Select the worker you want to opt out, and the reason.**

Then select the reason for opting them out from the drop-down menu and click "save."

### SUPERVISOR VIEW

EMPLOYEE NO.	NAME	NO. OF ACTIVITIES	OPT OUT OF ACTIVITY MANAGER	WPC STATUS	SUPERVISOR APPROVAL	WORKER ACCEPTANCE	TRAININGS COMPLETE	
052058	Cole, Raymond S	2	<input checked="" type="checkbox"/> Select reason No work performed UCB campus work only Equivalent authorization system used No work performed and no LBNL site access		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
066748	Gomez, Xavier	1			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
025877	Madison, Heather N	4	Select reason	<input checked="" type="radio"/> Active <input type="radio"/> On Hold	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Export To Excel

Save

There are four reasons to Opt-out a worker:

- **No Work Performed:** means the worker is not performing work at LBNL. An example would be a worker providing consultation or attending meetings, but not performing hands-on work at LBNL.
- **No Work Performed and no site access:** This means the person is not performing work at LBNL (and) does not have an LBNL Badge so cannot come onsite. Examples include collaborators at other institutions providing input on research or proposals.

- **UCB Campus Work Only:** This means the person is working exclusively on UC Campus (but not working in Donner Lab). Examples include researchers affiliated with LBNL Divisions but conducting work solely in Hildebrand Hall or other UC Berkeley facilities; these may come to the LBNL main site for meetings but do not conduct hands-on work at LBNL sites.
- **Equivalent Authorization System:** This means the person is authorized by a different work authorization system such as the Subcontractor Job Hazard Analysis, (SJHA), the Construction Job Hazard Analysis (CJHA), or the Advanced Light Source Experimental Safety Assessment Form (ESAF).

### Putting a worker “On Hold”

EXAMPLE: The **On-Hold** feature is mostly used for Facility Users who are already assigned to Activities. For example, a Molecular Foundry User may perform work on and off over the course of a year. For example, they may start a project and work for one week, but then take a three month or longer leave before they return. Instead of removing them from the Activity, the Activity Lead can put the worker On-Hold (Pause) when they are not working at the Foundry. When they return, the Activity lead “Un pauses” by setting their state to Active

**1 Select On-Hold**

EMPLOYEE NO.	NAME	NO. OF ACTIVITIES	OPT OUT OF ACTIVITY MANAGER	WPC STATUS	SUPERVISOR APPROVAL	WORKER ACCEPTANCE	TRAININGS COMPLETE	
052058	Cole, Raymond S	1	Select reason	<input checked="" type="radio"/> Active <input type="radio"/> On Hold	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
066748	Gomez, Xavier	1	Select reason	<input checked="" type="radio"/> Active <input type="radio"/> On Hold	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
025877	Madison, Heather N	2	Select reason	<input checked="" type="radio"/> Active <input type="radio"/> On Hold	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
069112	Newman, James Dean	1	Select reason	<input checked="" type="radio"/> Active <input type="radio"/> On Hold	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
022710	Peterson, Andrew Fitzgerald	3	Select reason	<input checked="" type="radio"/> Active <input type="radio"/> On Hold	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## How to view worker Activities and training status

The screenshot shows a web interface for viewing worker activities and training status. It includes a table of activities, a detailed view of a specific activity, and a list of trainings for that activity. Callouts A, B, C, and D highlight key actions: 'Click to Expand' (A), 'View Activity' (B), 'Expand again' (C), and 'View Training Status' (D).

EMPLOYEE NO.	NAME	NO. OF	OPT OUT OF ACTIVITY MANAGER	WPC STATUS	APPROVAL	ACCEPTANCE	COMPLETION
052058			reason	<input checked="" type="radio"/> Active <input type="radio"/> On Hold	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Activity Name: [EHS Division Office](#)  
Activity ID: [EH-0018](#)  
Activity Lead: Lin, Bryan  
Project Name: EHS Business Support  
Authorization Level: Authorized to Work  
Restrictions:

Activity Status: Active

**RAYMOND COLE'S TRAININGS**

The courses(below) are for this activity only.

COURSE NAME	COURSE ID	STATUS	EXPIRE DATE
Ergo Self Assessment-Refresher	EHS0058	Completed	11/20/2024
WorkSmart Ergonomics	EHS0062	Completed	
Govt Vehicle Driver Briefing	FAC0021	Completed	