**Quick Guide for UKG Dimensions:** To use the links below, hold down "control" on your keyboard and then click the link.

## Do you want to:

Approve a timecard?

Transfer a Salary Staff to an Hourly Job at their home site? (Scheduling Managers)

<u>Transfer an Hourly Employee to an Hourly Second Job</u>? (Scheduling Managers)

Transfer an Employee to a secondary location? (Scheduling Managers)

Not apply a shift diff for an employee who was not on site? (Scheduling Managers)

Request an Open Shift?

<u>Generate Open Shifts based on Census?</u> (Scheduling Managers)

Notify staff of open shifts (including SRT Staff)? (Scheduling Managers)

Scenarios	Steps	Screenshot			
How to Approve	1. Go to My Timecard tile.	My Timecard	*		
Timecards.					
<ul> <li>Every employee is</li> </ul>		Exceptions			
responsible for		4			
approving their own					
timecard on payroll		Actual Hours	35:00 Hrs		
Monday's before		Scheduled Hours	77:00 Hrs		
10am. Failure to do		Week to Date	35:00 Hrs		
so may result in					
delay of pay for that	2 View the colordoricon to		<i></i>		
coming pay week.	2. View the calendar icon to				
	check that the timecard is	Current Pay l	Period 🧿 Loaded: 2:37 P		
	on the correct pay period.		≪ କ ାମ		
	<ul> <li>If approving <u>on</u></li> </ul>		Share Calculate Save		
	<u>Monday</u> of payroll		Totals		
	select Previous Pay	Daily	Period		
	Period.				
	<ul> <li>If the approval is taking</li> </ul>				
	place <b>prior</b> to that				
	Monday select current				
	pay period.				
	Note that when a timecard is				
	approved neither an				
	employee nor manager will				
	be able to make changes.				

The approval will need to be removed					
	_	Date	Schedule		
3. View timecard for any		0000	Serieddie		
exemptions.	1	Sun 5/29			
Exceptions:	1	Mon 5/30	9:00 AM - 5:00 PM	•	
<ul> <li>Missed clock ins or outs</li> </ul>	Ì				
<ul> <li>Unexcused Absence</li> </ul>	Ì	Tue 5/31 🛆	9:00 AM - 5:00 PM	i	
<ul> <li>Before approving the</li> </ul>	Ì	Wed 6/01 🛆	9:00 AM - 5:00 PM	i.	
timecard the exceptions	Ì	Thu 6/02 🛆	9:00 AM - 5:00 PM	i.	
must be corrected.	đ	Fri 6/03	9:00 AM - 5:00 PM		
4. Click Approve.					

Scenario:	Steps:	Screenshot:
<ul> <li>Transferring from Salary</li> <li>Position to Hourly Position <ul> <li>at the same program.</li> </ul> </li> <li>Transferring from salary to hourly is used when <ul> <li>a Salary employee is <ul> <li>going to work a 2<sup>nd</sup> job</li> <li>under an hourly pay</li> <li>rate.</li> </ul> </li> </ul></li></ul>	<ol> <li>From the schedule, right click on the staff shift.</li> <li>Select Edit.</li> </ol>	Sun 9:00 AM - 5:00 PM [8:00]/Northern Region - Youth/RTC - Holley Residence/Director 1 9:00 AM - 5:00 PM [8:00]/Northern Region - Youth/RTC - Holley Residence/Director 2:00 AM - 5:00 PM 2:00 AM
<ul> <li>Example: Employee is a salary Clinician who will be working a 2<sup>nd</sup> job as an hourly Direct Care Staff at their primary site.</li> </ul>	2. Click Transfer Employee.	Regular • [8:00]       *         Start Time       End Time         9:00 AM       5:00 PM         5:00 PM       5/30         Transfer Employee       *         •       •         Comments [0]       Add Comment
	3. Select Add Labor Category.	Add Business Structure     Add Work Rule      Add Cost Center      Add Labor Category

4. Select Add HR Job.	Add HR JOB
5. For a second job as a direct	
<ul> <li>care staff, select 2nd Job- Direct Care 100007.</li> <li>*Please make sure that the staff's second job matches their second job in their staff record in UKG Pro.</li> <li>*If you do not know what the job title is reach out to Human Resources.</li> </ul>	
6. Under "Go To", select Work Rule.	Go To Business Structure Work Rule Cost Center
<ul> <li>7. Select the Work Rule: Exempt to Non-Exempt.</li> <li>This work rule tells the system that the employee is going from Salary to Hourly. Without this step, the system does not know to pay the person in addition to their salary.</li> </ul>	Add Work Rule   Search  Call Back  Exempt to Non-Exempt Hourly and COVI3+ Hourly SRTS Hourly w Shift Diff  o
8. Click <b>Apply.</b>	

