USA HEALTH
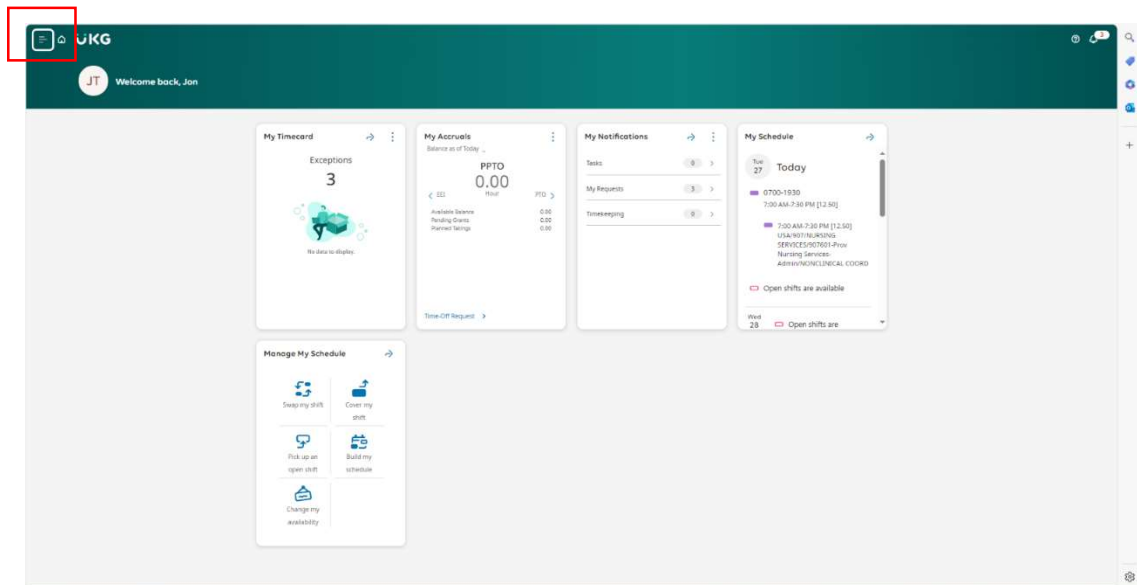
Navigate to Home Screen

o **Step One:** Log into Workspace One Account and Select the UKG Pro Icon.

o **Step Two:** Log into UKG Pro using USA Health J number and AD password.


UKG Home screen

o **Hamburger Icon:** *Clicking on this icon takes users to the following options:*

    o My Calendar

    o Location Schedule

    o My Timecard

o **Home Icon:** *Clicking on this icon takes users to the following options:*

    o Timecard

    o Accruals

    o Notifications

    o My Schedule

    o Manage My Schedule

        ▪ Swap Shifts

        ▪ Requests coverage for a shift

        ▪ Pick up an open shift

- Change availability
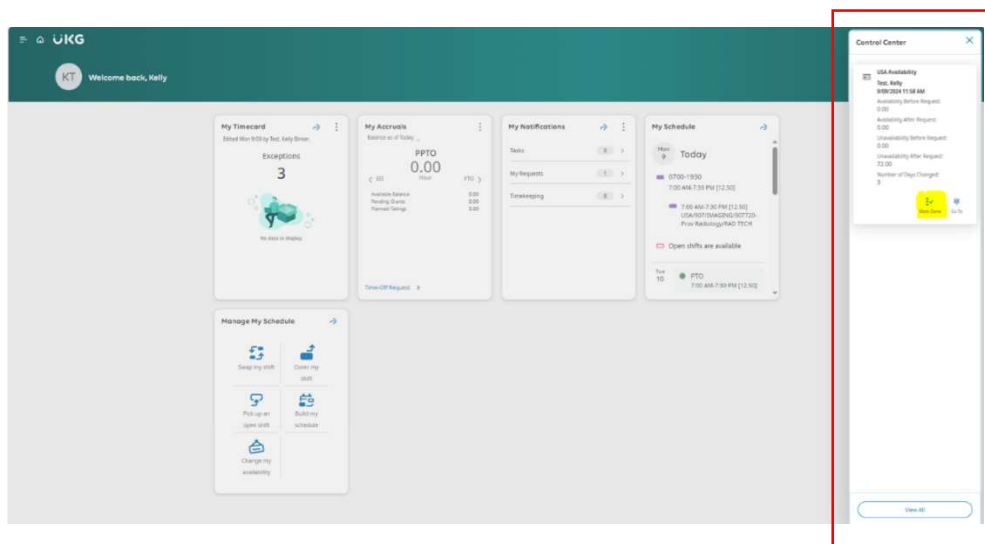- Use self-scheduling tools

Review My Notifications

Users can access Notifications from **two options**:

- **UKG Home screen** *or*
- **UKG Control Center**
  - This is accessed by clicking on the bell icon on the top right corner of the home screen.
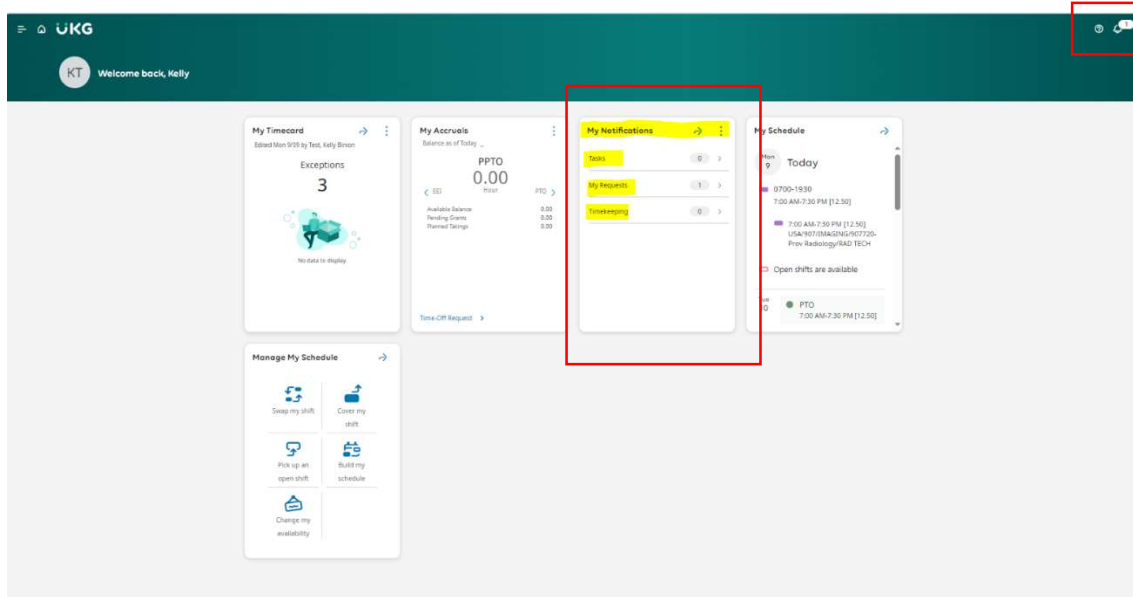
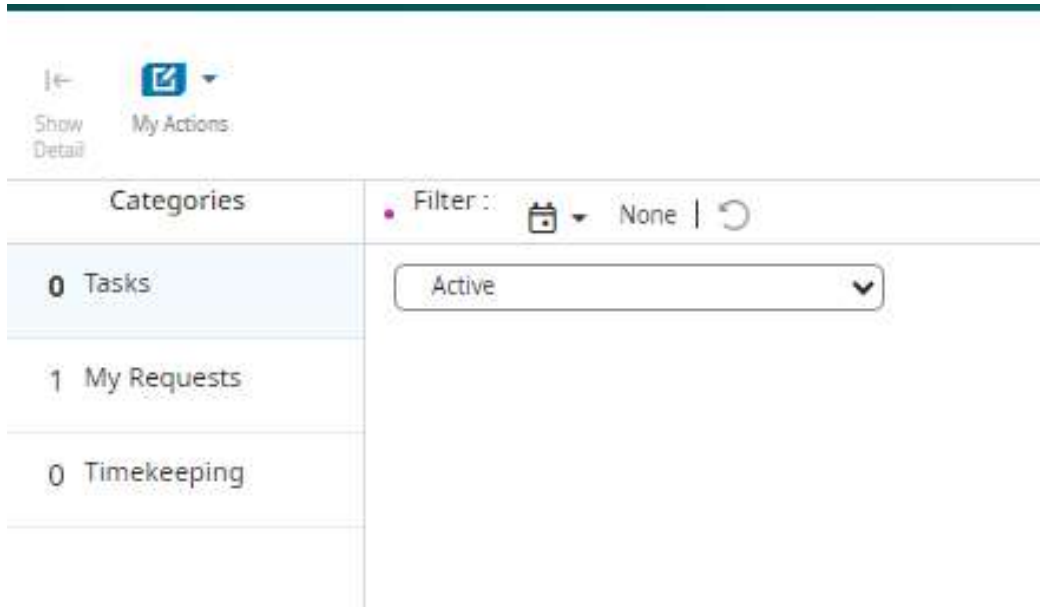- Once the icon is selected, the control center details will appear.
  - Select View All.
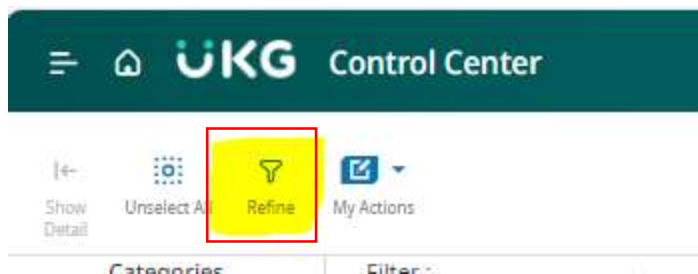 - *This will take users to the control center*

Control Center

There are different notifications in the control center:

- ○ Tasks
- ○ Status of My Requests
- ○ Tasks
- ○ Time Off
- ○ Shift Swaps
- ○ Timekeeping

- ○ Users can filter options in the control center.
  - ○ Filter will allow users to adjust the timeframe and the approval status by selecting Refine.

How to Record Time with Punch Tile

Navigation: Home Page – Punch Tile

- o **Step One:** Users can punch in their time on the Home screen.
    - o A success message will appear along with the time punch updated on the card.
    - o *If there is problem with the punch, a failure message will display on the screen.*
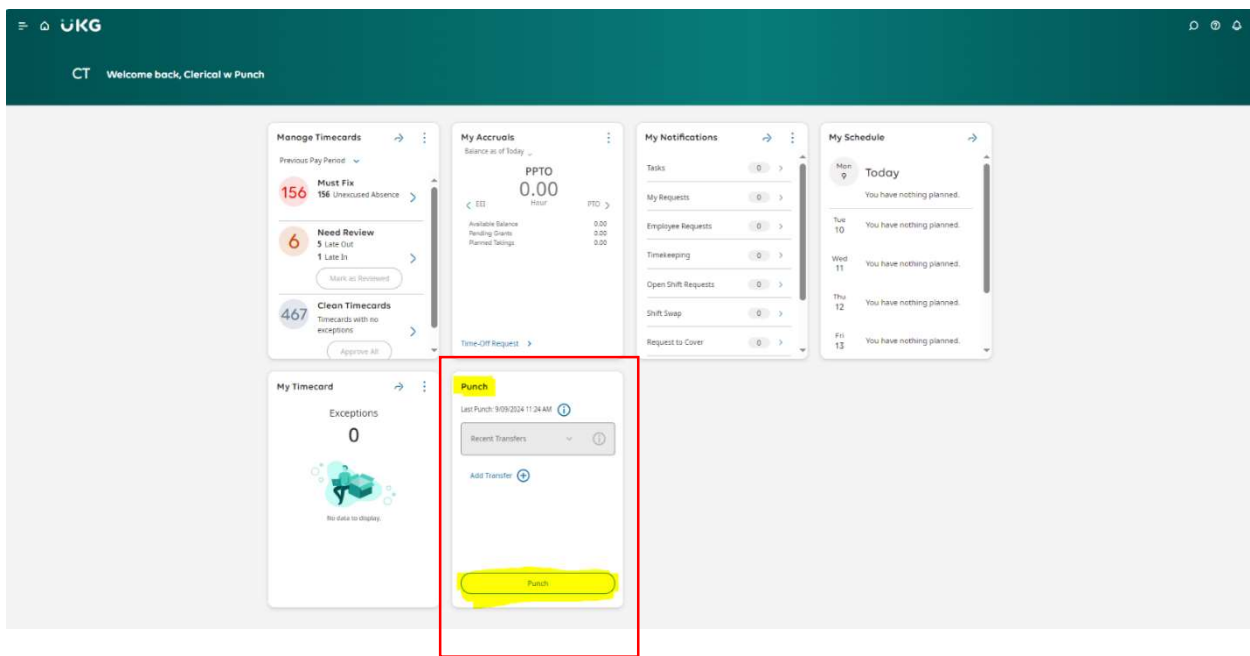
Functions of the Punch Tile Card

- o Record In and Out punches
- o Transfer time to another job, labor category or work rule
- o Cancel meal break or break reductions, if a break is not taken during shift
- o View last recorded punch time

Punch tile buttons may have slightly different names than what appears on the home screen due to organization's preferences.

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Transfer Record Time

A transfer is performed when an employee changes their job, or there is a change in labor category for a shift.

Navigation: Home Page > Punch Tile

- o **Step One:** Select Transfer from the drop-down list
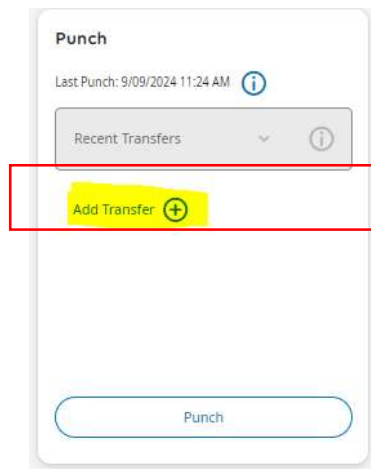
- o **Step Two:** From the Transfer Panel, select the appropriate option, then Apply when done.
  - o **Labor category**
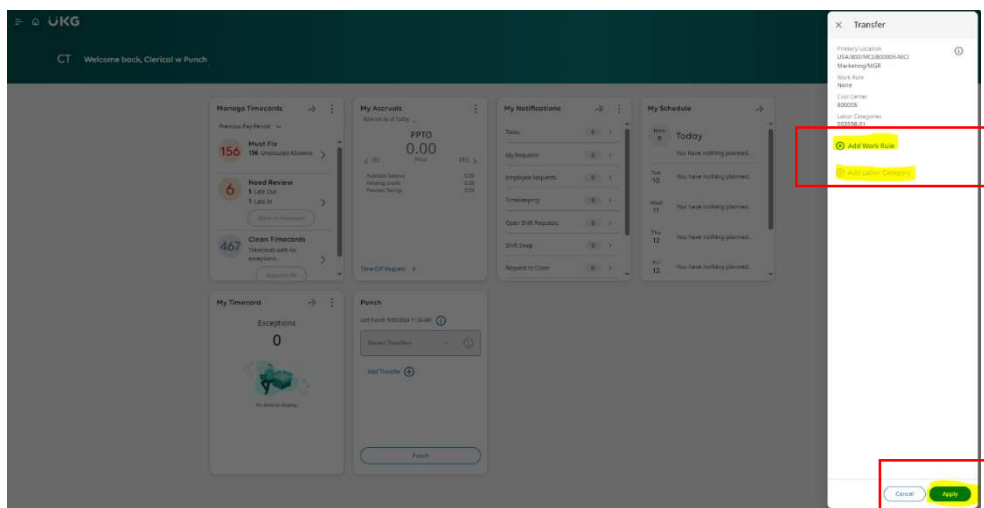
Selecting Apply will complete the transfer and place a timestamp on the timecard.

How to Review Timecard – Hourly

Employees have <u>two</u> options to review their timecard:

o **Option One**: Home screen > Timecard

o **Option Two:** Select the Hamburger Option on the top left corner, then select My Timecard under My Information.
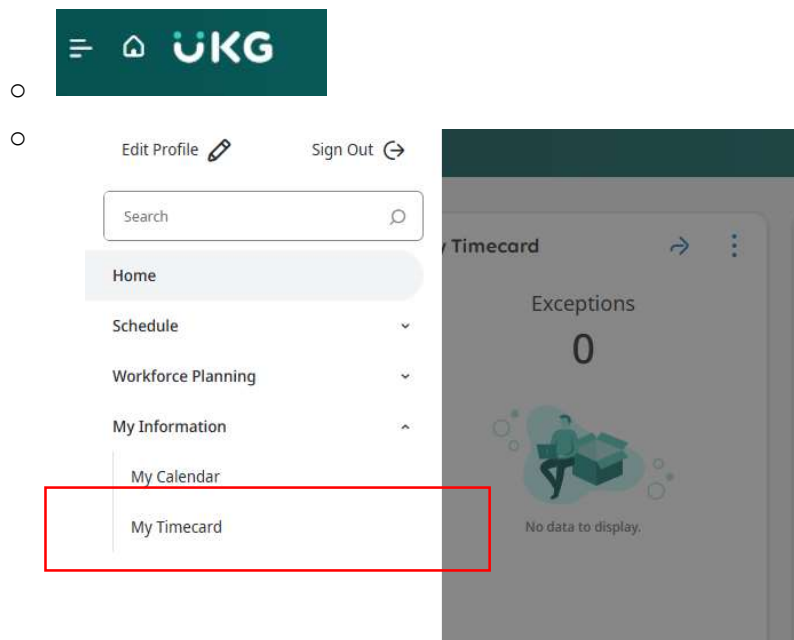
Timecard Overview
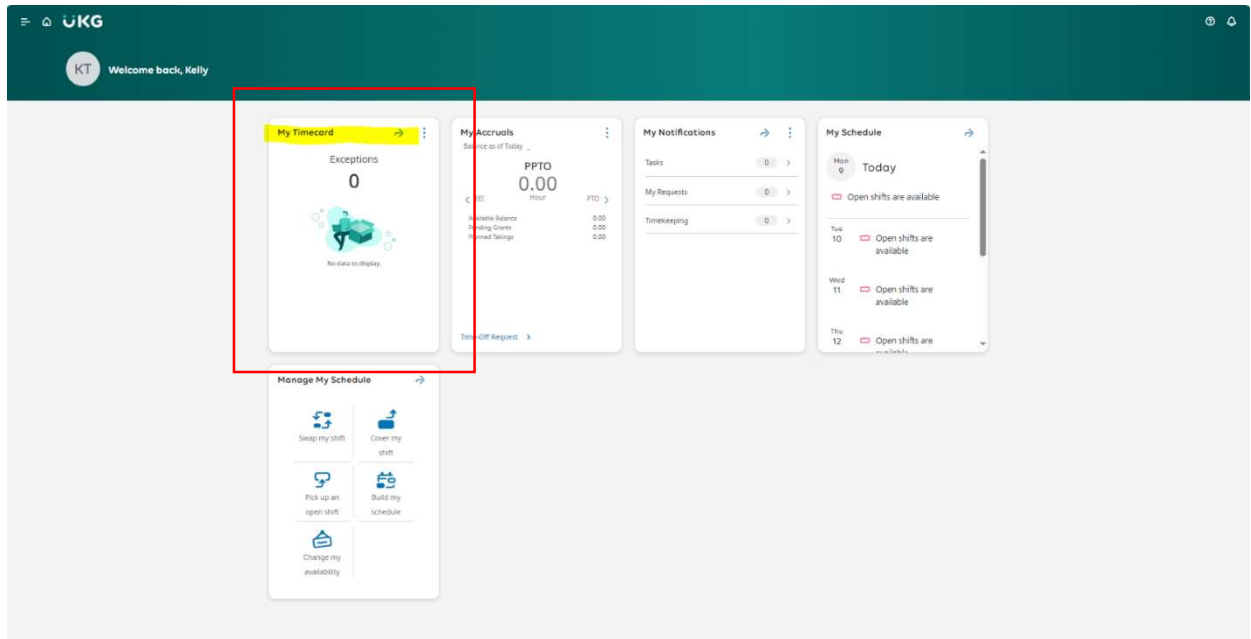
The following information displays on the employee timecard:

- o Schedule
- o Absences
- o In and Out punches
- o Transfers
- o Pay codes
- o Hour totals by shift, daily and time period

Icons:

- o Red exclamation points indicate exceptions such as Late or Early in/out punches
- o Red boxes indicate a Missed Punch

View My Calendar and Schedule

Employees have <u>two</u> options to review their schedule:

- o **Option One:** Schedule is available on the Home screen
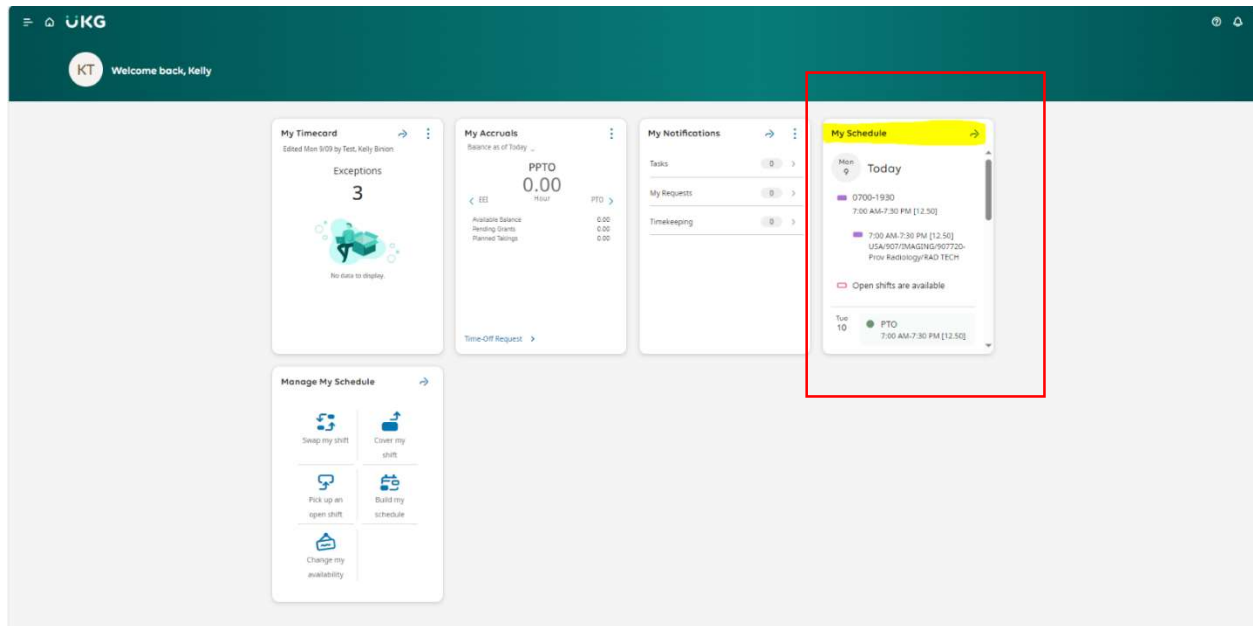
- o **Option Two:** Select the Hamburger Option on the top left corner, then select My Timecard under My Information

- o
- o Select Schedule from the dropdown
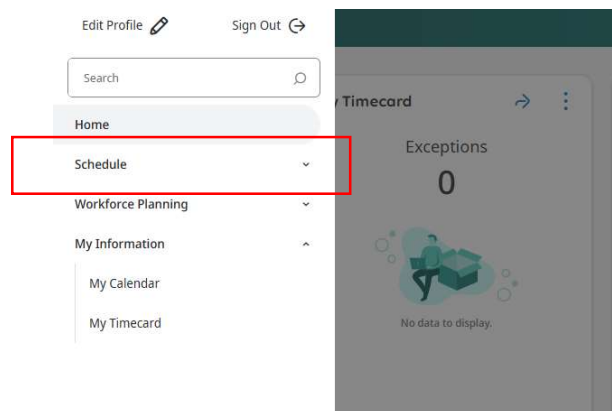
My Calendar

Employees can view either the full calendar *or* a list of events on the right.

The following information is viewable on the calendar:

- o Scheduled Shifts
- o Approved Time Off
- o Pending Time off
- o Scheduled Request
- o Open Shifts
- o Holidays

Events tab: Show shift segments and pay codes

Requests tab: Shows active requests for changes to employee schedules

My Calendar
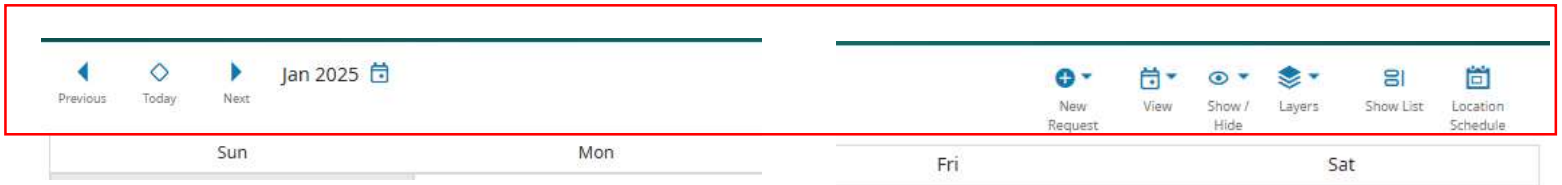
Employees can perform the following functions on the Calendar toolbar:

- o **Previous:** Shows the previous time period
- o **Today:** Current day
- o **Next:** Shows the next time period
- o **Share:** Allows employees to print a printable version of the schedule
- o **New Request** – Access to advanced scheduling options including:
    - o Time off requests
    - o Shift swap
    - o Requests to cover
    - o Open Shift request
    - o Self-Schedule request
    - o Change Availability
- o **View:** Select a daily, weekly, monthly, or yearly view of the calendar
- o **Show/Hide:** Select schedule items to show in calendar
- o **In Progress Requests:** Requests that are submitted and not yet approved or rejected
- o Approved Requests
- o Holiday
- o Transfers
- o Shifts
- o Schedule Tags
- o Paycodes
    - o Layers
    - o Location Schedule

