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)

Transfer an Hourly Employee to an Hourly Second Job? (Scheduling Managers)

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

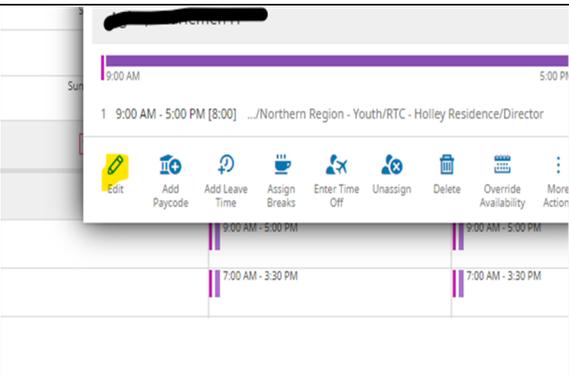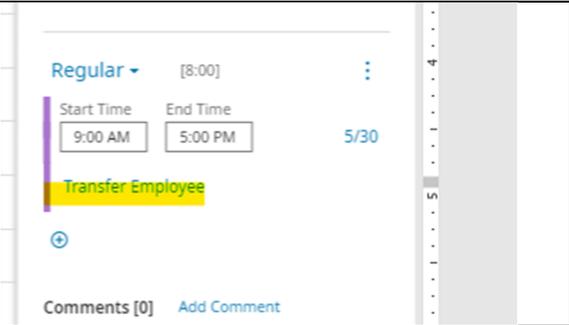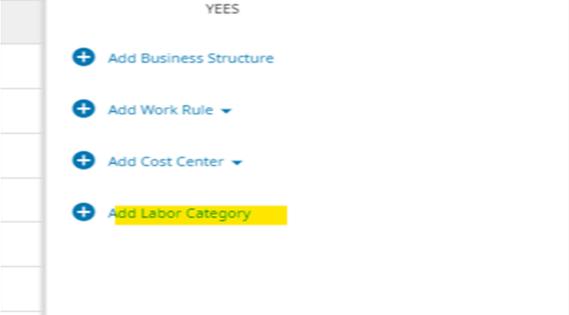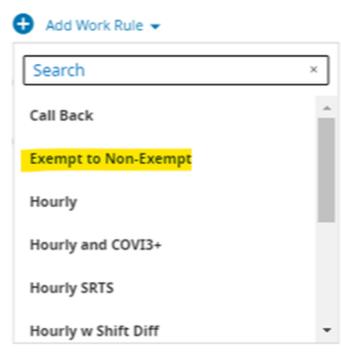Not apply a shift diff for an employee who was not on site? (Scheduling Managers)

Request an Open Shift?

Generate Open Shifts based on Census? (Scheduling Managers)

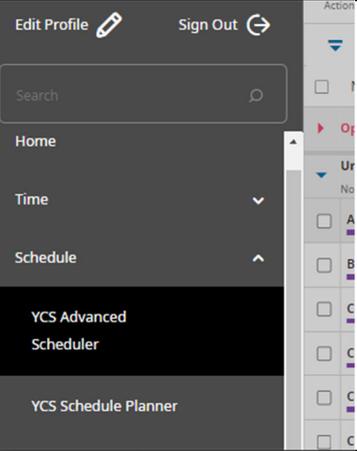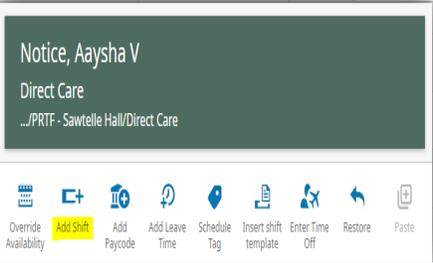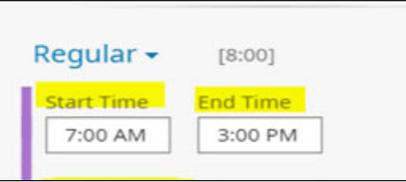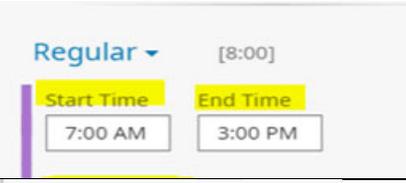Notify staff of open shifts (including SRT Staff)? (Scheduling Managers)

Scenarios	Steps	Screenshot
How to Approve Timecards. • Every employee is responsible for approving their own timecard on payroll Monday's before 10am. Failure to do so may result in delay of pay for that coming pay week.	1. Go to **My Timecard** tile.	
	2. View the calendar icon to check that the timecard is on the correct pay period. • If approving **on Monday** of payroll select Previous Pay Period. • If the approval is taking place **prior** 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.	
	3. View timecard for any exemptions. Exceptions: • Missed clock ins or outs • Unexcused Absence • Before approving the timecard the exceptions must be corrected.	
	4. Click **Approve.**	

Scenario:	Steps:	Screenshot:
Transferring from Salary Position to Hourly Position at the same program. • Transferring from salary to hourly is used when a Salary employee is going to work a 2nd job under an hourly pay rate. • **Example**: Employee is a salary Clinician who will be working a 2nd job as an hourly Direct Care Staff at their primary site.	1. From the schedule, right click on the staff shift. **Select Edit.**	
	2. Click **Transfer Employee**.	
	3. Select **Add Labor Category**.	

	4. Select **Add HR Job.**	⊕ Add HR JOB ▾ Search × Refine search for more results
	5. For a second job as a direct care staff, select **2nd Job-Direct Care 100007.** • *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.	
	6. Under "Go To", select **Work Rule.**	**Go To** Business Structure Work Rule Cost Center
	7. Select the Work Rule: **Exempt to Non-Exempt.** • 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.	⊕ Add Work Rule ▾ Search × Call Back Exempt to Non-Exempt Hourly Hourly and COVI3+ Hourly SRTS Hourly w Shift Diff
	8. Click **Apply.**	

Scenarios	Steps	Screenshot
Employee transferring to a different site location. ➢ This is when an employee is working at a different site only. The pay and job title will remain the same. The only difference will be the location. • Example: A Direct Care Employee s primary location is Fisher Hall. On 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.	1. Go to YCS Advanced Scheduler. Right click on the date of the shift for the employee who needs to be transferred. • NOTE: If transferring a shift that is already scheduled for the person, right click and select Edit. Skip to step 5.	
	2. Select **Add Shift.**	
	3. Under Regular, put in a **start time in the indicated field.**	
	4. Put in an **end time in the indicated field.**	
	5. Click on **Transfer Employee.**	
	6. Select **Add Business Structure** (The location the staff will be transferred to).	
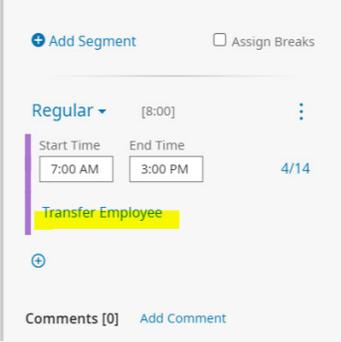
	7. Select the location of the transfer. Users can type in the box to populate the site's name. Different Job Transfer Include: Direct Care if someone will be in ratio that day. Select Director if someone is filling in for a manager that day Select Generic for anything else	**Transfer** Business Structure Search
	8. Click **Ok**.	Back Ok
	9. Click **Apply.**	Cancel Apply
	10. The line on the shift will be blue indicating the transfer.	7:00 AM - 3:00 PM
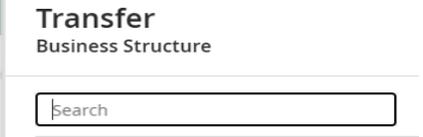
Scenarios	Steps	Screenshot
Changing an employee who receives the shift diff to an hourly wage without the shift diff. • This is a great tool for when an employee is going to work on Relias training during the weekend. Instead of the employee being paid the additional shift diff for the weekend, the employee will only be paid their hourly wage. • Example: A direct care employee who works at Fisher on the weekends receives the shiff diff when working directly with	1. Go to the employee's timecard.	
	2. Select the date.	
	3. Right Click in the Transfer box across from the date.	

residents. The individual's 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	4. The Transfer box will appear.	**Transfer** ✕ carol Primary Location — Youth Consultation Service/General and Administrati... Work Rule — None Cost Center — None Labor Categories — Chief Officer,SALARIED EMPLOYEES ⓘ ➕ Add Business Structure ➕ Add Work Rule ▾
	5. Select **Add Work Rule.**	➕ Add Business Structure ➕ Add Work Rule ▾ ➕ Add Cost Center ▾ ➕ Add Labor Category
	6. Select **Hourly.**	**Call Back** **Exempt to Non-Exempt** **Hourly** **Hourly and COVI3+** **Hourly PT SRTS WFS** **Hourly PT w Shift Diff**
	7. Click **Apply.**	

Scenarios	Steps	Screenshots
How to Request an Open Shift. ➢ For employees to see and select open shifts that are available. ➢ Example: David is not scheduled to work this Friday. David would like to pick up an additional shift for Friday and to see what other shifts are available.	1. Go to your home menu.	MD Welcome back, Michele
	2. Select the title **My Schedule.**	My Schedule → TODAY > ⓘ ⬤ Generic
	3. Click on **New Request.**	⊕▾ New Request
	4. A drop-down menu will appear. Click on **Open Shift.**	⊕▾ 📅▾ 👁▾ ⬙ Time-off Swap Open Shift Leave of Absence case Availability Change
	5. Select **Open Shift.**	⊕▾ 📅▾ 👁▾ ⬙ Time-off Swap Open Shift Leave of Absence case Availability Change
	5. Click on the day of the open shift. • The box will turn grey. • Example Saturday the 7th at 7am-3pm and Davis House	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.	
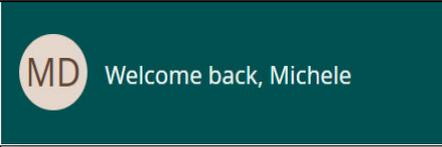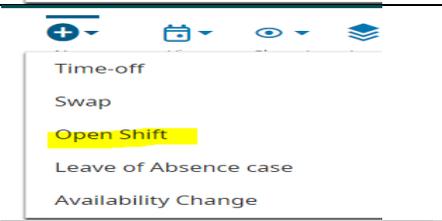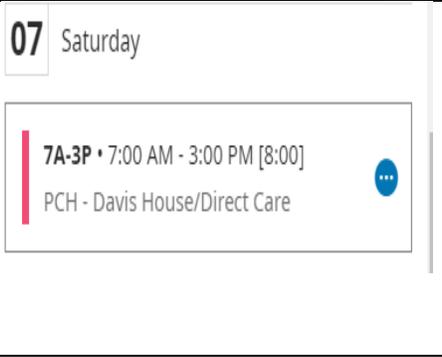
	Managers can approve or deny requests via the app or from their computer.	

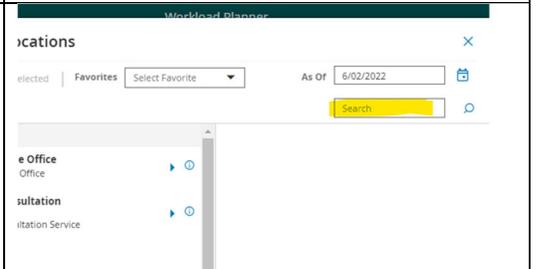| Scenarios	Steps	Screenshots

Transferring an Hourly Employee to their Hourly Second Job.
 	
  ➢ When an employee is going to work a 2ⁿᵈ job their pay rate will remain the same.
 	
  ➢ Example: Health is an hourly case manager at Fisher. She is going to work at Holley for a day as a direct care staff. Heather will remain as an hourly employee at her primary site. Therefore, there will not be a need to add a work rule or secondary location.
	1. From the employees Timecard or schedule right click on the date of the transfer.	

	2. Select **Edit.**	
	3. Enter Start time.	
	4. Enter End time.	
	5. Select **Transfer.**	
	6. Select **Add Labor Category.**	
	7. Select **Add HR Job.**	

	8. For a second job as a direct care staff, select **2nd Job- Direct Care 100007.** *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.	Add HR JOB ▼ direct care X 2nd Job- Direct Care 100007
	9. In the transfer window, select **Add Business Structure.**	EMPLOYEES ⊕ Add Business Structure
	10. Select the location.	**Transfer** **Business Structure** Search
	11. Click **Ok.**	Back Ok
	12. Click **Apply.**	Cancel **Apply**

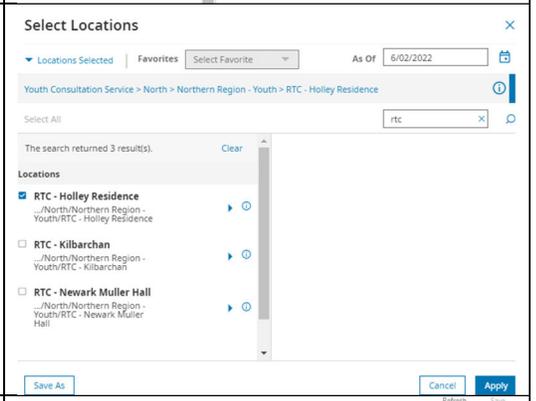| Scenario:	Steps:	Screenshots:
Generating open shifts based on the census at your program. ➢ Example: You need to adjust your staffing needs based on how many residents are currently at your program. You know you will need to staff for less clients for a period of time.	1. Navigate to Workforce Planning>Workload planner.	**Erin McCloskey** 👁 Show / hide 🔧 Tools Edit Profile ✏ Sign Out → Search 🔍 Home Time ⌄ Schedule ⌄ Workforce Planning ⌃ **Workload Planner** Operational Dashboard
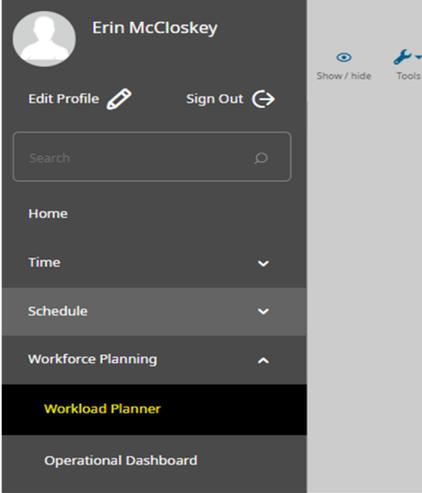
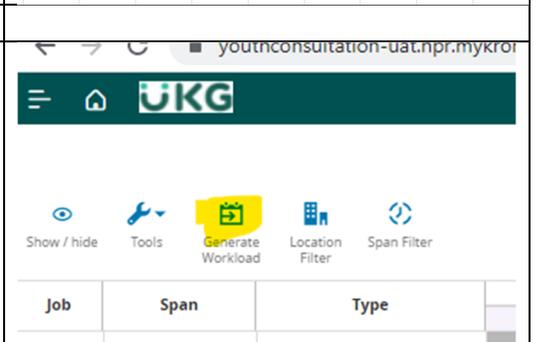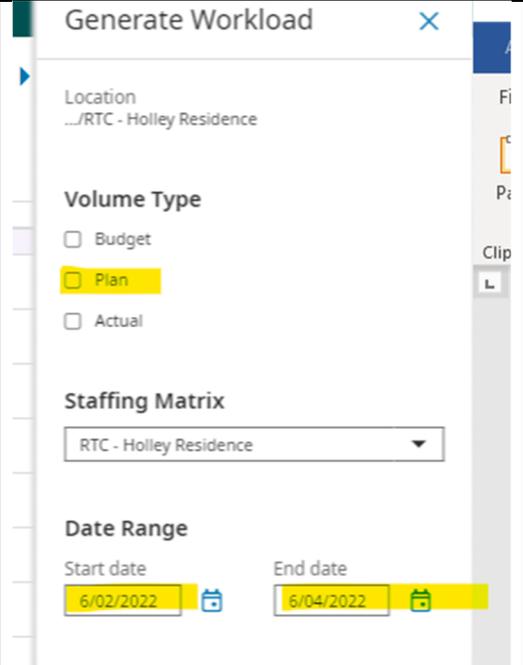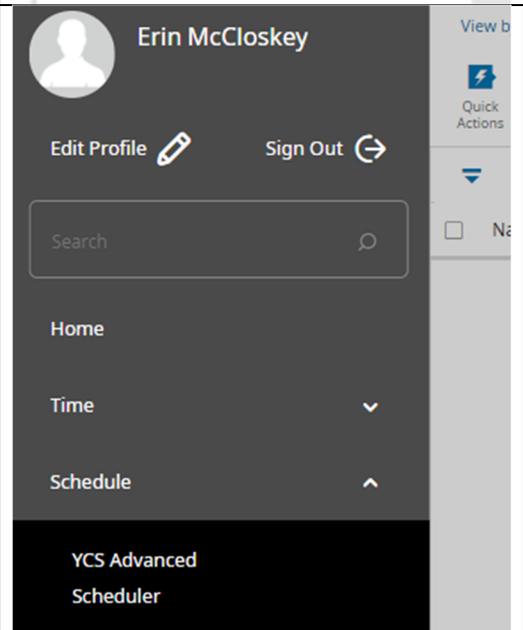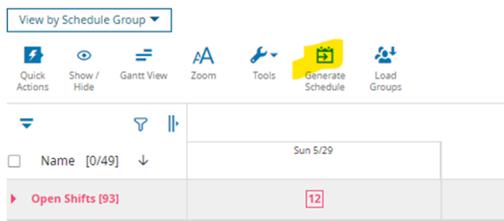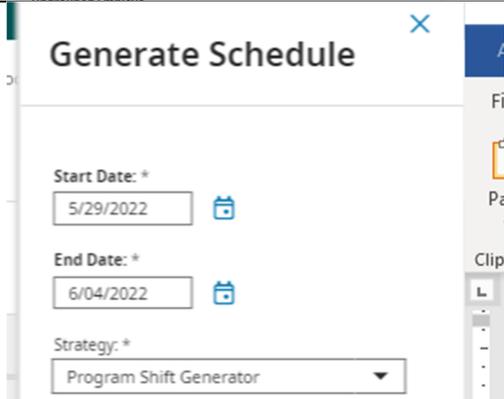|			
	2. Select your location on the top right side of your screen.		
	3. Type your site name in the search field on the window that appears.		
	4. Select the location and click apply.		
	5. To adjust based on the census at your program, type the number of clients in the Column under "Plan" for the duration of time needed.		
	6. Click **Save**.		
	7. Click Generate Workload.		
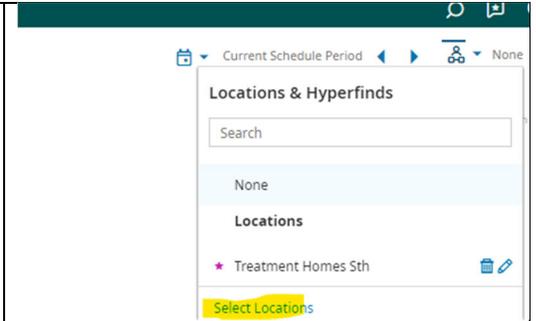
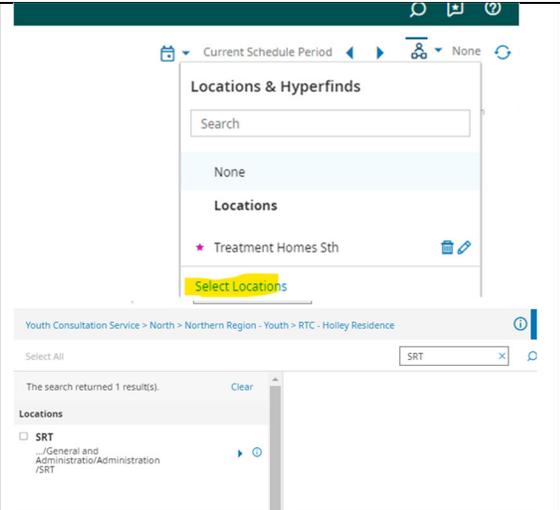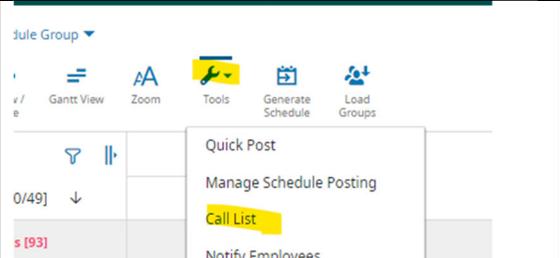|		
	8. Select Plan as the Volume type and indicate the date rate you are adjusting staffing needs for in the fields provided.	**Generate Workload** ✕ Location .../RTC - Holley Residence **Volume Type** ☐ Budget ☐ Plan ☐ Actual **Staffing Matrix** RTC - Holley Residence ▼ **Date Range** Start date · End date 6/02/2022 · 6/04/2022
	9. Navigate to YCS Advanced Scheduler.	**Erin McCloskey** Edit Profile ✏ · Sign Out → Search 🔍 Home Time ⌄ Schedule ⌃ YCS Advanced Scheduler
	10. Select the site location as outlined in steps 2 and 3. Note: Do not use a hyperfind, you must use the location outlined above.	

	11. Click Generate Schedule.	
	12. Select the same timeframe you had indicated in step 5.	
	13. Click Start. Your open shifts will be adjusted.	

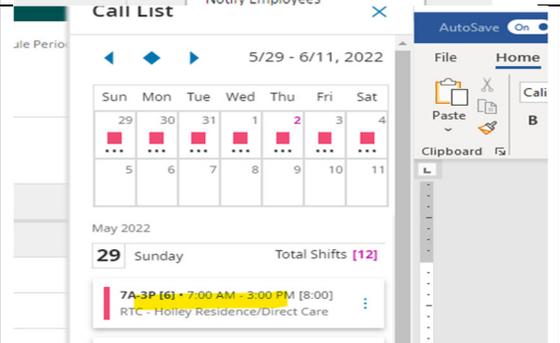| Scenario:	Steps:	Screenshots.
Manager wants to use the Call List to push out notifications to eligible staff.	1. Navigate to YCS Advanced Scheduler.	
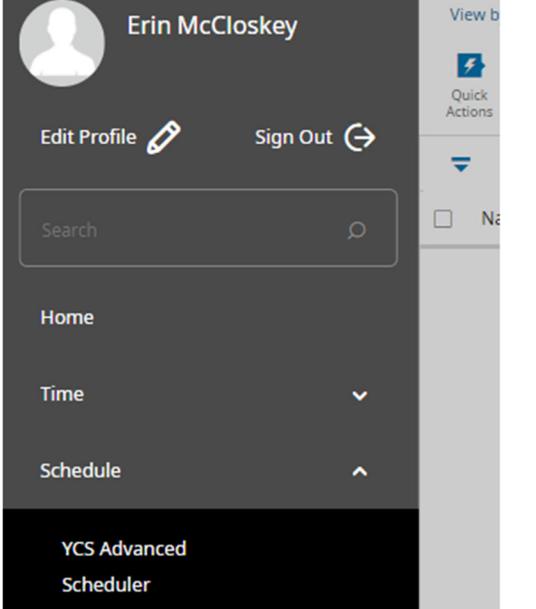
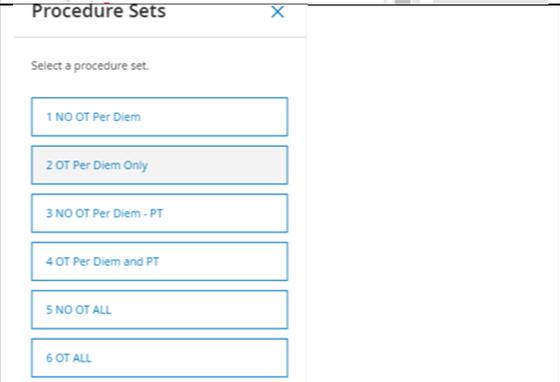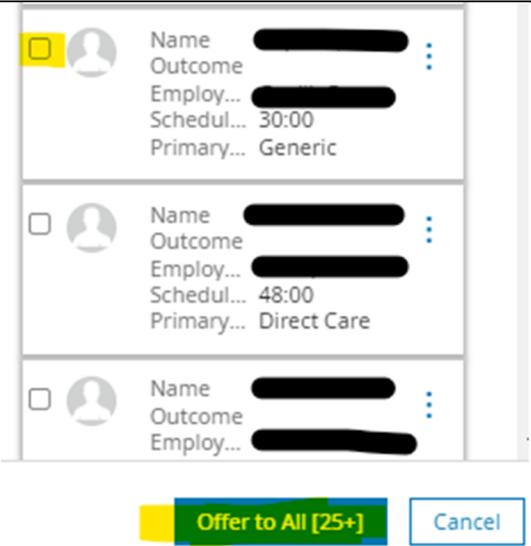|		
	2. Select your site's location by typing in the search bar. **Select the SRT location to include SRT staff**.	
	3. Click the **Tools** icon and select **Call List.**	
	4. Click on the open shift that appears on the left side of your screen.	
	5. Select the Procedure Set, or the group of employees you would like to notify according to their pay rule and/or Overtime status. • No OT Per Diem: On call staff with no OT this period. • OT Per Diem only: On Call staff regardless of OT. • No OT Per Diem PT: Part time On Call Staff with no OT. • No OT ALL: Any staff without OT this period.	

	• OT ALL: all staff even with OT this period.	
	6. Staff will populate. You can select specific staff by using check boxes or select **Offer to All**.	
	7. Notifications will be sent to all staff selected. NOTE: the manager of the employee has to approve the open shift. Once approved the rest of the staff will be rejected if they try to accept the open shift.	