Scenarios	Steps	Screenshot
<ul><li>Employee transferring to a different site location.</li><li>This is when an employee</li></ul>	<ol> <li>Go to YCS Advanced Scheduler. Right click on the date of the shift for the employee who needs</li> </ol>	Edit Profile Sign Out 🔶
is working at a different site only. The pay and job title will remain the same. The only difference will be the location.	<ul> <li>to be transferred.</li> <li>NOTE: If transferring a shift that is already scheduled for the person, right click and select Edit. Skip to step 5.</li> </ul>	Time Ur Schedule B YCS Advanced Scheduler C
• Example: A Direct Care Employee s primary location is Fisher Hall. On		YCS Schedule Planner
Wednesday, it was agreed to work at the Laurie Haven location. The staff did not pick up the open shift, so the manager does a manual transfer to that location.	2. Select <b>Add Shift.</b>	Notice, Aaysha V Direct Care /PRTF - Sawtelle Hall/Direct Care Override Availability Availability Add Shift Paycode Time Schedule Tag Tag Tag Tag Tag Tag Tag Tag
	3. Under Regular, put in a start time in the indicated field.	Regular -[8:00]Start TimeEnd Time7:00 AM3:00 PM
	4. Put in an <b>end time in the</b> indicated field.	Regular -[8:00]Start TimeEnd Time7:00 AM3:00 PM
	5. Click on <b>Transfer</b> Employee.	Add Segment     Assign Breaks
		start Time       End Time         7:00 AM       3:00 PM         4/14         Transfer Employee         ③         Comments [0]         Add Comment
	6. Select Add Business Structure (The location the staff will be transferred to).	Add Business Structure

<ul> <li>7. Select the location of the transfer. Users can type in the box to populate the site's name.</li> <li>Different Job Transfer Include: Direct Care if someone will be in ratio that day.</li> <li>Select Director if someone is filling in for a manager that day</li> <li>Select Generic for anything else</li> </ul>	Transfer         Business Structure         βearch	
8. Click <b>Ok</b> .	Back Ok	
9. Click <b>Apply.</b>	Cancel • Apply	
<ol> <li>The line on the shift will be blue indicating the transfer.</li> </ol>	7:00 AM - 3:00 PM	

Scenarios	Steps	So	cre	eensho	t			
Changing an employee who receives the shift diff to an hourly wage without the shift diff.	1. Go to the employee's timecard.	Image: Construction of the second			◆ + Emcloyee\$(sidence: ) unded 2:46 FT 4 • 0 目 0 Sine This Strate Size Facing Data			
<ul> <li>This is a great tool for when an employee is going to work on Relias training during the weekend. Instead of the employee being paid the additional shift diff for the weekend, the employee will only be paid their hourly wage.</li> <li>Example: A direct care employee who works at Fisher on the weekends</li> </ul>		+ + +		Dire         Scher           Sin 320	de dietre l' i teologi Vi teologi	מס אונכני    אונכ	'adf:	
	2. Select the date.	+	Ê	Date Sun 5/01	Schedule	Absence	In	Out
		+++++++++++++++++++++++++++++++++++++++	1 1	Mon 5/02 Tue 5/03	9:00 AM - 5:00 PM 9:00 AM - 5:00 PM		8:26 AM 🔮 8:25 AM	4:51 PM 🖸 4:30 PM 🚺
	3. Right Click in the Transfer box across from the date.	+	Ē	Date <mark>Sun 5/01</mark>	Schedule	Absence	In	Out
receives the shiff diff when working directly with		+++++++++++++++++++++++++++++++++++++++	1 1	Mon 5/02 Tue 5/03	9:00 AM - 5:00 PM 9:00 AM - 5:00 PM		8:26 AM 🔮 8:25 AM	4:51 PM 🔮

residents. The individual's	4. The Transfer box will	Transfer ×
Relias trainings are due. Instead of working hands with the residents, the employee will be completing training. Their manager will transfer the pay code from the shift diff to the hourly wage	appear. 5. Select <b>Add Work Rule.</b>	<ul> <li>carol</li> <li>Primary Location Youth Consultation Ser <i>instrat instrat Work Rule None Cost Center None Labor Categorie Chief Office;SALARIED Add Business Structure Add Business Structure Add Business Structure Add Work Rule   Add Work Rule = Add Cost Center = Add Labor Category Add Labor</i></li></ul>
	6 Select Hourly	Call Back
	o. Select <b>Houriy.</b>	cui buck
		Exempt to Non-Exempt
		Hourly
		Hourly and COVI3+
		Hourly PT SRTS WFS
		Hourly PT w Shift Diff
	7. Click <b>Apply.</b>	