Time Off Requests

Employees have <u>two</u> options to put in Time Off Requests

Option One: Navigation: Home screen> My Accruals

- o **Step One:** Select Time-Off Requests from My Accruals.
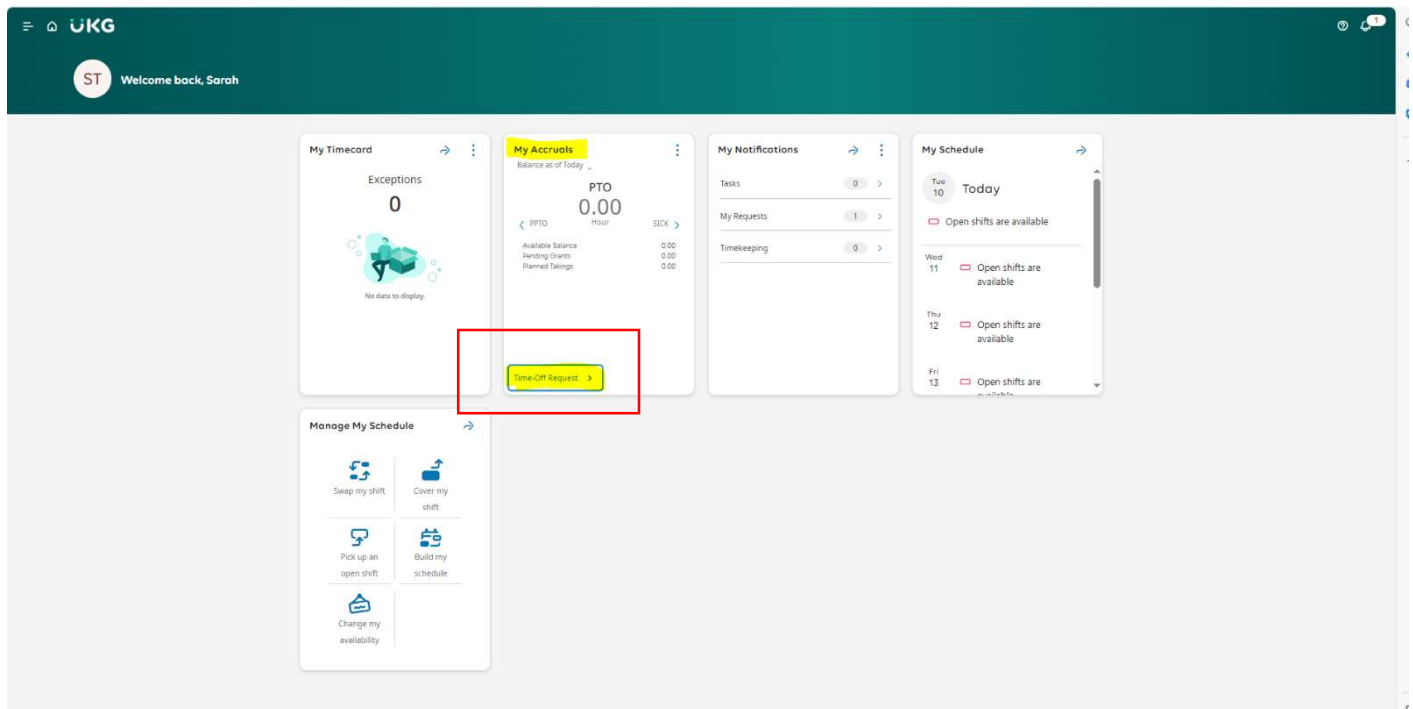
Option Two: Time-Off Requests can also be accessed from My Calendar.

- o **Step One: Navigation: Home screen > My Schedule**

Time off Requests

- o **Step Two**: Select the correct month and then day(s) that are needed in the request by clicking each box. Once the day(s) have been selected, click on Apply.
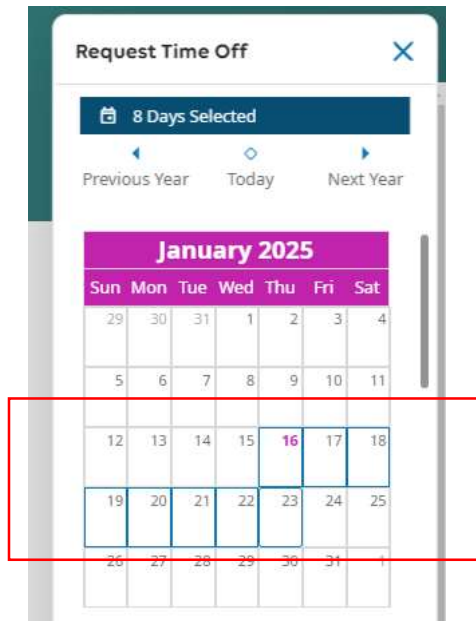

- o **Step Three**: Enter in the <u>**Start Time**</u> and <u>**Duration**</u> of the shift in hours.
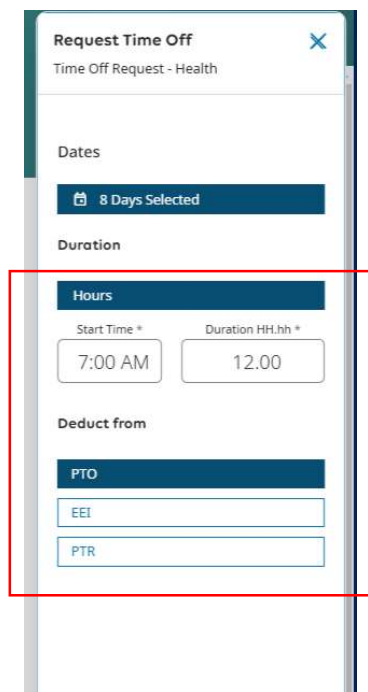
Time Off Requests

- o Additional Information
  - a. Hours
    - For start time, enter the start time of the employee's regular shift
    - For Duration select the length of the shift (8.0,12.0...etc.)
  - b. Deduct: Select the paycode for the time off.
    - PTO- Regular PTO bank
    - PTR – Providence Hospital Carried over PTO
  - c. Select Submit when done

If employees do not have sufficient PTO to cover the requested time off, employees will receive an error and will not be allowed to continue. Employees will need to speak with their unit manager on how to proceed.

Cancel Time Off Request from My Calendar
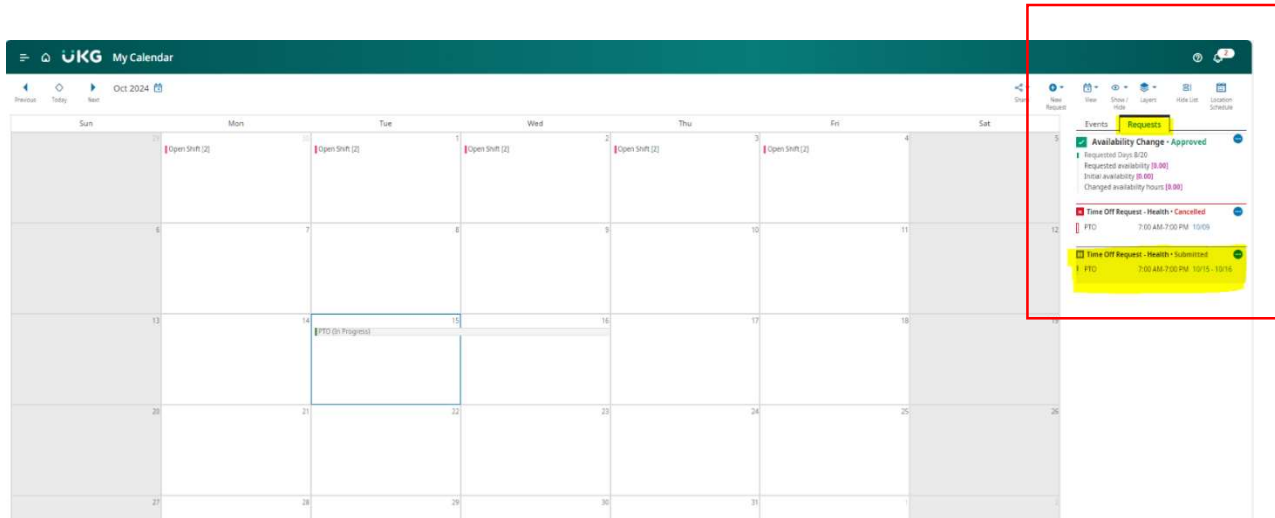
Employees can reschedule or cancel their time off requests if it is no longer needed.

- **Step One:** Access the submitted Time Off Request through My Calendar.

Navigation: Home screen > Hamburger dropdown > My Information > My Calendar > Requests Tab

- **Step Two:** Cancel the Time Off request by clicking on Cancel Request.

Important Note:

- Employees can <u>only</u> cancel their own submitted or approved time-off requests
- Cancellations are **<u>immediate.</u>** Employees will not be prompted to confirm.
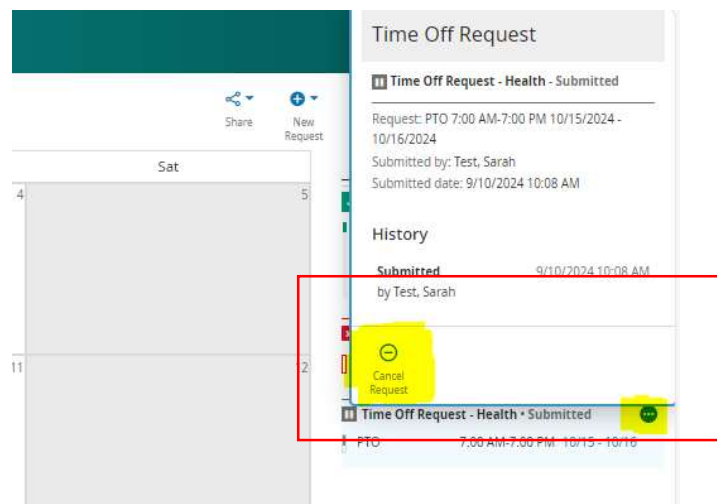
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Cancel Time Off Request from My Notifications

Employees can reschedule or cancel their time off requests if it is no longer needed.

- **Step One:** Select My Requests from the Home screen.

Navigation: Home screen > My Notifications > My Requests

- **Step Two:** Select the request and Select **Cancel Request**.
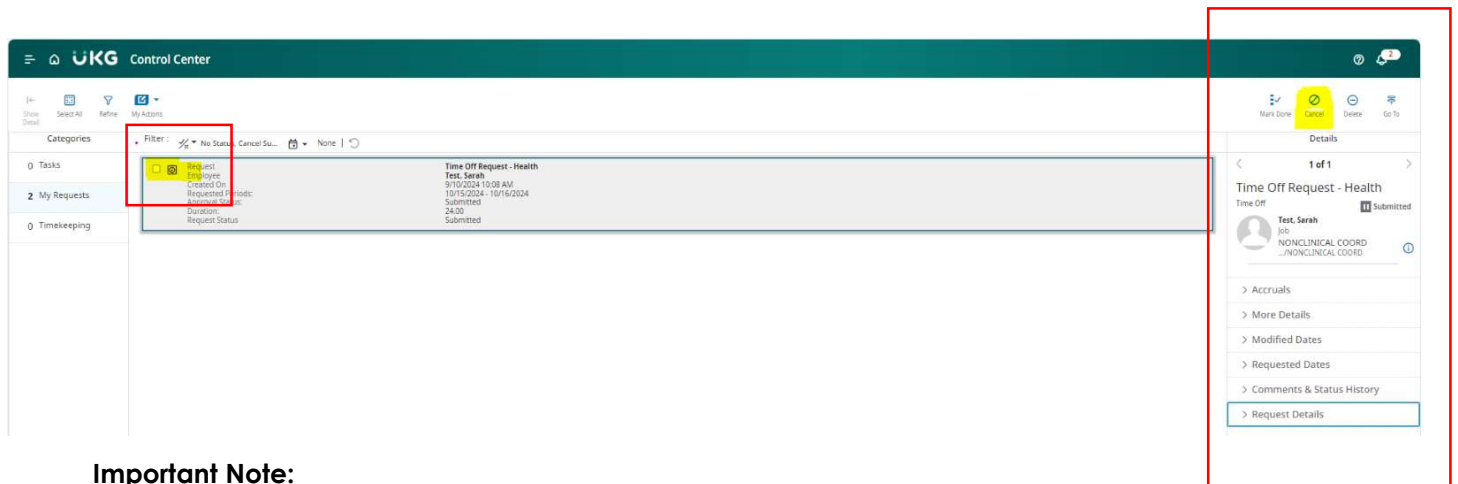
Important Note:

- Employees can _only_ cancel their own submitted or approved time-off requests

- Cancellations are **_immediate._** Employees will not be prompted to confirm.
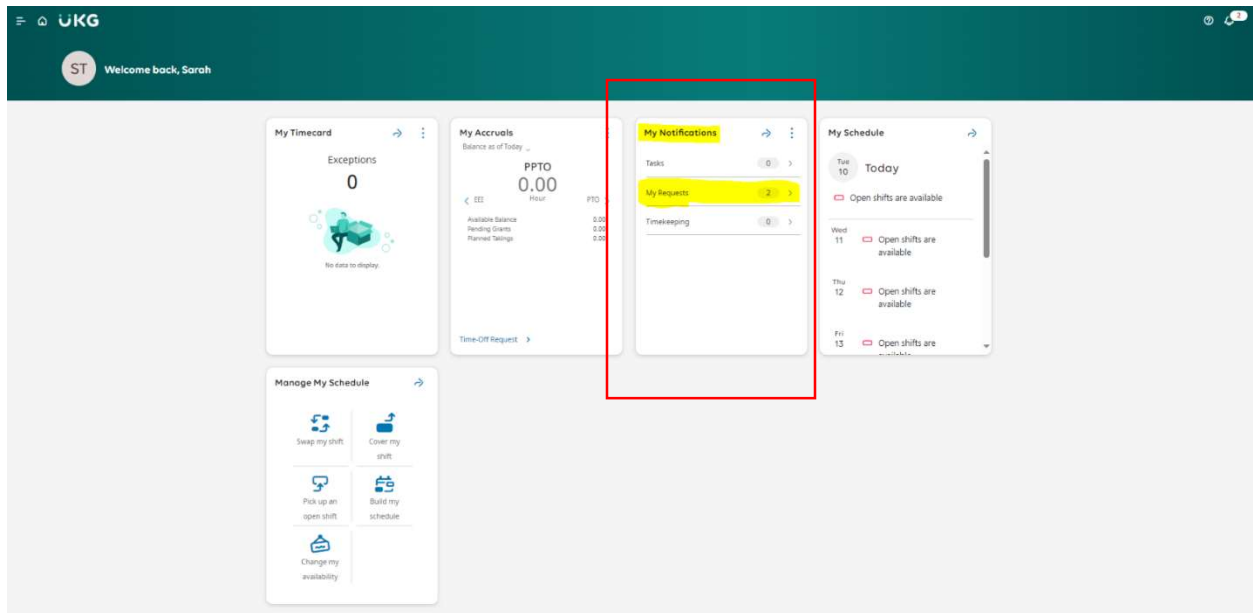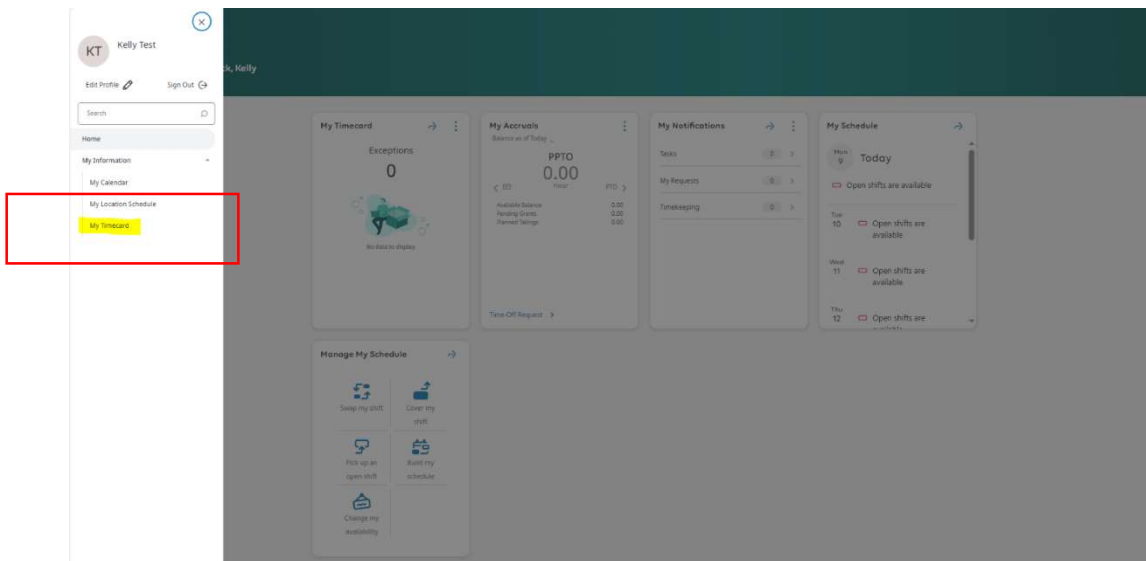
-

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Approve Timecard

Employees have <u>two</u> options to approve their timecard.
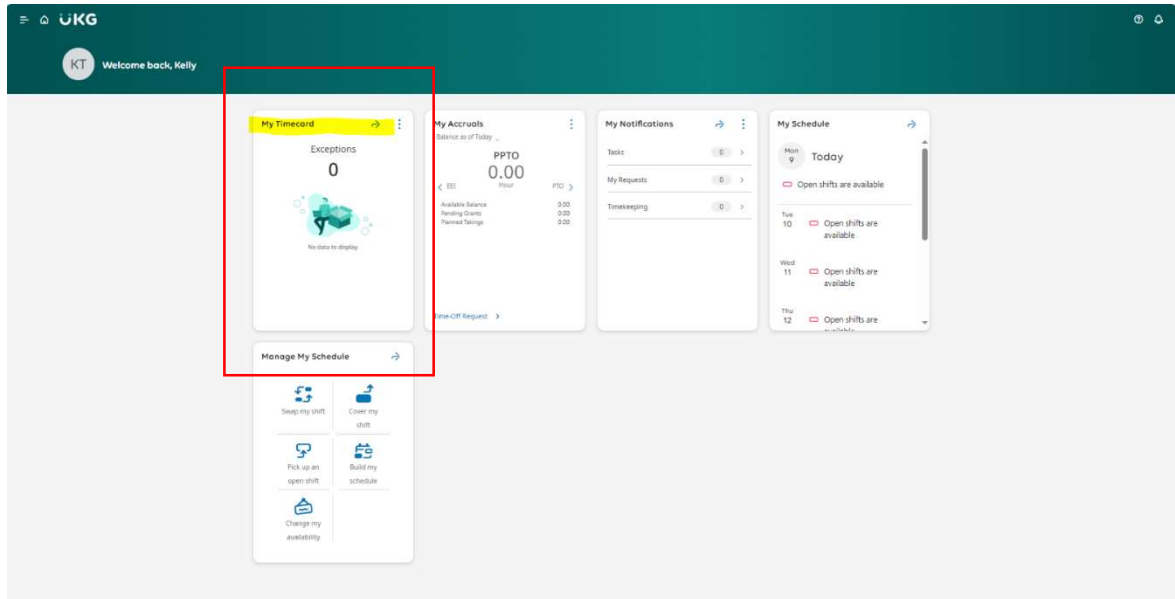
- **Option One**: Home screen > Timecard

- **Option Two:** Select the Hamburger Option on the top left corner, then select **My Timecard** under My Information.

Timecard Overview

The table view is a grid of columns and rows which displays each day for the selected timeframe in a row with columns.

The following information is visible on the timecard:

- Schedule and Absence
- In and Out punches
- Transfers
- Paycodes
- Hour totals by shift, daily, and time period

Important Information:

- Red Exclamation points indicate exceptions such as Late or Early in/out punches
- Red Boxes indicate a Missed Punch
- Employees should review their timecard for any missed errors or missed punches..

Step One: If there are <u>no</u> errors or corrections to be made to the timecard, select **Approve.**

- o *Any changes need to be reported to the department leader prior to **9am on Payroll Monday.***
- o *All associates are required to review and approve their timecard by **10 am on Payroll Monday**.*

Request to Work an Open Shift

Navigation: Home screen > My Schedule

- **Step One**: Select My Schedule from the Home screen.
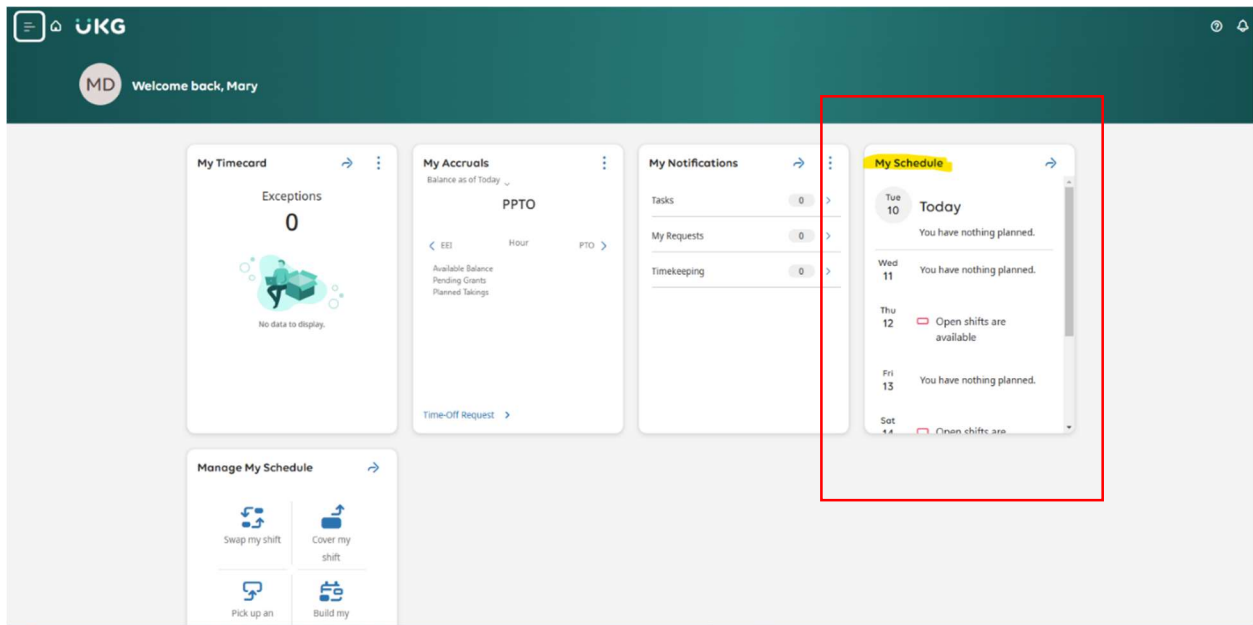
- **Step Two**: New Requests, then Open Shift.

Request to Work an Open Shift

Additional Information:

- Employees will only be able to see the shifts they are qualified to work through requests.
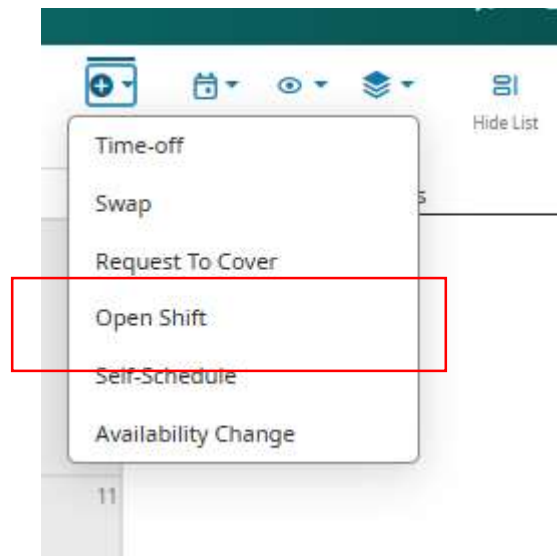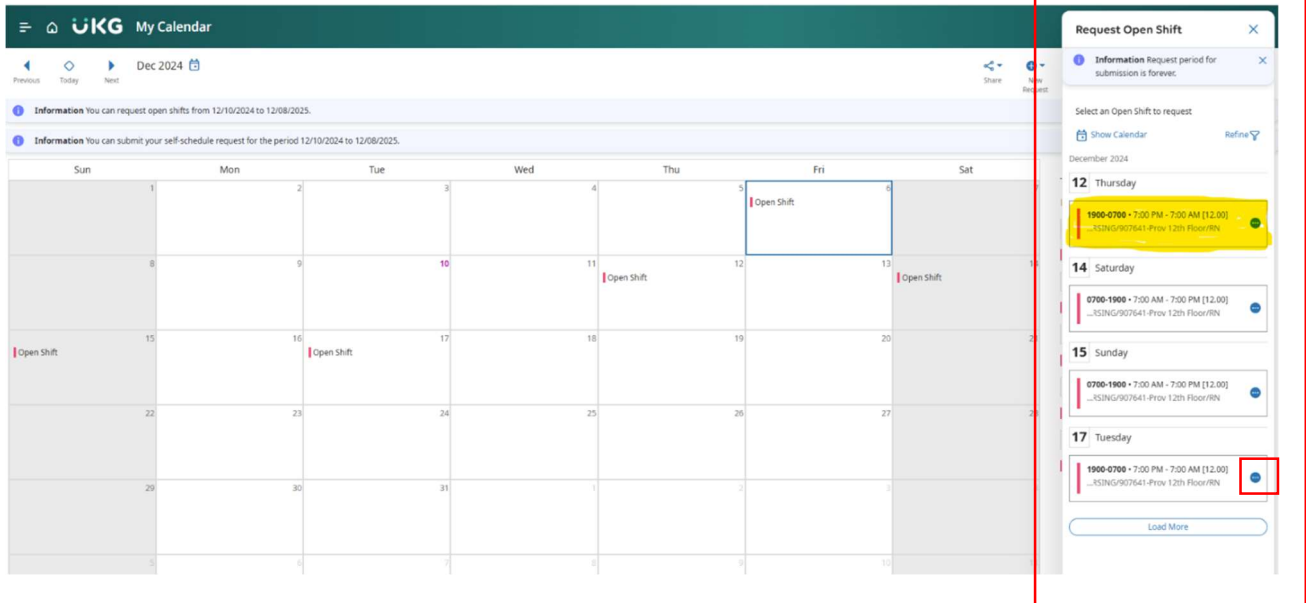- Depending on the organization's configuration, employees may be able to see other employees scheduled to work the day selected.
- Additional details about the shift include comments that can be viewed by selecting the ellipse sign to the right of the box.

Once the Request has been submitted:

- Blue information bar will indicate once the request has been submitted to the manager.
- Once approved or denied by the unit manager, employees will receive a notification in UKG. *Employees can review this information in their notifications.*
- If approved, the request will be displayed on the employee's schedule.
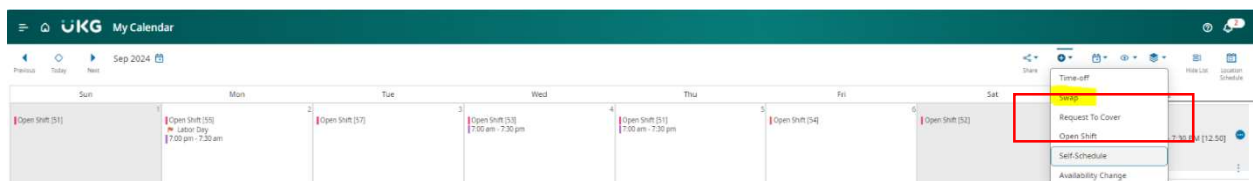
Request to Swap a Shift

Employees have <u>two</u> options to approve their timecard.

- **Option One**: Home screen> Manage My Schedule or

- **Option Two:** Home screen> My Schedule > View My Schedule
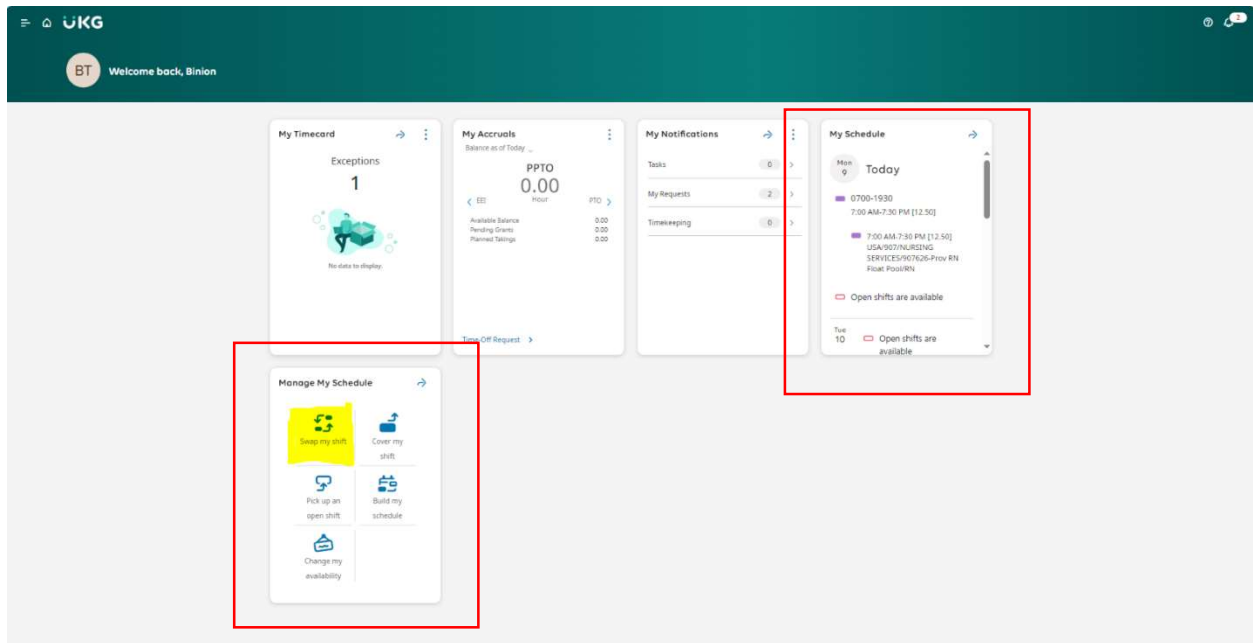
- o **Step One:** Select Request then Swap Shifts to open the Request Shift Swap panel.

- o **Step Two:** Select the New Request dropdown, then Swap Shift

o **Step Three:** The Request Shift Swap panel will display. Employees must choose the assignment associated with the shift they want to swap. *The employee's primary assignment will display by default.*
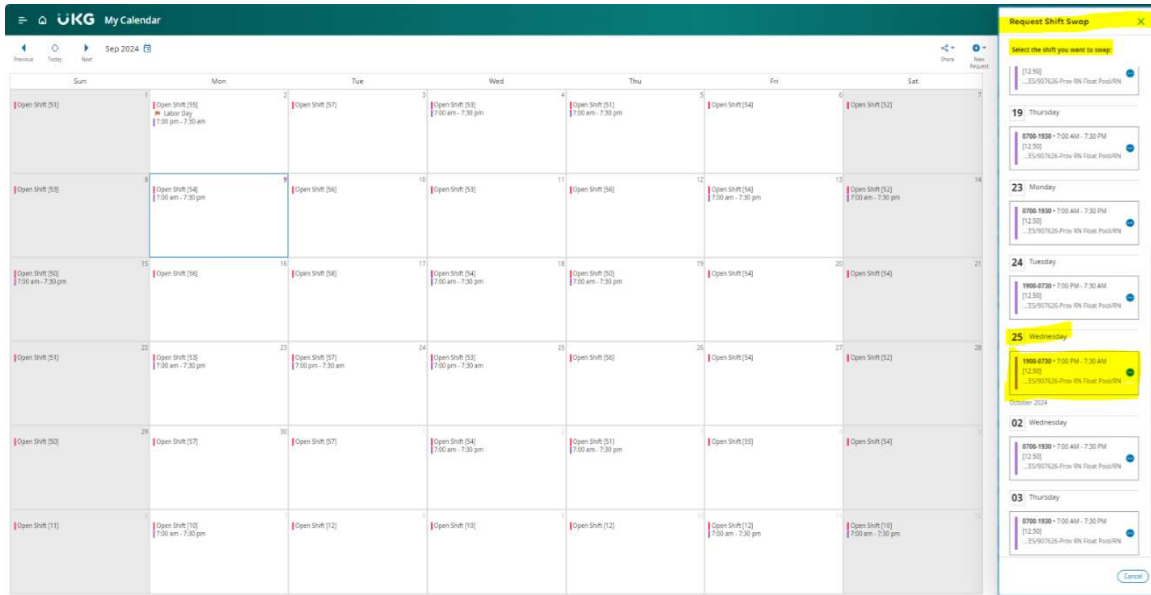
o **Step Four:** The Request Shift Swap panel refreshes to display summary information about the employee's shift. All the shifts that are available to swap will display, along with the job match and location.

  o Colleagues' shifts will display by date in ascending order. Select the colleague's shift employees would like to swap, or use one of these tools to filter the list of available shifts
  o Select Submit in the bottom right-hand corner.
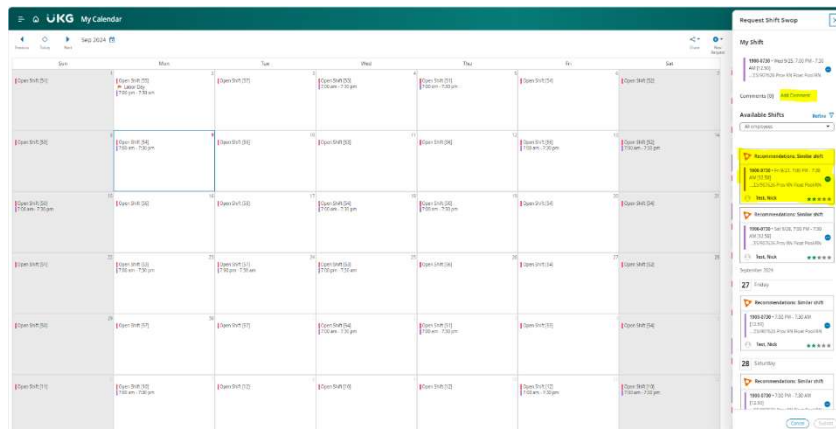
Additional Information:

- o Recommended shifts display an icon and describe the reason the shift is recommended *(the shift is often swapped on a particular day, for example)*.
  - o Click Submit.
- o The Request Shift Swap panel will also refresh to show a summary of the shift the employee offered to swap, the requested colleague's shift the employee wants to swap with, and any comments or notes employee(s) may have entered with the swap request.
  - o In the Request Shift Swap panel, click one of the following:
    - ▪ OK to submit the request.
    - ▪ Cancel Request to cancel the request.

