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Add a paycode





Note: You cannot add paycodes on signed-off or locked days.

Note: For employees who are signed off and have a non-midnight day divide, you can add duration paycodes on the partially signed-off day if the paycode start time occurs in the open period following the signed-off period. Non-duration paycodes cannot be added on a partially signed-off day.

You can add a paycode or you can convert a shift to a paycode. In both cases, similar options are available.

Convert a shift to a paycode

Use the **Paycode**  Quick Action to insert default values for a selected paycode, with start and end time that corresponds to the shift you replace:

1. Click **Quick Actions**  to open the Quick Action action bar.
2. Click **Paycode** .
3. Select the paycode type from the menu.
4. Click the shift you want to replace.
 - The paycode automatically replaces the entire duration of the shift with a paycode of the same duration.
 - The system automatically creates an open (unassigned) shift with the same start and end time as the replaced shift. If a segment tag is configured for the paycode, the segment tag is automatically added to all the segments — except for breaks — of the open shift. The segment tag alerts you that the open shift was created for a particular reason — such as vacation or sick leave — and needs to be filled immediately.
5. Click additional shifts as needed to replace them with the same paycode.
6. Click **Paycode**  again to deactivate the quick action.
7. **Save**  your changes.

Note: You **cannot** replace an empty cell, a shift segment, a locked shift, or a shift during a locked or signed-off day.


Add paycode on multi-shift days using Quick Actions




If your system is configured to do so, you can use the **Apply To** option when adding paycodes with Quick Actions. This option enables you to specify whether to apply a paycode to the whole day or to a selected shift when there are multiple shifts on a day.

Note: The **Apply To** option is only available when the **Shift-based Pay Code Edit Support for Multiple Shift Days** feature switch is enabled.





Note: This functionality is released with limited availability. For more information, contact your UKG Representative.

To apply a paycode to the whole day:


1. Click **Quick Actions**  to open the Quick Action action bar.


2. Click **Paycode** .
3. In **Apply To**, select **Whole Day**.
4. Select the paycode type from the menu.
5. If you click a schedule cell without selecting a shift:
 - The paycode edit amount will be the sum of all the shifts on the day.
 - The paycode edit start time will be the start time of the first shift on the day.
 - All shifts on the day will be overridden and changed to open shifts.
6. If you select a specific shift in a schedule cell:
 - The paycode edit amount will be the sum of all the shifts on the day.
 - The paycode edit start time will be the start time of the selected shift.
 - All shifts on the day will be overridden and changed to open shifts.
7. Click additional schedule cells or shifts as needed to replace them with the same paycode.
8. Click **Paycode**  again to deactivate the quick action.
9. **Save**  your changes.

To apply a paycode to a specific shift:

1. Click **Quick Actions**  to open the Quick Action action bar.
2. Click **Paycode** .
3. In **Apply To**, select **Selected Shift**.
4. Select the paycode type from the menu.
5. Click a shift.
 - The paycode edit amount will be based on the selected shift.
 - The paycode edit start time will be the start time of the selected shift.
 - The selected shift will be overridden and changed to an open shift.
 - All other shifts are left intact.
6. Click additional shifts as needed to replace them with the same paycode.
7. Click **Paycode**  again to deactivate the quick action.
8. **Save**  your changes.

Add a paycode from a glance

Use the **Paycode**  action available from different glances to access to all options for creating a paycode.

1. Right-click an employee, a shift, or a schedule cell. The corresponding glance appears.
2. Click **Add Paycode** . The Add Paycode panel appears.
3. Depending on which entity you first right-clicked, different options are available. Default options appropriate to the context are provided. Modify any default option as required:

- **Assignment** — Displays only for employees who have multiple assignments.

Select the assignment for which the paycode is to be applied.

The employee's default assignment — which is the highest ranked assignment that you have access to through your organizational set in your Employee Group and based on the selected location — is pre-selected when adding a paycode. However, if you add a paycode that overrides a scheduled shift, the paycode is automatically applied to the assignment associated with the shift.

When editing a paycode, the existing assignment associated with the shift is pre-selected.

- **Effective Date** — Select the **Effective Date** to define when to apply the paycode.
- **Apply To** — If your system is configured to do so, you can specify whether to apply a paycode to the **Whole Day** or to a **Selected Shift** when there are multiple shifts on a day.

Note: The **Apply To** option is only available when the **Shift-based Pay Code Edit Support for Multiple Shift Days** feature switch is enabled.

Note: This functionality is released with limited availability. For more information, contact your UKG Representative.

Note: If **Repeat For** is set to more than 1 day, **Whole Day** is selected by default and is disabled.

If **Whole Day** is selected and a specific shift was not pre-selected:

- The paycode edit amount will be the sum of all the shifts on the day.
- The paycode start time will be the start time of the first shift on the day.
- All shifts on the day will be overridden and changed to open shifts.

If **Whole Day** is selected and a specific shift was pre-selected:

- The paycode edit amount will be the sum of all the shifts on the day.
- The paycode start time will be the start time of the selected shift.
- All shifts on the day will be overridden and changed to open shifts.
- If you select **Override Shift > Partial Shift**, all intersected portions of shifts will be overridden. If you select **Override Shift > Whole Shift**, all shifts are overridden. However, if the Duration is set to **Full Schedule Day**, all shifts on the day are overridden regardless of whether **Override Shift > Partial Shift** or **Override Shift > Whole Shift** is selected.

If **Selected Shift** is selected:

- The paycode edit amount will be the amount of the selected shift.

In the Add Paycode panel, all shifts on the day are listed. You can select a different shift if desired.

- The paycode start time will be the start time of the selected shift.
- The selected shift will be overridden and changed to an open shift. All other shifts are left intact.
- If you select **Override Shift > Partial Shift**, only the portion of the paycode edit that intersects the selected shift will be overridden. If there is no intersection, no override occurs.
- **Paycode type** — Select the **Paycode** type. There are two basic types:
 - Time-based paycodes are based on a value for time (duration). This time may be interpreted or converted to an amount of money at some point, but the base variable is always time, not money. Example: An employee misses a scheduled shift because of illness. A time based paycode ties the amount of pay to the number of hours of work missed.

- Money-based paycodes are defined as an amount of money. This amount is not tied to time. Example: An employee receives a fixed amount of money as a bonus.

The following terms may apply:

- Symbolic amounts can be used to define time values based on shift length.
- A cascading paycode is in a dependent relationship with another paycode. It can only appear when that paycode is first applied. Typically this is when there are inadequate accruals for given paycode. The missing accruals are then removed from the accruals for the cascading paycode.
- **Start time** — Enter the **Start Time** to define the time of day.

Note: For money-based paycodes, this setting only controls where the paycode appears in the Gantt view.

- **Time-based paycodes** — You must define a **Duration**. Selecting a symbolic value tells the system to automatically calculate the duration.
 - **Full or Half Schedule Day** — The sum or half of the sum of all shifts during the day. Selectable even if the employee has no shifts; if so, the amount is 0:00. Full Schedule Day accounts for breaks, shift differentials, and overtime.
 - **Full or Half Pattern Day** — The sum or half of the sum of all shifts of all patterns associated with the employee on that day. The Amount dynamically updates after changes to the pattern. Selectable even if the employee is not associated with a pattern; if so, the amount is 0:00.
 - **Full or Half Contract Day** — The sum or half of the sum of all shifts of all contract groups associated with the employee. The Amount dynamically updates after changes to the contract group. Selectable even if the employee is not associated with a contract group; if so, the amount is 0:00. Full Contract Day accounts for breaks, shift differentials, and overtime.

Specify Amount allows you to enter a duration as **Amount Hours** (hh:mm).

- **Money based paycodes** — Specify the **Amount** of pay.
- **Define overrides**

- If the paycode edit replaces a shift, select **Override shift**. Example: Set a Vacation paycode to override a shift.
- You can override a whole shift or a partial shift.

Whole Shift removes the shift and replaces it with the paycode.

Partial Shift creates a segment within the existing shift or segment and replaces that part of the shift with the paycode.

- **Note:** If an employee has more than one scheduled shift during a day, a paycode edit overrides only the first shift that day. To change this default override, your system administrator can configure paycodes to override all shifts on a day.
- If **Override Shift** is selected, **Create Open Shift** is also selected by default.

When you apply a paycode with **Create Open Shift** selected, the system creates an open shift with characteristics identical to the shift or the portion of a shift that was replaced by the paycode. If you do not want the system to create an open shift clear the **Create Open Shift** option.

- If you want to apply the paycode in addition to the shift, clear the **Override Shift** option.

Override Shift is selected by default. Your system administrator can set this option to be cleared by default. To add a paycode to a day containing a shift, do **not** override the shift.

4. Select **Assign Breaks** to have breaks automatically added in the shift based on the employee's configured Automated Break Placement rules.

Note: If the **Adjust Breaks Automatically** setting is selected in the Schedule Planner configuration (or, if using the Staffing Dashboard, in the Staffing Dashboard configuration), the **Assign Breaks** option in the Add Paycode slider is selected by default.

5. (Optional) Enter the number of consecutive days to **Repeat** the paycode. This value is in continuous days and does not skip holidays or weekends.

- **Custom unavailability**

For absence paycodes that have been configured to affect an employee's scheduling availability, two unavailability options display that enable you to customize the start time and duration of the employee's unavailability.

Note: These options are available only when the pay code definition configuration has the **Edit affects availability to be scheduled** option selected in **Application Setup > Pay Policies > Pay Code Definition**.

- **Unavailable Start Time** — Displays the time that the employee's unavailability begins.

If there is a scheduled shift on the day, the default value is the shift Start Time. If there is no scheduled shift on the day, the default value is 12:00 AM.

To specify an **Unavailable Start Time** other than the default, enter a value from 00:00 to 24:00.

For unscheduled days, when in the Gantt View viewing a 48-hour period, if you click on a specific time in the schedule cell, the Add Paycode panel displays that selected time as the paycode **Start Time** and the **Unavailability Start Time**.

- **Unavailable Amount** — Displays the duration (HHH:mm) from the **Unavailable Start Time** that the employee is unavailable for scheduling.

The default value is 24:00 hours.

To specify an **Unavailable Amount** other than the default, enter a value from 0 to 168 hours.


Availability Restoration and Overrides

When you delete an absence paycode for an employee, the unavailability that was created with the **Unavailable Start Time** and **Unavailable Amount** options is removed and the employee's availability that was in place when the paycode was created is restored.

Example

However, if an availability override was done on the affected dates after the paycode was created, then the employee's previous availability that was in place when the paycode was created is not restored and the availability override is retained.

- **Comments and notes**

If you need to include some additional information, you can create a comment or a note. Click  **Comment** to choose a configured comment from the list that appears and add it to the Paycode. Type in the **Note** text box to add a personalized note to the comment.


- In **Transfers**, select:

- **Business Structure** — Select **New**, then select or search for a location transfer from the Business Structure. Access to perform transfers in the Business Structure must be enabled.

- **Payer Cost Center** — Select **New**, then select or search for and select a cost center. Access to perform a Cost Center transfer must be enabled.

- **Labor Category** — Select the labor category that you want to transfer, select or search for the labor category entry. Access to perform a Cost Center transfer must be enabled.

4. Click **Apply**.

5. **Save**  your changes.

Required units

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