Scenarios	Steps	Screenshots
How to Request an Open Shift. > For employees to see	1. Go to your home menu.	MD Welcome back, Michele
and select open shifts that are available.	2. Select the title My Schedule.	My Schedule
Example: David is not scheduled to work this Friday. David would like to pick up an		TODAY > (i)
additional shift for Friday and to see what other shifts are	3. Click on New Request.	New Request
available.	<ol> <li>A drop-down menu will appear. Click on <b>Open</b> Shift.</li> </ol>	Image: Second system         Time-off         Swap         Open Shift         Leave of Absence case         Availability Change
	5. Select <b>Open Shift.</b>	Time-off   Swap   Open Shift   Leave of Absence case   Availability Change
	<ul> <li>5. Click on the day of the open shift.</li> <li>The box will turn grey.</li> <li>Example Saturday the 7<sup>th</sup> at 7am-3pm and Davis House</li> </ul>	07 Saturday 7A-3P • 7:00 AM - 3:00 PM [8:00] PCH - Davis House/Direct Care
	5. Click Submit.	Cancel Submit
	6. The request will go to your manager for approval.	

Managers can approve or	
deny requests via the app or	
from their computer.	

Scenarios	Steps	Screenshots
Transferring an Hourly Employee to their Hourly Second Job.	1. From the employees Timecard or schedule right click on the date of the transfer.	Date
When an employee is going to work a 2 <sup>nd</sup> job their pay rate will remain the same.	2. Select <b>Edit.</b>	Wed 5/11       Wed 5/11       Image: Constraint of the state of the stateo
Example: Health is an hourly case manager at Fisher. She is going	3. Enter Start time.	Regular -     [8:00]       Start Time     End Time       7:00 AM     3:00 PM
to work at Holley for a day as a direct care staff. Heather will	4. Enter End time.	Regular -     [8:00]       Start Time     End Time       7:00 AM     3:00 PM
remain as an hourly employee at her primary site. Therefore, there will not be a need to add a work rule or secondary location.	5. Select <b>Transfer.</b>	Add Segment     Assign Breaks      Regular      [8:00]     Start Time     Find Time     Joo PM     4/14      Transfer Employee      Comments [0]     Add Comment
	6. Select Add Labor Category.	<ul> <li>Add Business Structure</li> <li>Add Work Rule -</li> <li>Add Cost Center -</li> <li>Add Labor Category</li> </ul>
	7. Select Add HR Job.	Add HR JOB

8. For a second job as a direct care staff, select <b>2nd Job- Direct Care 100007.</b>	🕂 Add HR JOB 🔻
*Please make sure that the staff's second job matches their second job in their staff record in UKG Pro. *If you do not know what the job title is reach out to Human Resources.	direct care × 2nd Job- Direct Care 100007
9. In the transfer window, select Add Business Structure.	Add Business Structure
10. Select the location.	Transfer Business Structure
11. Click <b>Ok.</b>	Back
12. Click <b>Apply.</b>	Cancel Apply

Scenario:	Steps:	Screenshots:
Generating open shifts	1. Navigate to Workforce	Erin McCloskey
based on the census at your	Planning>Workload planner.	○ #-
program.		Edit Profile 🖉 Sign Out 🕞
Example: You need		
to adjust your		Search O
staffing needs based		Home
on how many		Home
residents are		Time 🗸
currently at your		Schedule 🗸
program. You know		Wedfare Blanding
you will need to staff		
for less clients for a		Workload Planner
period of time.		Operational Dashboard

					Q	الغ
2. Select your location on the						
top right side of your screen.		Locat	tions & Hype	rfinds	60	• None
		Searc	ch			
		No	one			
		Lo	cations			
		★ Tre	eatment Homes	Sth		10
		Select	: Locations			
<ol> <li>Type your site name in the search field on the window that appears.</li> </ol>	ocations elected Favorites Select F	Workload Plans avorite 🔻	As Of	02/2022	×	
		-				
	e Office Office	• •				
	sultation	, 0				
4. Select the location and click	Select Locations					×
apply.	Locations Selected Favori	Select Favorite	e 👻	As Of 6/02/2	022	6
	Youth Consultation Service > North	> Northern Region -	Youth > RTC - Holley Re	idence		()
	Select All The search returned 3 result(s).	Clear		rtc		Q ×
	Locations					
	RTC - Holley Residence /North/Northern Region - Youth/RTC - Holley Residence	, 0				
	RTC - Kilbarchan    /North/Northern Region -	• 0				
	Vouth/RTC - Kilbarchan RTC - Newark Muller Hall					
	/North/Northern Region - Youth/RTC - Newark Muller Hall	• 0				
			*			
E To adjust based on the	Save As				Cancel Refresh	Apply Save
5. TO adjust based off the	Thu 6/02	ul autor	Fri 6/03	Redent	Sat 6/04	Latural.
type the number of clients	30 10 5	30	10 5	30	10	5
in the Column under "Plan"	30 10	30	10	30	10	
for the duration of time	30 10	30	10	30	10	
needed.						
6. Click Save.						
7. Click Generate Workload.	€ ⇒ 6	you	ithconsulta	ion-uat	.npr.m	укгог
	= 🗅 Ū	KG				
	• <i>}</i> -	Ē	8.	0		
	Show / hide Tools	Generat Workloa	te Location ad Filter	Span Fil	ter	
	Job 9	ipan		Туре		
				<i>.</i>		

<ol> <li>Select Plan as the Volume type and indicate the date rate you are adjusting staffing needs for in the fields provided.</li> </ol>	Generate Workload × Location/RTC - Holley Residence Volume Type Budget Pa Budget RTC - Holley Residence Volume Type Budget Glip Pian Clip Date Range Start date G/02/2022 G 5/04/2022 C
9. Navigate to YCS Advanced Scheduler.	Erin McCloskey     Edit Profile     Sign Out     Search     Home     Time   Schedule     YCS Advanced   Scheduler
<ul> <li>10. Select the site location as outlined in steps 2 and 3.</li> <li>Note: Do not use a hyperfind, you must use the location outlined above.</li> </ul>	

11. Click Generate Schedule.	View by Schedule Group 🔻	
	Quick Show/ Gantt View Zoom Tools Characte Load Schedule Groups	
	▼ Y II·	
	□ Name [0/49] ↓ Sun 5/29	
	▶ Open Shifts [93] [12]	
<ol> <li>Select the same timeframe you had indicated in step 5.</li> </ol>	Generate Schedule	A
	Start Date: *	Pa
	End Date: * 6/04/2022  Strategy: * Program Shift Generator	Clip · ·
13. Click Start. Your open shifts		
will be adjusted.		

Scenario:	Steps:	Screenshots.
Manager wants to use the Call List to push out notifications to eligible	<ol> <li>Navigate to YCS Advanced Scheduler.</li> </ol>	Erin McCloskey
staff.		Edit Profile Sign Out (-)
		Home
		Time 🗸
		Schedule ^
		YCS Advanced Scheduler

2 Salast your site's location by	の L し C
2. Select your site's location by	
typing in the search bar. Select	
the SRT location to include	Locations & Hyperfinds
SRT staff.	Search
	None
	Locations
	* Treatment Homes Sth 🛛 📋 🖉
	Select Locations
	Youth Consultation Service > North > Northern Region - Youth > RTC - Holley Residence
	Select All
	The search returned 1 result(s).
	Locations
	/General and Administratio/Administration
	7381
2 Click the <b>Tools</b> ison and select	
5. Click the <b>Tools</b> icon and select	Jule Group 💌
Call List.	
	v / Gantt View Zoom Tools Generate Load
	e Schedule Groups
	V V Quick Post
	Manage Schedule Posting
	Call List
	s [93] Notify Employees
4. Click on the open shift that	Call List AutoSave On
appears on the left side of	Jle Perio
appears on the left side of	
your screen.	Sun Mon Tue Wed Thu Fri Sat
	5 6 7 8 9 10 11
	May 2022
	29 Sunday Total Shifts [12]
	7A-3P [6] + 7:00 AM - 3:00 PM [8:00]
	RTC - Holley Residence/Direct Care
E Salact the Bracadure Set or	Procedure Sets ×
5. Select the Procedure Set, or	
the group of employees you	Select a procedure set.
would like to notify	
according to their pay rule	1 NO 01 Per biem
and/or Overtime status.	2 OT Per Diem Only
No OT Per Diem: On call	
etoff with no OT this	3 NO OT Per Diem - PT
	4 OT Per Diem and PT
period.	
<ul> <li>OT Per Diem only: On</li> </ul>	5 NO OT ALL
Call staff regardless of	60TAU
OT.	
No OT Per Diam PT: Part	
• NO OT FEI DIEIII FI. Falt	
time On Call Staff with no	
OT.	
<ul> <li>No OT ALL: Any staff</li> </ul>	
without OT this period	

