

How to Add and Edit On Call Schedules

Effective 10/2/2023, On Call schedules are managed through UKG Workforce Management. This job aid is intended to assist People Managers in creating and editing On Call schedules in the Schedule Planner.

Audience

People Managers.

Assumptions

This document assumes users manage On Call schedules.

Sections

Press Ctrl + Click to go directly to the section.

Adding On Call Schedule Patterns to Employee(s)

Accessing On Call Schedules in Schedule Planner

Viewing On Call Schedules through Schedule Planner

Swapping On Call Shifts

Removing On Call Pay Codes and Schedule Tags from employees

Removing an On Call Schedule Pattern from Employees

Adding On Call Schedule Patterns to Employee(s)

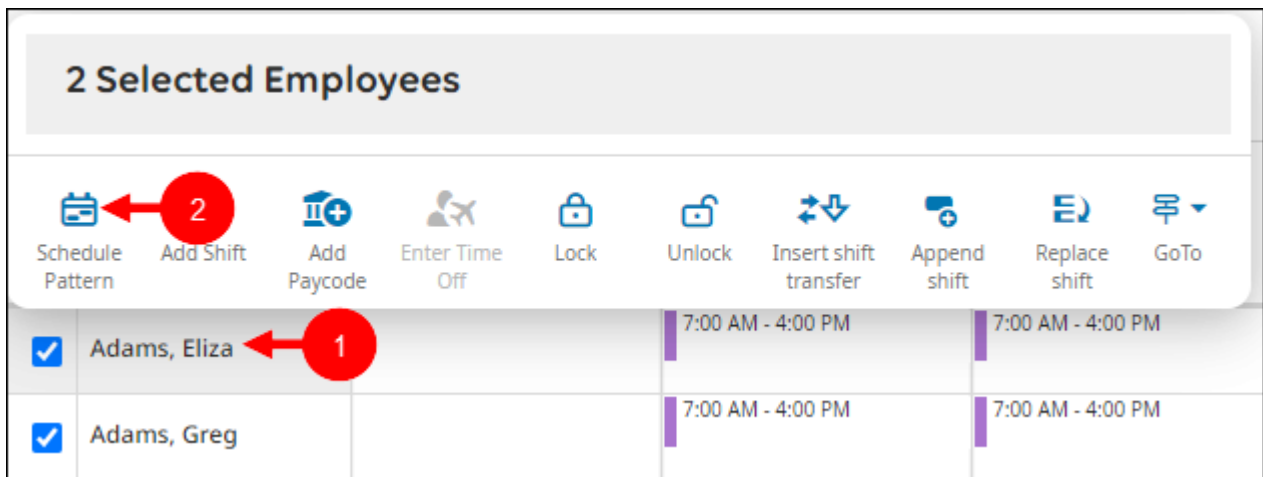
Schedule patterns allow you to fill out a schedule quickly in an organized way. Use a Pattern Template to assign a single week On Call Schedule Pattern or a multi-week On Call Schedule Pattern.

The On Call Schedule Pattern contains the pay code “US-On Call” to pay the employee, and a Schedule Tag (such as “WFD Primary OC”) allows you to quickly identify On Call shifts in the schedule.

Step 1: Select the employee(s) that require an On Call schedule

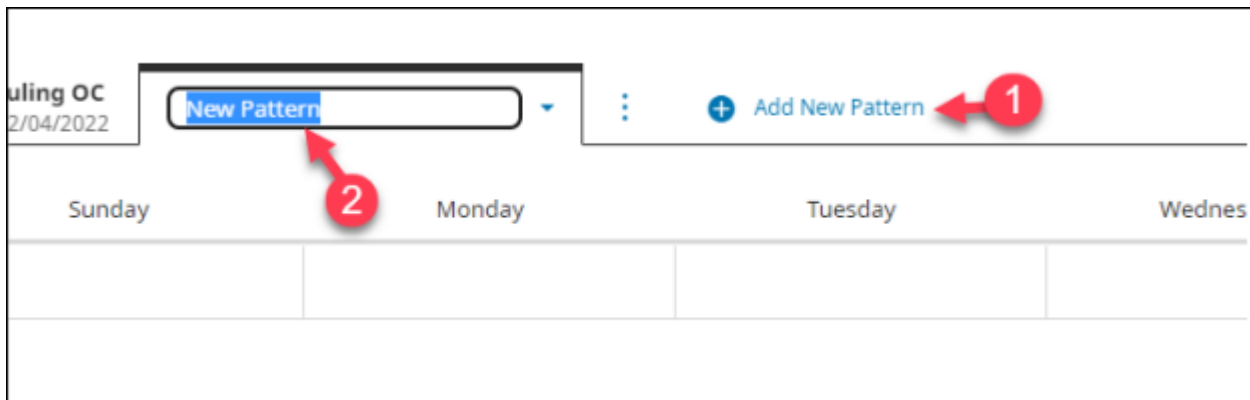
You can create a schedule pattern for a single employee, multiple employees, or a schedule group. There are two ways to open the Schedule Pattern. Start by looking for specific employees that have the same schedule pattern and then do one of the following:

1. Double-click an employee name. This will quickly open the Schedule Patterns window.
2. Right-click an employee name and from the option menu, select **Schedule Pattern**.



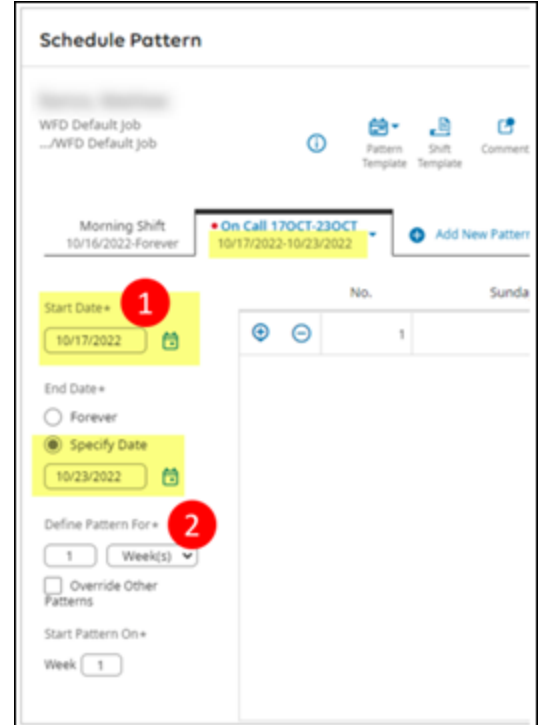
Step 2: Add a New Pattern

1. Click **Add New Pattern**.
2. Enter a new **Name** for the Schedule Pattern in the text box.



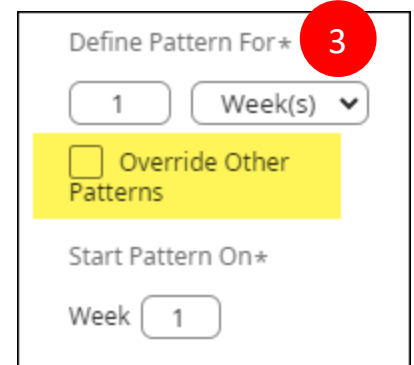
Step 3: Define the Pattern

1. Specify a **Start Date** and an **End Date** to indicate the effective period of the pattern.
 Example: For a single week's On Call Schedule Pattern, define the pattern from Monday – Sunday.
2. In the **Define Pattern For** field, specify the length of the cycle that repeats (in days or weeks).

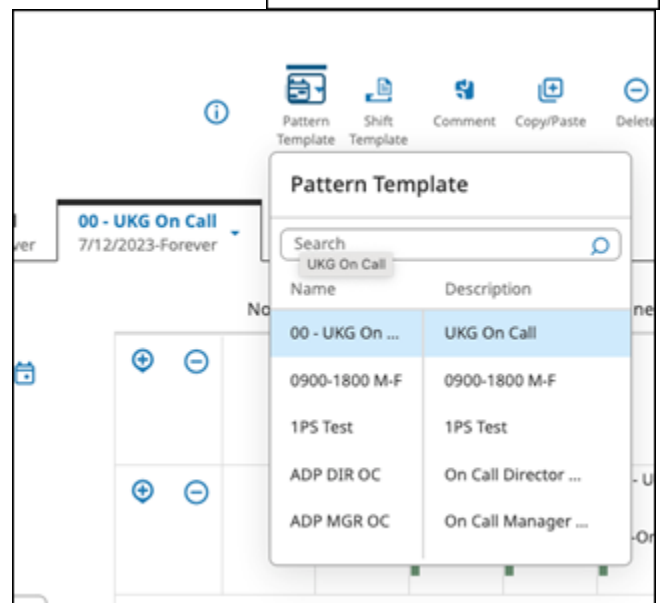


3. Deselect the **Override Other Patterns** check box. Otherwise, the employee's regular schedule pattern will be overwritten.

Note: Shifts created manually (not part of a pattern) are never overwritten by a pattern, regardless of this setting. However, you must ensure that any manually created shifts do not conflict with the pattern created shifts.



4. From the Schedule Pattern window, click **Pattern Template**, then select a template. Select the corresponding On Call Team pattern. If you are not scheduling On Call by team, you should select the generic **UKG On Call** pattern or



5. Confirm that the Pattern Template accurately displays in the Schedule Pattern, as shown below.

No.	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	WFD Primary OC US-On Call [1:00]	WFD Primary OC US-On Call [2:00]	WFD Primary OC US-On Call [2:00]	WFD Primary OC US-On Call [2:00]	WFD Primary OC US-On Call [2:00]	WFD Primary OC US-On Call [2:00]	WFD Primary OC US-On Call [2:00]

IMPORTANT: Confirm that **Override Other Patterns** is deselected. Otherwise, the employee’s regular schedule pattern will be overwritten.

Define Pattern For*

1 Week(s)

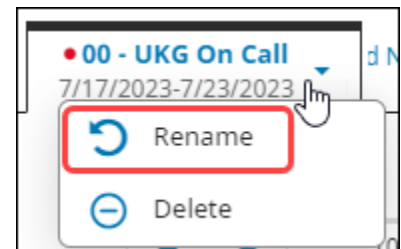
Override Other Patterns

Start Pattern On*

Week 1

6. Optionally, if the pattern name was reset, click the down arrow next to **Pattern Name** and select **Rename** to change the name of the Schedule Pattern.

7. Click **Apply**. The Schedule Pattern window closes and you are returned to the Schedule Planner. The On Call schedule pattern is applied to the selected employee(s) for the loaded period in the Schedule Planner.

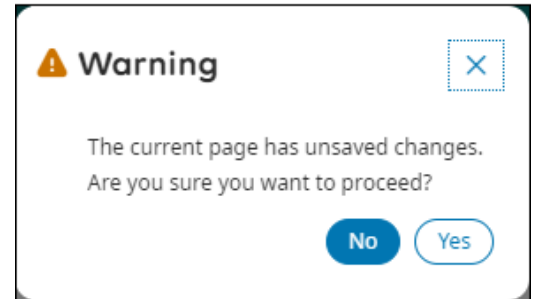
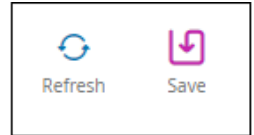



8. Review the employee(s) schedule carefully before saving to verify that the employee’s regular shift, On Call Pay Code, and On Call Schedule Tag display correctly on the appropriate days in the employee’s row.

View by Employee		7/19/2023 - 7/21/2023		All Home	Loaded	4:41 PM
Name [2/16]		Wed 7/19	Thu 7/20			
<input checked="" type="checkbox"/>	Adams, Eliza	US-On Call [2:00] 7:00 AM - 4:00 PM WFD Primary OC	US-On Call [2:00] 7:00 AM - 4:00 PM WFD Primary OC			
<input checked="" type="checkbox"/>	Adams, Greg	US-On Call [2:00] 7:00 AM - 4:00 PM WFD Primary OC	US-On Call [2:00] 7:00 AM - 4:00 PM WFD Primary OC			

Note: If the pattern does not look correct, select **Refresh**, then click **Yes** to confirm.

Return to [Step 1](#) to create the pattern again.

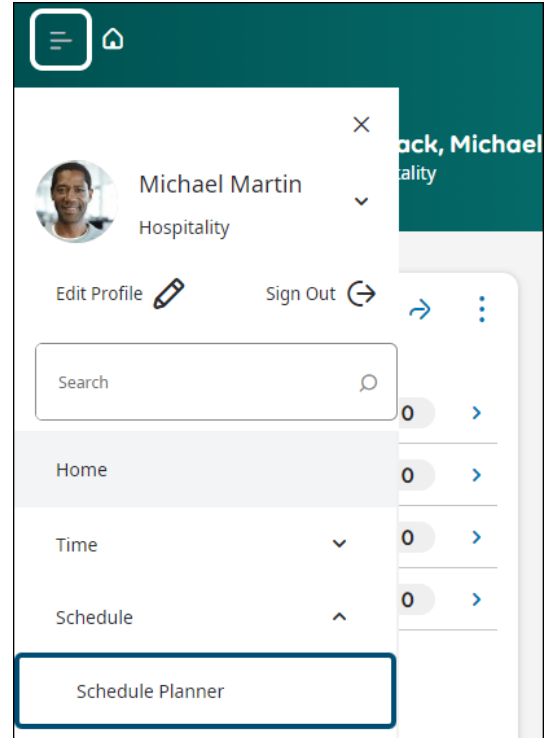


9. Click **Save** . The pattern is rolled out for the entire duration based on the pattern Start Date and End Date.

Accessing On Call Schedules in Schedule Planner

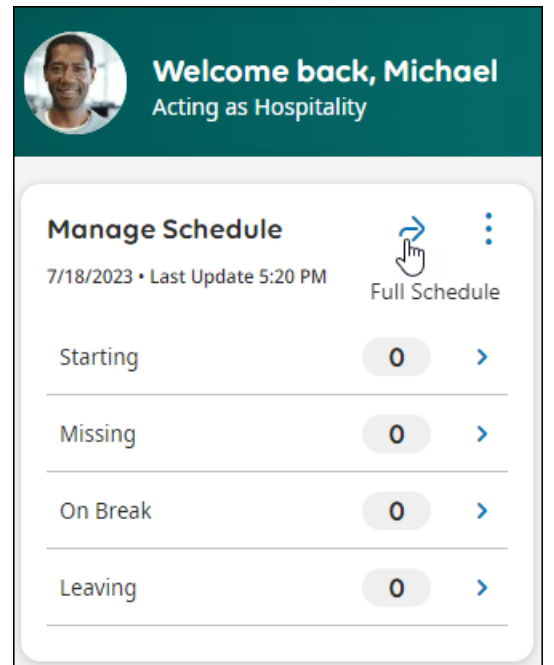
Option 1 – From the Main Menu:



1. From the Home Page > Main Menu > **Schedule**.
2. Click **Schedule Planner**.

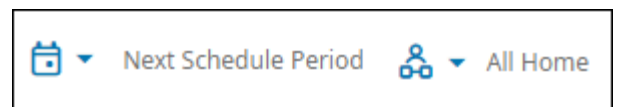


Option 2 – From the My Schedule tile:

1. From the Home Page > **Manage Schedule** tile.
2. Click the arrow at the top-right side of the tile to navigate to the Schedule Planner.



3. From the Schedule Planner, click **Select Timeframe** , select a relative period or choose **Select Range** and enter a specific **Start Date** and **End Date**.
4. Click **Select Hyperfind**  and choose a group of employees you want to view.



Viewing On Call Schedules through Schedule Planner

There are two ways to view On Call schedules within Schedule Planner.

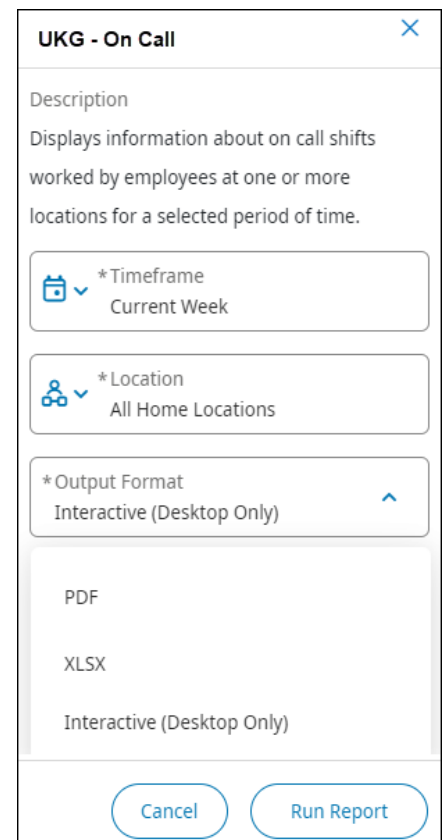
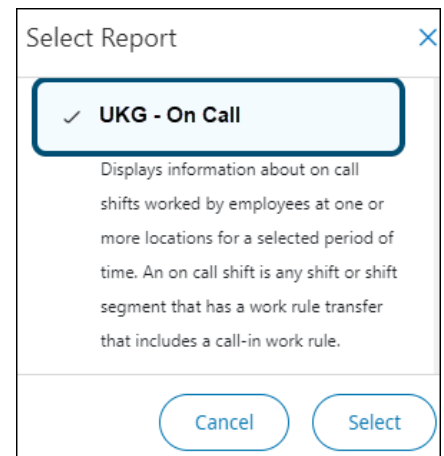
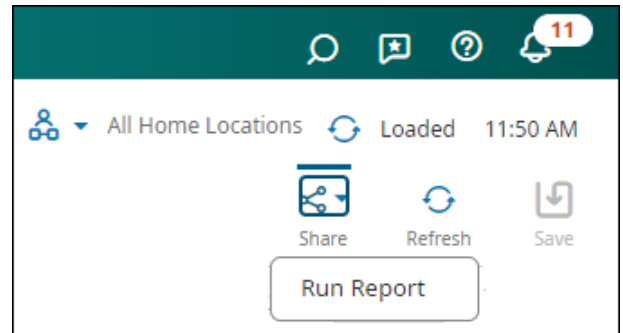
Option 1 – Share:

Using the Share function in the Schedule Planner, you can quickly run reports such as the UKG -On Call Report directly from the Schedule Planner.

1. From the Schedule Planner, select **Share > Run Report**. The Select Report panel opens.

2. From the Select Report panel, choose **UKG - On Call**, then click **Select**.

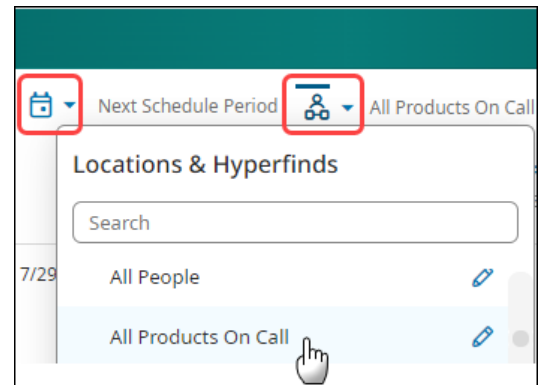
3. Select the report **Timeframe**.
4. Select the **Location** you want to view.
5. Select the type of report you want to generate from **Output Format**.
6. Select **Run Report**.



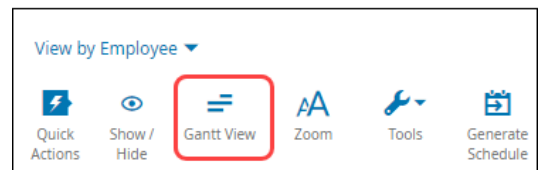
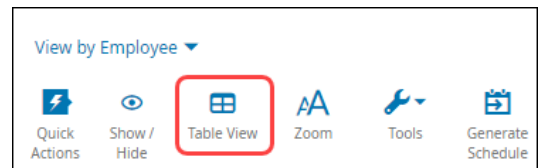
Option 2 – Hyperfind:

Using the On Call Hyperfind selection in the Schedule Planner, you can view employees with On Call schedules in the Schedule Planner grid.

1. From the Schedule Planner, select **Timeframe**, then select a relative period or choose Select Range.
2. From **Select Hyperfind**, choose **All Products On Call**.



3. From the action menu, select **Table View** or **Gantt View**.



Note: On Call shifts will appear differently depending on the schedule view you choose.

Table View

An employee's On Call shift is identified with a Schedule Tag indicator below the On Call (OC) shift name.

Name [0/16] ↓		Wed 7/19	Thu 7/20
<input type="checkbox"/>	Adams, Eliza	US-On Call [2:00] 7:00 AM - 4:00 PM WFD Primary OC	US-On Call [2:00] 7:00 AM - 4:00 PM WFD Primary OC
<input type="checkbox"/>	Adams, Greg	US-On Call [2:00] 7:00 AM - 4:00 PM WFD Primary OC	US-On Call [2:00] 7:00 AM - 4:00 PM WFD Primary OC

Gantt View

An employee's On Call shift is identified with a colored-bar indicator above the On Call (OC) shift name.

Name [0/16]		Wed 7/19																
		7A	8A	9A	10A	11A	12P	1P	2P	3P	4P	5P	6P	7P	8P	9P	10P	11P
<input type="checkbox"/>	Adams, Eliza	7:00 AM - 4:00 PM												US-O...	WFD Primary OC			
<input type="checkbox"/>	Adams, Greg	7:00 AM - 4:00 PM												US-O...	WFD Primary OC			

Swapping On Call Shifts


When an employee swaps their On Call shift(s) with another employee, the manager can change On Call Schedule by:

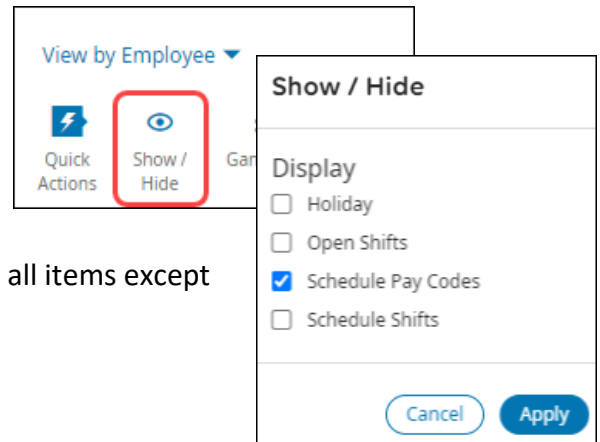
- [Removing the On Call Pay Codes and Schedule Tags](#) from the original employee.
- Then [Adding On Call Schedule Patterns](#) to the recipient employee.

If the employee is leaving On Call for an extended period, the manager can [End-date or delete an employee's On Call Schedule Pattern](#).

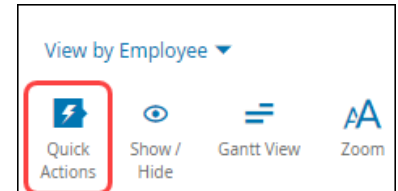
Removing On Call Pay Codes and Schedule Tags from employees


Follow the steps below when you need to remove the original employee's On Call Pay Codes and Schedule Tags.

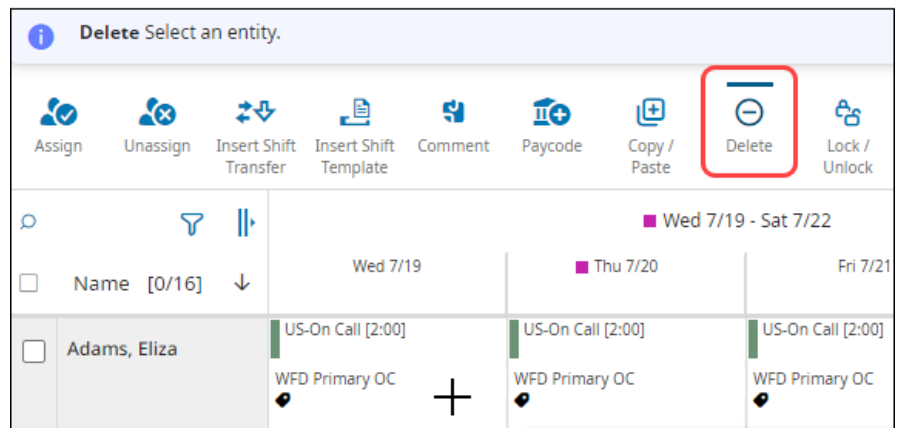
1. From the Schedule Planner, select **Timeframe**  and choose the relative period or range of dates that contains the original employee's On Call Schedule.
2. From the action menu, click **Show/Hide**. The Show/Hide panel opens.
3. From the Show/Hide panel in the **Display** category, deselect all items except **Schedule Pay Codes** and click **Apply**.



4. Expand **Quick Actions**.
5. Select **Delete**. The cursor will change to a crosshair.




6. Click the On Call Pay Codes and On Call (OC) Schedule Tags you want to delete from the employee's row.
7. Click **Save**  to save the edits.
8. Refer to the section, [Adding On Call Schedule Pattern to Employees](#) to add an On Call Schedule Pattern to the recipient employee who is taking over the On Call shifts.




Removing an On Call Schedule Pattern from Employees

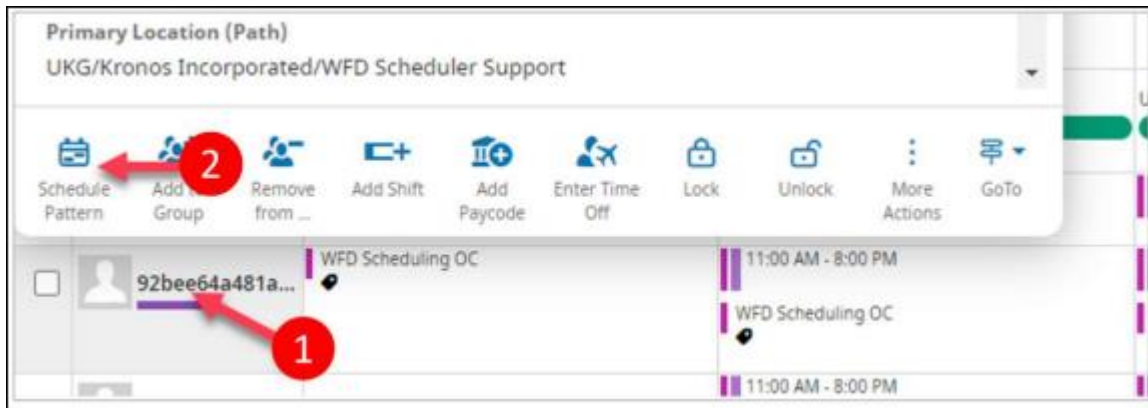
When you need to delete an On Call Schedule Pattern for a single week, use these steps to end-date the On Call Schedule Pattern that was assigned to the original employee.

Step 1: Select the employee

1. From the Schedule Planner, click **Timeframe**  and select the relative period or choose **Select Range** to enter a specific Start Date and End Date that contains the original employee's On Call Schedule.

Note: If you do not see the employee's On Call Schedule pattern, change the **Timeframe**  in the Schedule Planner to the relative period or range of date when the Schedule Pattern was effective.

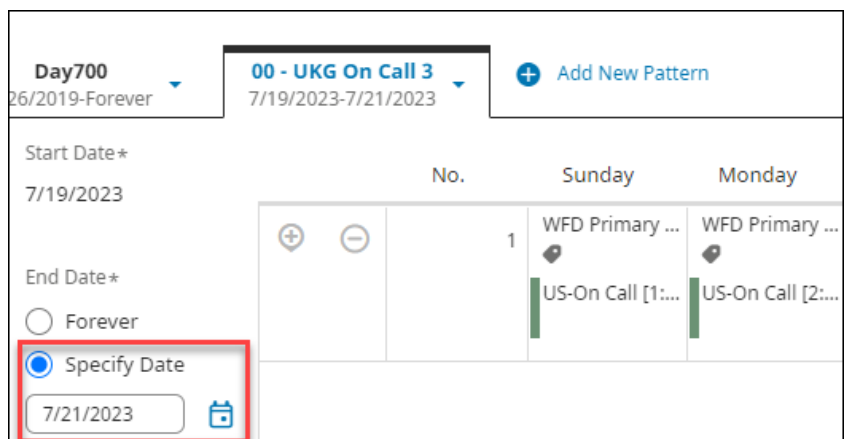
2. Right-click the employee's name.
3. Select **Schedule Pattern**.



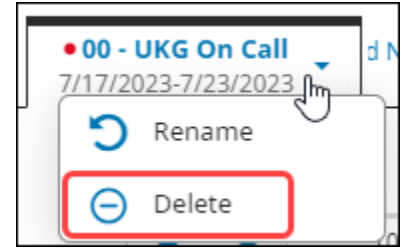
Step 2: End-date or delete the On Call Schedule Pattern


1. Click the On Call Schedule Pattern tab that needs to be modified.
2. Is the pattern Start Date in the future?
 - **No.** If any portion of the employee's On Call Schedule has already started, then select **Specify Date** and in the End Date field, enter today's date or a future date.

Note: If the Schedule Pattern is partially in the past the pattern can only be end-dated starting today or on a future date.



- **Yes.** If the employee's On Call Schedule Pattern starts on a future date (such as a 1-week Schedule Pattern), then click the down arrow in the Pattern Name tab and select **Delete** to remove the entire On Call Schedule pattern from the employee.



3. Click **Apply**. The Schedule Pattern window closes, and you are returned to the Schedule Planner. The On Call schedule pattern is applied to the selected employee for the loaded period in the Schedule Planner.
4. Review the employee(s) schedule carefully before saving to verify that the employee's regular shift, On Call Pay Code, and On Call Schedule Tag display correctly on the appropriate days in the employee's row.
5. Click **Save** .

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