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Add a shift

> **Note:** You cannot add shifts on signed-off or locked days.

> **Note:** For employees who are signed off and have a non-midnight day divide, you can add shifts on the partially signed-off day if the shift start time occurs in the open period following the signed-off period.

Create a shift by typing (table view only)

Click a cell in the schedule and enter one of the following:

- The name of a shift template. For example, if your site has a shift template called day12, click the cell and type "day12".
- A start time and an end time separated by a hyphen. Use standard time-of-day format. For example, click the cell and type "8a-4p" to create a shift from 8:00 in the morning to 4:00 in the afternoon.

Create a shift from a template

1. Right-click a date cell in the schedule. The Employee glance appears.
2. Click **Insert Shift Template** 📄▷. The Insert Shift Template panel opens.
3. For employees with multiple assignments: In **Assignment**, select the assignment for which the shift template is to be added. 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.
4. To have the system automatically assign breaks to the shifts based on employees' configured Automated Break Placement rules, select **Assign Breaks**. Shift breaks are updated according to the work rule for each assigned employee. Breaks for open shifts are updated according to the transferred work rule.

   > **Note:** When the **Adjust breaks automatically for Quick Actions and glances** setting is selected in the Schedule Planner configuration (or, if using the Staffing Dashboard, in the Staffing Dashboard configuration), the **Assign Breaks** option is selected by default.

5. Select the shift template from the list. You can also use the **Search** box to locate the appropriate shift template.

6. Click **Save** ⤓ when finished.

> **Note:** A shift created from a template is not linked to the template. If you modify the template, existing shifts do not change. Only shifts created after the template modification are affected. Similarly, if you modify a shift created from a template, the template is not affected.

Create a shift with all options available

Right-click a date cell in the schedule, then click **Add Shift** 🗂 in the Employee glance. The Add Shift panel for the selected employee appears so you can modify the shift label, use a template, add or modify segments, repeat a shift and more.

Modify entire shift

Select **More** near the top of the panel to see available actions for modifying the shift as a whole:

- **Assignment** displays only for employees who have multiple assignments. Select the assignment for which the shift is to be added.

  When you edit an existing shift and select a new assignment, the regular segment of the shift becomes a transfer. If the original shift had a transfer segment to the job of the newly selected assignment, that segment becomes a regular segment.

- **Use Template** sets the shift parameters to match the shift template you select.

  When you select an on-call work rule, all segments on the shift must have an on-call work rule specified with the same call-in rule.

- **Change Shift Label** enables you to modify the label that is displayed on the shift in the schedule. Shift labels are displayed when **Shift Display > Shift Label** is selected in the Show/Hide panel.

  > **Note:** Shift labels do **not** change automatically if you edit a shift. **Example**: If the shift label is 7a3p, and you change the end time to 4:00pm, the label is removed and is replaced by the shift start and end times.

  > **Note:** The following behavior applies only if your system has been configured to synchronize shift labels. This functionality is only available to a limited set of customers. For more information, contact your UKG representative.

  - When you add or modify a label on a shift, then click **Apply**:

- The label is saved and displays on the shift if the new label matches an existing shift template label, and the segment start and end times of the shift template match those of the segments in the shift.

- The label is saved and displays on the shift if there is no existing shift template with that label.

- An error message displays if the new label matches an existing shift template label but the segments in the shift do not match those in the shift template.

  Note: If there is no label specified in the shift template definition, the system uses the existing shift template name for comparison with new and modified shift labels.

  - If you delete a shift label, no label displays on the shift unless you manually enter a new label or reapply a new shift template.

**Adjust start and end times of shift segments**

Use the shift panel graphic to adjust the start and end times of any segment of the shift.

When you modify a shift, the shift label is removed from the shift if you change the shift start or end time, or if you change any shift segment times that do not affect the overall shift start and end time. The label is removed when you click **Apply** in the Edit Shift panel.

Note: This behavior only applies if your system has been configured to synchronize shift labels. This functionality is only available to a limited set of customers. For more information, contact your UKG representative.

If your system has not been configured to synchronize shift labels, the shift label is only removed when you adjust the start time of the first segment or the end time of the last segment of the shift.

Shift labels are not removed when you add job levels, labor levels, work rule transfers, segment tags, or skills and certifications to a shift.
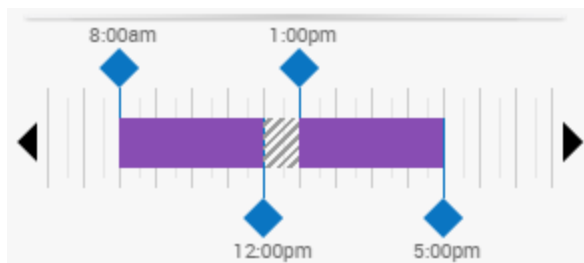
- Drag the blue diamond left or right to adjust the start or end time of a segment.