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Request Availability Change

Employees can enter and request availability changes to let their managers know when they are not available to work.

Availability changes can be for a one-time event, for one or more days or they can be made to the long-term schedule.

*Note: A request to "Change my Availability" is not the same as a "Time Off Request".*

Employees have <u>two</u> options to submit requests for Changing their Availability:

- **Option One:** Home screen > Manage My Schedule *or*

    Home screen > Hamburger icon> My Information> My Calendar
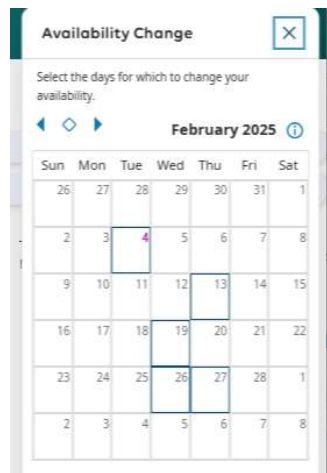
    o **Step One:** Select Change my Availability
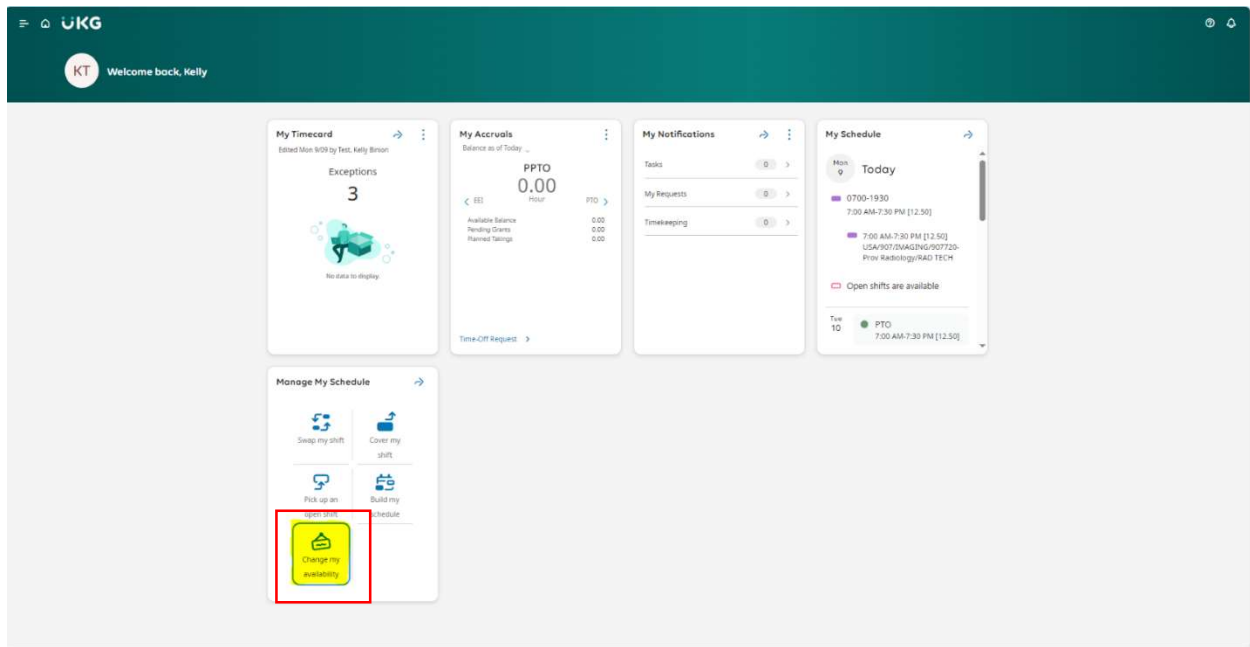
    o **Step Two:** Under New Request, select Availability Change.

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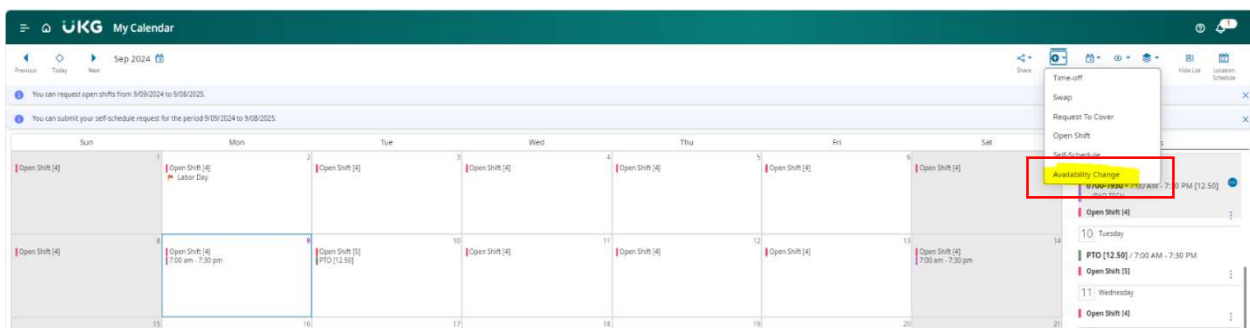
- o **Step Three:** A calendar will appear under *Availability Change*. Click the
  <u>day or days</u> on which to change the schedule.
  *To select two or more contiguous days, drag the mouse pointer over the
 days you want.*
    - ▪ Then, select Next at the bottom of the page.

- o **Step Four:** Set employee availability, as follows:
    - **Status**, select one of the following: **Unavailable**, **Available**,
    - Enter the **Start Time** or **End Time**.
    - Select one of the following:
        - ▪ **Merge with Previously Scheduled Availability** to maintain
          your previous availability while adding the changes.
        - ▪ **Replace Previously Scheduled Availability** to replace your
          previous availability entirely with the changes.
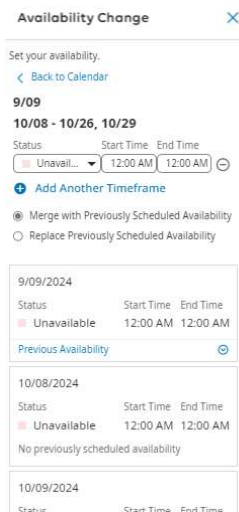
- Click **Review**.

○ **Step Five**: Employees can make the following changes *(if needed)* before submitting their request:

▪ **Toggle between Show List and Show Calendar:** Employees can review their requests in different formats and detail. Click on a day in the calendar to displays a summary of the availability configured for the day.

▪ **Edit Request:** Employees can submit or cancel the request. Additional days can be added using the calendar. Select Add Days in the list view to display the calendar.

▪ **Comments *(optional):* ** Employees can add comments and notes to the request.
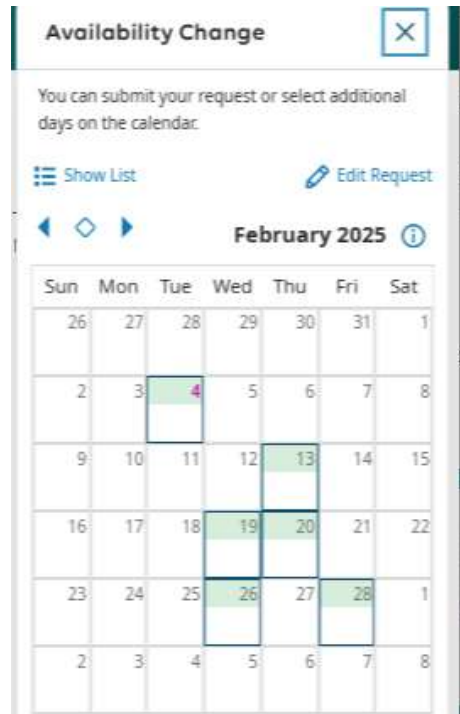
○ **Step Six:** Select Submit when done.