

Edit a Single Shift

Provides step-by-step instructions on how to make changes to a shift.

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You can edit a shift directly within the schedule (quick shift edits) or you can use the Edit Shift slider for full functionality.

Quick Shift Edits

You can make the following shift edits directly within the schedule.

Note You cannot edit locked shifts or shifts on signed-off or locked days.

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

Change Time or Assign Shift Template

In the Table View only, you can change a shift's start or end time, or assign a shift template by typing directly in a schedule cell.

Navigation: Main Menu > Schedule > [Select a Schedule]

1. Select Table View.
2. Select a shift.
3. Use the keyboard to enter either:
 - A new start time, end time, or both. Use standard time-of-day format.
 - The name of a shift template
4. Save your changes.

Note In the Gantt View, when in the one-day view, you can change a shift's start or end time by dragging the left or right border of the shift ahead or backwards in time (right or

left). Save your changes when complete.

Move a Shift to a Different Day or Another Employee

Use the following steps to move a shift to a different day or another employee.

1. In either Gantt or Table View, drag the shift left, right, up, or down and drop it on the row of the employee you want to work the shift. Start and end times as well as other shift characteristics remain the same.
 2. Save your changes.
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Copy and Paste a Shift

Use the following steps to copy a shift and paste it somewhere else in the schedule.

1. Right-click a shift and select **Copy**.
 2. Right-click any unlocked day in the schedule and select **Paste**. You can repeat this step as many times as needed to paste the same shift anywhere.
 3. Save your changes.
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Complete Shift Edits Using the Edit Shift Panel

Use the Edit Shift Panel to make changes to the shift .

Select a shift and then select **Edit**. From here, you can modify a shift, manage with shift segments, add comments, and more.

Modify Entire Shift

Modify an entire shift by selecting More near the top of the Edit Shift panel.

- **Assignment** sets the assignment for which the shift is to be added. Displays only for employees who have multiple assignments.
- **Use Template** sets the shift parameters to match the shift template you select.
- **Change Shift Label** modifies the label displayed on the schedule when Shift Label visibility is selected.

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

If your system is configured to synchronize shift labels, the following occurs when you add or modify a shift label:

- 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, the label is saved and displays on the shift.
- If the new label matches an existing shift template label but the segments in the shift do not match those in the shift template, an error message displays.
- 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.

Automatically Adjust Breaks

The system can be configured to automatically adjust breaks within shifts to comply with the adjusted shift length or work rule transfer.

Note To use this functionality, the **Adjust breaks automatically** setting must be selected in the Schedule Planner or 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 and Insert Shift Template slider, 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 select **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 your system has been configured to synchronize shift labels, when **Assign Breaks** is selected in the Insert Shift Template slider, the shift label associated with the shift template will be removed.

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.

When the **Adjust breaks automatically for Quick Actions and glances** setting is configured in the Schedule Planner or Staffing Dashboard, the system will also automatically adjust breaks in shifts 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 shift is visually updated in the Schedule to show the modified breaks.

Change Shift Segments

The following are options for changing shift segments.

To change the segment type, select the segment type to see the menu. For example, select Regular.

- **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 slider appears.
- **Break** is a default break.

Note Depending on your access rights, when you select a **Transfer** segment, the jobs that display when you select **Add Business Structure** in the Transfer panel may only be employee-centric organizational jobs. These are the jobs that are included in the employee's transfer set, any additional jobs specified in the Manager Additions (configured in People Information), and the employee's primary job. This ensures that you select a job that is applicable for the employee.

Adjust the **Start Time** and **End Time** for the segment.

Select More to see available options for modifying the segment:

- **Add Segment Before** or **Add Segment After** creates a new segment adjoining this one.
- **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. (Select 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**. Select **Apply**.)

Note You cannot add a tag to a break.

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