- If the start or end time you need is not visible (because it is beyond the left or right edge of the panel) select the left caret ◀ or right caret ▶ to bring the desired time into view.

- Drag the break ▨ left or right to reposition it without changing its duration.

Automatically adjust breaks

In the Shift Editor

> **Note:** To use this functionality in the Shift Editor, the **Adjust breaks automatically** setting must be selected in the Schedule Planner configuration. If using the Staffing Dashboard, this setting must be selected in the Staffing Dashboard configuration.

When you create, modify, or move shifts, the system automatically adjusts the break within the shift to comply with the adjusted shift length or work rule transfer. Breaks are added or adjusted based on Automated Break Placement rules that are configured in employees' default work rules, such as required break length, time without a break, and coverage.

Automatic break adjustments apply to shifts created or modified in the Schedule and in the Shift Editor. The shift is visually updated in the Schedule to show the modified breaks.

In the Schedule, breaks are automatically added or adjusted when you:

- Resize a shift by dragging the start time or end time.

- Drag and drop a shift to a different employee.

- Drag and drop a shift to a different day.

- Right-click a shift and select **Assign Breaks** in the glance.

In the Shift Editor, breaks are automatically added or adjusted when you:

- Select **Assign Breaks** when creating or modifying a shift. A break is automatically added in the shift based on configured Automated Break Placement rules when you click **Apply**.

  > **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 Shift slider is selected by default.

Assign Breaks may break one or more shift segments in two. In addition, when **Assign Breaks** is selected, if you already have a break defined or if you create manual breaks, a message displays that those breaks will be overwritten.

> **Note:**
> Moving or resizing breaks directly in the Schedule Planner overrides the Automated Break Placement rules that are applied when **Assign Breaks** is selected in the Shift Editor.

In Quick Actions and Glances

> **Note:** To use this functionality in Quick Actions and glances, the **Adjust breaks automatically for Quick Actions and glances** setting must be selected in the Schedule Planner configuration. If using the Staffing Dashboard, this setting must be selected in the Staffing Dashboard configuration.

When you use Quick Actions or shift glances to insert a shift template or perform actions on shifts (assign, unassign, copy, paste, or swap), the system automatically adjusts the break within the shift to comply with the adjusted shift length or work rule transfer. Breaks are added or adjusted based on Automated Break Placement rules that are configured in employees' default work rules, such as required break length, time without a break, and coverage. The shift is visually updated in the Schedule to show the modified breaks.

In the Insert Shift Template slider

In the Insert Shift Template slider, breaks are automatically added or adjusted when you select **Assign Breaks**. A break is automatically added in the shift based on configured Automated Break Placement rules when you click **Apply**.

Assign Breaks may break one or more shift segments in two. In addition, when **Assign Breaks** is selected, if you already have a break defined or if you create manual breaks, a message displays that those breaks will be overwritten.

> **Note:** If the **Adjust breaks automatically for Quick Actions and glances** 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 Insert Shift Template slider is selected by default.

> **Caution:** When a shift starts with a break segment followed by a transfer segment, and you select Assign Breaks to assign a break to the transfer segment, the break that is assigned follows the default work rule instead of the work rule for the transfer. This may result in incorrect breaks being assigned. However, if you assign breaks again to the transfer segment, the correct work rule is followed and the correct breaks are assigned.

Add or change shift segments

1. Click **Add Segment**.

2. In the Add Segment editor, select the displayed segment type — for example, select **Regular** ▼ — if you want to choose a different segment type to add.

   ○ **Regular** is the primary location and job of the employee, which also references (as applicable) the employee's primary work rule, payer cost center, and labor category.

   ○ **Transfer** is the business structure (location and job), work rule, payer cost center, or labor category you define for this segment, for this employee. The Transfer a shift panel appears.

   ○ **Break** is a default break.

3. Enter the **Start Time** and **End Time** for the segment.

4. Click **Add**. The shift graphical view and the shift details are updated to included the added segment.

5. Click to see more options for modifying the segment:

   ○ **Delete Segment** removes this segment from the shift.

   ○ **Add Segment Tag** attaches a tag to the segment to identify defined characteristics. The Add Segment Tag panel appears.

      a. Click the check box for the tag or tags you want to add. To find a specific tag in a list of many, enter the first few letters of the tag name in the search field and press Enter.

      b. Click **Apply**.

         Note: You cannot add a tag to a break.

   ○ **Add Skills and Certifications** enables you to specify specific qualifications for a shift segment. The Skills and Certifications panel appears.

   ○   **Note:** You cannot add skills and certifications to a break.

   ○ **Transfer Employee** is an alternate method to define the segment as a transfer. The Transfer a shift panel appears.

6. Click **Apply**.

Add comments

Add Comment allows you to attach a predefined comment to the shift by selecting it from a menu.

- To add a personal note to the comment, type in the box.

- To delete a comment or a note, select the ✕ next to it.

- Shifts with comments attached appear like this on the schedule: