UKG2022 Go-Live Guide

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1. Memo from the desk of Tim Schantz, Troon's President & CEO

I hope all are well, safe and healthy, along with those you love and care for and about. It's hard to believe that we are at year-end and running headlong into the holidays. We're in the home stretch on the implementation of an incredible "gift" for the Company. To have a successful Go-Live for the UKG system and confirm that all associates are prepared, I need for each of you to review and become very familiar with all of the resources provided. The Go-Live Guide is located on our website, https://ukg2022.com/resources/. Additionally, we've also added the recorded meetings on the website. If you couldn't attend or need a refresher, please visit https://ukg2022.com/training-videos/. Next week, you will be receiving additional email reminders. Please make sure you read them closely and proceed as directed. Additionally, if you have any questions, please email ukg2022@troon.com for further guidance.

An incredible amount of effort has gone into the selection and implementation of this tool. As I've noted before, no matter how high quality a tool is, it only "works" if those who use it become familiar with how to do so. We're at that stage so let's commit ourselves to becoming master "craftspeople".

On behalf of the Executive Team, I want to thank each of you for your involvement in attending and participating in the UKG Change Management meetings.

Best,

Tim

2. Go-Live Timeline

12/10/21	Review UKG2022 follow-up email
	Become familiar with all documents located in the Go-Live Guide
	Complete the Managerial Training Map https://edhosting.ukg.com/UA/Retail_Hospitality/Retail/troon/Troon_UKG_Supervisor_Training/story.html
	Review Wave 2 meeting recordings https://ukg2022.com/training-videos/
	Complete Supervisor Hierarchy updates
	"GM's" lead at each facility will follow the instructions in the "Mail Merge Guide"
	"GM's", lead at each facility, will distribute all UKG User ID print outs – see sample "UKG User ID Template"
	Dual maintenance ends
	Supervisors to manually maintain a list of changes in legacy system
	Complete the All-Associates Training Map https://edhosting.ukg.com/UA/Retail_Hospitality/Retail/troon/Troon_Associate_UKG_Training/story.html
12/13/21	Quick Time Stamp setup needs to be complete
	All remaining associates (non-benefits eligible) take their UKG User ID document and log into UKG for the first time
12/18/21	Bi-weekly associates first punch in UKG
12/18/21-12/31/21	All Associates need to update Federal & State W-4 forms
	Update email address, phone number, mailing address, emergency contacts, etc.
	Bi-weekly Supervisors need to get in the habit of completing Payroll Close Tasks **DAILY**
	Add 1/1/22 Merit Increases
12/25/21	Weekly associates first punch in UKG (including facilities in RI and NY)
12/31/21	Last day of the first payroll cycles in UKG
1/3/22	Payroll is due by 9:00 local time for your facility
1/7/22	First pay date in UKG

3. Dual Maintenance

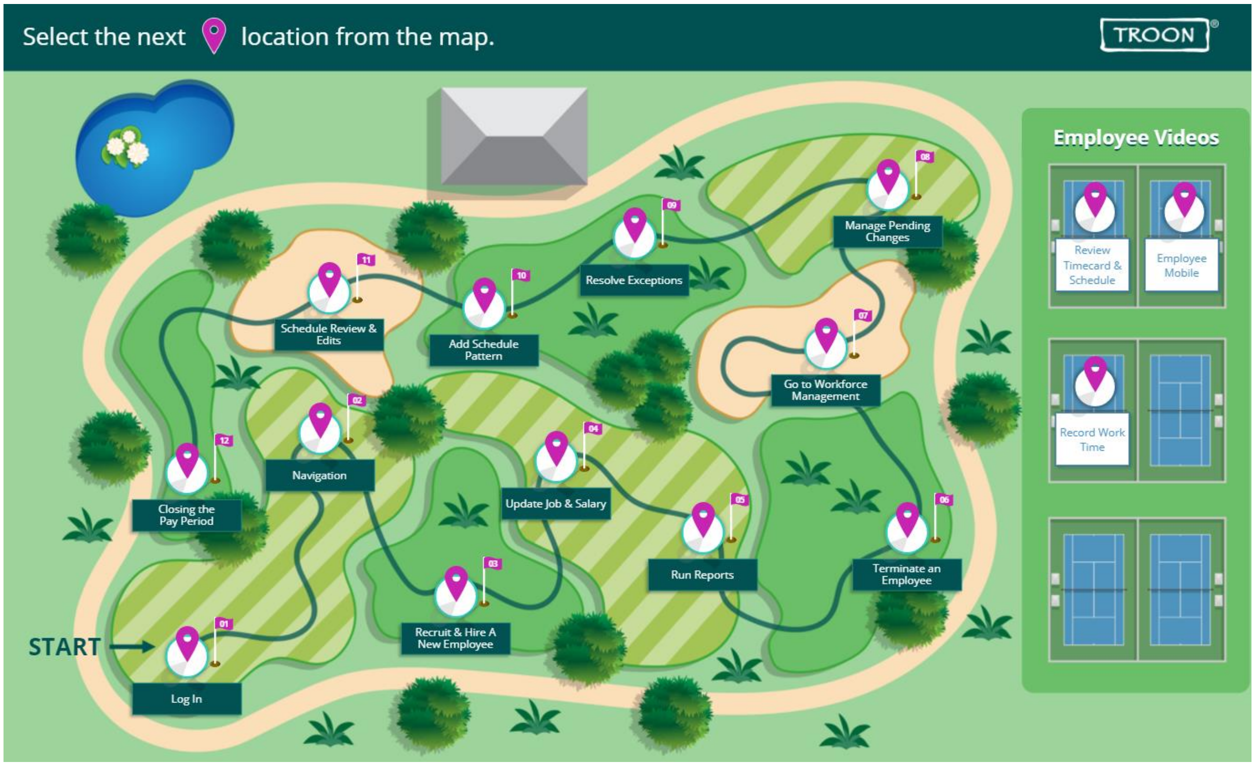
Dual maintenance is the process of making associate record changes in both the legacy system (Oracle, ADP, PrimePay, Paylocity, Paycom) and UKG. Dual maintenance ended on 12/10.

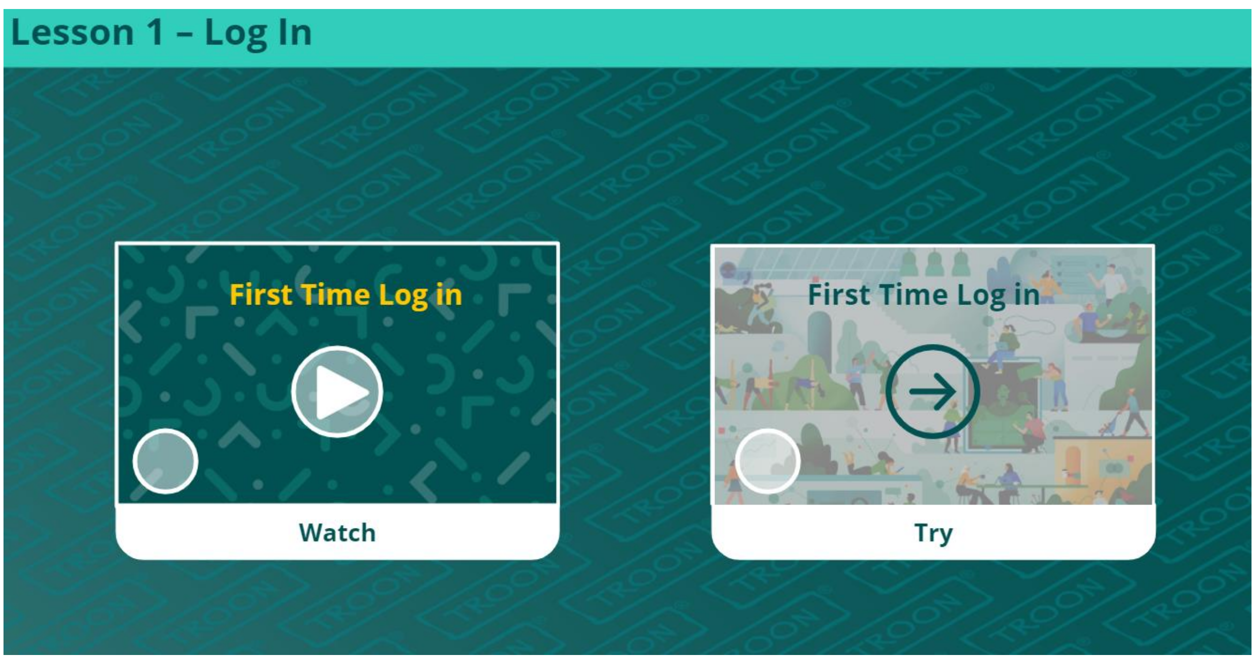
For bi-weekly payroll cycles this means Supervisors will need to make any changes that happen (example: terminations) in your legacy system from 12/11-12/17. All Supervisors will need to maintain a written list of all changes by associate that were made in the legacy system during that time period. For the bi-weekly facilities, Supervisors will need to enter all of the changes by associate into UKG on 12/18.

Supervisors at weekly facilities will maintain a written list of all changes by associate that were made in the legacy system from 12/11-12/24. On 12/25, Supervisors will need to enter all of the changes by associate into UKG.

4. Supervisor Training Map

https://edhosting.ukg.com/UA/Retail_Hospitality/Retail/troon/Troon_UKG_Supervisor_Training/story.html





5. UKG Go Live: Supervisor Checklist

This checklist provides a list of specific actions to complete to ensure a smooth and successful go-live for employees punching. These activities should be performed each day you are at work. If you are out of office during the go-live period, please work with your GM to take care of the list of tasks below.

Daily Tasks

Indicator	Action Type	Description
✓	Recommended	Action recommended as a guideline, representing the most efficient or helpful plan.
⚠	Required	Action required by due date, if provided. Consequences that will impact employee paychecks may apply after the due date.

Step 1: Take the Training

Action	Description	Date	Additional Info	☐
✓	Access the website (www.ukg2022.com) and select **Training Library**. Your supervisor training recordings and course materials will be located under the **Supervisor** section. You will have access to step-by-step instructions as well via UKG Case Management. Be sure to look there for additional details.	Starting on **12/09/21**. Must be completed by **12/13/21.**	After completing the training, complete the form that will be available in your golf course to get credit. Training completion results will be reported to the Executive Sponsors.	

Step 2: Log In and Verify Information

<table>
<tr><th>Action</th><th>Description</th><th>Date</th><th>Additional Info</th><th>☐</th></tr>
<tr>
<td></td>
<td>Log in and verify your list of employees:

Use the URL: https://n35.ultipro.com/Login.aspx

Username: Your Emp ID followed by Last Name (Ex: 01010101Smith)
Password: Your birthdate (MMDDYYYY)

Bookmark the URL in your browser for future access.
Once in the system, click the main menu and then select the My Employees, and click Search to pull up all the people you have access to.

Note: In UKG Pro, you will see direct and indirect reports, but in UKG Workforce Management, you will only see your direct reports.</td>
<td>On 11/29/2021- until 12/17/2021</td>
<td>If you skip this step, your associates will not be able to paid correctly.

If you are missing an employee, or have the incorrect list of employees, please request assistance from your GM or open a support case in UKG before 12/09/2021 to get this corrected.</td>
<td></td>
</tr>
</table>

Step 3: Distribute your UKG User ID's to your Associates

Action	Description	Date	Additional Info	ü
	Log into UKG and run the UKG Usernames report to locate all the associates usernames needed to login for the first time. GM's are responsible for giving the supervisor specific reports for your direct workgroup. Print out the report, and hand your associates clear instructions on how to log into UKG for the first time. An Associate Go Live Checklist has been provided to your GM.	Starting on **12/13/21**	Associates will begin punching in and out using UKG on 12/18/21 if they are biweekly paid, and 12/25/21 if they are weekly paid. IT IS IMPORTANT to start distributing these logon instructions to associates ASAP – they must be logged in before they can record their worked time (they won't see anything but will be ready for 12/18 punches). Please review the Mail Merge instructions for User ID distribution located in Employee Case Management.	-

Step 4: Show your associates how to clock in

Action	Description	Date	Additional Info	ü
	Use the information in the training and the videos on the website to show your associates how to clock in and out using UKG. For detailed instructions, log into case. There are three options available for associates to record their time. Your GM will specific which option your team should be using and further instructions on how to get started.	Starting on **12/13/21**	Associates will begin punching in and out using UKG on 12/18/21 if they are biweekly paid, and 12/25/21 if they are weekly paid. You should review your timecards daily to make your pay period end as efficient as possible.	-

Step 5: PTO Edits and Approvals for Missed Time

Action	Description	Date	Additional Info

	If an associate forgets to clock in/out, they will be prompted to request a timecard edit the next time they clock in. Once you review the edit, you can approve or refuse the time they entered. 1. From the Manage Timecards tile, select **Must Review**. 2. Locate the Pending Changes slider on the right, and select **Approve** or **Refuse** on each of the Punches that the associate has corrected.  3. Once approved, their edits will be displayed on the timecard.	**Complete this <u>DAILY</u> starting on 12/18/21 (Bi-weekly) or 12/25/21 (Weekly).** **Edits must be approved by 12/31/21.**	If you don't have any edits to approve, you can skip this step today! If you have any issues, please contact your **UKG2022 Change Champion** at your facility for assistance. You should review your timecards daily to make your pay period end as efficient as possible.
	If you have associates that requested time off (PTO, bereavement, jury duty, etc.) **in your prior timekeeping system**, you must add the time to their timecards in UKG so that they get paid correctly. 1. Access the associate's timecard, and select the paycode from the **Paycode** column corresponding to the **date** row of the absence. For example, select PTO on the row for 12/19/21. 2. In the **Amount** column, type the number of hours the associate requested to take off. If they requested the full day, you can select **full day** from the list. 3. Save your edit by pressing the **save** icon.	**Complete this starting on 12/18/21 (Bi-weekly) or 12/25/21 (Weekly) before 12/31/21.**	If you don't have any PTO requests to enter, you can skip this step! PTO and Legislative Sick balances will not be available until late December. If the plan allows borrowing, the time off request can be entered. PTO requests that were approved in a different system will not transfer to UKG. You

			must manually enter them in the UKG timecard. You should review your timecards daily to make your pay period end as efficient as possible.

Step 6: Enter any absences or transfers, if necessary

Action	Description	Date	Additional Info	
✓	If an associate is expected to work, and does not punch in or out during the shift, this is considered an absence and in order to get paid, it needs to have a pay code added to account for the missing time. Review the Manage Timecard tile for absences. Address the absence by one of the following: • Have the associate complete a request for time off • Add a pay code to the associate's timecard, if the associate is unable to submit a time off request	**Starting on 12/18/21 (Bi-Weekly) or 12/25/21 (Weekly) before 12/31/21.**	Time off requests must be approved before closing the pay period for associates to get paid correctly. Any retroactive changes should be submitted via case management.	-
✓	You must transfer hours in the timecard of any associate who works multiple jobs for them to get paid correctly. In the transfer cell, on the shift that needs to be moved to a secondary job code: • Select the transfer drop-down in between the in and out punches. • Select **Search** and in the panel, select Add Business Structure • Then select the appropriate secondary job code • Save your edit	**Starting on 12/18/21 (Bi-weekly) or 12/25/21 (Weekly) before 12/31/21.**	Transfers must be entered before closing the pay period for associates to get paid correctly.	

Step 7: Submit associate salary changes

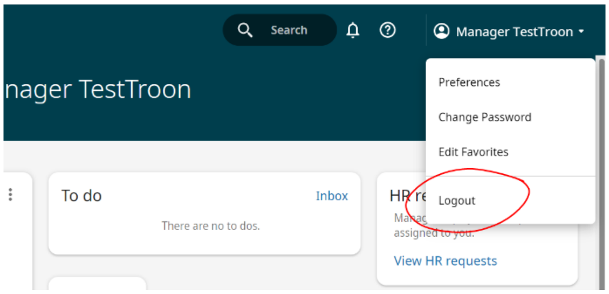
Action	Description	Date	Additional Info	□
⚠	Salary updates must be submitted using UKG this year. Supervisors will also be responsible for submitting Minimum Wage increases for their hourly associates. Please view the Minimum Wage Chart located in Employee Case Management.	**Starting on 12/18/21 with a due date of 12/31/21**	For assistance completing this step, please review case titled: Submit Salary Changes in UKG.	-

Step 8: Perform your pay period close tasks

Action	Description	Date	Additional Info	☐
	1. Timecard Maintenance • Review PTO and Sick requests – approve or deny • Exceptions – need to be corrected or approved (Ex: missed punch) • Add additional pay – Ex: lesson, commission, Tips, service charge • Add additional deductions – meal deductions, uniforms 2. Review timecard for any penalties – (CA meal break and NY span of hours) 3. Review/edit transfers to departments to labor category/job **All of the above actions can be done daily throughout the pay period** 4. Payroll Close: • Approve timecards (all exceptions must be cleared) • Timecard approvals must be completed by 9:00 a.m. local time on Monday after pay period end	**On 12/31/21, after all your associates have clocked out of their shift.** **Deadline is 9am Local Time.**	If you approve your timecards before the associates have finished their shifts, then their punches will not be recorded.	-
	Mark any notifications and alerts as read to clear the number for the next pay period.	**Complete at the end of each pay period starting on 12/31/21.**		-

Logout

Because UKG has two parts, Pro and Workforce Management, the recommended practice is to Logout of both applications when you've finished working in the system, especially if you are using a shared computer.



Dual Maintenance Note

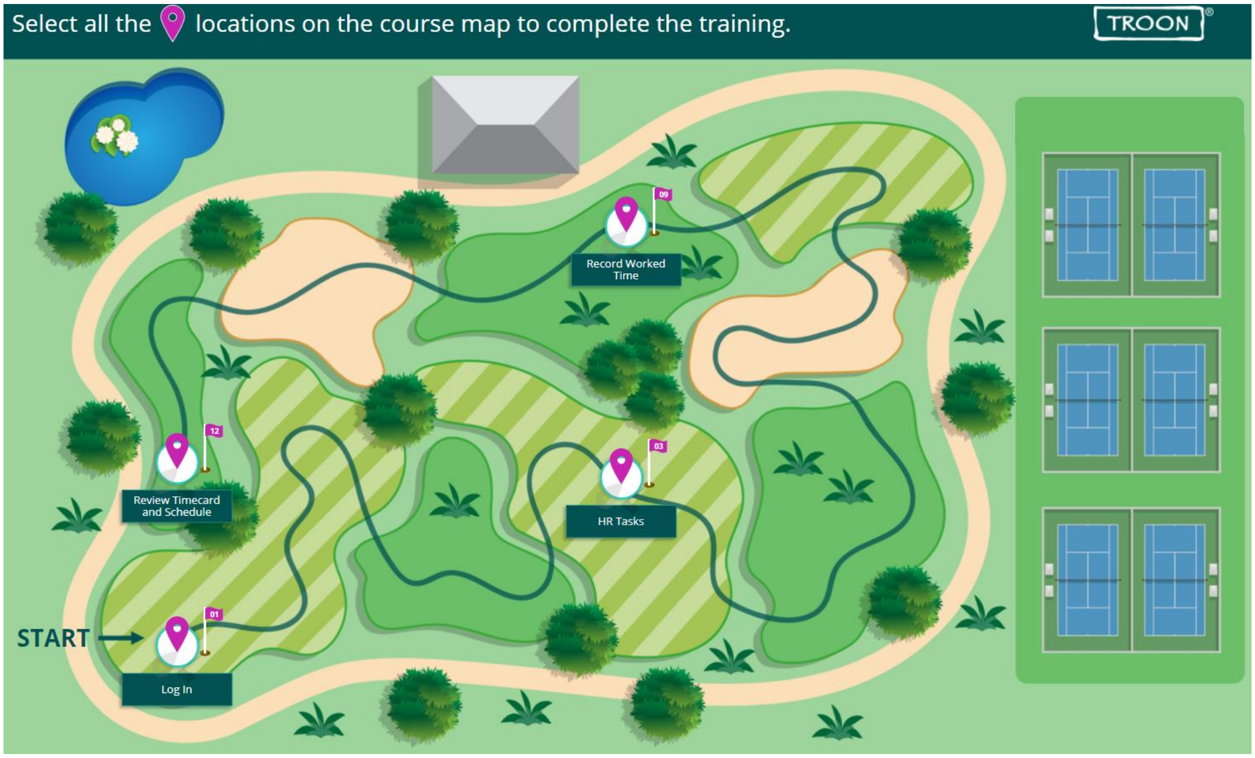
Action	Description	Date	Additional Info	□
⚠	Dual Maintenance is the process of making associate record changes in both the legacy system and UKG; ending on 12/10. For **bi-weekly** payroll cycles this means Supervisors will need to make any changes that happen (like - new hires/terminations/etc) in your legacy system (Oracle, ADP, PrimePay, Paylocity, Paycom) from 12/11-12/17. All Supervisors will need to maintain a written list of all changes by associate that were made in the legacy system during that time period. For the bi-weekly facilities, Supervisors will need to enter all of the changes by associate into UKG on 12/18.	**Starting on 12/11/21 through 12/17/21 (Bi-weekly) Due in UKG on 12/18/21** **12/11/21 through 12/24/21 (Weekly) due in UKG on 12/25/21**	For assistance completing this step, please review case titled: Dual Maintenance.	-

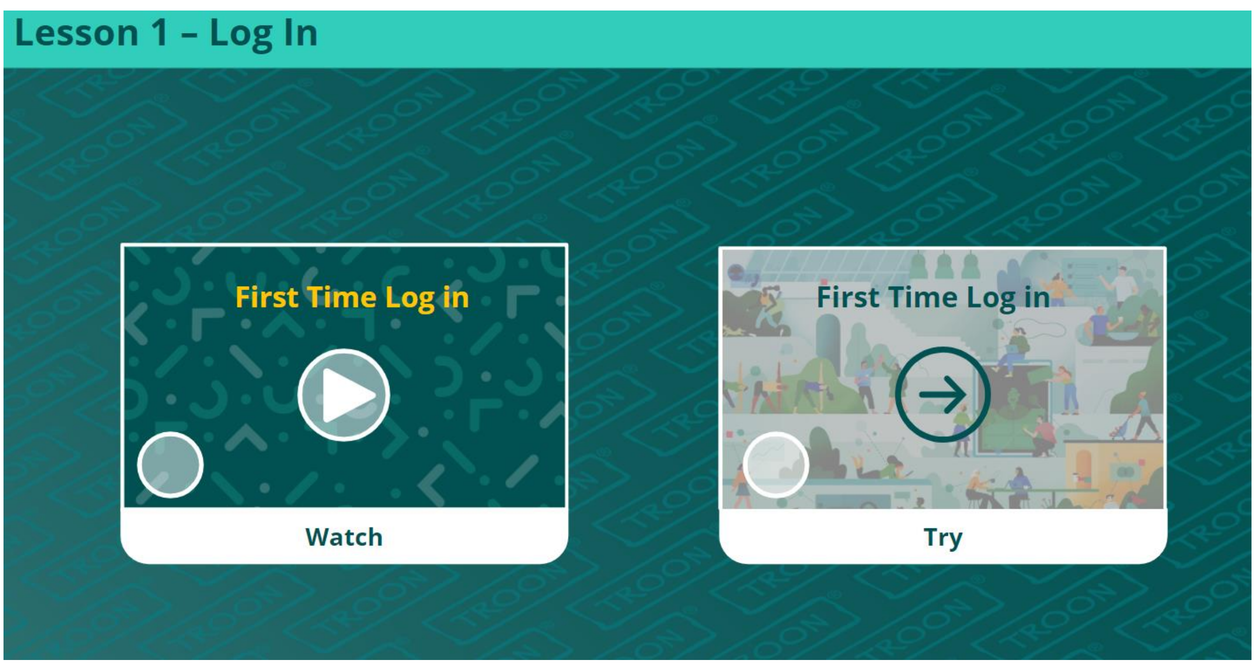
	For facilities with **weekly** payroll, your manual dual maintenance phase is longer because the first punch in UKG is 12/25. So, Supervisors at weekly facilities will maintain a written list of all changes by associate that were made in the legacy system from 12/11-12/24. On 12/25, Supervisors will need to enter all of the changes by associate into UKG.			

If you any questions or problems, please contact your UKG Change Champion.

6. ALL Associate Training Map

https://edhosting.ukg.com/UA/Retail_Hospitality/Retail/troon/Troon_Associate_UKG_Training/story.html





7. UKG Go Live: Associate Checklist

This checklist provides a list of specific actions to complete to ensure a smooth and successful go-live. These activities should be performed each day you are at work.

Daily Tasks

Indicator	Action Type	Description
	Recommended	Action recommended as a guideline, representing the most efficient or helpful plan.
	Required	Action required by due date, if provided. Consequences that will impact paychecks may apply after the due date.

Step 1: Log In and Verify Information

Action	Description	Date	Additional Info	☐

	Log in, change your password, set up your security questions, and verify your information is correct in UKG:
	• Use the URL: https://n35.ultipro.com/Login.aspx
	  ○ Username: Your Emp ID followed by Last Name (Ex: 01010101Smith)
	  ○ Password: Your birthdate (MMDDYYYY)
	• Bookmark the URL in your browser for future access.
	• Once in the system, click the main menu and review your Personal Information section.
		On 12/13/2021- until 12/17/2021	If you skip this step, you may have the wrong details and may result in delayed approvals for payroll.	

Step 2: Take the Training

Action	Description	Date	Additional Info	☐
	Access the website (www.ukg2022.com) and right on the home page, your associate training course will be displayed.	Starting on **12/09/21**. Must be completed by **12/17/21.**	After completing the training, be sure to speak with your supervisor if there are any questions. You will only get credit for completing the training after submitting the Training Completion form located in the golf-course.	

Step 3: Follow the instructions provided by your Supervisor to clock in

Action	Description	Date	Additional Info	ü
	Using UKG, Punch in and out at the start and end of every shift, and during your meal breaks. Depending on your facility, you may have different time entry mechanisms. Check with your supervisor for details.	Starting on **12/18/21.** Complete Daily.	Associates will begin punching in and out using UKG on 12/18/21 if they are biweekly paid, and 12/25/21 if they are weekly paid. **Failure to punch using UKG will result in not getting paid correctly.**	-

Step 4: Corrections for Missed Time and Cash Tips

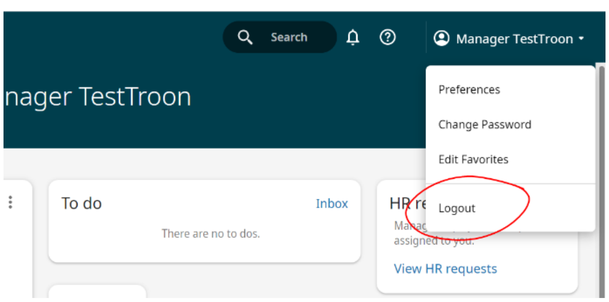
Action	Description	Date	Additional Info	□
	Fix any missed time when prompted and enter any cash tips at the end of your shift using UKG. Edits are subject to supervisor approval.	**Complete this daily starting on 12/18/21 (Bi-Weekly) or 12/25/21 (Weekly).** **Edits must be approved by your supervisor before 12/31/21.**	If you don't have any missed time to correct, you can skip this step today! Keep up the good job! If you have any issues, please contact your **UKG2022 Change Champion** at your facility for assistance. Failure to correct these time edits daily, will result in longer review times at the end of the pay period and you may get paid incorrectly.	-
	Use UKG to request time off for future dates that you are planning to take PTO (sick, vacation, jury, etc.). Requests must be submitted before the end of the pay period that contains the absence. Recommended practice is that you submit a request for time off as soon as you know your dates.	**Complete this daily starting on 12/18/21 (Bi-Weekly) or 12/25/21 (Weekly).**	If you don't have any PTO requests to enter, you can skip this step! PTO requests that were approved in a different system will not transfer. Your Supervisor must manually enter them into your UKG timecard. Failure to do this will result in incorrect paychecks.	-

Step 5: Update your W4 Tax Information

Action	Description	Date	Additional Info	☐
⚠	W4 withholdings will have to be entered and verified in UKG before 12/31/21.	**Starting on 12/18/21 with a due date of 12/31/21**	Failure to enter your tax information will result in incorrect deductions which will have to be adjusted in a future paycheck.	-

Logout

Because UKG has two parts, Pro and Workforce Management, the recommended practice is to Logout of both applications when you've finished working in the system, especially if you are using a shared computer.

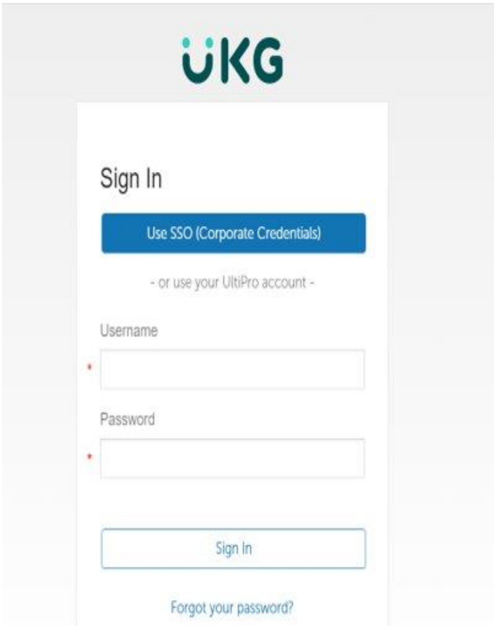


Need More Information?

For more information on how to complete some of these steps, please visit the HR Help link in UKG by going to Menu-> HR Help

If you any questions or problems, please contact your UKG Change Champion.

8. Quick Time Stamp



For Go-Live we will be using what is called a Quick Time Stamp. This is a web based clock that is simply a URL.

For most facilities, the URL for the Quick Time Stamp will automatically be deployed to your POS by the Troon and Indigo Golf Partners IT departments. For those facilities where technology isn’t managed by Troon or Indigo Golf Partners, we will be publishing instructions on UKG2022.com/Resources and in HR Help on how to obtain and add the link to a POS, central computer, or tablet.

9. Support Structure Overview

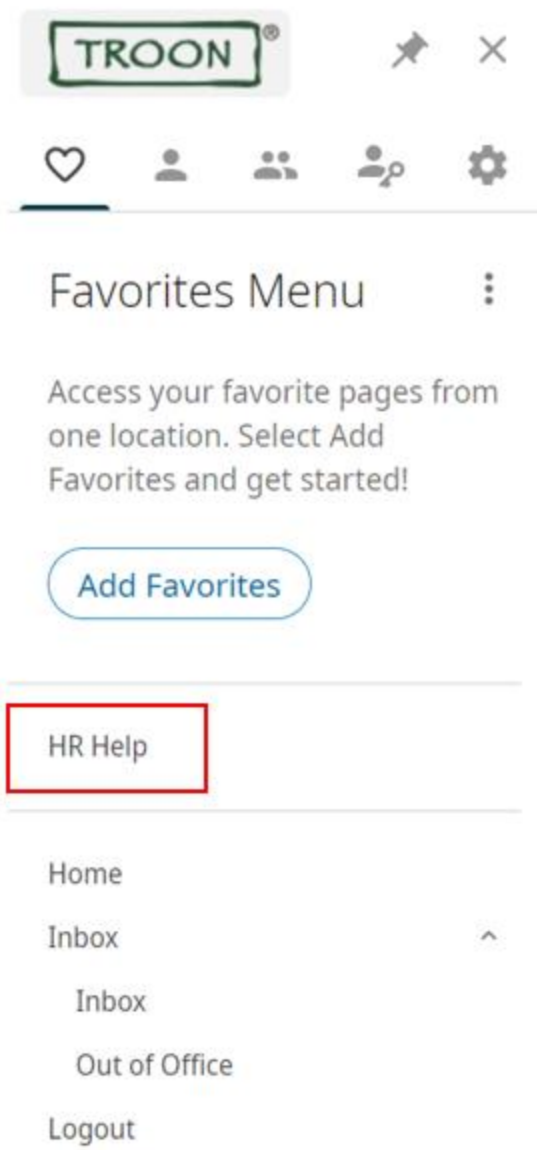
- Level 1 – Local
    - Supervisor
    - Change Champion (temp), “HR Contact”, Club UKG “Admin” (these may all be the same person)
- Level 2 – Workforce Support
- Level 3 – “A specialist that can better help” (HR, Pay, Ben, etc.)
- Level 4 – Function/Group Managers
- Level 5 – HRIS Specialist
- Level 6 – UKG Support

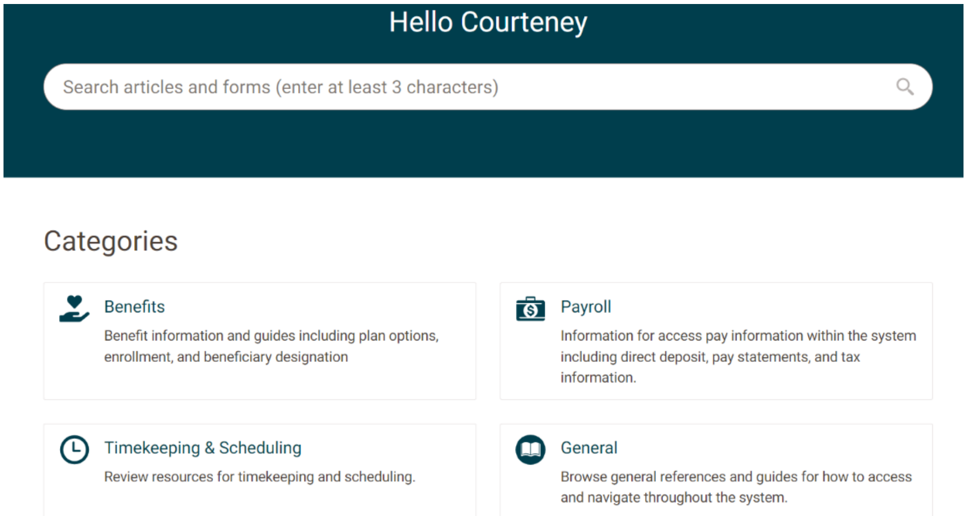
Level 1 – Local

- How: Call the club, talk to manager, etc.
- Who:
    - Supervisor, Facility “HR Contact, General Manager, UKG 2022 Change Champion.
- Skills:
    - General knowledge of UKG, resources, and Troon Workforce Support
- Role:
    - Initial questions from supervisors and on-site employees, and direct users to resources that can solve their problems (Job aids, training, operational procedures, employee assist, case, Troon Workforce Support phone number and email address).

10. HR Help, Employee Case Management

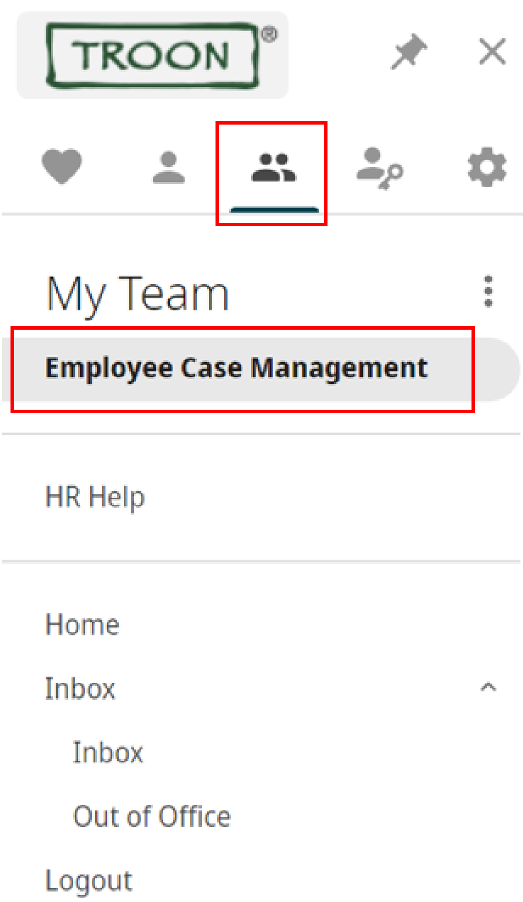
Navigation: Menu > HR Help

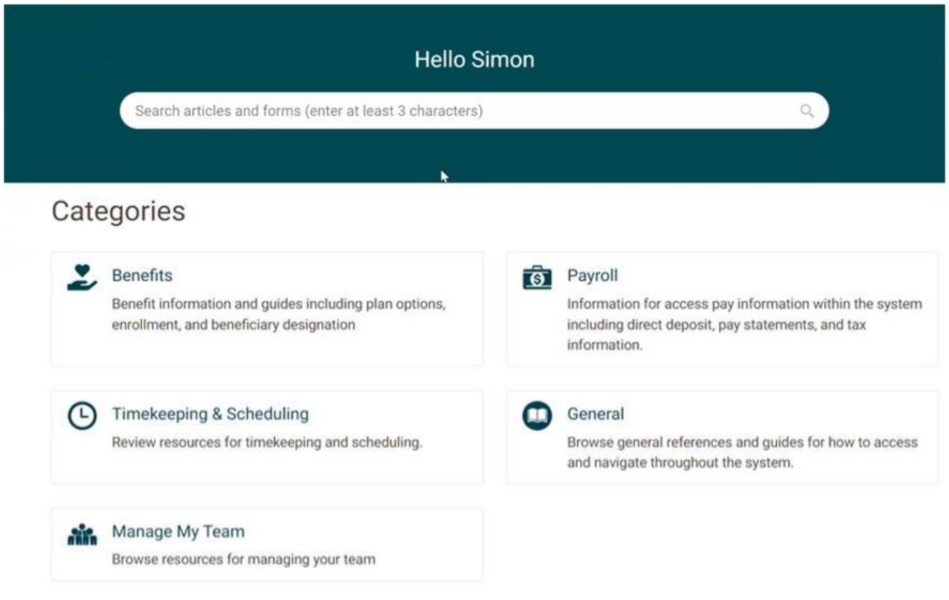




Employee Case Management

Navigation: Menu > My Team> Employee Case Management




Hello Simon
Search articles and forms (enter at least 3 characters)
Categories
Benefits
Benefit information and guides including plan options, enrollment, and beneficiary designation
Payroll
Information for access pay information within the system including direct deposit, pay statements, and tax information.
Timekeeping & Scheduling
Review resources for timekeeping and scheduling.
General
Browse general references and guides for how to access and navigate throughout the system.
Manage My Team
Browse resources for managing your team

11. Knowledge Articles are in Employee Case Management and HR Help

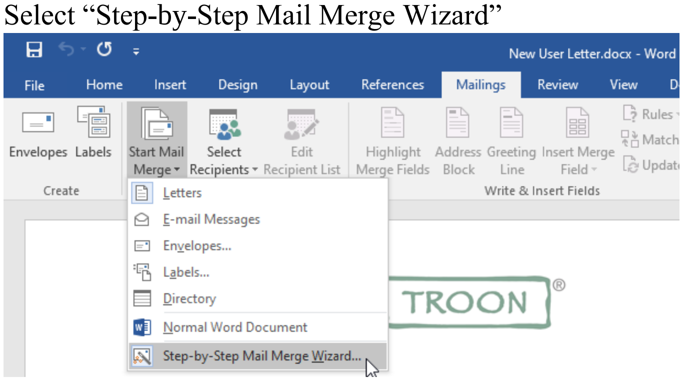
A. Mail Merge Instructions for UKG User ID Distribution

Note: This step must be completed no later than 12/13/21

Please use the attached template along with log in instructions to provide your associates with their username and important information about UKG. This is a template. Feel free to customize, update the logo, etc. based on any unique requirements you have at your club.

Mail Merge Instructions:

1. Save the sample letter to your computer
2. Customize the letter to your operation
    a. Most clubs are biweekly (12/18/2021). If you are in NY or RI you are on a weekly cycle (12/25/2021). If you have questions on what cycle you are on please reach out to your payroll contact.
    b. Add your club specific instructions on clocking in
3. Run Your “UKG Username” Business Intelligence Report
    a. For information on how to run a Business Intelligence report, see the tutorial below
4. Download as Excel data and save this to your computer
5. Sort the data in the order you want the documents to print with the merge
6. Save the file to your computer
7. Follow the mail Merge wizard features in Word
    a. Open the letter
    b. Select the “Mailings” tab
    c. Select “Start Mail Merge”
    d. Select “Step-by-Step Mail Merge Wizard”



Step 1: Select “Letters” as the document type
Step 2: Select Starting document: “Use the current document”
Step 3: Select Recipients: “Use Existing list”
Step 4: Select browse and find the UKG Username file that you saved in the above step 6,
Step 5: Add the fields into the letter.

- To do this you will highlight the place holder fields (ex. Highlight [Full Name]), next on the right-hand side select “More Items”. Click on the “Full Name” in the list and select insert. Repeat this step for all placeholder fields.

Step 6: Preview the letter

-Read through the letter and verify that all of the placeholder fields are filled in with the correct information

Step 7: Complete and print your mail merge

8. Provide letters on your go live date

Template Sample:

Date]

[Full Name],
Welcome to UKG!
UKG is the new exciting Human Resources platform for Troon and its family of brands. Beginning on [Date 12/18/2021 or 12/25/2021] you will use UKG to review your timecard, manage your schedule, complete learning, manage your contact information, retrieve your payroll payment advice, and much more.
Your first critical steps in the system are as follows:

1. Use Google Chrome to navigate to Troon's UKG website: https://n35.ultipro.com/Login.aspx (or use the QR code below).
2. Enter your user name (below).
3. Enter your password. Your default password is your date of birth in the following format MMDDYYY. Example February 4th 1992 is 02041992
4. Answer security questions

User Name: [insert user name]
Please log in to the application prior to clocking in the first time. If you have already logged in for open enrollment you can skip these steps, you are all ready to go!
[Club specific language on clocking in]
If you have questions on anything UKG you have 3 primary resources:

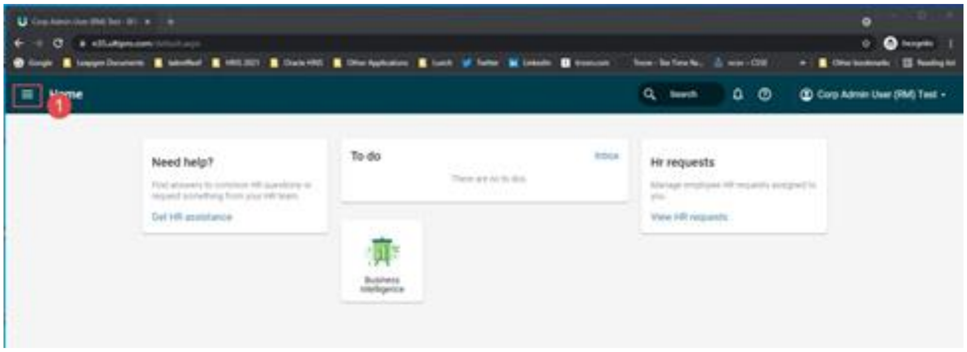
1. Reach out to your supervisor or Facility Leader
2. Go to https://UKG2022.com
3. Once you have logged in UKG you can navigate to HR Help to access the growing library of resources and important information to help you navigate the system.

Thank you!

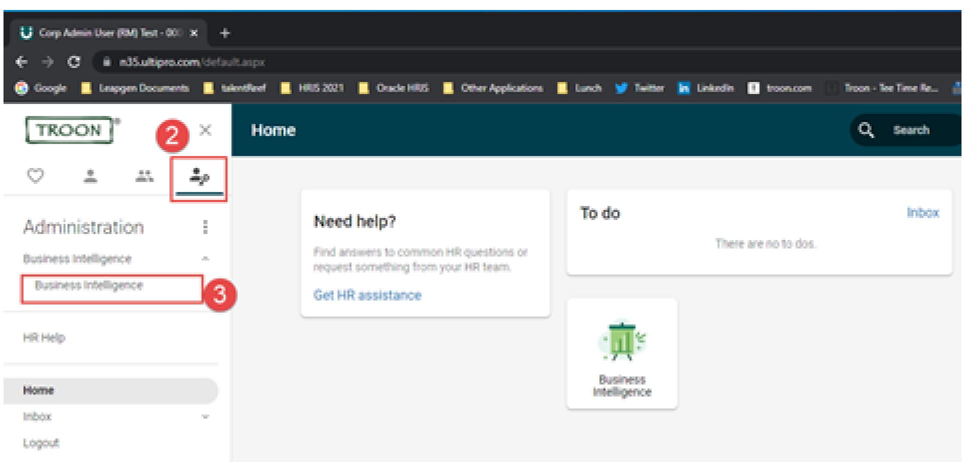
[Full Name], [Organization], [Department], [Primary Job], [User Name]

B. Business Intelligence

1. Log in to UKG

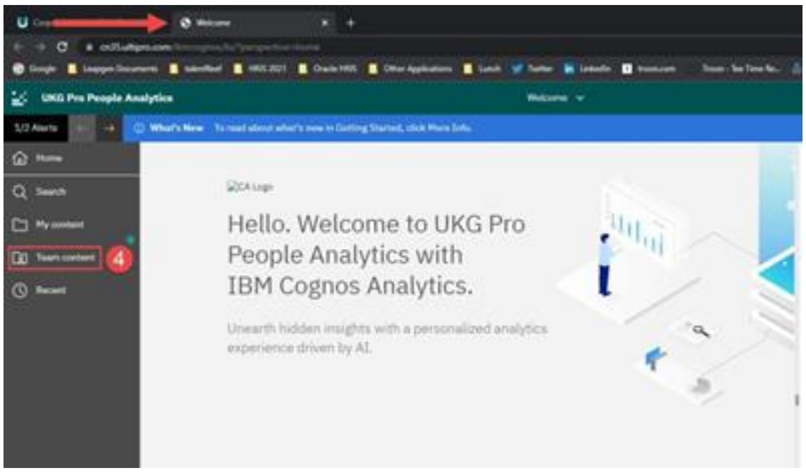


2. Open the “administration” window
3. Click on “Business Intelligence”

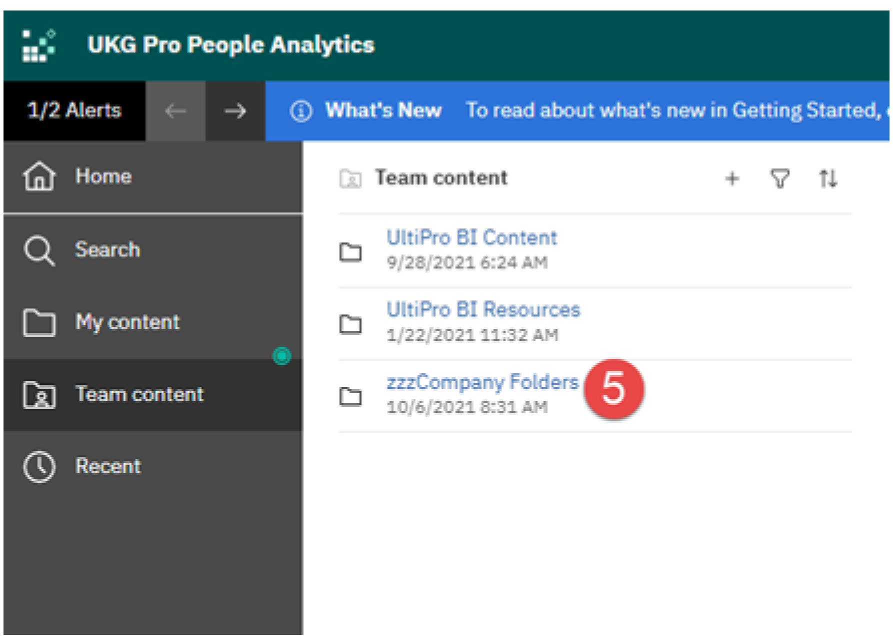


A new browser window will open for People Analytics

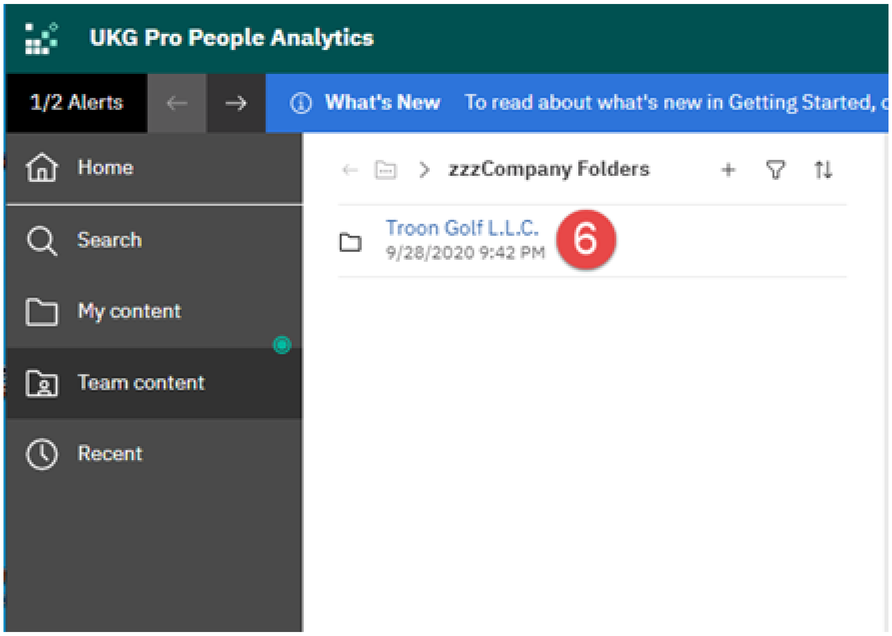
4. Open “Team Content” folder



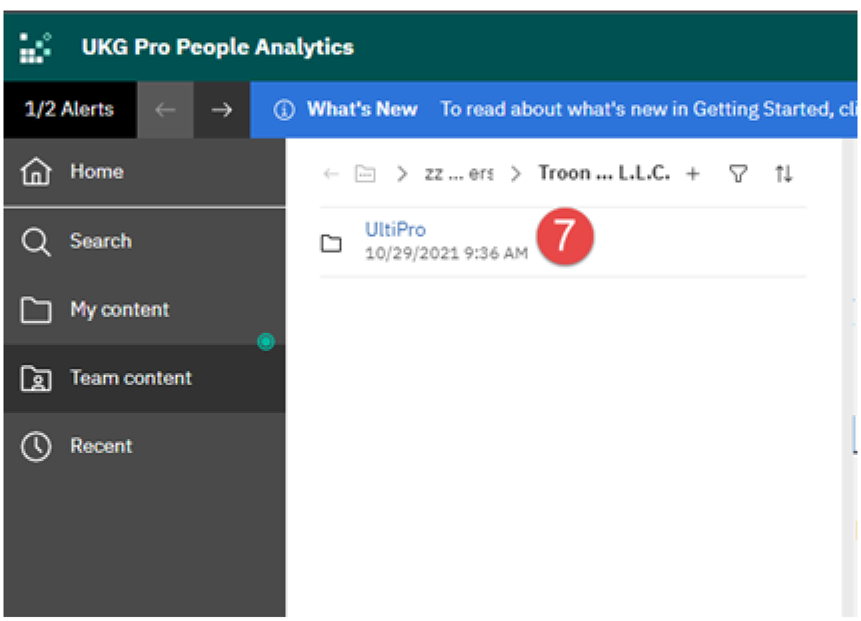
5. Open zzzCompany Folders



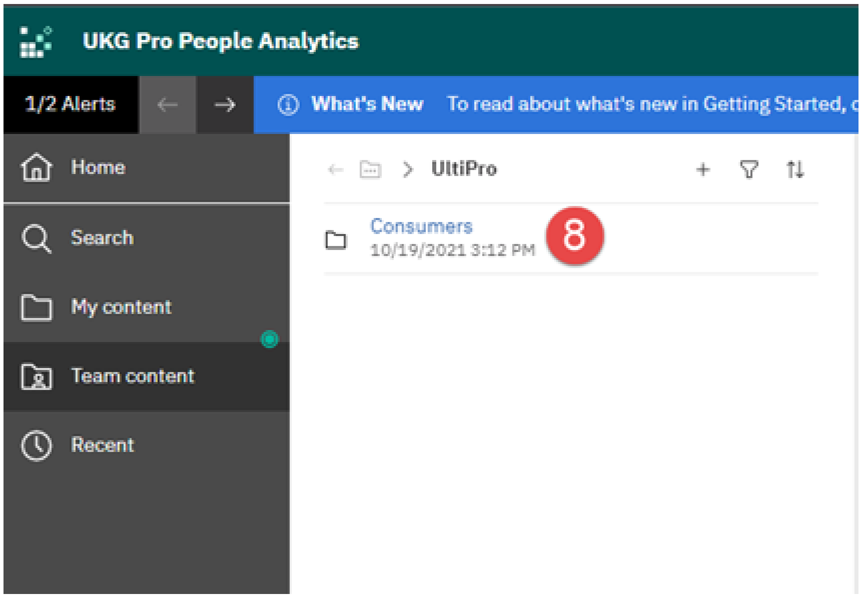
6. Open Troon Golf L.L.C.



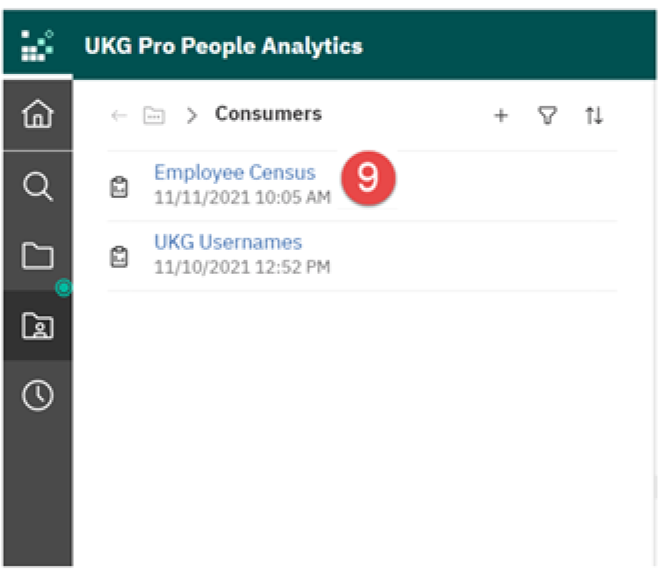
7. Open UltiPro folder



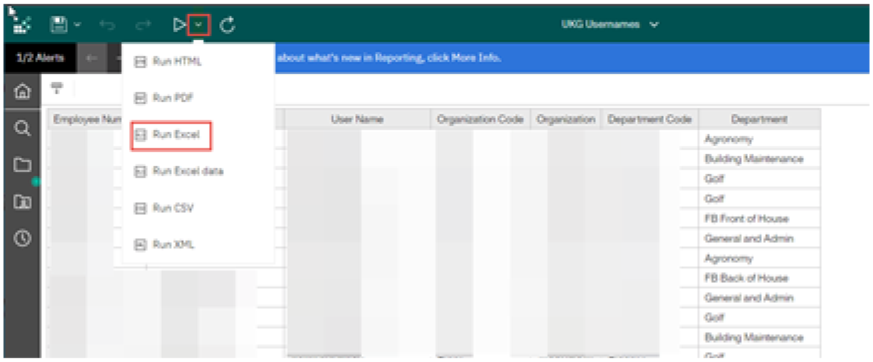
8. Open Consumers folder



9. Click on the report.



The report will run in the application



Click the carrot next to the run button to rerun he report in Excel

C. Update Federal & State W-4

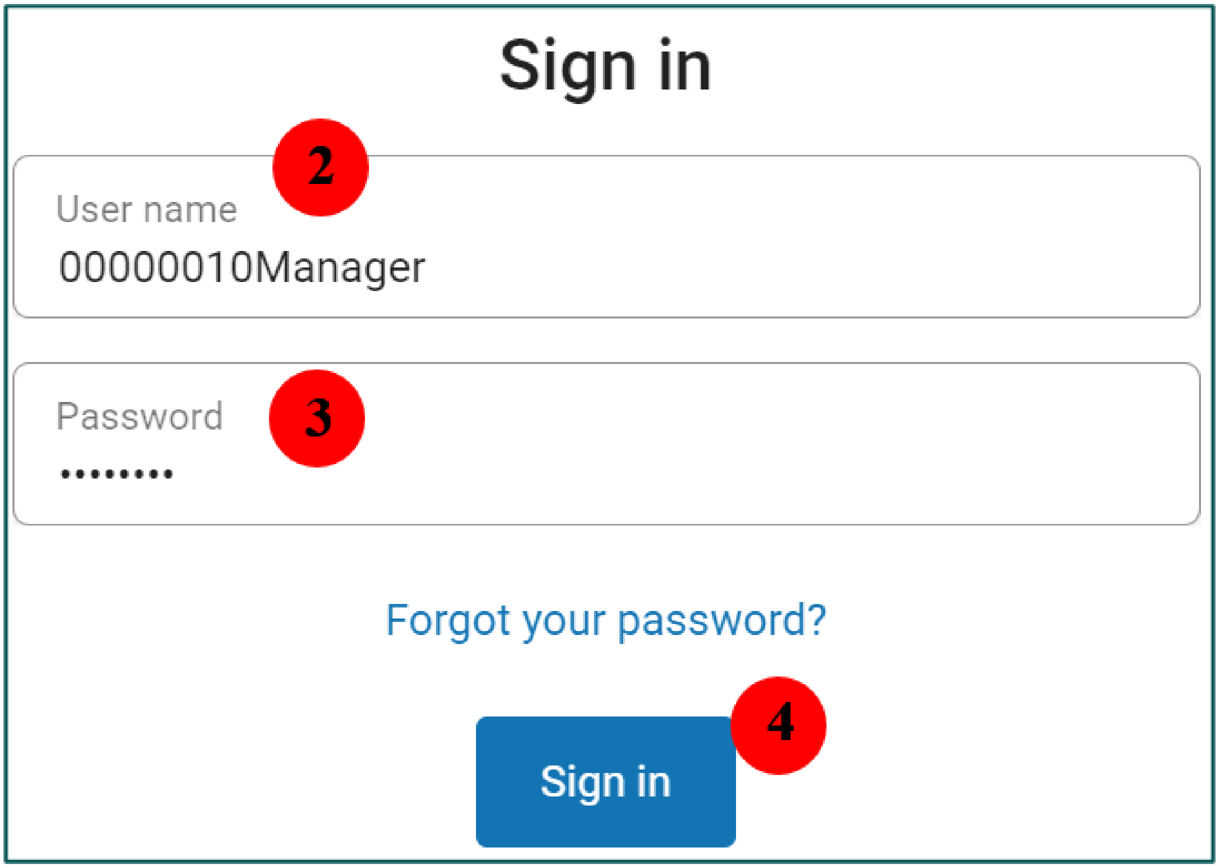
You can log into UKG and update your Federal or State income tax withholding at any time.

We have also created a video tutorial on how to complete this update. Watch it UKG: Updating Your Federal or State W 4 UKG: Updating Your Federal or State W 4

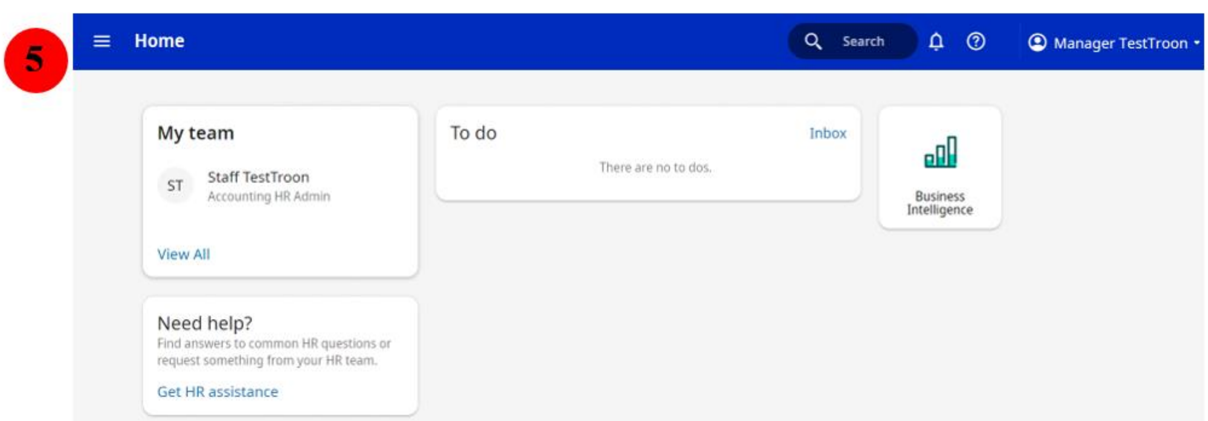
UKG: Updating Your Federal or State W 4

Navigation: Enter the URL provided into the internet web browser. Google Chrome is the most compatible web browser.

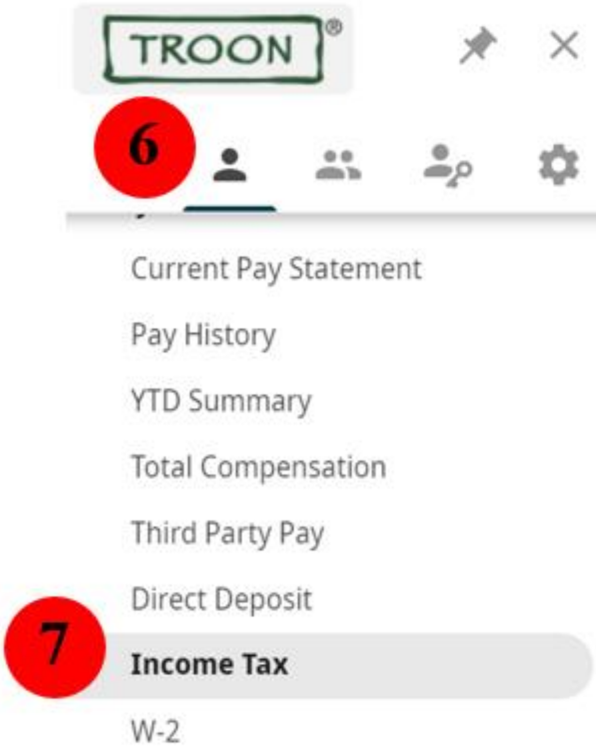
1. Go to the Troon UKG site: https://n35.ultipro.com
2. Enter your provided username
3. Enter your password
    - If you haven't logged in before your default password is your date of birth in the format MMDDYYYY
4. Click Sign in



5. Click on Menu in the upper left-hand corner



6. Select the “Myself” tab
7. Select “Income Tax”

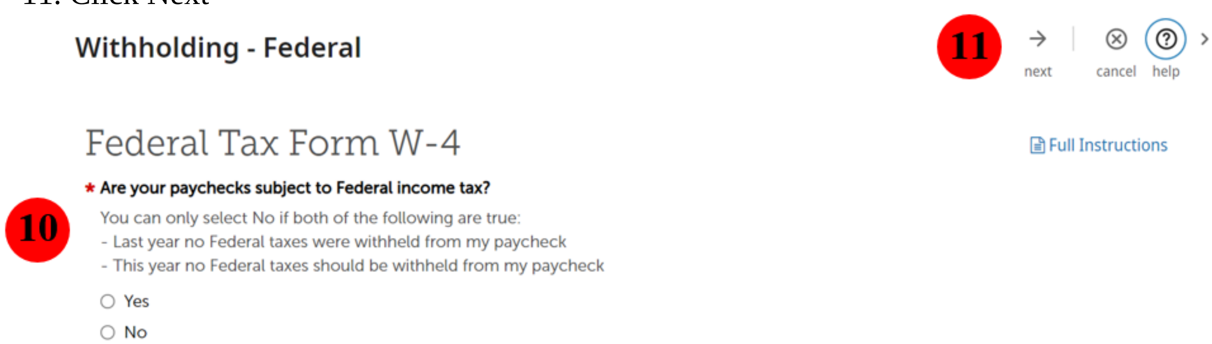


8. Under "Things I Can Do" on the left-hand side select "Add/Change Withholding From (W-4)"

9. Select the form you wish to update

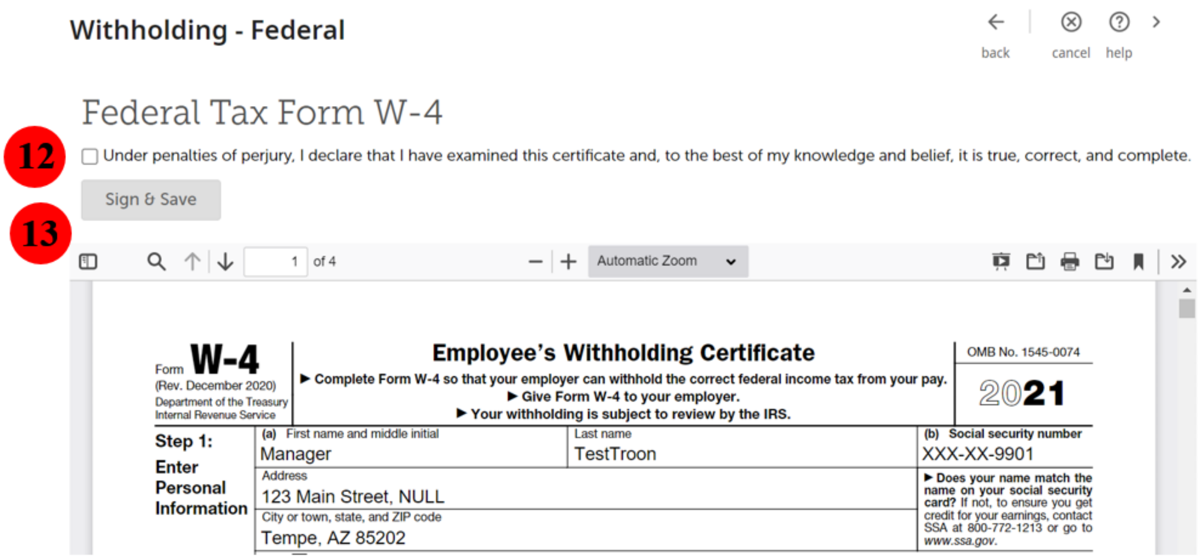
Note: The federal form is available with Spanish translation. There is also a W-4 for Non-Resident Aliens. Please select the appropriate form. The state forms will vary based on your location.

10. You will then fill out the series of questions
11. Click Next



Note: You have the option to view the "Full Instructions" which will bring up a traditional W-4 form with instructions.

12. Acknowledge the statement by checking the radio box
13. Next click "Sign & Save"

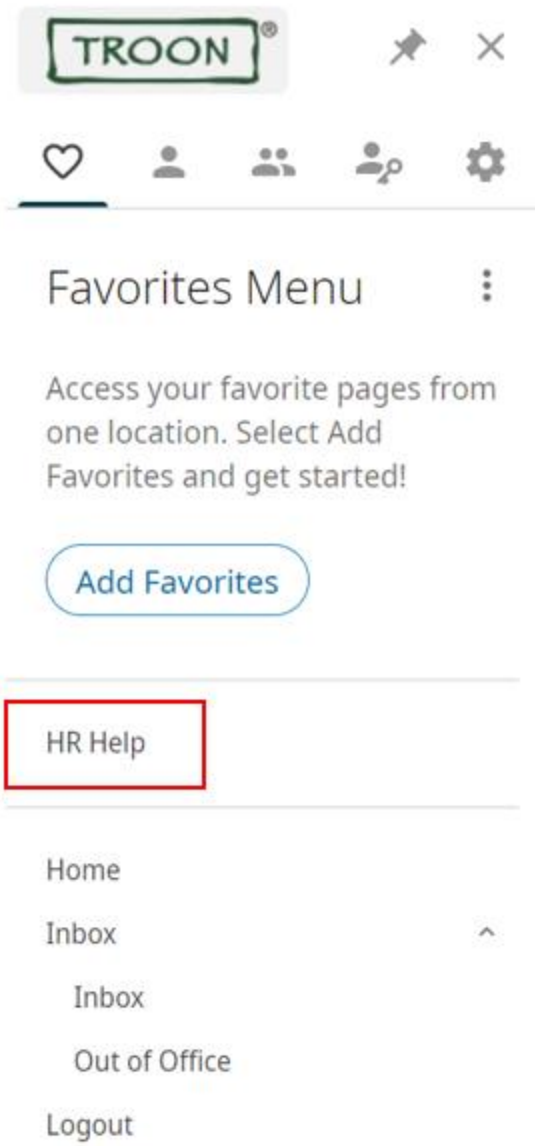


Note: you do have the option to download and print your form during this stage. It will also be saved to your UKG profile for you to reference or update at any time.

For this example, we chose the Federal tax form. To update your state tax form, you will repeat these steps. Note, the state form will vary from state to state.

Additional Information

Need Help?
Click on the HR Help link and complete a form to receive additional help.
Navigation: Menu > HR Help


TROON
Favorites Menu
Access your favorite pages from one location. Select Add Favorites and get started!
Add Favorites
HR Help
Home
Inbox
Inbox
Out of Office
Logout

D. Update Direct Deposit

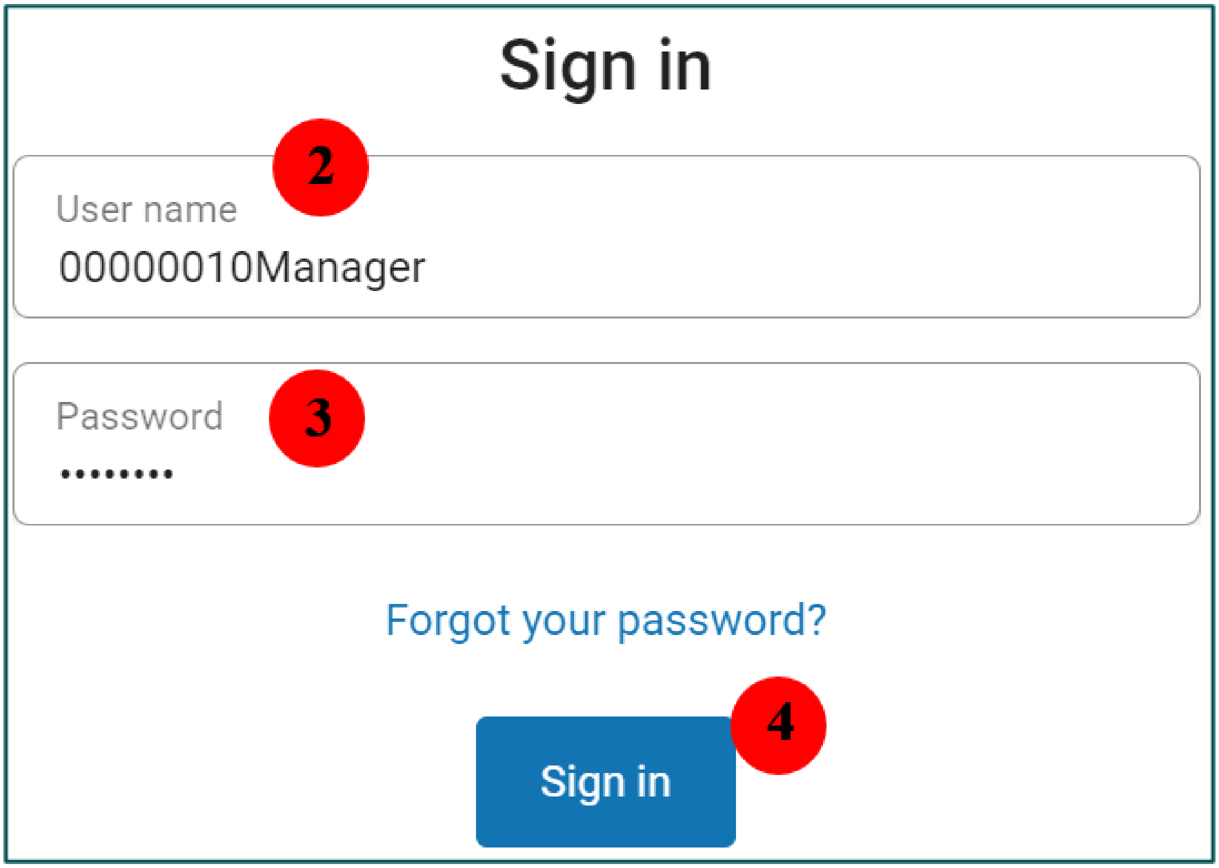
You can log into UKG and add or update your direct deposit at any time.

We have also created a video tutorial on how to complete this update. Watch it

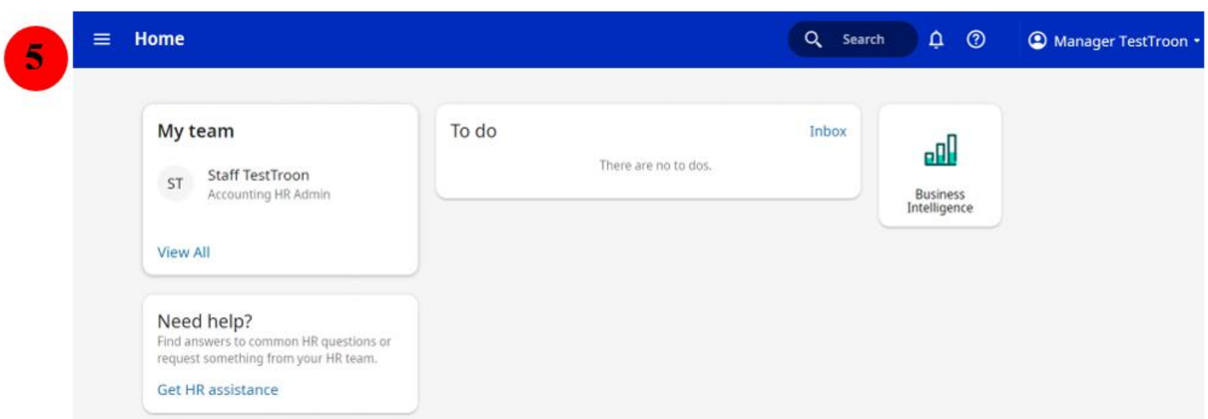
[UKG: Add or Update Direct Deposit]

Navigation: Enter the URL provided into the internet web browser. Google Chrome is the most compatible web browser.

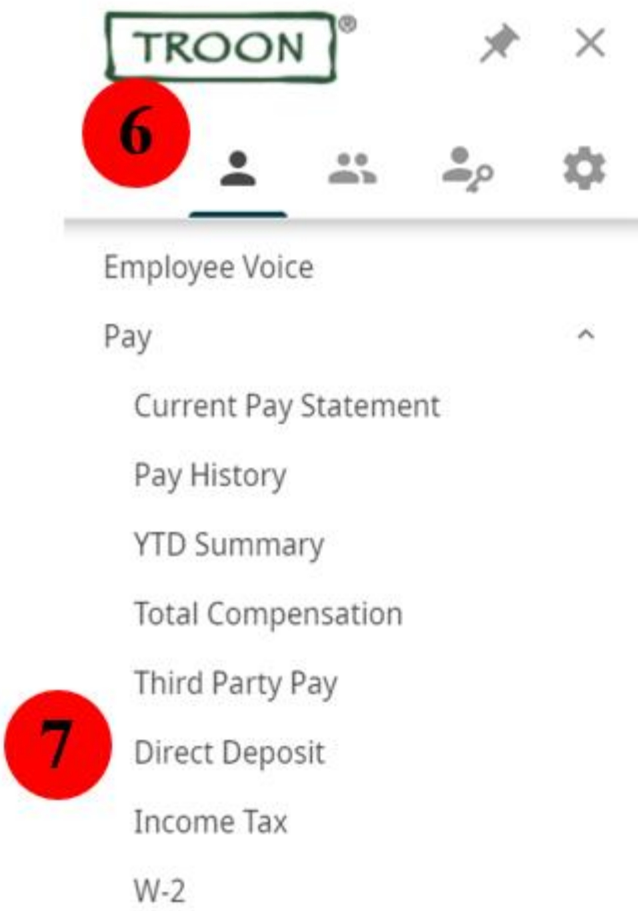
1. Go to the Troon UKG site: https://n35.ultipro.com
2. Enter your provided username
3. Enter your password
    - If you haven't logged in before your default password is your date of birth in the format MMDDYYYY
4. Click Sign in



5. Click on Menu in the upper left-hand corner



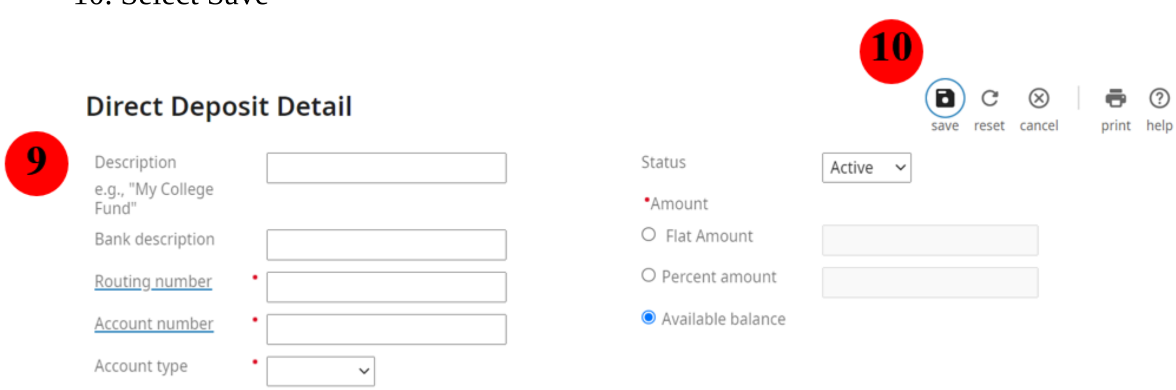
6. Select the "Myself" tab
7. Select "Direct Deposit"



8. Select the 

at the top of the page

9. Fill out the form using your bank account information
10. Select Save



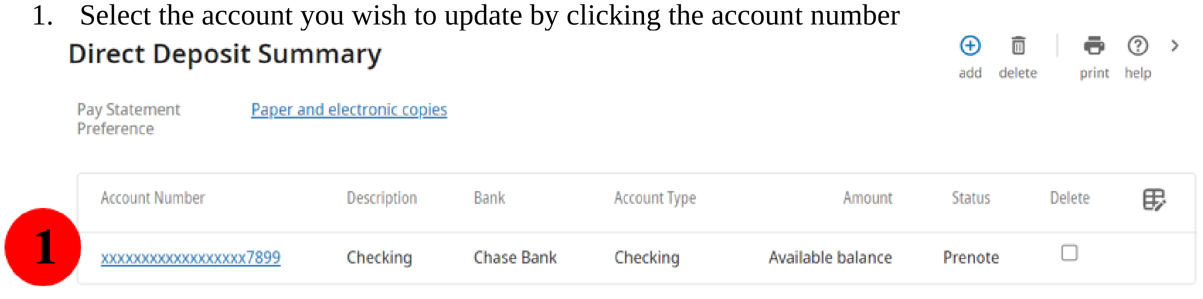
Note: By selecting “available balance”, your entire payment will go into this account. If you wish to split your payment between two accounts, you will enter in a “flat amount” for one of the accounts and keep “available balance” on the other.

Additional Information

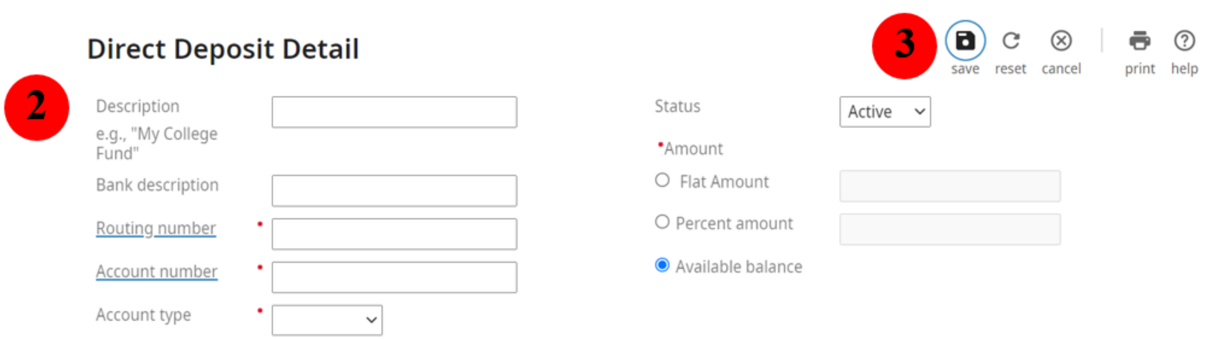
Updating Direct Deposit

Navigation: Menu> Myself> Direct Deposit

1. Select the account you wish to update by clicking the account number



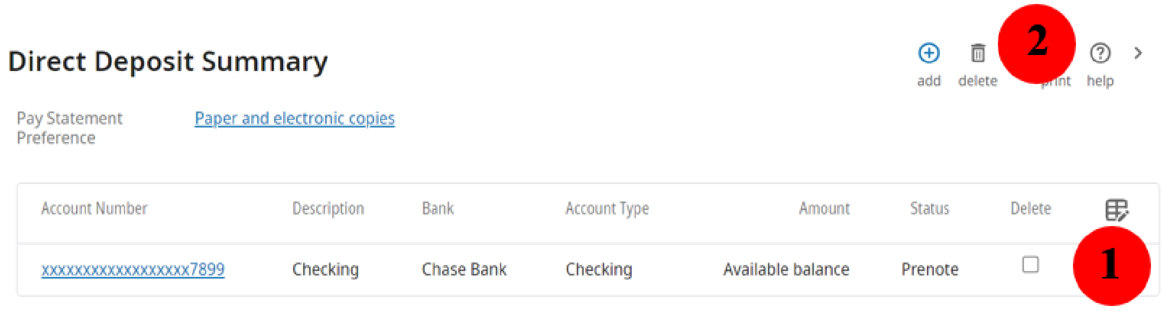
2. Next edit the form with your bank information
3. Select Save



Deleting a Direct Deposit Account

Navigation: Menu> Myself> Direct Deposit

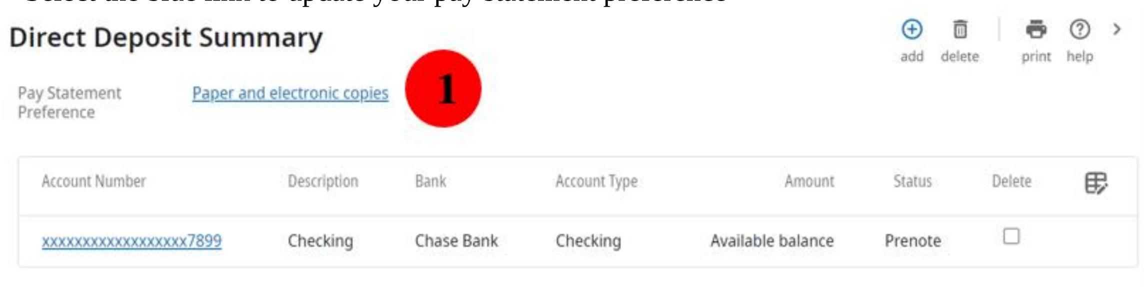
1. Select the account you wish to delete by clicking the check box under the delete column
2. Next click delete at the top



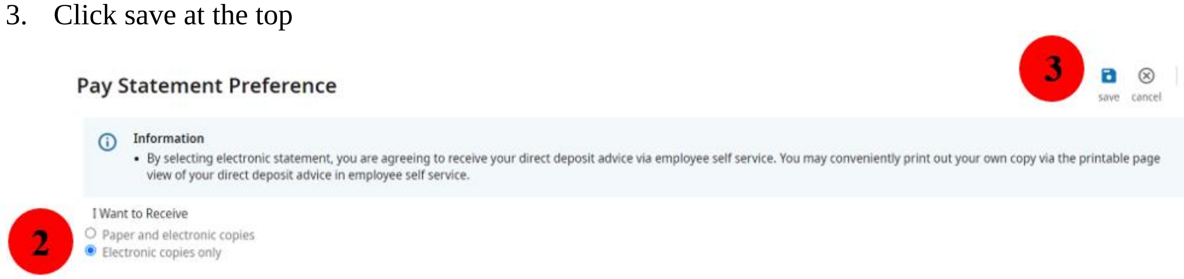
Updating Pay Statement Preferences

Navigation: Menu> Myself> Direct Deposit

1. Select the blue link to update your pay statement preference

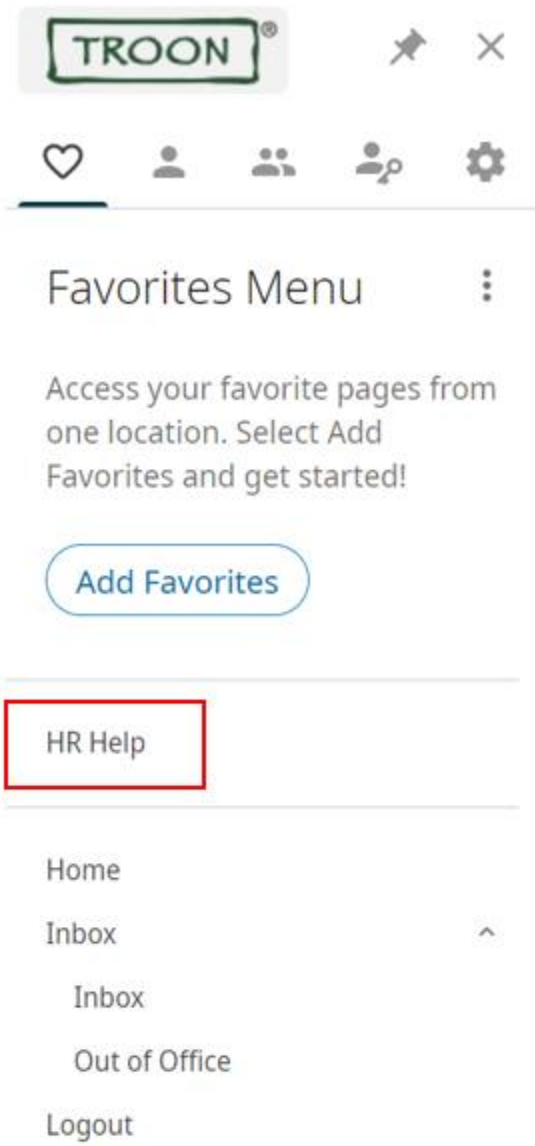


2. Next select your new preference option
3. Click save at the top



Need Help?

Click on the HR Help link and complete a form to receive additional help.
Navigation: Menu > HR Help


TROON
Favorites Menu
Access your favorite pages from one location. Select Add Favorites and get started!
Add Favorites
HR Help
Home
Inbox
Inbox
Out of Office
Logout

E. Minimum Wage Chart: Rates and Credits

Payroll Administration Guide, Wage-Hour Laws & Rules, Minimum Wage Chart: Rates and Credits

Payroll Administration Guide
Wage-Hour Laws & Rules

Minimum Wage Chart: Rates and Credits

(General Industry, Private Sector Only)

[*Note:* Bloomberg Law editors continually monitor developments and revise content as warranted; All amounts in this chart are in effect as of July 1, 2021, unless otherwise indicated.]

			Tipped Employees		
	Hourly Minimum Wage Rate	Future Hourly Minimum Wage Rate	Minimum Cash Wage	Based on Maximum Credit of	Credit for Meals/ Lodging
Federal	$7.25	None	$2.13	$5.12	Yes
Alabama	No State-Mandated Minimum Wage				
Alaska	$10.34	Eff. 1/1/22: $10.34 Indexed for Inflation	Tip Credit Not Allowed		None
Arizona	$12.15	Eff. 1/1/22: $12.80 Indexed for Inflation	$9.15 (Eff. 1/1/22: $9.80)	$3.00	Yes
Arkansas	$11	None	$2.63	$8.37	Yes
California	Employers with at least 26 employees, $14; Employers with fewer than 26 employees, $13	Eff. 1/1/22: Employers with at least 26 employees, $15; Employers with fewer than 26 employees, $14[1]	Tip Credit Not Allowed		No
Colorado	$12.32	(Proposed eff. 1/ 1/22: $12.56) Indexed for Inflation	$9.30	$3.02	Yes
Connecticut	$13	Eff. 7/1/22: $14[1]	$6.38, wait staff; $8.23, bartenders	$6.62, wait staff; $4.77, bartenders (eff. 7/1/22: $7.62, wait staff; $5.77, bartenders)[1]	Yes
Delaware	$9.25	Eff. 1/1/22:	$2.23	$7.02 (Eff. 1/1/	None

		$10.50[1]		22: $8.27)[1]	
District of Columbia	$15.20	Indexed for Inflation	$5.05	$10.15	Yes
Florida	$10	Eff. 9/30/22: $11[1]	$6.98 (eff. 9/30/22: $7.98)	$3.02	None
Georgia	$5.15[2]	None	None	None	None
Hawaii	$10.10	None	$9.35[3]	$0.75[3]	Yes
Idaho	$7.25	None	$3.35	$3.90	Yes
Illinois	$11	Eff: 1/1/22: $12[1]	$6.60	$4.40	Yes
Indiana	$7.25	None	$2.13	$5.12	None
Iowa	$7.25	None	$4.35	$2.90	Yes
Kansas	$7.25	None	$2.13	$5.12	None
Kentucky	$7.25	None	$2.13	$5.12	None
Louisiana	No State-Mandated Minimum Wage				
Maine	$12.15	Eff. 1/1/22: $12.75 Indexed for Inflation	$6.08 (eff. 1/1/22: $6.38)	$6.08 (eff. 1/1/22: $6.38)	Yes
Maryland	Employers with at least 15 employees: $11.75; Employers with no more than 14 employees: $11.60	Eff. 1/1/22: Employers with at least 15 employees: $12.50; Employers with no more than 14 employees: $12.20[1]	$3.63	$8.12, $7.97[1]	Yes
Massachusetts	$13.50	Eff. 1/1/22: $14.25[1]	$5.55[1]	$7.95	Yes
Michigan	$9.65 (increase to $9.87 in 2021 suspended)	Eff. 1/1/22: $9.87 (except suspended if for prior year's unemployment rate is at least 8.5%)	$3.67[1]	$5.98[1]	None
Minnesota	Large employers: $10.08; Small employers: $8.21	Eff. 1/1/22: Large employers, $10.33; Small employers, $8.42 Indexed for Inflation	Tip Credit Not Allowed		Yes

Mississippi	No State-Mandated Minimum Wage				
Missouri	$10.30	Eff: 1/1/22: $11.15[1]	$5.15	$5.15	Yes
Montana	$8.75[4]	Eff. 1/1/22: $9.20 Indexed for Inflation	Tip Credit Not Allowed		Yes
Nebraska	$9	None	$2.13	$6.87	None
Nevada	$9.75, $8.75 w/ health benefits	Eff. 7/1/22: $10.50, $9.50 w/ health benefits[1]	Tip Credit Not Allowed		Yes
New Hampshire	$7.25	None	$3.27	$3.99	Yes
New Jersey	$12; seasonal employers and small employers with no more than five employees: $11.10; agricultural employers: $10.30[1 4]	Eff. 1/1/22: generally $13; seasonal employers and small employers with no more than five employees: $11.90; agricultural employers: $11.05[1 4]	$4.13[1]	$7.87[1]	Yes
New Mexico	$10.50	Eff. 1/1/22: $11.50[1]	$2.55[1]	$7.95[1]	None
New York	Eff. 12/31/20: New York City employers: $15; Nassau, Suffolk, Westchester counties, $14; the rest of the state, $12.50[5]	Eff. 12/31/21: $15, New York City and Nassau, Suffolk, Westchester counties; the rest of the state: $13.20, plus inflation adjustment[1,5]	Varies By Occupation and Locations (however, tip credit eliminated for miscellaneous industry nonhospitality workers on 12/31/20)		Yes
North Carolina	$7.25	None	$2.13	$5.12	Yes
North Dakota	$7.25	None	$4.86	$2.39	Yes
Ohio	$8.80[4]	Eff. 1/1/22: $9.30 Indexed for Inflation	$4.40 (eff. 1/1/22: $4.65)	$4.40 (eff. 1/1/22: $4.65)	Yes
Oklahoma	$7.25[4]	None	$3.63	$3.63	Yes
Oregon	Portland Metro: $14 Standard: $12.75,	Eff. 7/1/22: Portland Metro: $14.75 Standard: $13.50,	Tip Credit Not Allowed		Yes

	Nonurban counties: $12	Nonurban counties: $12.50[1]			
Pennsylvania	$7.25	None	$2.83	$4.42	Yes
Puerto Rico	$7.25[4]	Eff. 1/1/22: $8.50[1]	None	None	None
Rhode Island	$11.50	Eff. 1/1/22: $12.25[1]	$3.89	$7.61	None
South Carolina	No State-Mandated Minimum Wage				
South Dakota	$9.45	Eff. 1/1/22: $9.95 Indexed for Inflation	$4.725 (Eff. 1/1/22: $4.975)	$4.725 (Eff. 1/1/22: $4.975)	None
Tennessee	No State-Mandated Minimum Wage				
Texas	$7.25	None	$2.13	$5.12	Yes
Utah	$7.25	None	$2.13	$5.12	None
Vermont	$11.75	Eff. 1/1/22: $12.55[1]	$5.88 (Eff. 1/1/22: $6.28)[6]	$5.88 (Eff. 1/1/22: $6.28)[6]	Yes
Virginia	$9.50	Eff. 1/1/22: $11[1]	$2.13	$7.37	Yes
Washington	$13.69	Eff. 1/1/22: $14.49 Indexed for Inflation	Tip Credit Not Allowed		None
West Virginia	$8.75	None	$2.62	$6.13	Yes
Wisconsin	$7.25	None	$2.33[7]	$4.92[7]	Yes
Wyoming	$5.15[2]	None	$2.13	$3.02	None

[1] See state summary for subsequent increases.

[2] Employees subject to the Fair Labor Standards Act must be paid the federal hourly minimum wage rate of $7.25 per hour.

[3] Employers can take a tip credit if the combined amount of the employee's wages and tips total at least $7 more than the current hourly minimum wage, and the employee earns more than $20 per month in tips.

[4] Different rates apply to certain employers/employees; see state summary for further information.

[5] Separate rates for fast food workers; see state summary for more information.
[6] Applies to hotel, motel, tourist and restaurant industry employees who earn at least $120 per month in tips.
[7] Rate is for non-opportunity tipped employees; opportunity tipped employees must be paid a cash wage of $2.13 an hour.

F. January 1st Merit and Minimum Wage Increases

January 1st merit increases will be entered into UKG. Managers should follow the below steps to make sure salary increases are in effect for payroll. These changes must be entered by December 31, 2021.

Steps to change a salary:

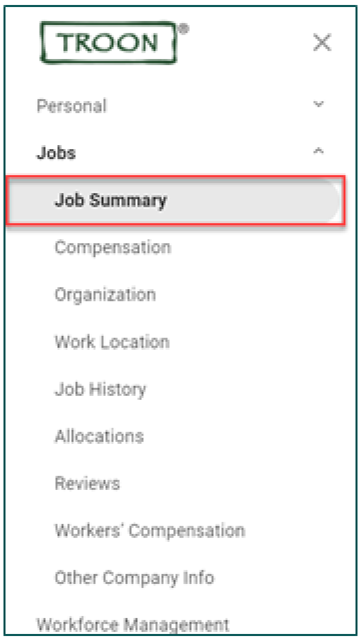
1. Run the Business Intelligence report titled "Employee Listing with Salary"
   a. This report will help you budget to for the new year
   b. Instructions for running a BI report can be found in the guide
2. Navigate in UKG to make the update to the employees profile
   a. Use the below steps to guide you through making a salary increase in UKG
   b. Note, these changes will also need to be made for minimum wage increases where applicable

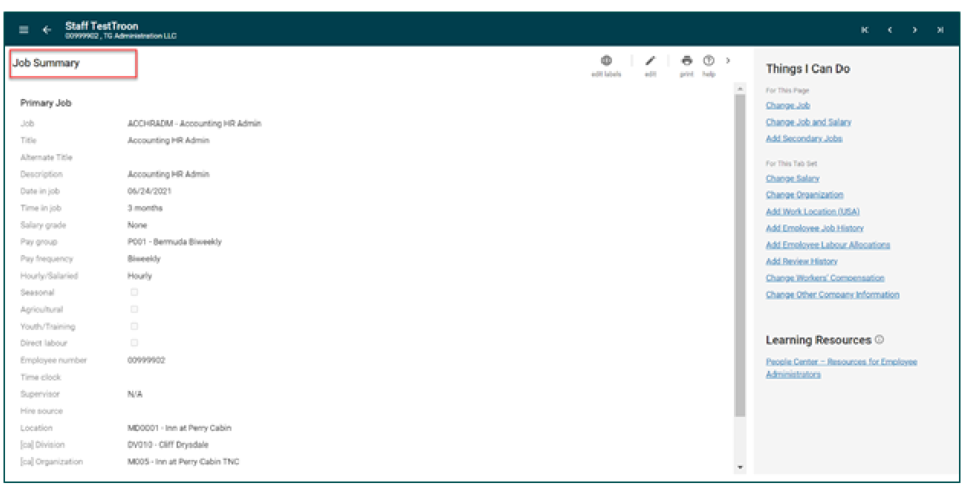
G. View/Change Employee or Job Salary Information

After searching for and opening the record of an employee in UKG Pro™, you can use the options under the **Things I Can Do For This Page** on the **Job Summary** page to make employee job and salary changes. The options you have depend on the page you are viewing.

To View an Employee's Job Information

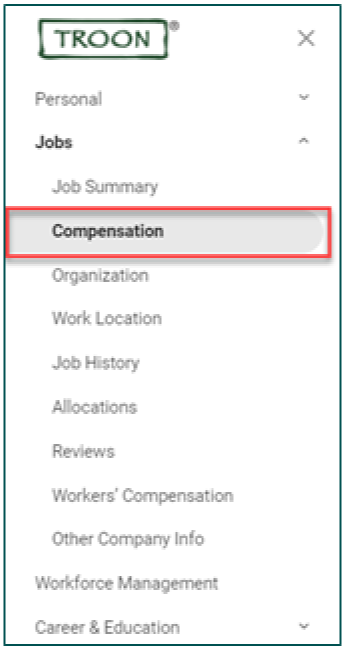
Navigation: My Employees > Search and select Employee (a separate window will open) > While viewing Employee's Record > Click the **Side Navigation Menu** **> Jobs > Job Summary**

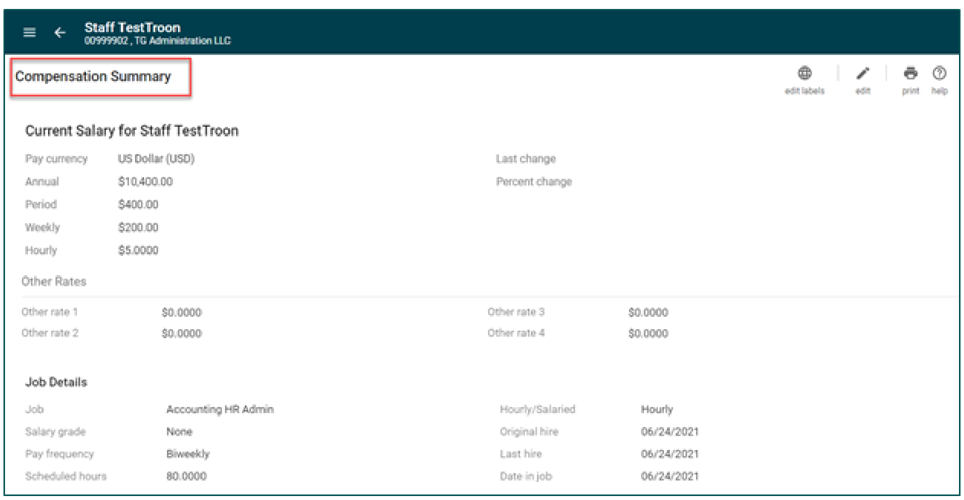




To View Salary Information

Navigation: While viewing an Employee's Record > Click the **Side Navigation Menu** > **Jobs > Compensation**





To Change Job and Salary Information

From the employee's **Job Summary** page:

1. **Change Job and Salary** under the **Things I Can Do For This Page** section on the right hand side. The **Change Job and Salary** page will open in a separate window.
2. On the **Change Job** tab/section, enter at least the following required fields (marked with a):
   - **Effective** date

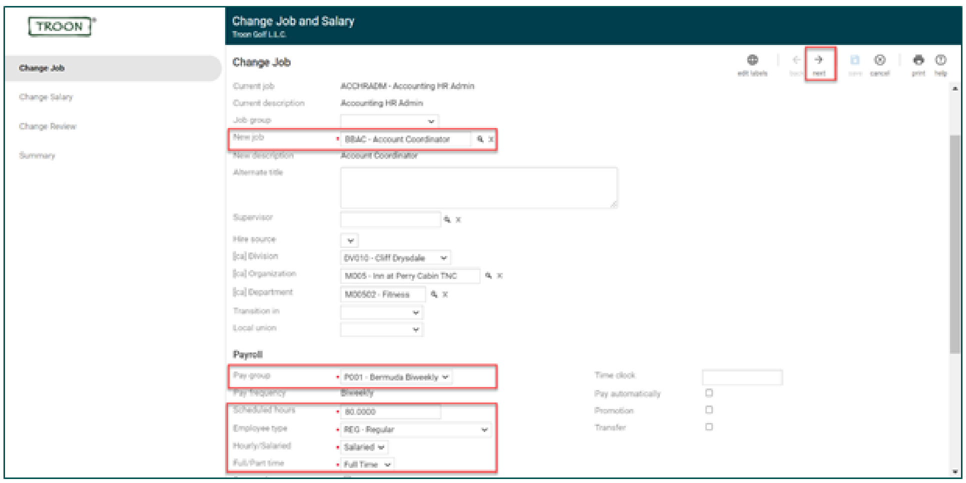
- **Reason**; choose a reason from the dropdown list
- **New job**; click on the box to open a search window

NOTE:

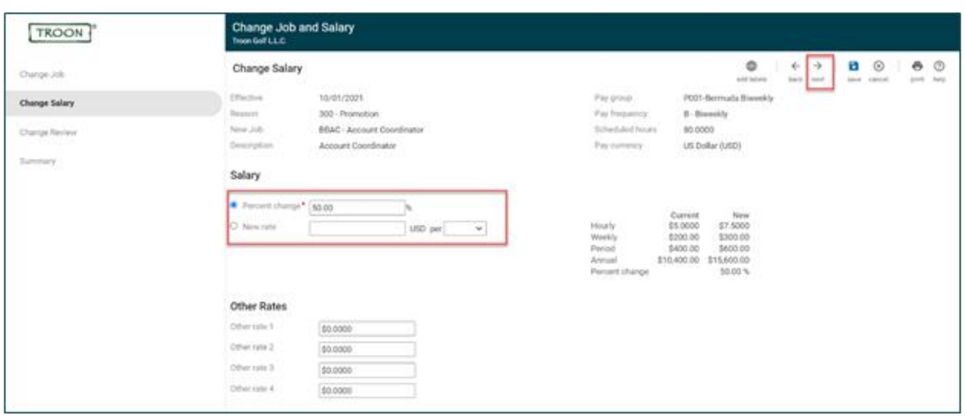
Use **Description contains** in the **Find by** criteria to quickly to quickly search for and locate the new job name using one of the words in the job

- **Pay group**
- **Scheduled hours**
- **Employee type**
- **Hourly/Salaried**
- **Full/Part time**

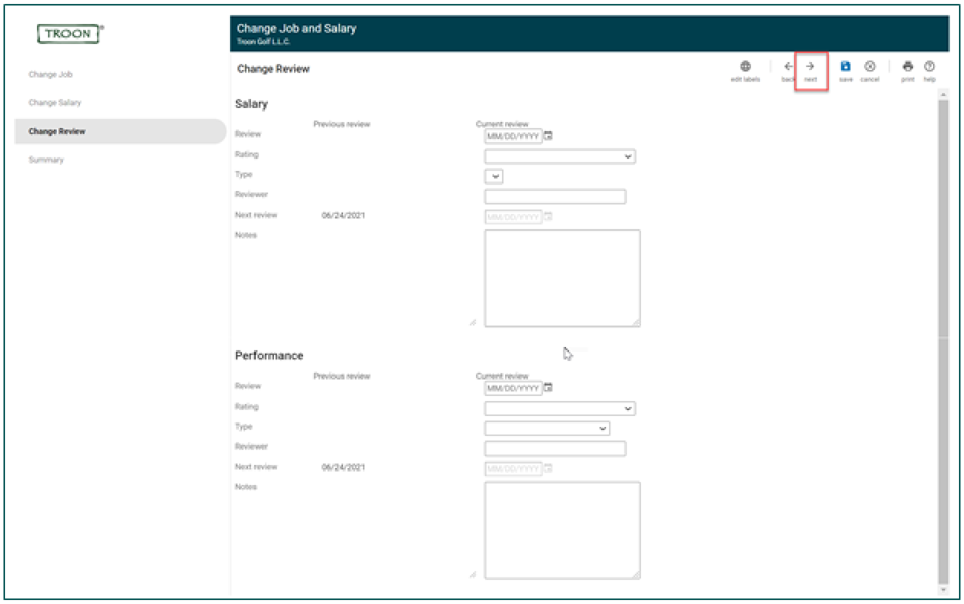
3. Click **Next** at the top of the page to go to the next tab/section



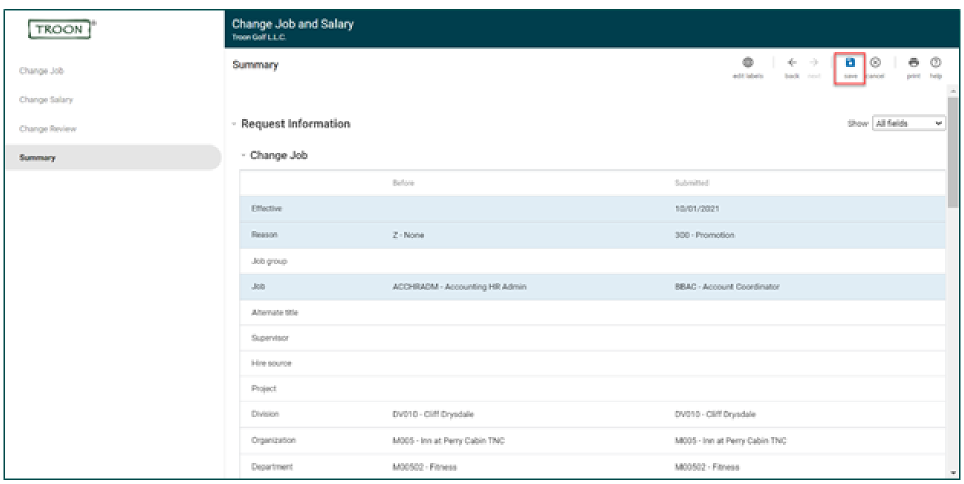
4. On the **Change Salary** tab/section, select and complete either of the following fields (none are required fields):
   - **Percentage change**
5. Click **Next** next at the top of the page to go to the next tab/section



6. On the **Change Review** tab/section, select and complete any of the fields applicable to this change (none are required fields).
7. Click **Next** next at the top of the page to go to the next tab/section



8. On the **Summary** tab/section, you will be given a summary of all the and salary-related changes you are making to the employee's record. Click **Save** save **at the top of the page to complete the transaction.**



H. Payroll Close Process

•DAILY **Supervisor Responsibilities - Timecard Maintenance**
•Review PTO and Sick requests – approve or deny
•Exceptions – need to be corrected or approved (Ex: missed punch)
•Add additional pay – Ex: lesson, commission, Tips, service charge
•Add additional deductions – meal deductions, uniforms
•Review timecard for any penalties – (CA meal break and NY span of hours)
•Review/edit transfers to departments or to labor category for a job change
Above actions can be done daily throughout the pay period
•Review and ensure ALL data on timecards is correct
•Approve timecards (all exceptions must be cleared)
Timecard approvals must be completed by 9:00 a.m. local time on Monday after pay period end

WAVE 2 Training Presentation discussion:

As you all know, the payroll close process is a critical Company activity. Our associates are integral to the Company's success so making sure they are paid accurately, with transparency, each and every payroll is paramount.

To be able to make that happen, all of the following tasks must happen on a DAILY basis. By engaging in a regular cadence of the activities that we will discuss in a moment, the weekly and bi-weekly processes will become easier. Additionally, DAILY completion of tasks will result in less rework, improved associate communications, and more accurate intra period information.

To reiterate --- all of these tasks must happen on a DAILY basis
1. Review PTO and sick requests – the supervisors will approve or deny them, result in associate satisfaction with quick response to requested – when does this happen??? DAILY
2. Exceptions like missed punches will need to be approved by the Supervisor, contemporaneous error corrections means less mistakes – completed DAILY
3. Supervisors will add any additional pay like commissions, lessons, service charges, tips to the associates timecard. Reporting additional pay in the proper period is critical to certain payroll calculations such as overtime. – Must happen DAILY
4. Supervisors will add any additional deductions to the associates timecard like meal deductions, uniform deductions to the associates timecard – DAILY
5. Supervisors will review and edit any transfers that occur to the appropriate department or labor category – when do you think this gets completed??? Yep, you guessed it DAILY

All timecards must be approved and ALL exceptions must be cleared.

All timecards must be reviewed and approved NO later than 9:00am local time on the Monday after the pay period ends. To be crystal clear, our first payroll cycle in UKG ends on 12/31 for all payroll cycles (weekly and bi-weekly) so, that means if you are a facility located on the east coast you need to submit by 9:00am EST on January 3rd.

If all of our Supervisors review and update the timecard DAILY, the completion of payroll should be able to be accelerated and facilities should be able to submit in advance of the 9am local deadline on Monday.
To be clear, if these tasks aren't completed and approved by the deadline, your payroll and pay checks will be delayed.

I. 2022 Payroll Calendar

Bi-Weekly 2022 Payroll Calendar

2022 Payroll Calendar - Bi-Weekly

	January-2022						
	S	M	T	W	T	F	S
						31	1
Prd 1	2	3	4	5	6	7	8
	9	10	11	12	13	14	15
Prd 2	16	17	18	19	20	21	22
	23	24	25	26	27	28	29
	30	31					

	July-2022						
	S	M	T	W	T	F	S
						1	2
Prd 14	3	4	5	6	7	8	9
	10	11	12	13	14	15	16
Prd 15	17	18	19	20	21	22	23
	24	25	26	27	28	29	30
	31						

	February-2022						
	S	M	T	W	T	F	S
Prd 3			1	2	3	4	5
	6	7	8	9	10	11	12
Prd 4	13	14	15	16	17	18	19
	20	21	22	23	24	25	26
	27	28					

	August-2022						
	S	M	T	W	T	F	S
Prd 16		1	2	3	4	5	6
	7	8	9	10	11	12	13
Prd 17	14	15	16	17	18	19	20
	21	22	23	24	25	26	27
	28	29	30	31			

	March-2022						
	S	M	T	W	T	F	S
Prd 5			1	2	3	4	5
	6	7	8	9	10	11	12
Prd 6	13	14	15	16	17	18	19
	20	21	22	23	24	25	26
	27	28	29	30	31		

	September-2022						
	S	M	T	W	T	F	S
Prd 18					1	2	3
	4	5	6	7	8	9	10
Prd 19	11	12	13	14	15	16	17
	18	19	20	21	22	23	24
Prd 20	25	26	27	28	29	30	

	April-2022						
	S	M	T	W	T	F	S
Prd 7						1	2
	3	4	5	6	7	8	9
Prd 8	10	11	12	13	14	15	16
	17	18	19	20	21	22	23
Prd 9	24	25	26	27	28	29	30

	October-2022						
	S	M	T	W	T	F	S
							1
	2	3	4	5	6	7	8
Prd 21	9	10	11	12	13	14	15
	16	17	18	19	20	21	22
Prd 22	23	24	25	26	27	28	29
	30	31					

	May-2022						
	S	M	T	W	T	F	S
	1	2	3	4	5	6	7
Prd 10	8	9	10	11	12	13	14
	15	16	17	18	19	20	21
Prd 11	22	23	24	25	26	27	28
	29	30	31				

	November-2022						
	S	M	T	W	T	F	S
			1	2	3	4	5
Prd 23	6	7	8	9	10	11	12
	13	14	15	16	17	18	19
Prd 24	20	21	22	23	24	25	26
	27	28	29	30			

	June-2022						
	S	M	T	W	T	F	S
				1	2	3	4
Prd 12	5	6	7	8	9	10	11
	12	13	14	15	16	17	18
Prd 13	19	20	21	22	23	24	25
	26	27	28	29	30		

	December-2022						
	S	M	T	W	T	F	S
					1	2	3
Prd 25	4	5	6	7	8	9	10
	11	12	13	14	15	16	17
Prd 26	18	19	20	21	22	23	24
	25	26	27	28	29	30	31

	Pay period end date
	Payroll Processing Day
	Paydate with Benefit Deductions
	Paydate without Benefit Deductions
	Field Holiday Schedule
	Employer Benefits Charged the 1st and 2nd paycheck date of the month
9	Corporate Holiday

	January-2023						
	S	M	T	W	T	F	S
Prd 1	1	2	3	4	5	6	7
	8	9	10	11	12	13	14
Prd 2	15	16	17	18	19	20	21
	22	23	24	25	26	27	28
Prd 3	29	30	31	1	2	3	

Benefits (not FSA or 401k) are skipped in months that have 3 paycheck dates in them. They are skipped on the 3rd paycheck date.

Weekly 2022 Payroll Calendar

2022 Payroll Calendar - Weekly

January-2022

	S	M	T	W	T	F	S
						31	1
Prd 1	2	3	4	5	6	7	8
Prd 2	9	10	11	12	13	14	15
Prd 3	16	17	18	19	20	21	22
Prd 4	23	24	25	26	27	28	29
	30	31					

February-2022

	S	M	T	W	T	F	S
Prd 5			1	2	3	4	5
Prd 6	6	7	8	9	10	11	12
Prd 7	13	14	15	16	17	18	19
Prd 8	20	21	22	23	24	25	26
	27	28					

March-2022

	S	M	T	W	T	F	S
Prd 9			1	2	3	4	5
Prd 10	6	7	8	9	10	11	12
Prd 11	13	14	15	16	17	18	19
Prd 12	20	21	22	23	24	25	26
	27	28	29	30	31		

April-2022

	S	M	T	W	T	F	S
Prd 13						1	2
Prd 14	3	4	5	6	7	8	9
Prd 15	10	11	12	13	14	15	16
Prd 16	17	18	19	20	21	22	23
Prd 17	24	25	26	27	28	29	30

May-2022

	S	M	T	W	T	F	S
Prd 18	1	2	3	4	5	6	7
Prd 19	8	9	10	11	12	13	14
Prd 20	15	16	17	18	19	20	21
Prd 21	22	23	24	25	26	27	28
	29	30	31				

June-2022

	S	M	T	W	T	F	S
Prd 22				1	2	3	4
Prd 23	5	6	7	8	9	10	11
Prd 24	12	13	14	15	16	17	18
Prd 25	19	20	21	22	23	24	25
Prd 26	26	27	28	29	30		

July-2022

	S	M	T	W	T	F	S
						1	2
Prd 27	3	4	5	6	7	8	9
Prd 28	10	11	12	13	14	15	16
Prd 29	17	18	19	20	21	22	23
Prd 30	24	25	26	27	28	29	30
	31						

August-2022

	S	M	T	W	T	F	S
Prd 31		1	2	3	4	5	6
Prd 32	7	8	9	10	11	12	13
Prd 33	14	15	16	17	18	19	20
Prd 34	21	22	23	24	25	26	27
	28	29	30	31			

September-2022

	S	M	T	W	T	F	S
Prd 35					1	2	3
Prd 36	4	5	6	7	8	9	10
Prd 37	11	12	13	14	15	16	17
Prd 38	18	19	20	21	22	23	24
Prd 39	25	26	27	28	29	30	

October-2022

	S	M	T	W	T	F	S
							1
Prd 40	2	3	4	5	6	7	8
Prd 41	9	10	11	12	13	14	15
Prd 42	16	17	18	19	20	21	22
Prd 43	23	24	25	26	27	28	29
	30	31					

November-2022

	S	M	T	W	T	F	S
Prd 44			1	2	3	4	5
Prd 45	6	7	8	9	10	11	12
Prd 46	13	14	15	16	17	18	19
Prd 47	20	21	22	23	24	25	26
	27	28	29	30			

December-2022

	S	M	T	W	T	F	S
Prd 48					1	2	3
Prd 49	4	5	6	7	8	9	10
Prd 50	11	12	13	14	15	16	17
Prd 51	18	19	20	21	22	23	24
Prd 52	25	26	27	28	29	30	31

(purple)	Check Date for prior week. Weekly Pyrll only
(yellow)	Check Date for prior week & Bi-Weekly Check Date.
(green)	Payroll Processing Day
(pink)	Employer Benefits Charged the 1st, 2nd, 3rd, 4th paycheck date of the month
(red)	Field Holiday Schedule
9	Corporate Holiday

January-2023

	S	M	T	W	T	F	S
Prd 1	1	2	3	4	5	6	7
Prd 2	8	9	10	11	12	13	14
Prd 3	15	16	17	18	19	20	21
Prd 4	22	23	24	25	26	27	28
Prd 5	29	30	31	1	2	3	

Benefits (not FSA or 401k) are skipped in months that have 5 paycheck dates in them. They are skipped on the 5th paycheck date.

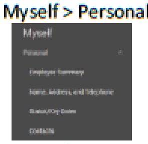
J. Quick Reference Guide for Associates

Quick Reference Guide for Employees

UKG Pro

Personal Information

Navigation: Myself > Personal



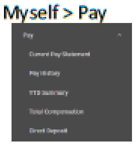
You can view or update personal information by selecting the links under Myself > Personal.

To **Update**, click the Edit symbol at top right of page.

- Summary of personal information
- Displays Name, Address, Telephone and Email
- Shows Employment Dates
- Emergency Contact information
- Displays Date of Birth, Gender, SSN and Ethnicity

Pay Statements

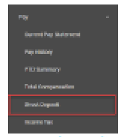
Navigation: Myself > Pay



You can view your current or prior pay statements by selecting Myself > Pay Current Pay Statement OR Pay History.

Direct Deposit Information

Navigation: Myself > Pay > Direct Deposit

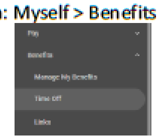


You can view or update direct deposit accounts information under Myself Pay > Direct Deposit.

- To **Add** an account, select the **Add** button at top right of the page.
- To **Delete** an existing account, check the box under Delete column for the account to be removed and select the **Delete** button at top right of page.

PTO Requests

Navigation: Myself > Benefits > Time Off



Note:
Not all employees will submit PTO requests in Pro. Check with your manager or HR for requirements!

You can submit PTO requests under Myself > Benefits > Time Off.

- To **Add** a request, select the **Add** button at top right of the page.
- To **Delete** a request, check the box under Delete column for the request to be removed and select the **Delete** button at top right of page.

Benefits: Life Events

Navigation: Myself > Life Events > Life Events

You can add or update benefits under Myself > Life Event > Life Events. Life Events are changes that happen to you or your family that affect your benefits.

Here are a few examples of Life Events:

- New Hire
- Marriage/Divorce
- Birth/Adoption/Death

Mobile Information

- Download the Pro Mobile App from the Apple or Google Play app stores.
- Enter the **Company Access Code**.
- To **Sign In**, you will use the username and password you use to log in to the Pro website.

Pro Quick Tours and Tips

Additional help is provided under **Things I Can Do** on the right side of each page in Pro.

- **Overviews** are high-level summaries.
- **Tours** are short, detailed demonstrations.
- **Learning Resources** are short job aids to support completing Pro tasks

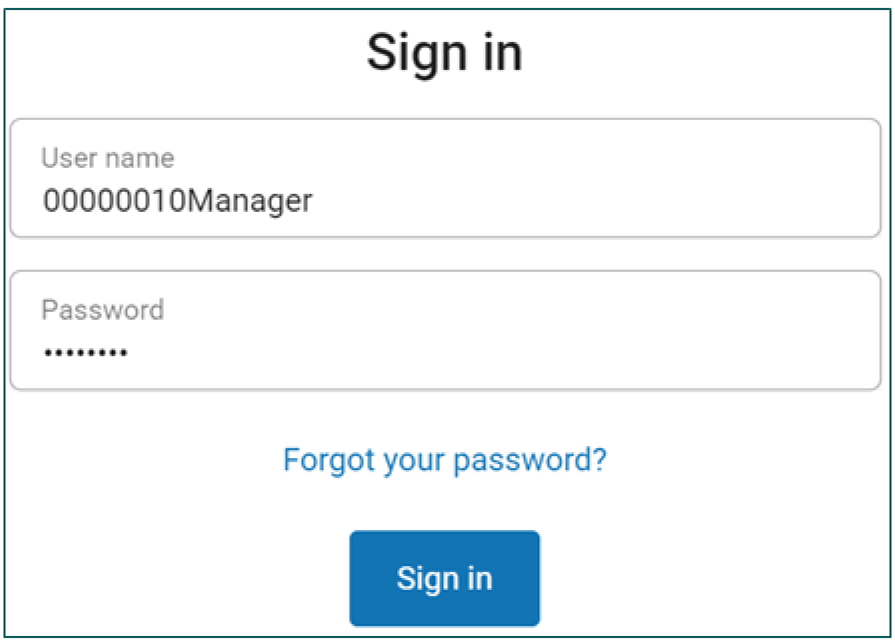
K. UKG Login

Associates can log into UKG once a link and username with a default password is provided top them.

Navigation: Enter the URL provided into the internet web browser

https://n35.ultipro.com/login.aspx

1. Enter your provided username
- Employee ID number followed by last name
- EX: 12345678Smith
- Usernames can be found by running a BI report. See instructions below.
2. Enter your provided default password
- Default password is date of birth in the format MMDDYYYY
- EX: Birth day is January 01, 1980, default password is 01011980
3. Click Sign in

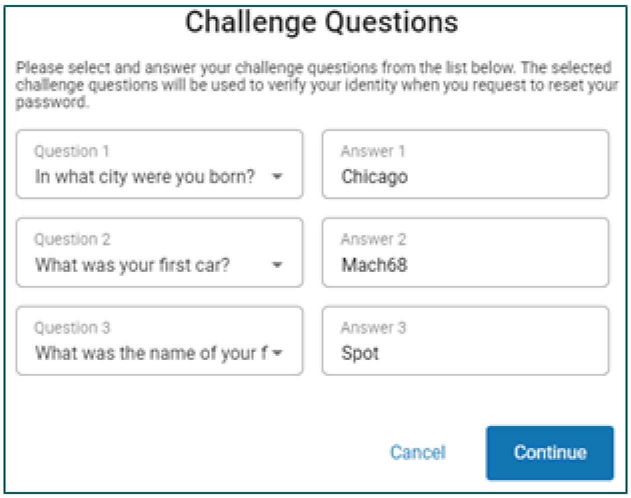


Note: Google Chrome is the preferred application browsers for UKG Pro.

To Change Password

When logging in for the first time you will be asked to **Change Your Password** page in your browser, follow the instructions displayed on the screen:

4. Chose a new password, following the provided password requirements
5. Enter your current default password in Current password
6. Re-enter the new password in Confirm password
7. Once you have met the password requirements the OK button will display
8. Click **OK**
9. Choose your **Challenge Questions**
10. Enter the Challenge Question answers
11. Once entered the **Continue** button will display
12. Save these answers and your new chosen password in a secure place



13. Select **Continue**

Additional Information

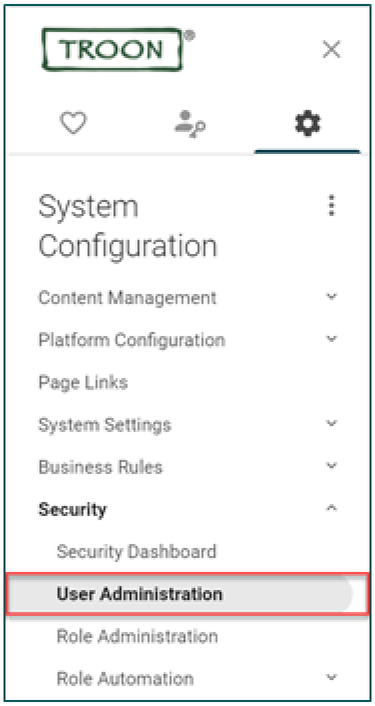
BI Report for Usernames

Resetting Your Own User Password

Associates can reset their password using the **Forgot your password?** link when logging in to UKG. However, this requires the associate to know their User Name and have previously logged in and gone through the steps to set their challenge questions. If they do not know their username, an administrator can provide it to them and reset their password in UKG through the **User Administration** page.

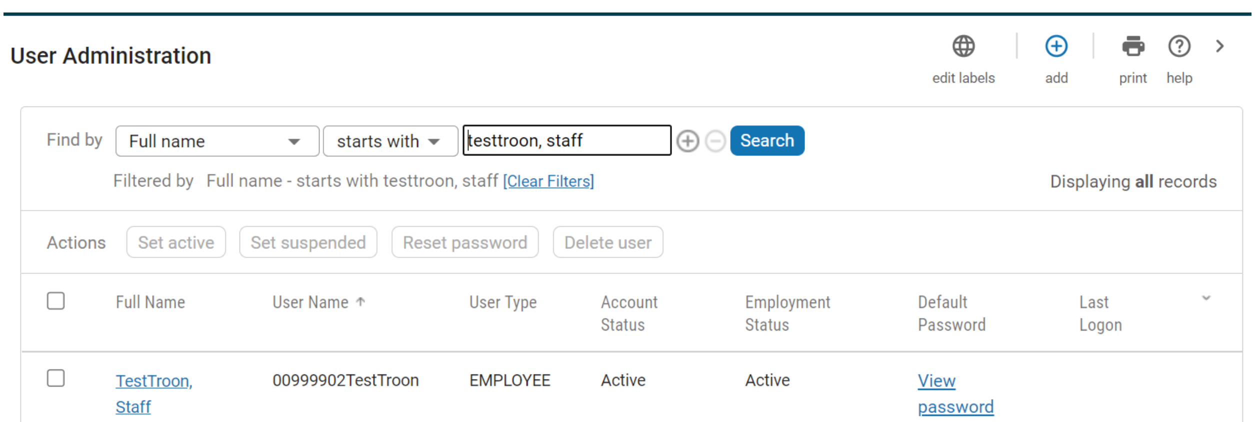
Resetting Other Associates User Password to the Default

Navigation: System Configuration > Security > User Administration



To reset a User's password in UKG:

1. On the **User Administration** page, use the **Find by** search area to specify the search criteria for the associate whose password you would like to reset.
2. Select the check box to the left of the desired associate's name and click the **Reset password** button.



Note: the Username is visible from this screen.

4. After the password has been reset, the associate will be prompted to login and create their password, create Challenge Questions and then will be able to log in.

Trouble Shooting Questions

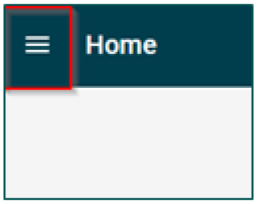
1. What is the URL that you are trying to login to?
- n35.ultipro.com/login.aspx
2. Which browser are you using?
- Note UKG is most compatible with Google Chrome
- Ask the associate to clear cache
3. Have you logged into UKG and created a password and security questions before?
4. Have you tried using the forgot your password link from the login screen?
5. What username and password are you entering?

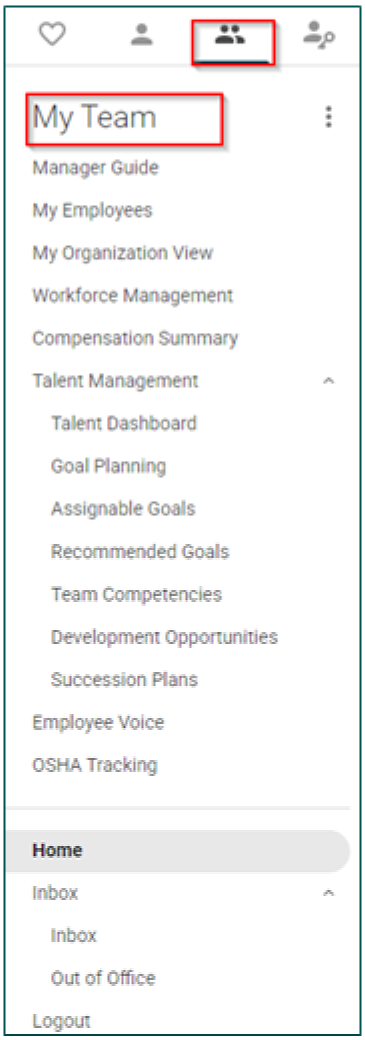
Still having problems?

If these questions have been asked and the steps above have been executed, please escalate to the next support tier.

L. Navigating UKG Pro

From the **Home** Page > Select the **Side Navigation/Hamburger Menu** > My Team



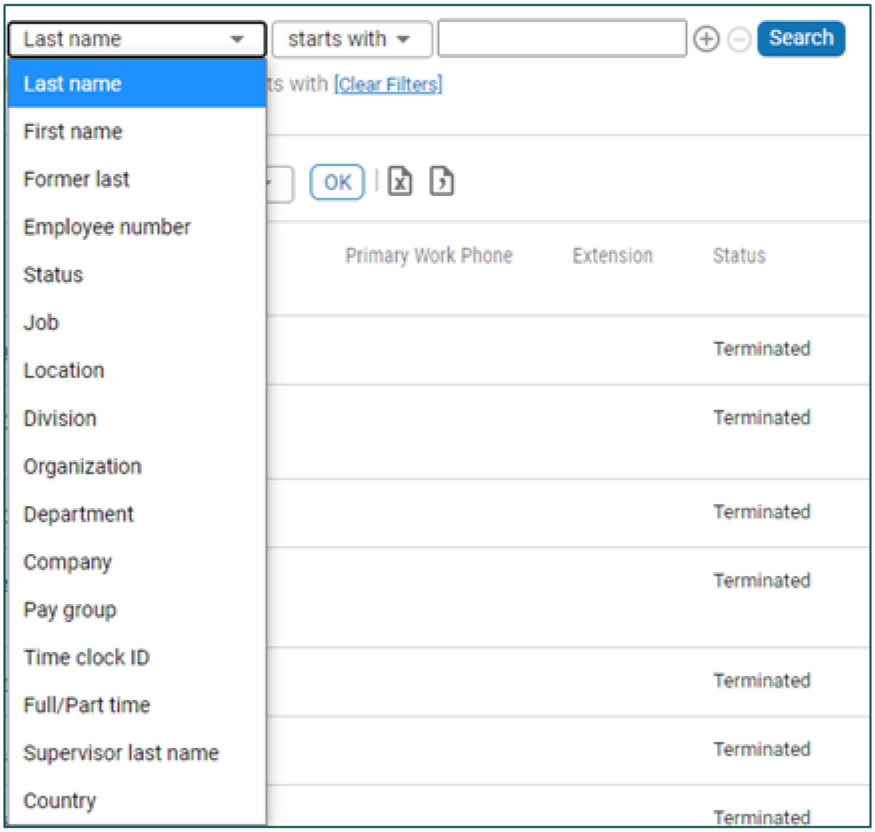


To View Employees

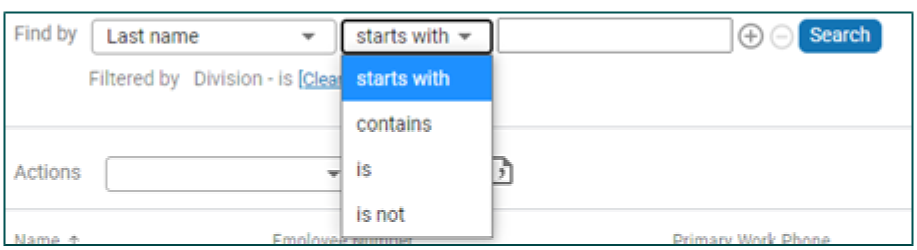
From the **My Team** page in Pro, see below steps:

1. Select My Employees

2. Select Associate's applicable criteria to locate them or select the search with a blank start with instead and it will pull all associates.



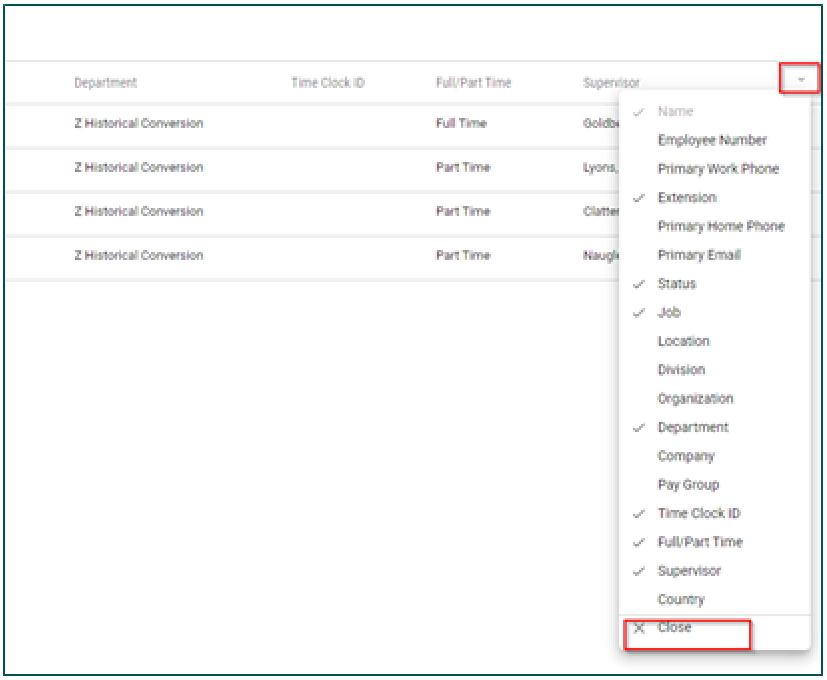
3. Change the criteria in the center bar to meet your search needs



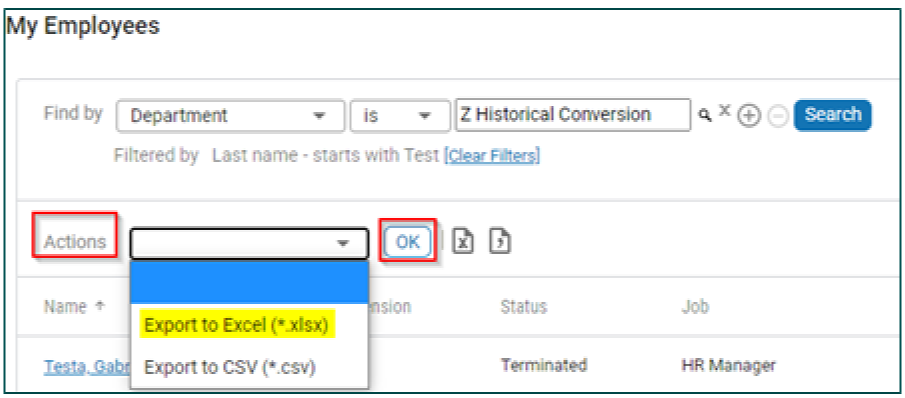
Bonus!

See specific information directly on the screen when viewing an associate, see below steps:

- Chose the arrow drop down
- Select or unselect, you cannot remove the associate name from your selection
- Select Close
- Choices will remain displayed the next time you search under your team



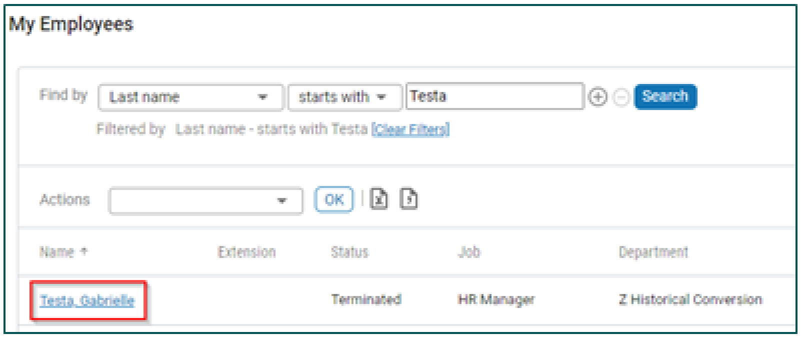
- You also have the option to export selected information in excel or csv



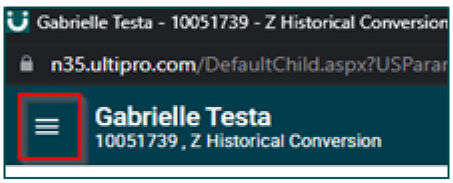
View A Specific Employee

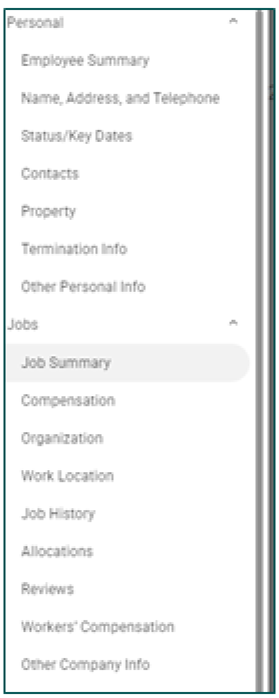
From My Employees in Pro, see below steps:

1. Select your applicable employee by criteria
2. Select the blue hyperlinked name



3. Associate’s information will display in a secondary browser
4. Select the three bars next to the employee’s name to display employee view options
5. Select area you would like to view



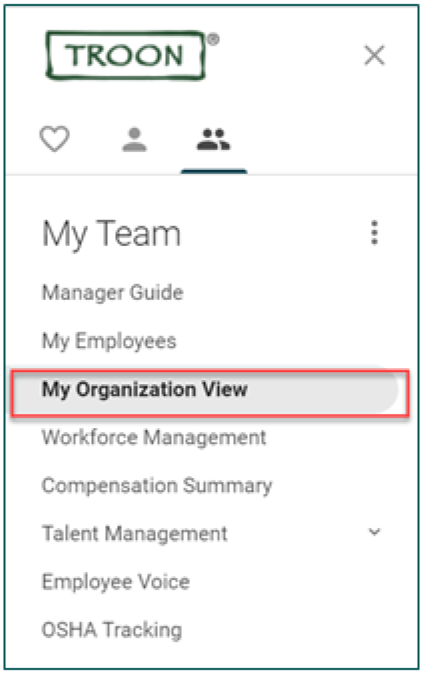


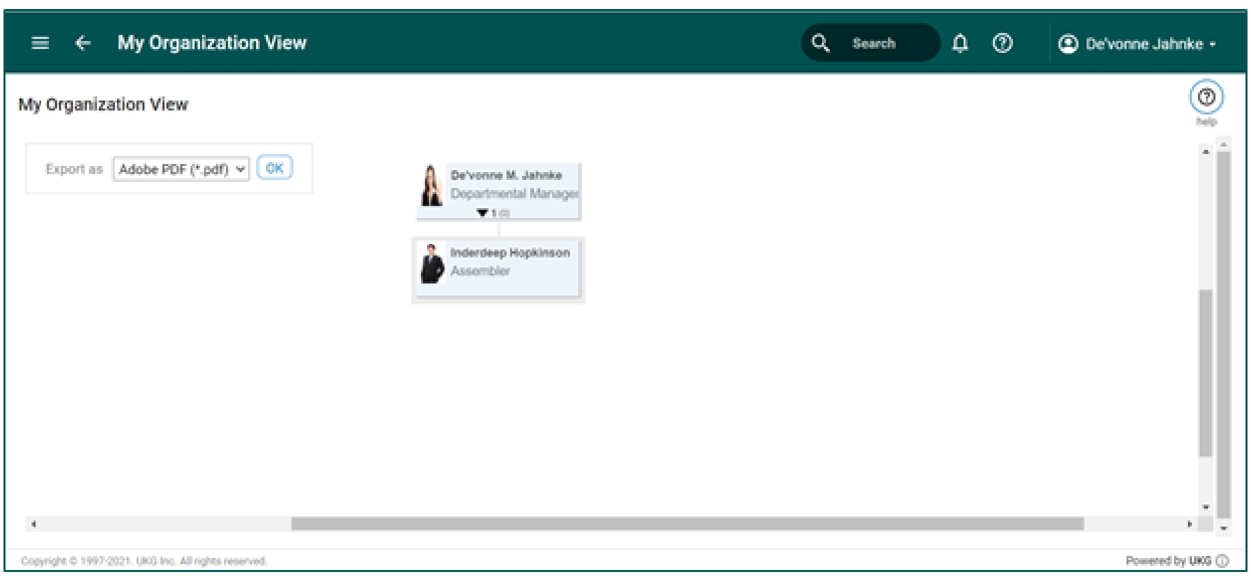
Additional Information

Viewing Your Organization

The **My Organization View** page provides a graphic display of the manager and his/her reporting relationships, including associate first and last name, associate title, and associate photo (based on configuration). Only active employees are listed in the organization chart.

Navigation: Myself > My Team > My Organization View



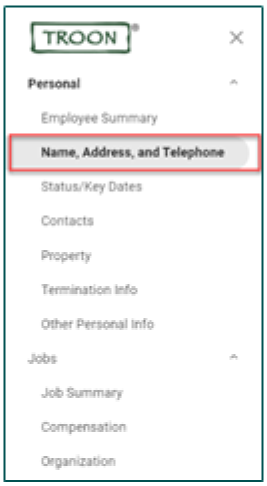


M. Employee Information Updates

Change Employee Email Address and Telephone Number

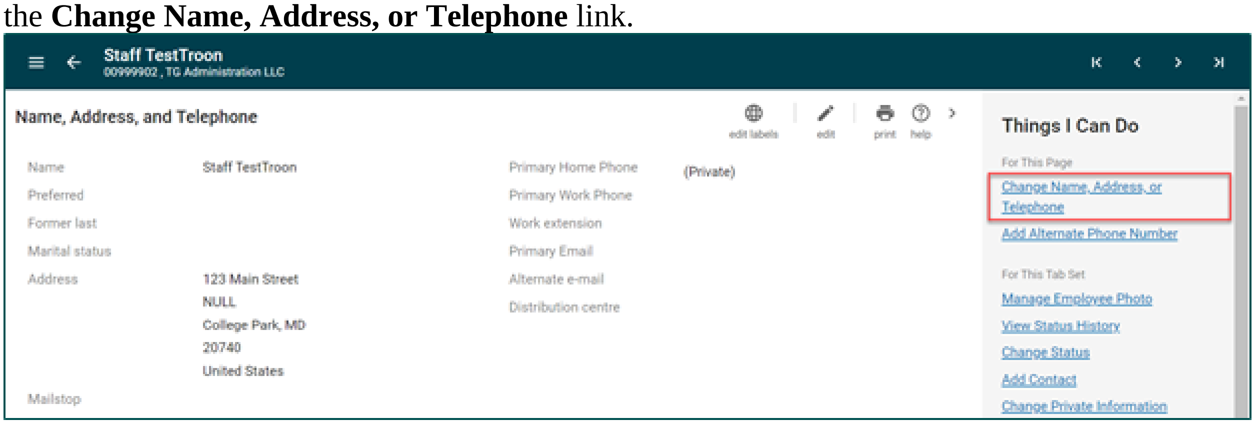
You can **view** and **update** an employee's Email Address and Phone Number on the **Name, Address, and Telephone** page while in an employee's record in UKG Pro™.

Navigation: My Employees > Search and select Employee (a separate window will open) > While viewing Employee's Record > Click the **Side Navigation Menu** > Personal > Name, Address, and Telephone



On the **Name, Address and Telephone** page of an employee's record:

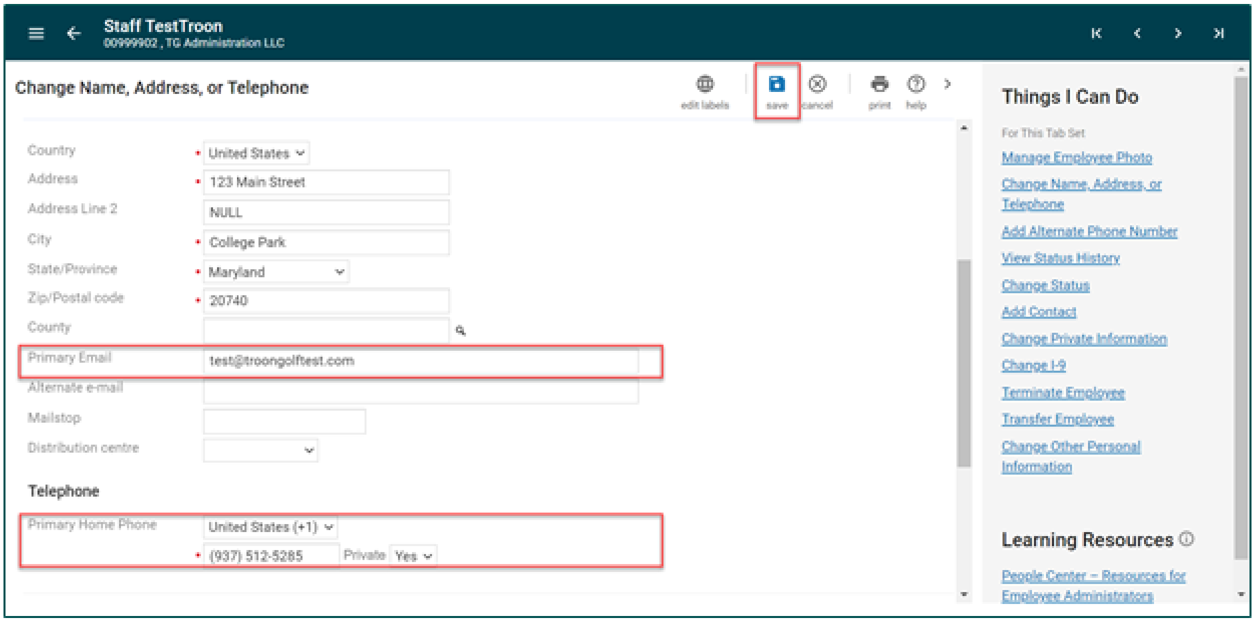
1. From the **Things I Can Do For This Page** section on the right side of the page click the **Change Name, Address, or Telephone** link.



2. On the **Change Name, Address, or Telephone** page, make the desired updates to the following fields:

- **Primary email**
- **Telephone**; select the Country

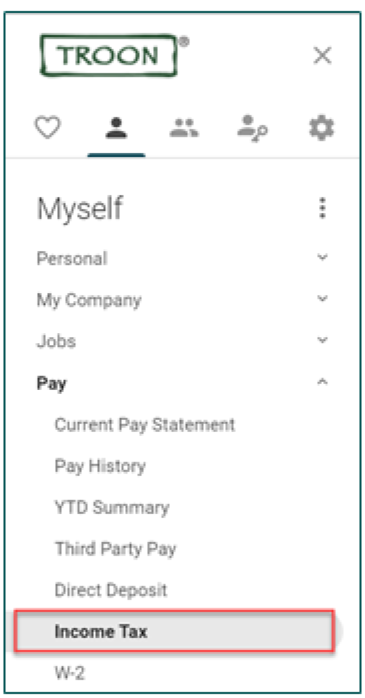
3. Click the **Save** button at the top of the page



Update Tax Information (W-4)

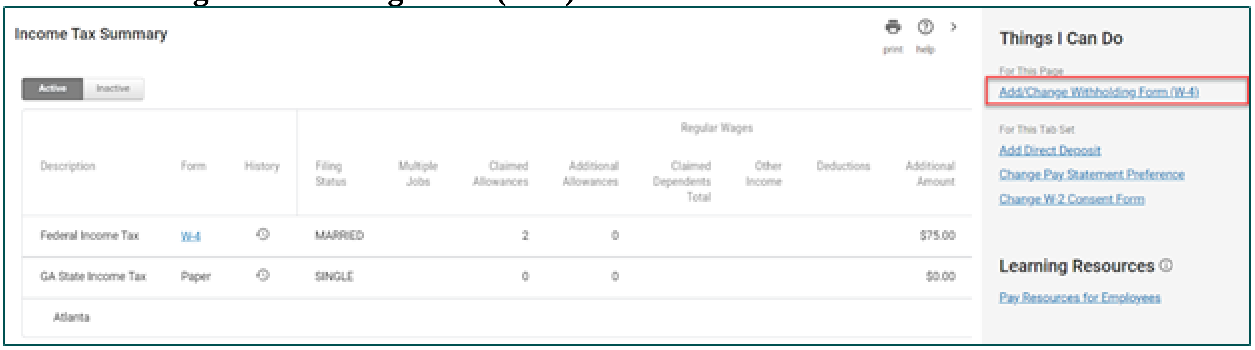
You can **view** and **update** your tax information by selecting **Income Tax** from the **Pay** section in UKG Pro™.

Navigation: Myself > Pay > Income Tax



To update your Withholding information:

1. Under **Things I Can Do For This Page** on the right side of the page, click the **Add/Change Withholding Form (W-4)** link.

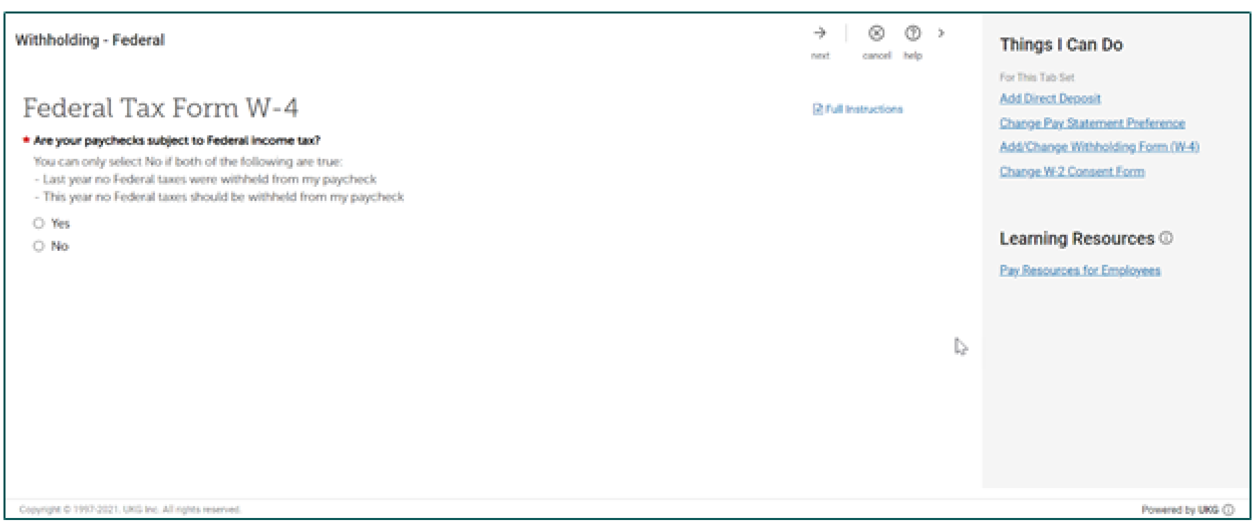


2. On the **Withholding Forms (W-4)** page, select either the form link for either the Federal of State Withholding Form you would like to make changes for from the **Add/Change Withholding Form (W-4)** section

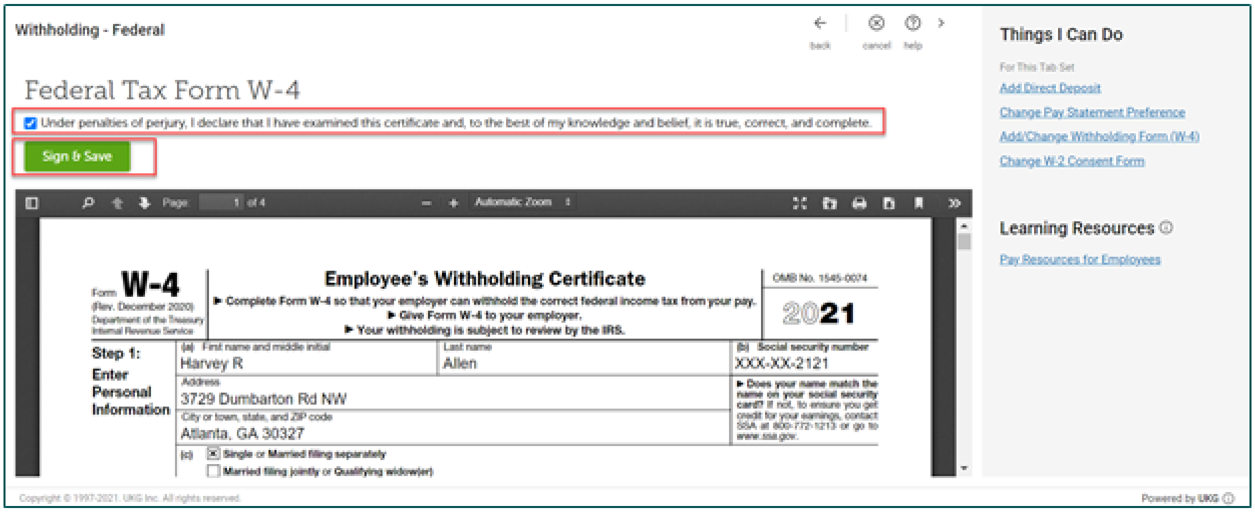
3. On the **Withholding – Federal/State** page complete the fields necessary on the form.

NOTE:

Your responses to each question will determine the following question you are asked to complete. Required fields are marked with *.



4. Click **Next** at the top of the page after answering all questions.
5. Review the Form W-4 to ensure accuracy.
6. Click the check box acknowledging you have reviewed and the form is accurate.
7. Click **Sign & Save**.



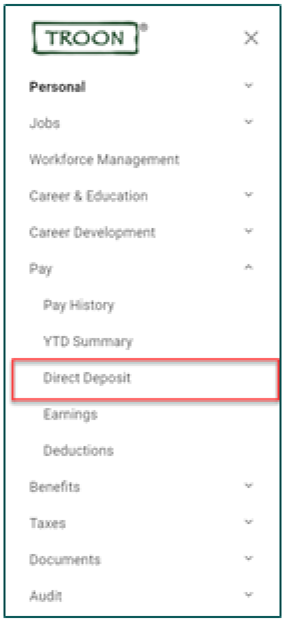
NOTE:

If approvals are required, you must select **Submit** to complete the request.

Add or Update Direct Deposit Information

You can add, delete or update existing Direct Deposit Accounts by selecting Direct Deposit from the Pay section in UKG Pro.

Navigation: Pay > Direct Deposit



Add a Direct Deposit Account

From the **Direct Deposit Detail** page in Pro, see below steps:

1. Click the **Add** button at the top right of page.
2. Enter a **Description** (such as Checking Account) and **Bank Name**.

NOTE:

These fields are optional.

3. Enter the **Routing** and **Account** number.

NOTE:

If you are unsure where to find these numbers, you can click the Routing Number and Account Number links on the page for additional information.

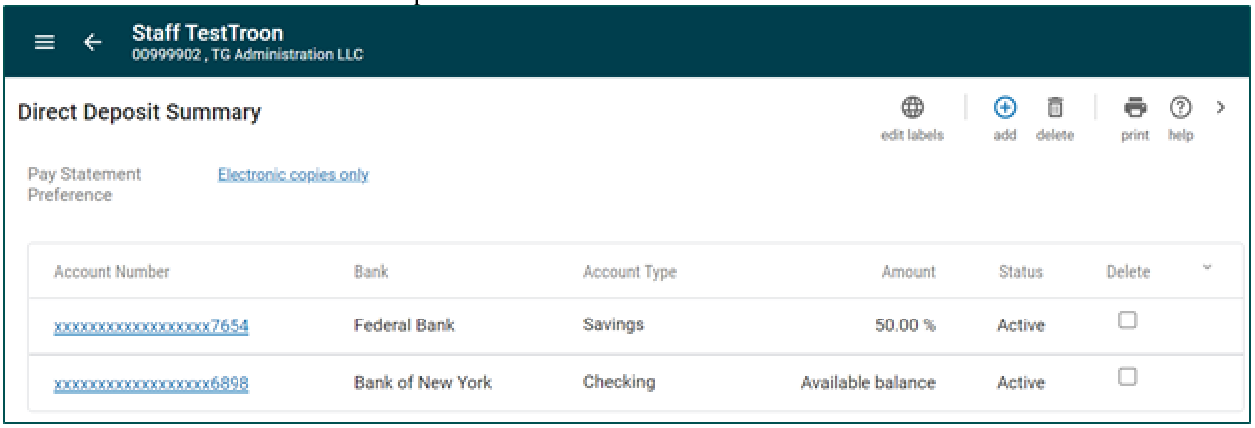
4. Choose the Account **Type**.
5. From the **Status** drop down, select Active or Inactive.

NOTE:

Inactive direct deposit accounts will not have any money deposited during payroll processing.

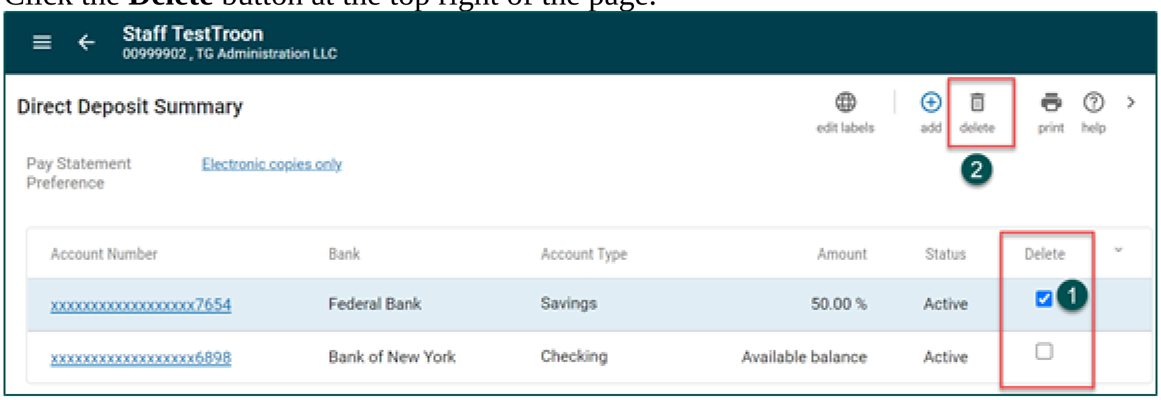
6. Enter the amount to be deposited each pay date. You can enter a flat amount, percentage of net pay, or have the available balance (all amount) into the account.

7. Click the **Save** button once complete.



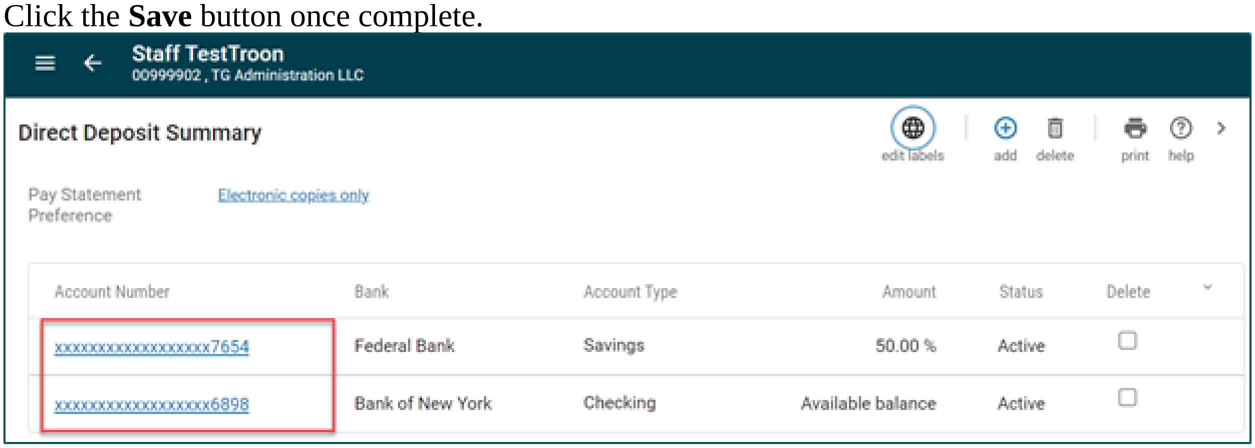
Delete a Direct Deposit Account

1. Check the box under the Delete column on the row for the account you want to delete.
2. Click the **Delete** button at the top right of the page.



Update an Existing Direct Deposit Account

1. Click on the **Account Number** link.
2. Update necessary fields.
3. Click the **Save** button once complete.

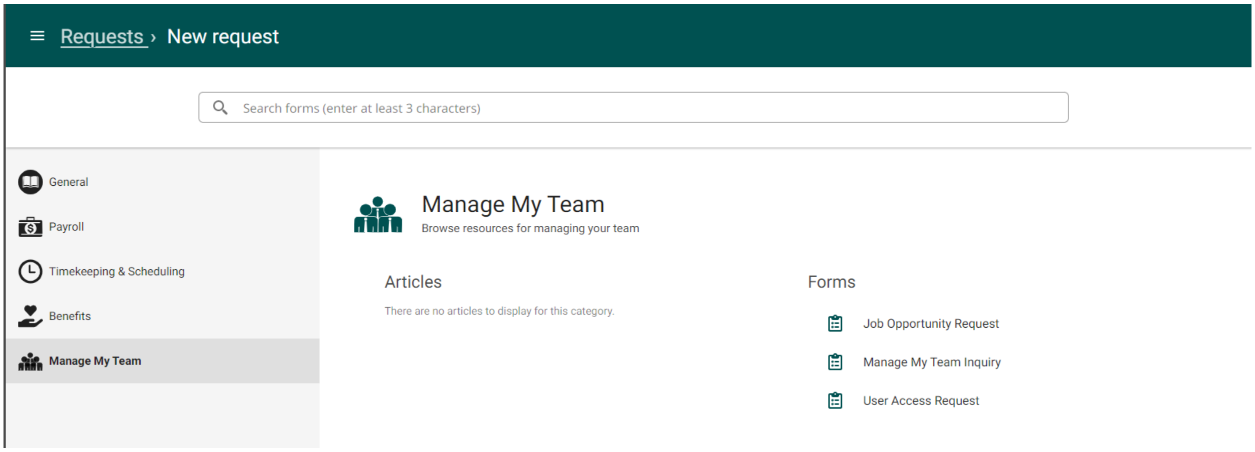


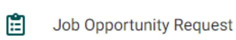
4. **B. Business Intelligence**

N. Recruiting Guide for Managers

Request an Opportunity

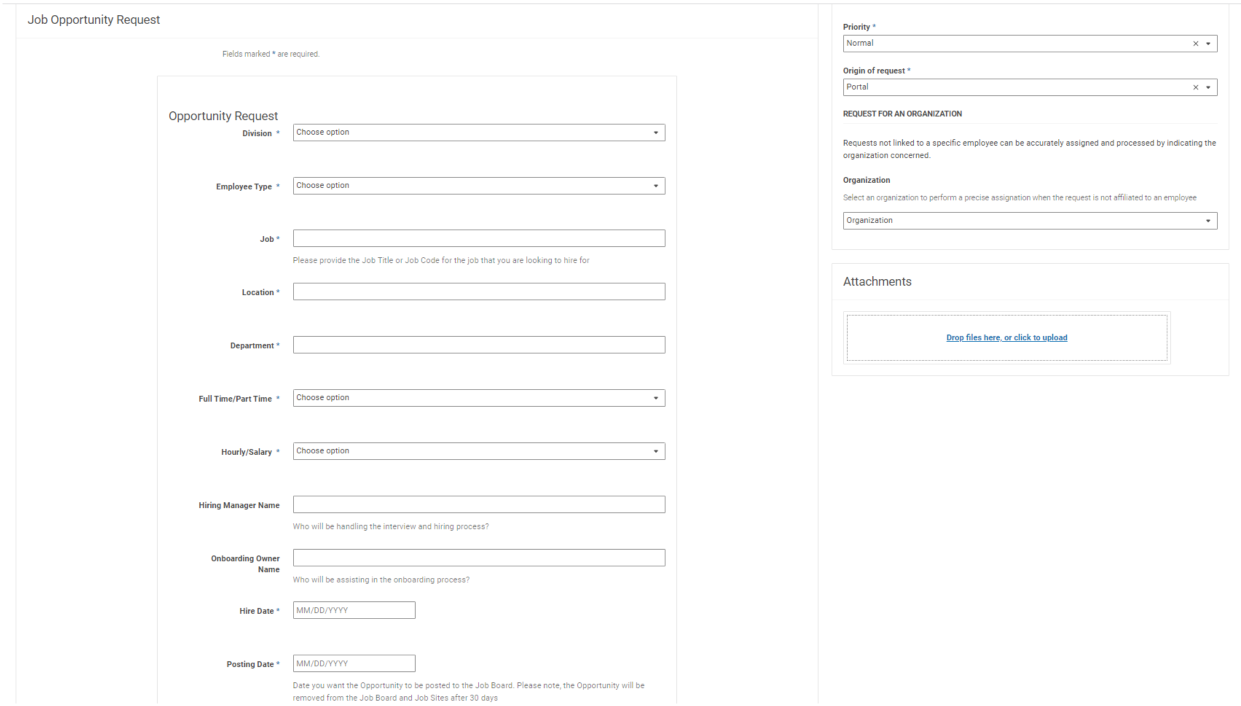
The Job Opportunity Request Form is a form in the Case Management section that allows managers to request that Recruiters create an Opportunity for applicants to apply to in Recruiting. The Job Opportunity Request form is located in the Manage My Team category in Case Management





The Job Opportunity Request allows the managers to provide:

1. The job, location, and department that the manager is hiring the applicant to
2. The status of the new hire, including Full Time/Part Time status, whether they are Hourly or Salaried, and their Pay Rate (If you choose to provide) Ideally, I'd like for compensation information to be required. They can indicate if they want it posted or not.
3. Job posting information, including the date you would like the job posted, the hire date for the position, and whether the job should be posted internally and/or externally
4. The information for the managers that will be assisting during the recruiting process and onboarding process, if it is different than the person who is submitting the Opportunity Request.



Job Opportunity Request

Fields marked * are required.

Opportunity Request

Division *	Choose option
Employee Type *	Choose option
Job *	Please provide the Job Title or Job Code for the job that you are looking to hire for
Location *	
Department *	
Full Time/Part Time *	Choose option
Hourly/Salary *	Choose option
Hiring Manager Name	Who will be handling the interview and hiring process?
Onboarding Owner Name	Who will be assisting in the onboarding process?
Hire Date *	MM/DD/YYYY
Posting Date *	MM/DD/YYYY Date you want the Opportunity to be posted to the Job Board. Please note, the Opportunity will be removed from the Job Board and Job Sites after 30 days

Priority *
Normal

Origin of request *
Portal

REQUEST FOR AN ORGANIZATION

Requests not linked to a specific employee can be accurately assigned and processed by indicating the organization concerned.

Organization

Select an organization to perform a precise assignation when the request is not affiliated to an employee

Organization

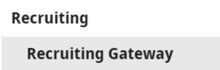
Attachments

Drop files here, or click to upload

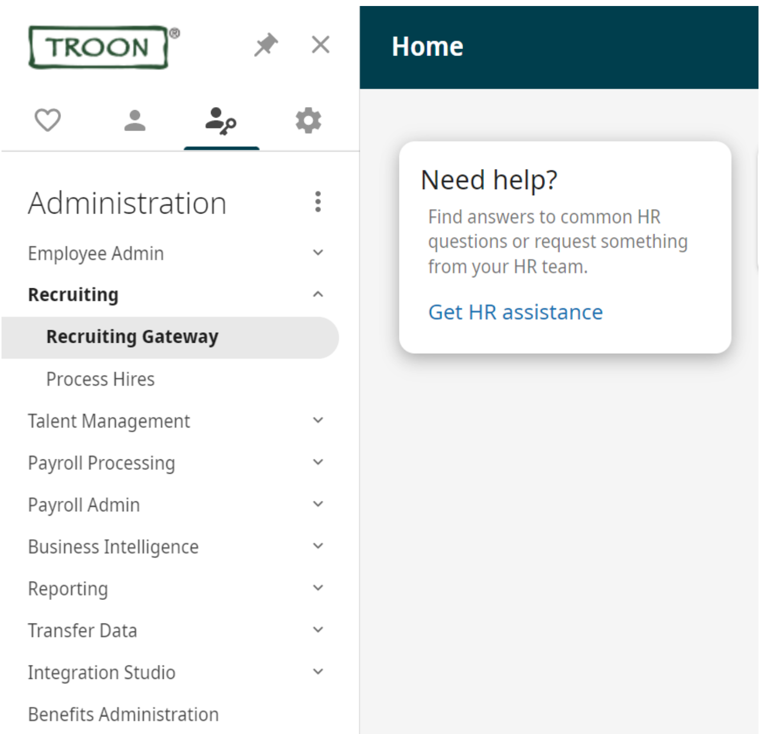
After submitting the Job Opportunity the Recruiter may use the case's chat functionality to reach out and request or confirm any information that was in the request to ensure that the Opportunity is created correctly.

Accessing the Recruiting Gateway

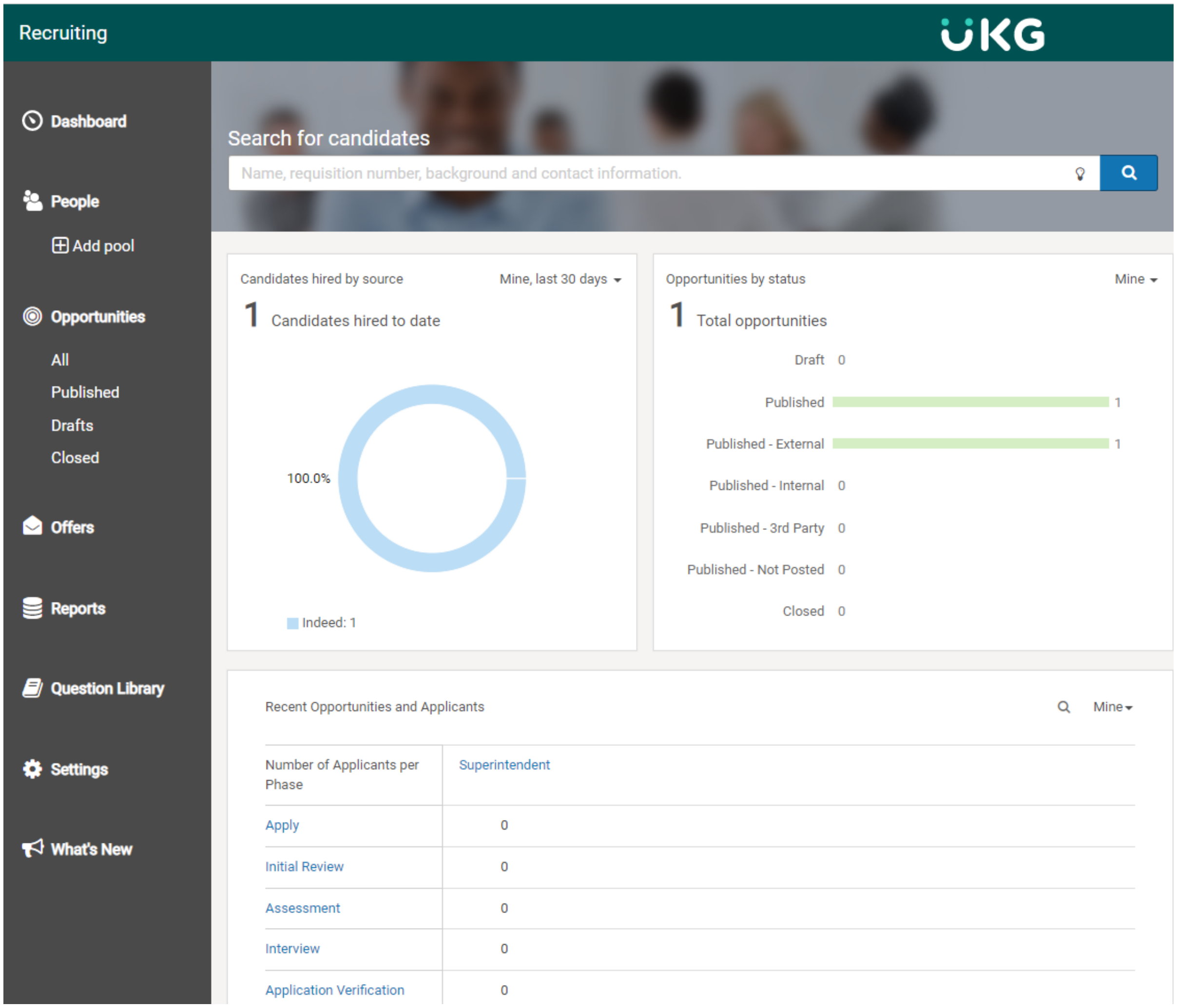
The Recruiting Gateway in UKG Pro will be the section where you can view the Opportunities that the Recruiters have created for your location, view the candidates that have applied to your Opportunities, and move the candidates through the Dispositioning steps.



To access the Recruiting Gateway, on the UKG Pro homepage locate the Recruiting section under Administration. Open the Recruiting section to find the Recruiting Gateway, this will open the Recruiting Gateway on a new tab in your browser.



Recruiting Gateway will take you to your Dashboard where you will be able to see the status of your Opportunities and candidates.

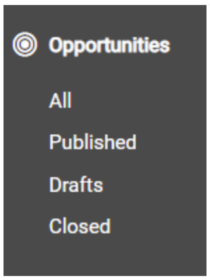

Recruiting
UKG
Dashboard
People
Add pool
Opportunities
All
Published
Drafts
Closed
Offers
Reports
Question Library
Settings
What's New
Search for candidates
Name, requisition number, background and contact information.
Candidates hired by source
Mine, last 30 days
1 Candidates hired to date
100.0%
Indeed: 1
Opportunities by status
Mine
1 Total opportunities
Draft 0
Published 1
Published - External 1
Published - Internal 0
Published - 3rd Party 0
Published - Not Posted 0
Closed 0
Recent Opportunities and Applicants
Mine
Number of Applicants per Phase
Superintendent
Apply 0
Initial Review 0
Assessment 0
Interview 0
Application Verification 0

Viewing the Opportunity

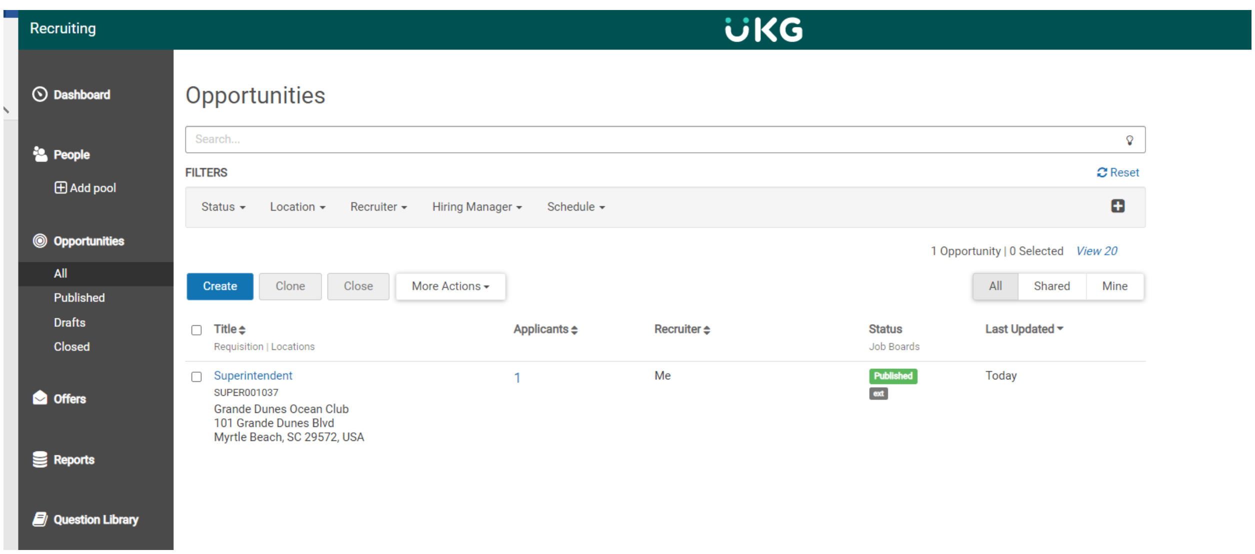
Opportunities are the requisitions and job postings that the candidates apply to. Opportunities can be published externally to your division's job board as well as external job sites, while internal Opportunities will be posted so only internal applicants currently within the company can see it.

The Opportunities section is located on the left hand side of your screen with the options to see All, Published, Drafts, and Closed Opportunities.

1. Published Opportunities are the Opportunities that have been fully created and applicants can apply to, and have been published to job sites if requested.
2. Draft Opportunities are Opportunities that in the process of being created or have not been published to job sites yet
3. Closed Opportunities are the Opportunities that have been closed and are no longer active.

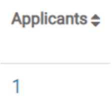


Once on the Opportunities section, the Opportunities that the managers are able to see based on the qualifications are listed.

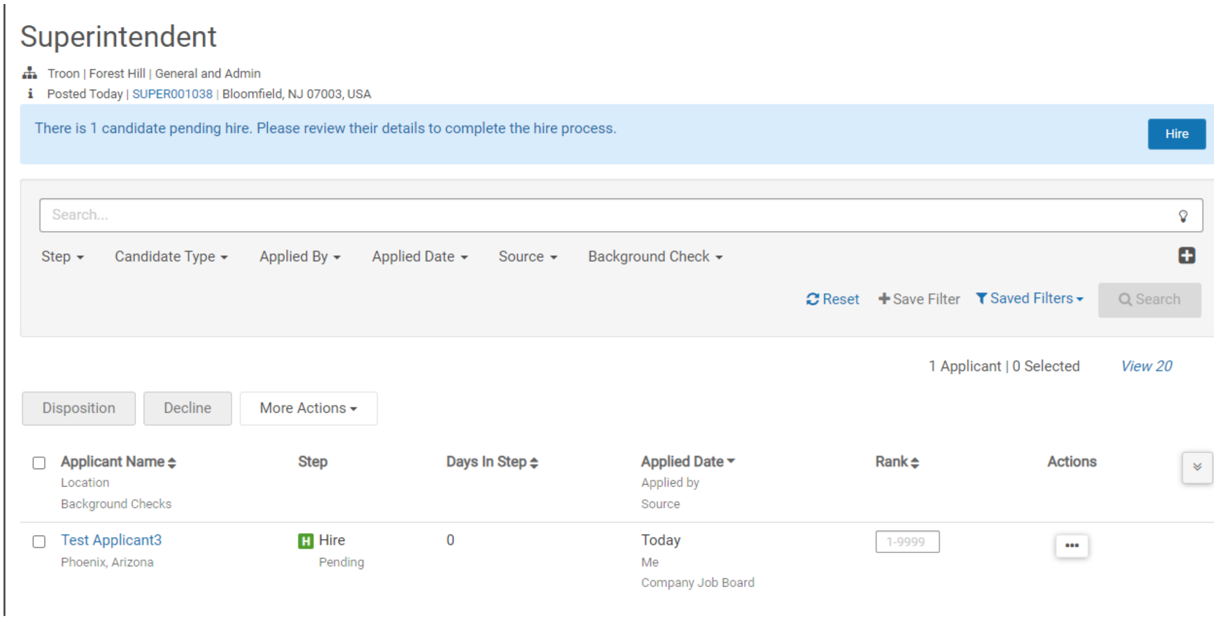


Viewing Candidates

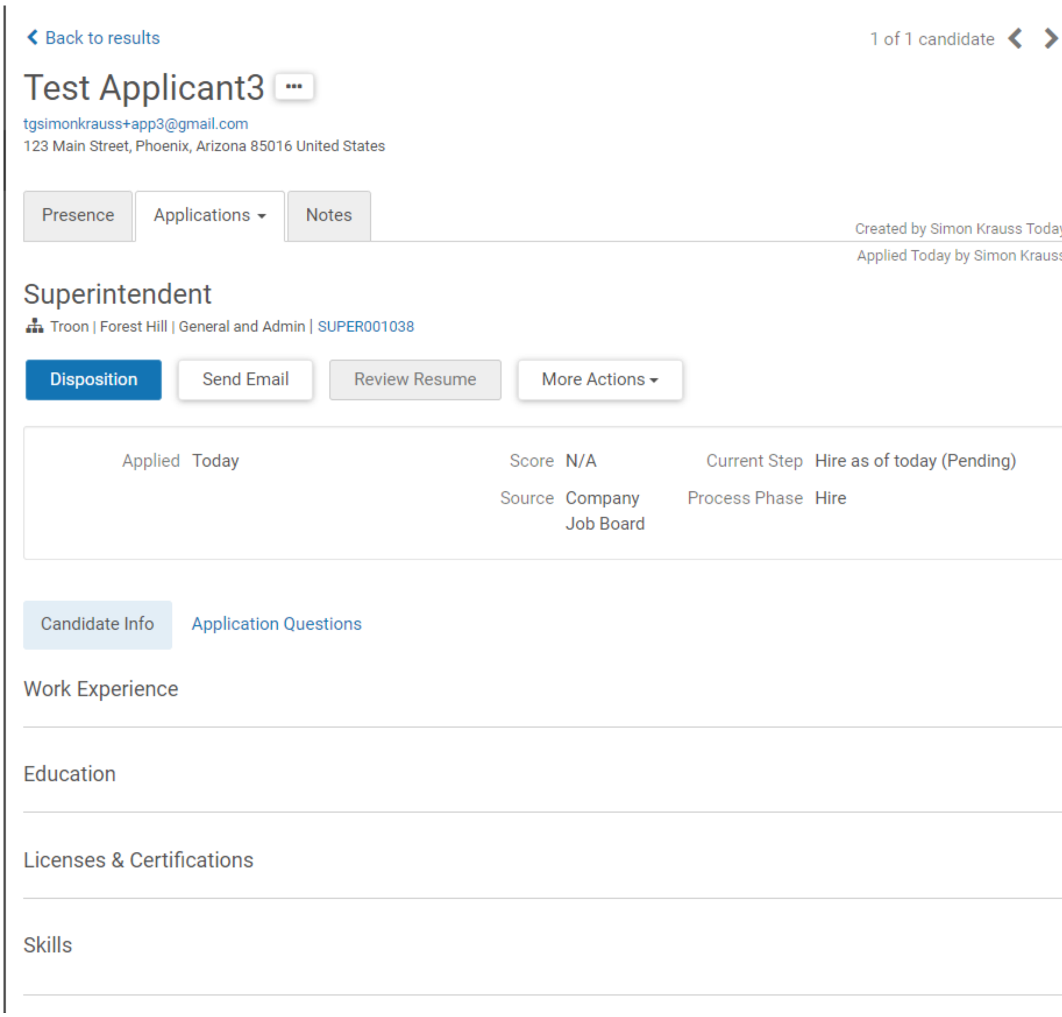
In order for external candidate to apply to an Opportunity, they will have to create a Presence with their information and fill out all the information in the Opportunity that you provided when the Opportunity was created.



Once a candidate applies to an Opportunity you will be able to see them, and all the other applicants, in the Applicants section.



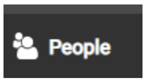
From there, you will be able to view the information that they provided during the application process, including the personal information they provided, any answers to questions that were asked on the Opportunity, and any resume, work experience, or education that they provided.



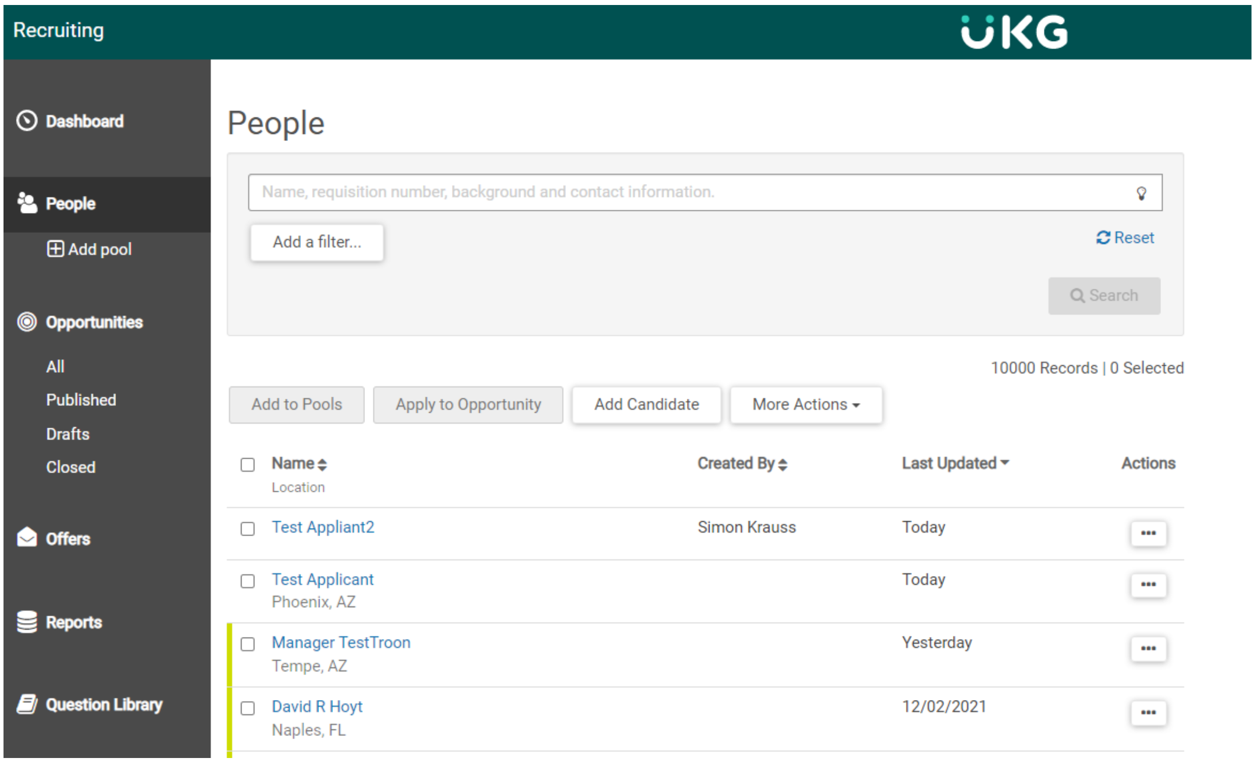
If a candidate already had a Presence created before they applied to your Opportunity, you will be able to see their previous applications and any notes that Managers or Recruiters had left about them.

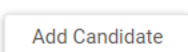
Manually Adding Candidates and Applying on their Behalf

For candidates that want to apply in person or for jobs that may not involve as thorough of a candidate search, candidates can be manually added to the Recruiting Gateway and managers can apply to Opportunities on their behalf.

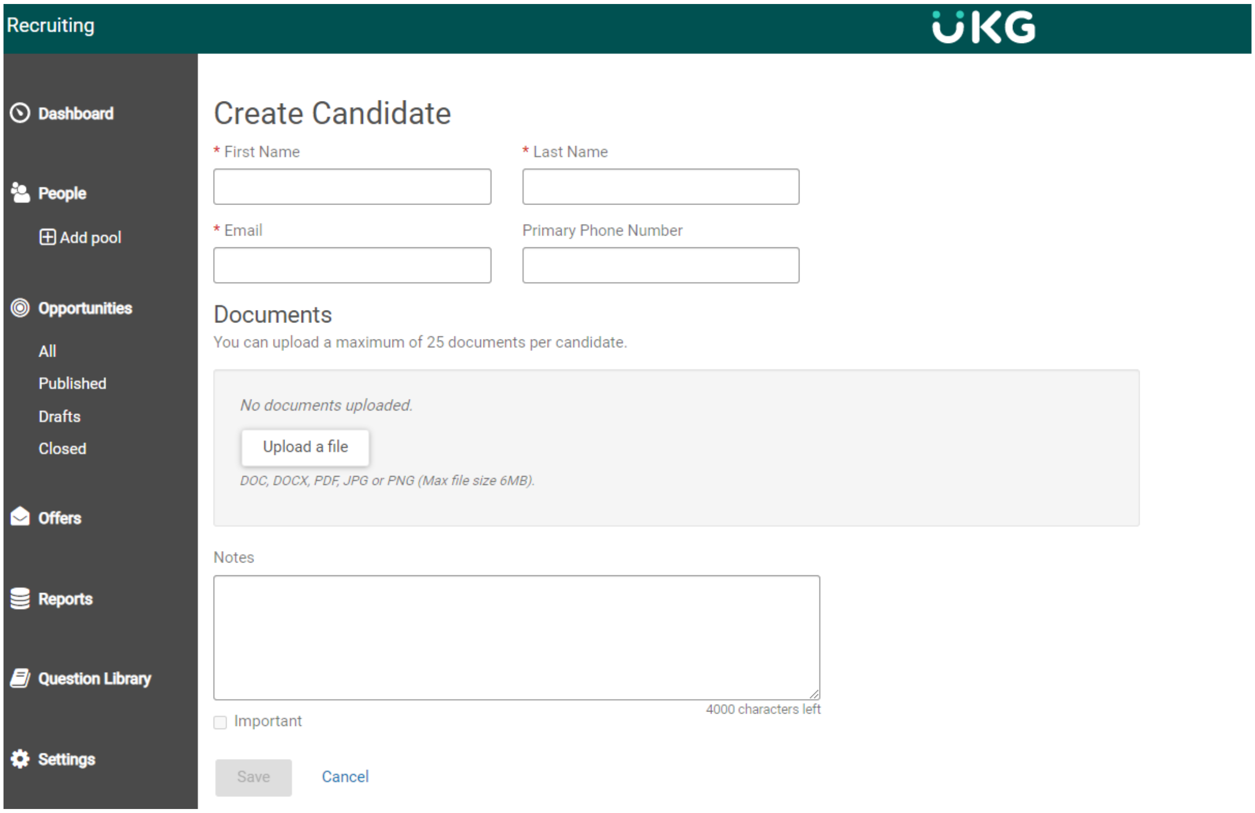


On the left hand side of the screen, select the People section. This will bring up a list of all the candidates and employees that can be added to an Opportunity.

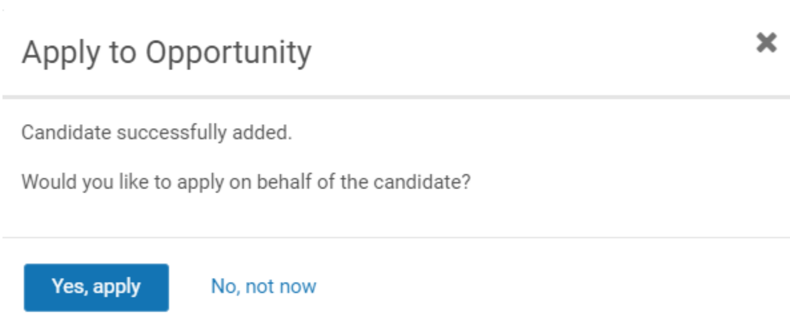




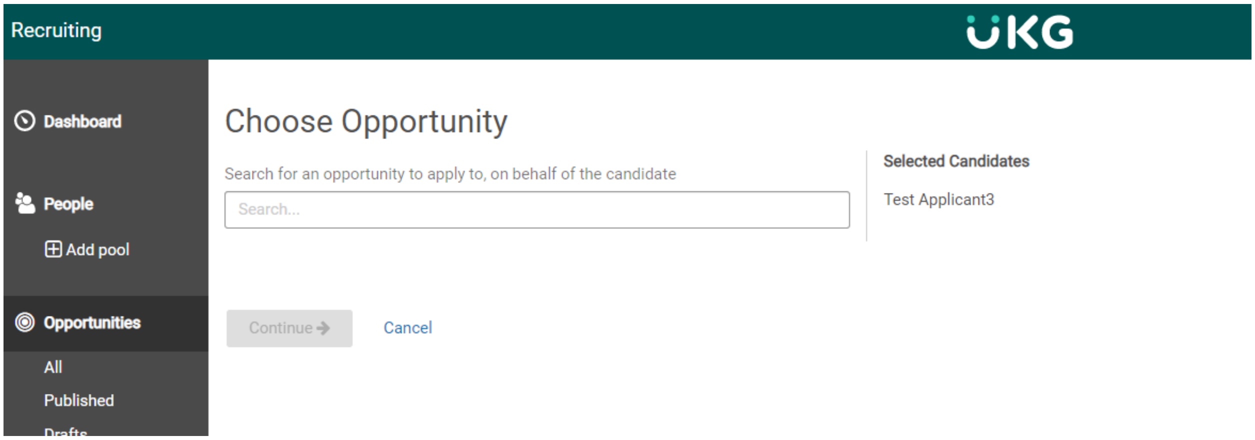
To create a new applicant, use the Add Candidate button on the screen and provide the information that is requested to create the Presence on behalf of the candidate.

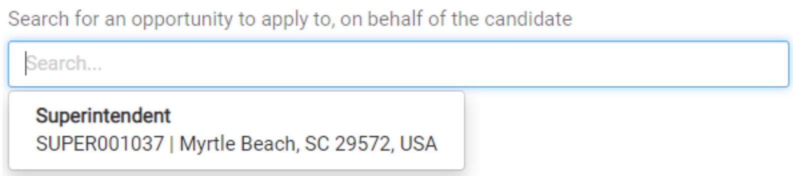


Once the candidate has been created, you can apply to the Opportunity on their behalf.

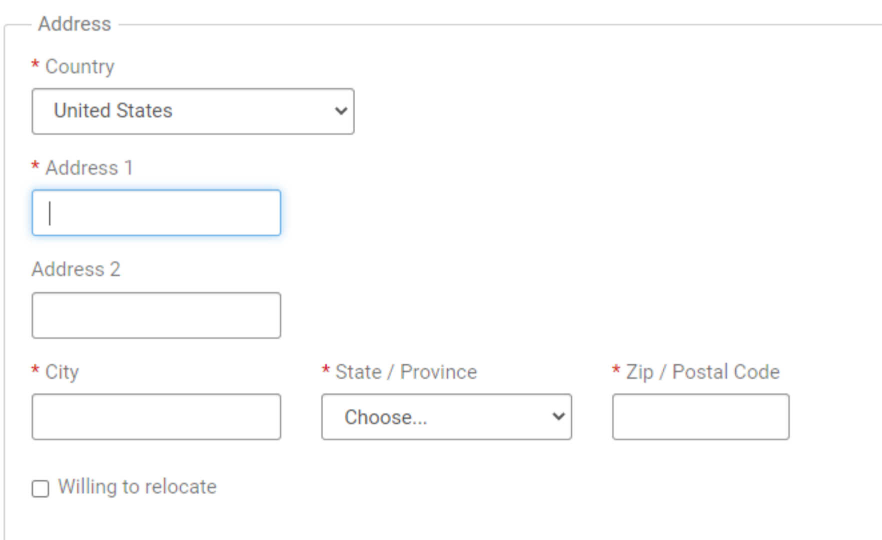


Select the Opportunity that they would like to apply to and click Apply. Fill out the rest of the required information and click the Apply button to add the applicant as a candidate to the Opportunity.





Fill out the applicant's address and the rest of the application questions at the bottom of the page and click Apply



☐ Notify the candidate of this application ⚠

Notes

4000 characters left

☐ Important

* How did they hear about this opportunity?

Indeed

Were they referred by a current employee?

○ Yes

◉ No

When can they start?

December 5, 2021

Apply   Cancel

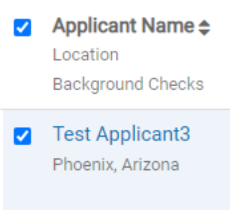
Dispositioning Candidates

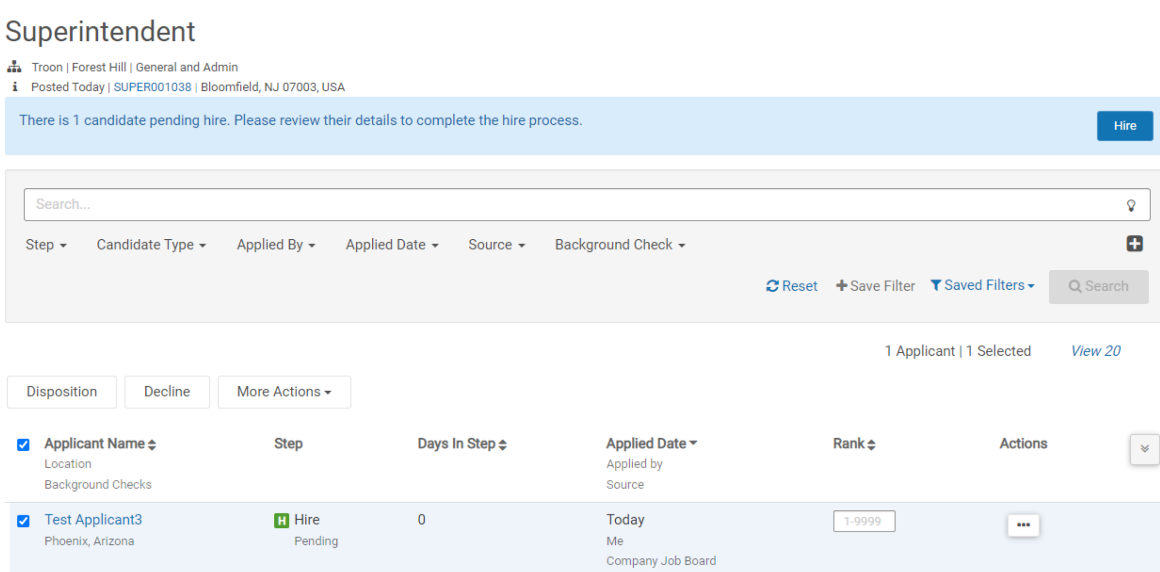
Once a candidate has applied, managers can move, or disposition, candidates through different steps in the recruiting process. Managers can track where candidates are in the recruiting process through these dispositioning steps and managers can provide reasons why a candidate was moved from one step to another.

Different Opportunities may have different steps depending on the Division and the complexity of the position, including whether or not the job requires an Offer Letter and/or Background Check.

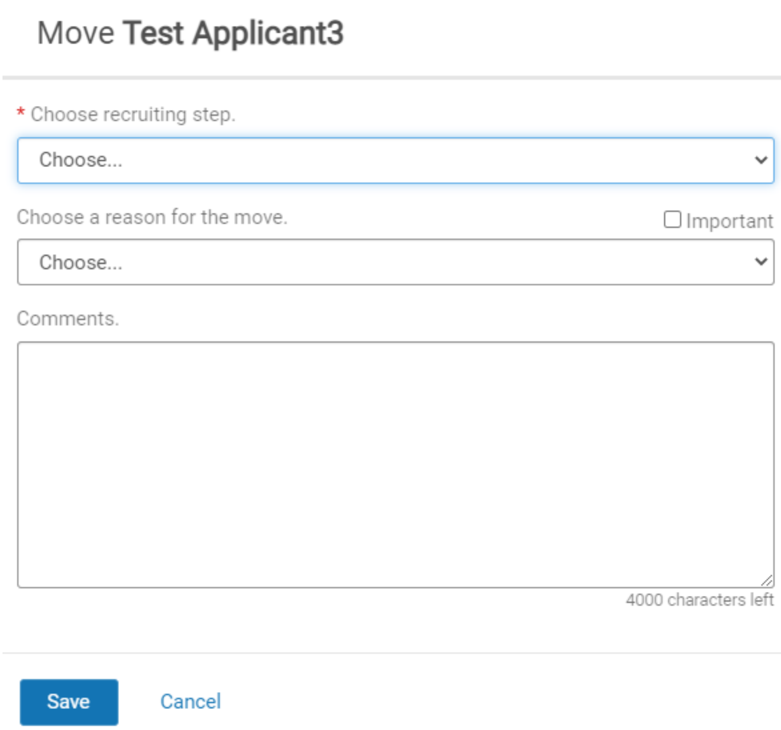
4. For jobs that are hourly and do not require a background check, managers only have a select few disposition steps to move candidates to.
5. For positions that require a background check, including manager and salaried positions, managers have more disposition step options including Offer Letter, Background Check, and steps for reviewing applications
6. For Caddie-specific Opportunities Dispositioning steps include Eligibility Test, Talent+ Assessment, and Certification/Training. More information regarding the CADDIEMASTER recruiting process please review the CADDIEMASTER Recruiting article

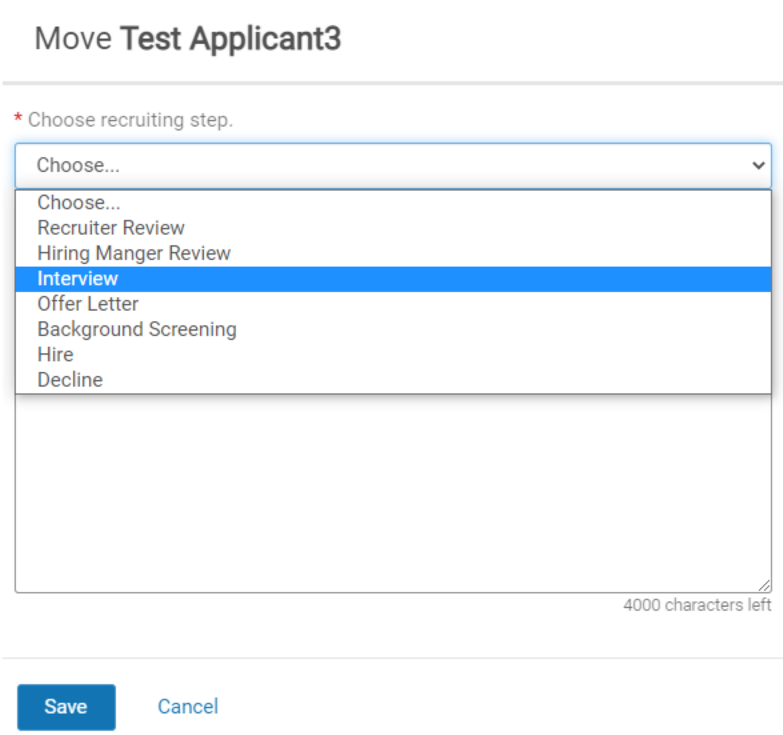
To Disposition a candidate, click on the Opportunity with the candidate you want to disposition. Select the candidate and click on the Disposition button.



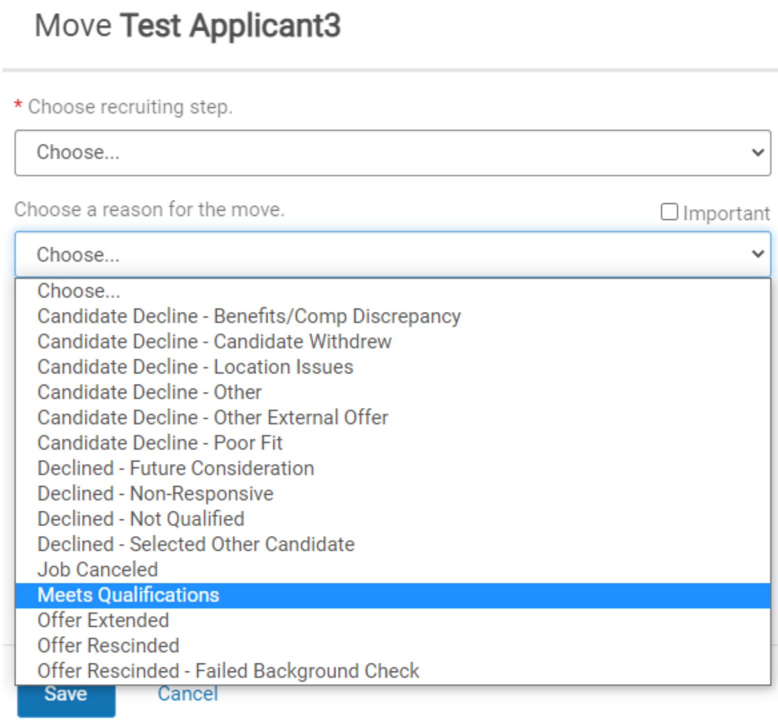


On the Move page, you can select the recruiting step you would like to disposition the candidate to. Select the Choose Recruiting Step dropdown and select the recruiting step you would like to move the candidate to.

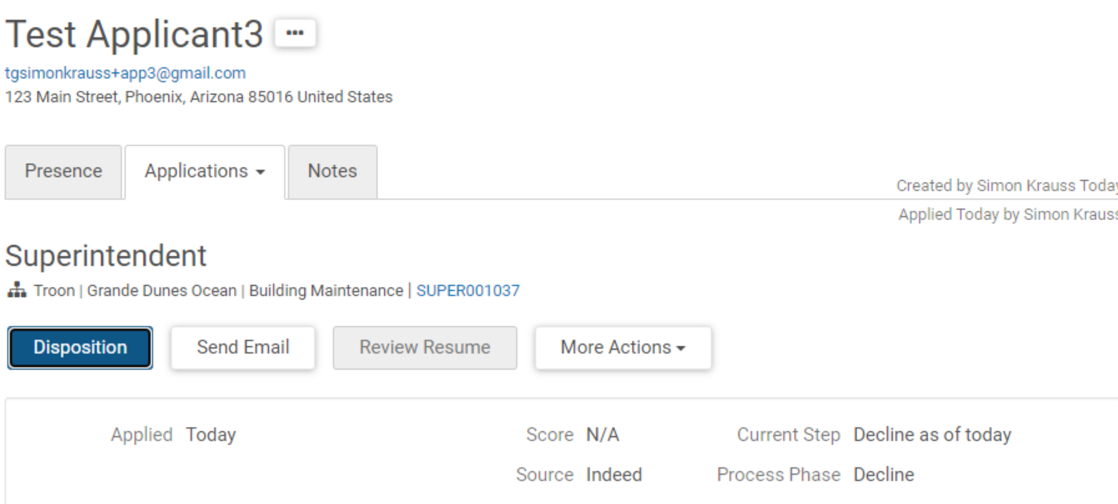




You can also select a move reason to document why you chose to move the candidate from one step to the other, although this is not required. You can also add comments to the reason for the disposition.



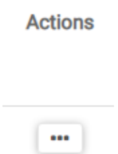
You can also disposition a candidate from their personal page. While on the Applications section of the candidate's profile, you can select the Disposition button and follow the process listed above.

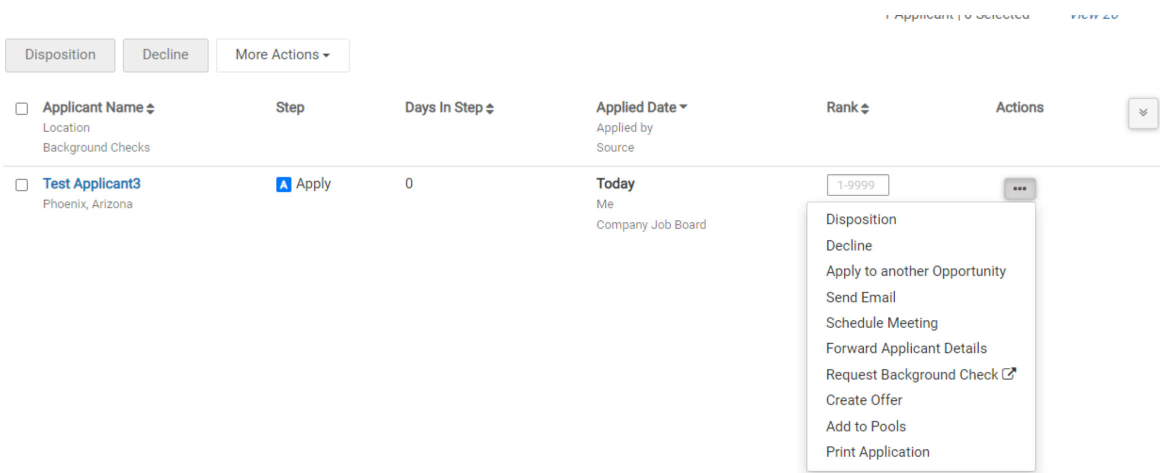


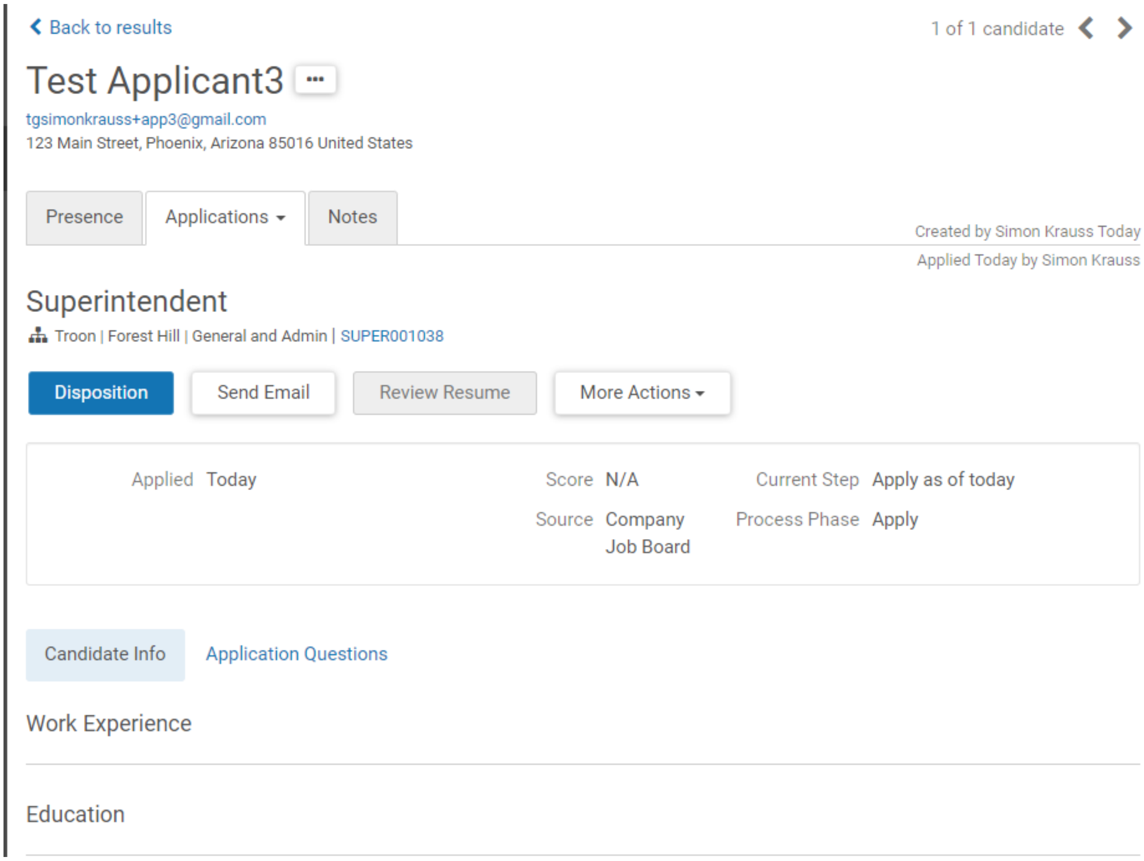
Sending Emails to Candidates

Managers can communicate directly with candidates through the Recruiting Gateway by using the Send Email function. Managers can create their own emails to send to candidates if they need to request specific information, such as scheduling an interview or request a resume. Managers can also use pre-configured templates if it is part of the recruiting process.

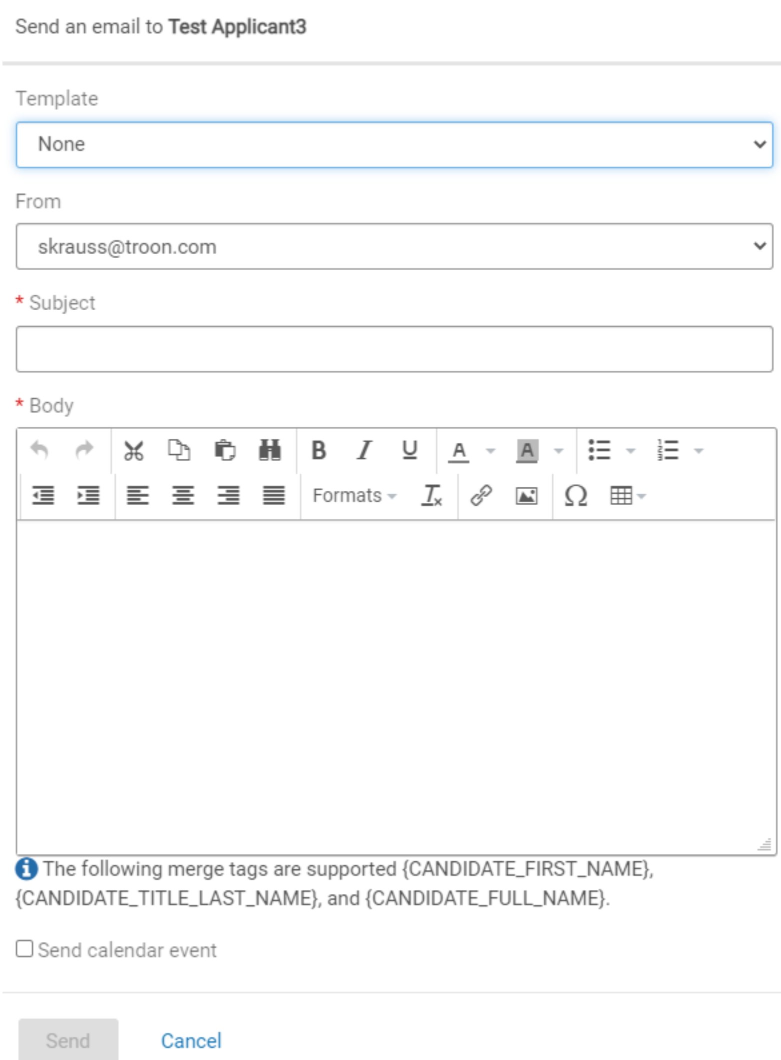
Send Email While in the Opportunity, you can select the Actions button and select the Send Email action. You can also click on the candidate's profile and select the Send Email button to bring up the email template.



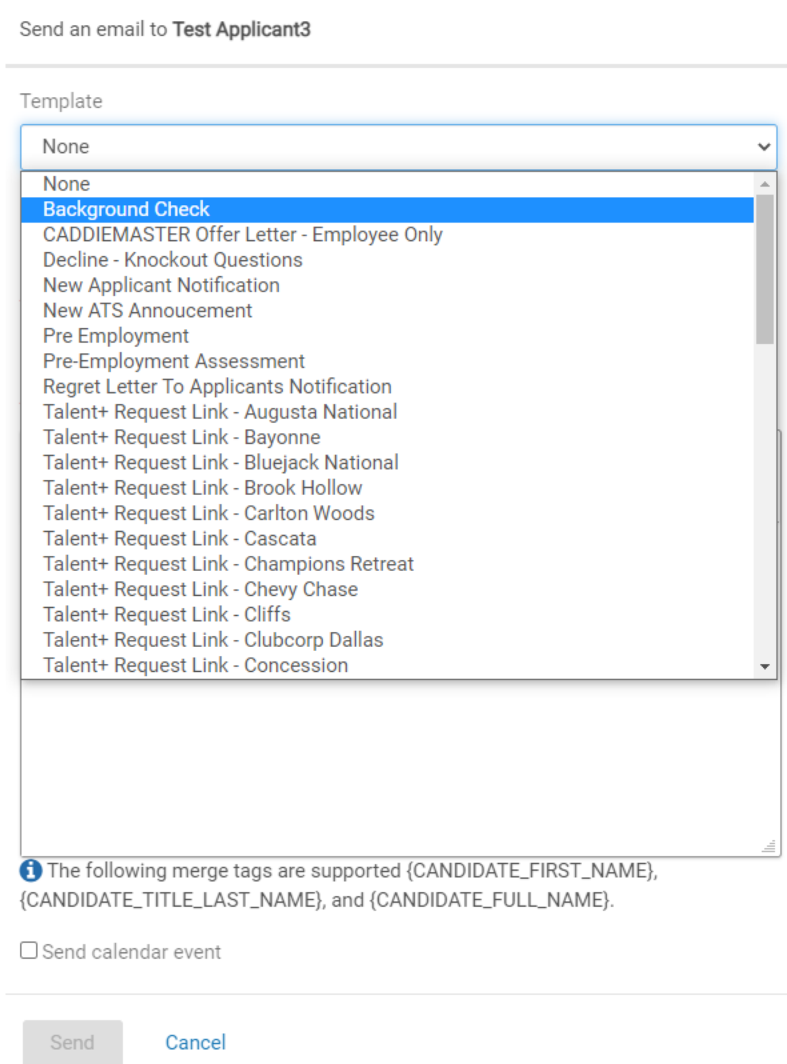




Once on the email page, the manager can compose an email to send to the candidate, change who the email is coming from, or select a pre-configured email template.



Preconfigured email templates can be accessed by clicking the Templates drop down and selecting the correct email template. Some recruiting processes may require Email Templates be used for certain steps. Can all Hiring Mangers see all email templates? I'm slightly concerned that hiring managers will use these without understanding how the process works. For example – a hiring manager sends a background check email to a candidate that doesn't actually require a background check. Is there any way we can make it easy for them to choose from one or two of the top email templates and then communicate that the rest are for other recruiting processes?



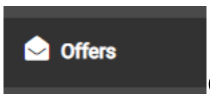
The From section on the email can be updated with either the sender's email or a generic email if the sender does not want their email to be used.

Offer Letter Process

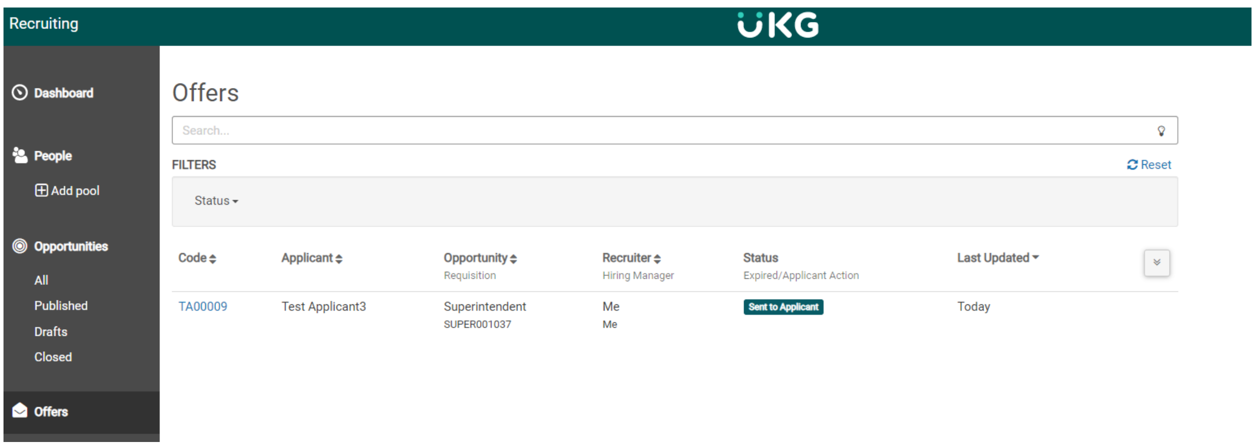
For positions that require a background check, managers can disposition candidates to the Offer Letter stage and work directly with a Recruiter to send an Offer Letter directly to the candidate through the Offers section in Recruiting.

Once the manager decides to formally offer the candidate a job, the candidate is dispositioned into the Offer Letter step.

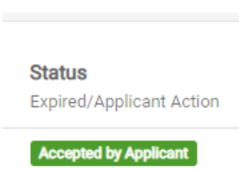
Once in the Offer Letter step the Recruiter will be notified that there is a candidate who needs an Offer Letter created. The Recruiter may reach out for more information in order to send the candidate the Offer Letter, including timing of how long the candidate has to accept the offer and any specific compensation information.



Candidates who have been sent an Offer Letter can be tracked in the Offers section on the left side of the screen. On the Offers section, the applicant, their Opportunity, and the status of the Offer Letter are all listed.



The candidate will be sent an email with the link to access the Offer Letter and will be required to log into their Presence to accept the letter. Once the candidate accepts the Offer Letter, their status will be updated and the Recruiter will be notified. How will the candidate accept an offer if the manager has applied for them on their behalf?



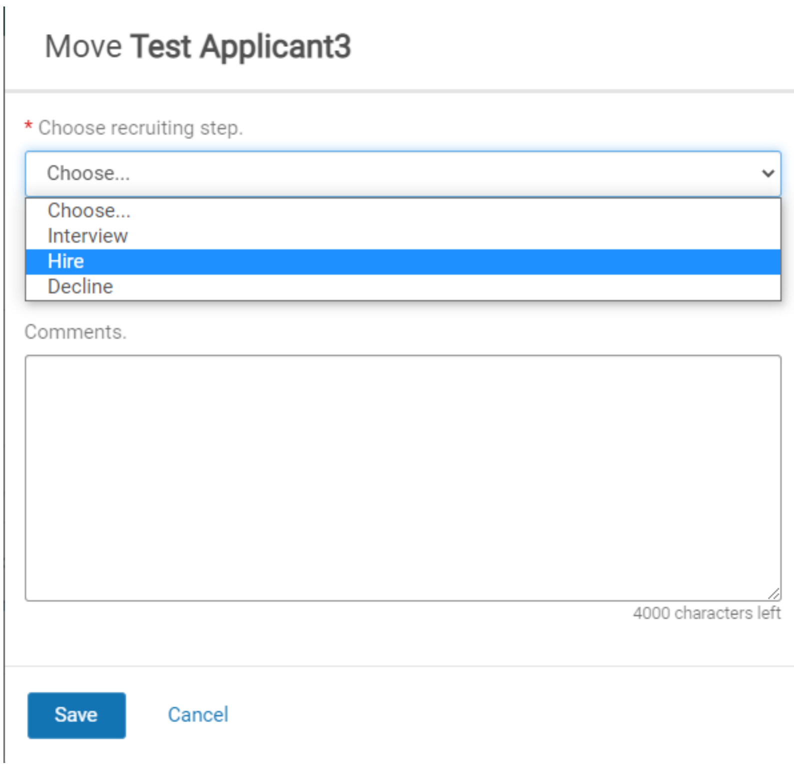
Background Check Process

For positions that require a background check, managers can disposition candidates to the Background Check step and work directly with a Recruiter to have a background check and/or drug screening submitted to the background check provider. Once the Recruiter receives the background check results, the manager will be notified via email either by the Recruiter or automatically through Recruiting.

After moving the candidate to the Background Check process, the manager does not need to move the candidate any further in the process. Once the Recruiter receives the results of the background check, they will move the candidate from Background Check to Hire and complete the information required to move the new hire to the Onboarding section.

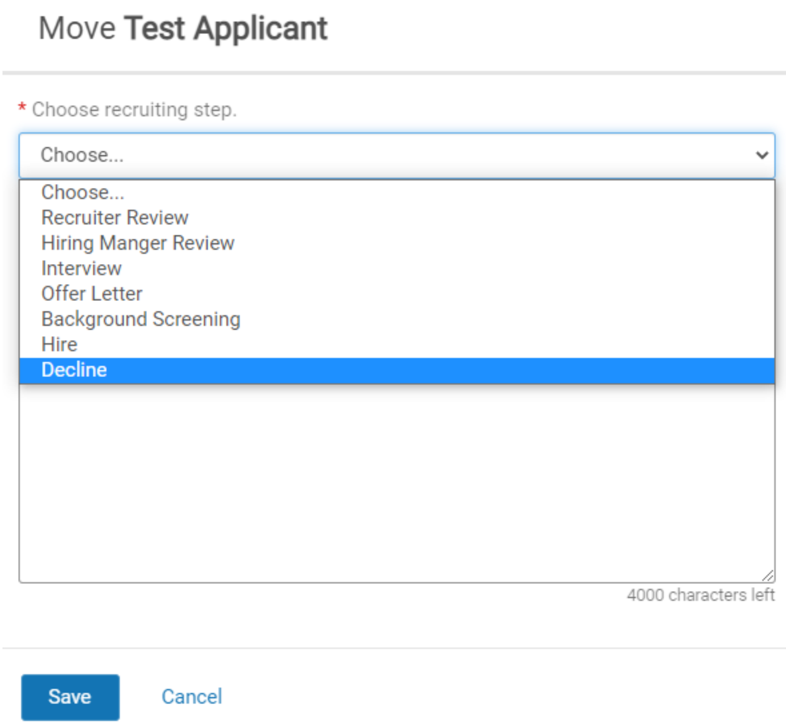
Hiring or Declining an Employee

Once a decision has been made on a candidate, the candidate can either be Hired or Declined. For positions that do not require a background check, the manager can move the candidate directly to the Hire stage. If a position does required a background check, the Recruiter will move the candidate to the Hire stage, as explained above.

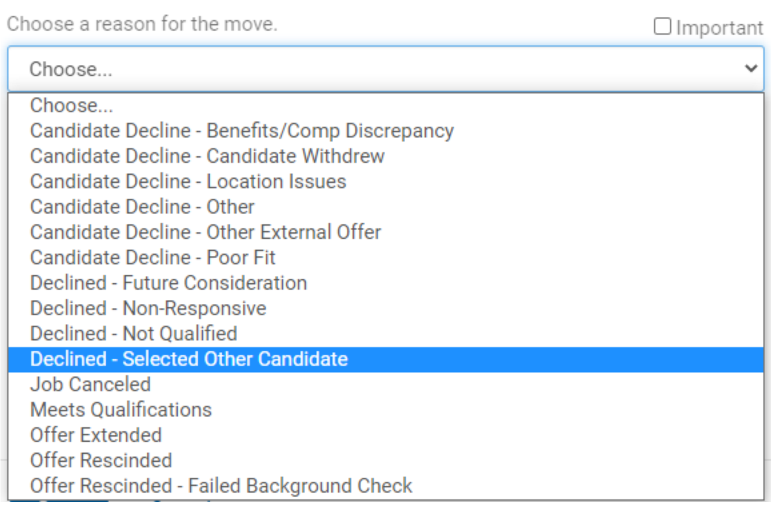


If the candidate is not a fit or does not meet any qualifications the manager can disposition them to the Decline stage and they will no longer be a candidate for the job. The manager can select a reason for declining the candidate and can send the candidate a Decline email directly from Recruiting.

From the Disposition page, the manager can select the Decline step from the recruiting step drop down.



The manager can also select the reasons for declining the candidate.

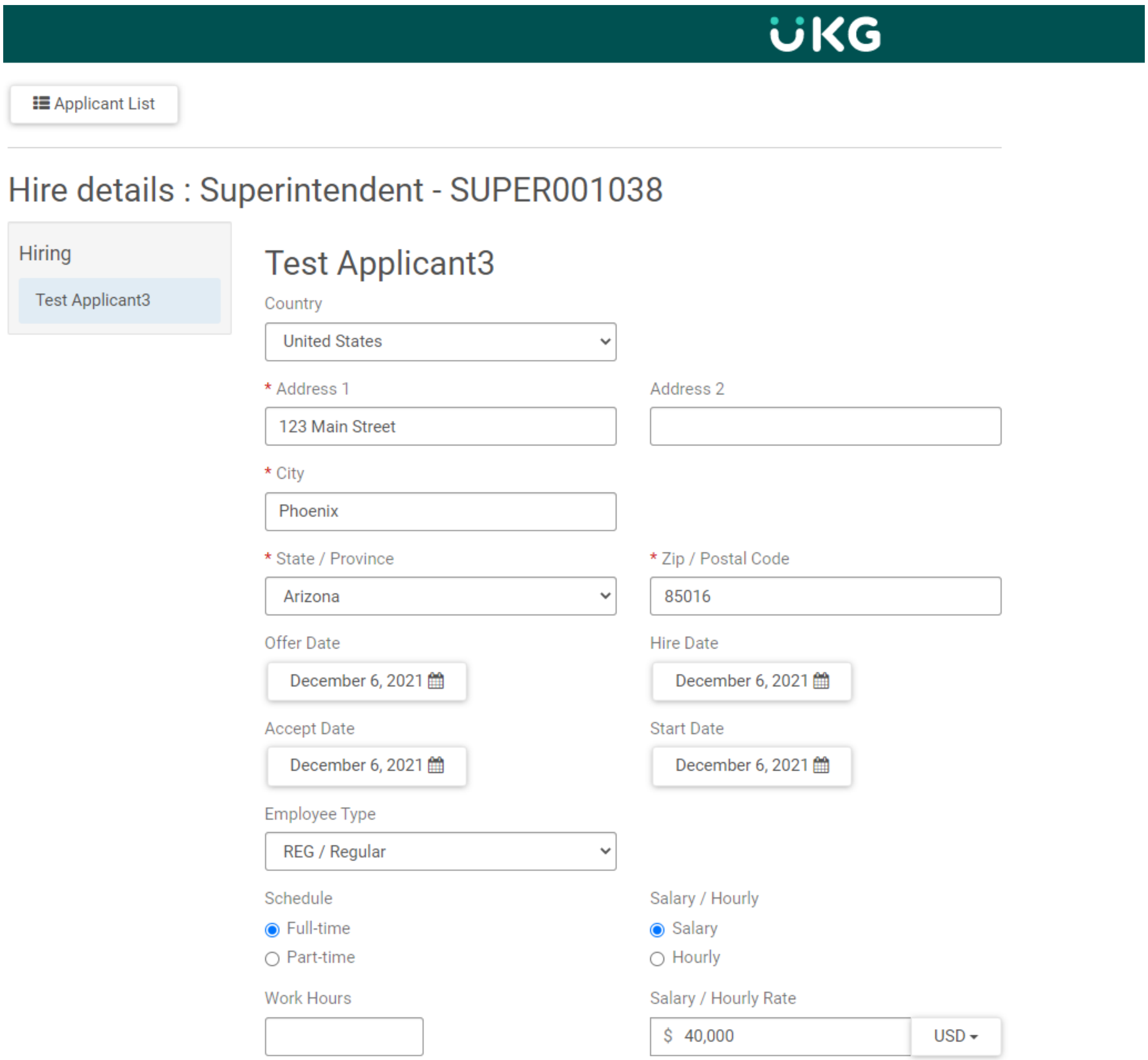


Managers can also send Decline emails to the candidate, if they so choose. It may be a good idea to encourage them to use our standard decline email templates here. Concerned about what some of the hiring managers might include in the decline email if they aren't following our templates.

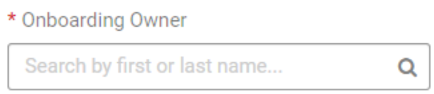
Moving the Employee to Onboarding

(Only for positions that do not require a background check)Once the candidate has been dispositioned to the Hire section, the manager can review that the information is correct and can assign a Supervisor and Onboarding Owner, if they are not already assigned. The Onboarding Owner will be responsible for assisting the new hire with their onboarding forms and will get notified via email once the candidate is moved from Recruiting to Onboarding.

After moving the applicant to Hire, the manager will need to make sure all the information is correct and complete on the Hire Details page before the candidate is hired.

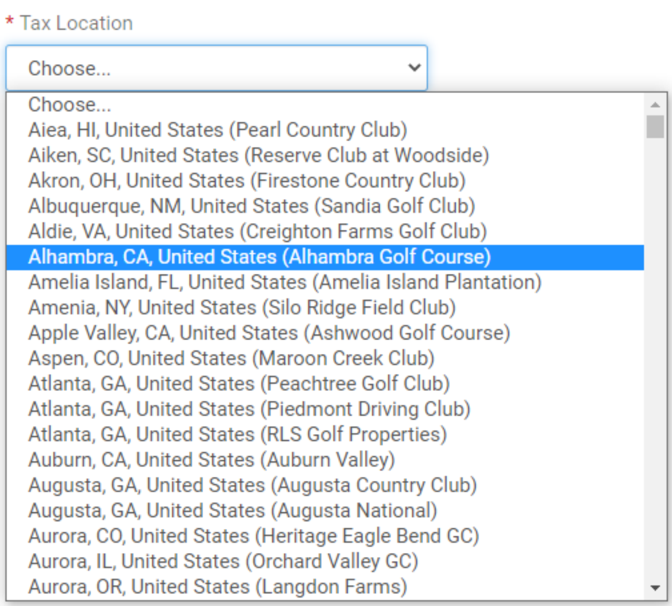


The manager should confirm that the Onboarding Owner section is filled out. The Onboarding Owner is responsible for assisting the new hire during onboarding and will get an email once the new hire has been moved to the Onboarding section. If this was provided during the Job Opportunity Request and entered when the Opportunity was created, the section will already be filled out.



IMPORTANT!

The one piece of information that will need to be filled out before moving the new hire to onboarding is the Tax Location. The tax location dropdown has all of the locations listed and they are listed by city and state, **NOT** by location. Please search for your location by city and select the correct option, the location will be listed in parenthesis.



Once all the information has been filled out, select the Hire button and the new hire will being the onboarding process

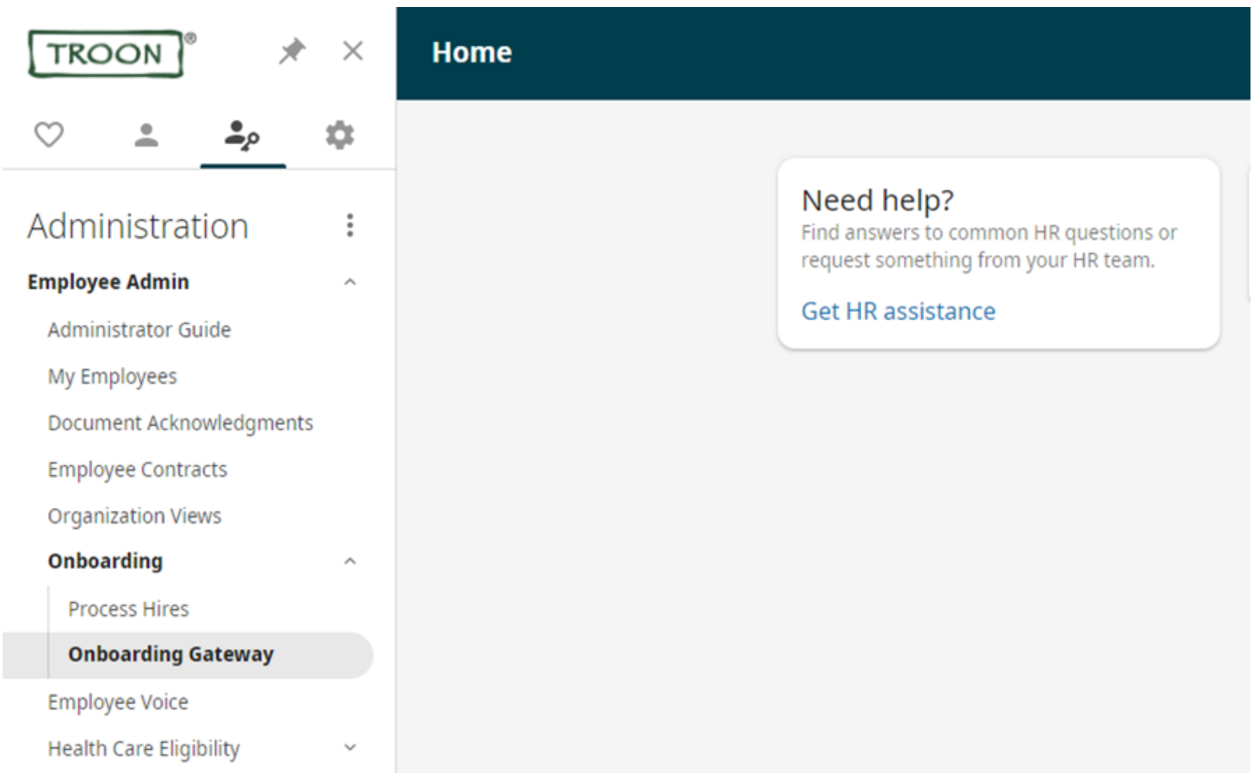
B. Business Intelligence

O. Onboarding Guide for Managers

Accessing the Onboarding Gateway

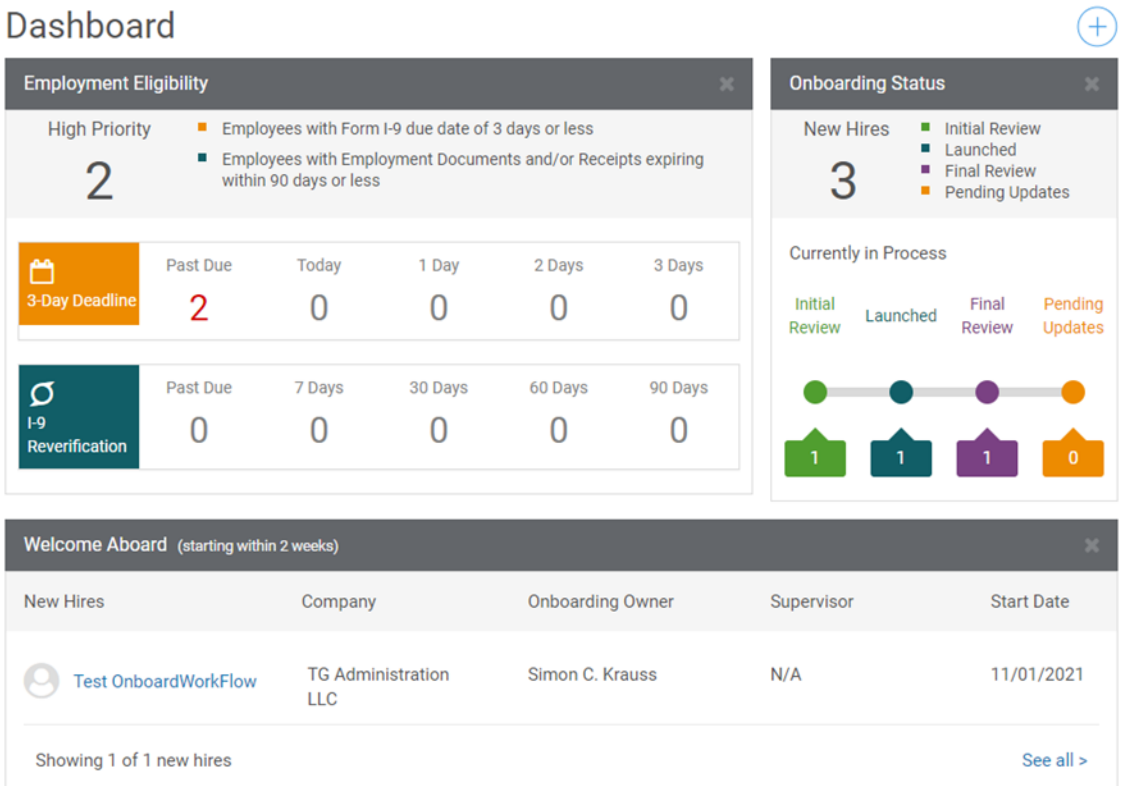
The Onboarding Gateway in UKG Pro will be the section where you can view all of the new hires that have been moved from Recruiting to Onboarding and are ready to begin the onboarding process.

To access the Onboarding Gateway, on the UKG Pro homepage locate the Onboarding section within the Employee Admin section. Open the Onboarding section to find the Onboarding Gateway, this will open the Onboarding Gateway on a new tab on your browser.



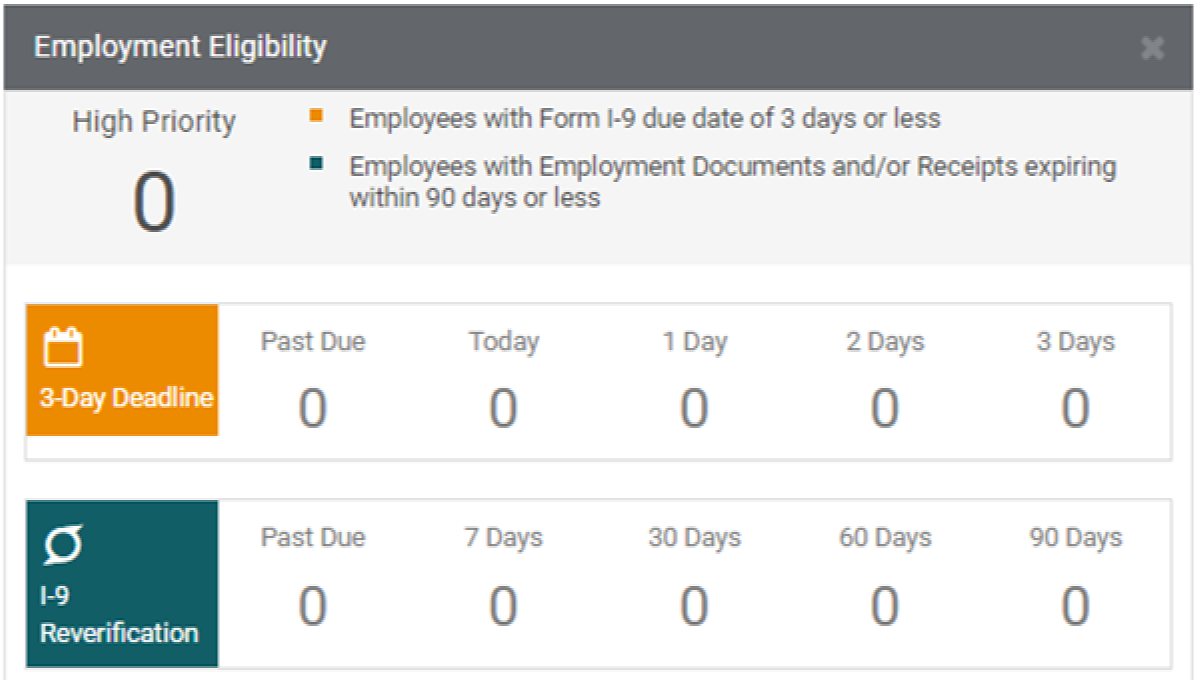
Onboarding Gateway Overview

Within the Onboarding Gateway, managers can view the new hires that are assigned to them so they can assist with the onboarding process. Once an employee has been hired through Recruiting, they will flow into the Onboarding Gateway and appear on the Onboarding Dashboard.

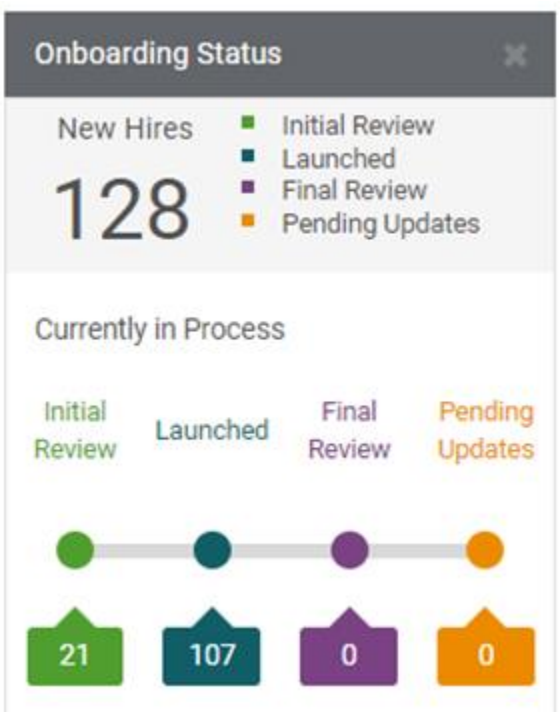


Employees that need attention will appear on the Dashboard for review:

Employees with upcoming I-9 due dates will appear in the Employment Eligibility section.



The Onboarding Status section will show the stages of all the current employees that are in Onboarding and which stage in the process they are in



1. Initial Review – New Hires that need information updated so they can begin their paperwork

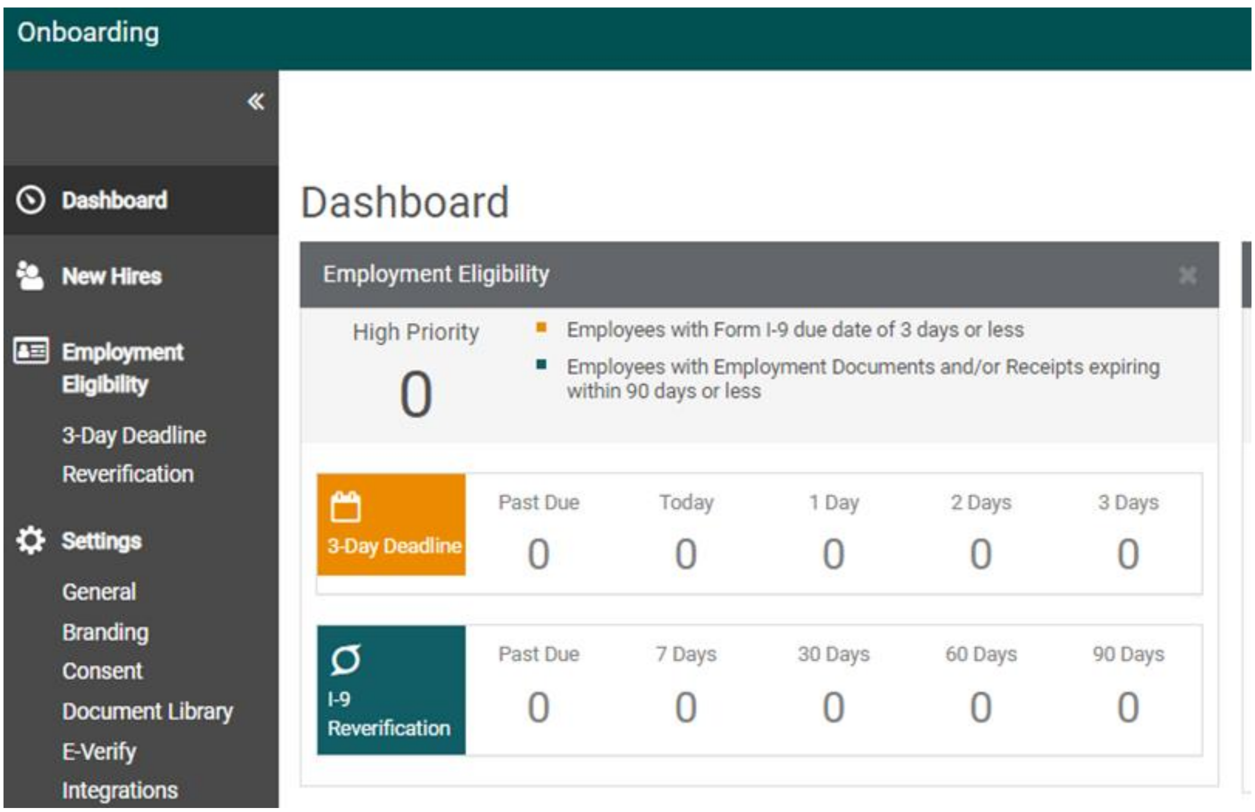
2. Launched – New Hires who have been sent their Welcome Email and have started on their paperwork
3. Final Review – New Hires that have completed their paperwork and need employment verification before they can be processed to UKG Pro

The Welcome Aboard section shows all of the new hires that have a Start Date within the next 2 weeks

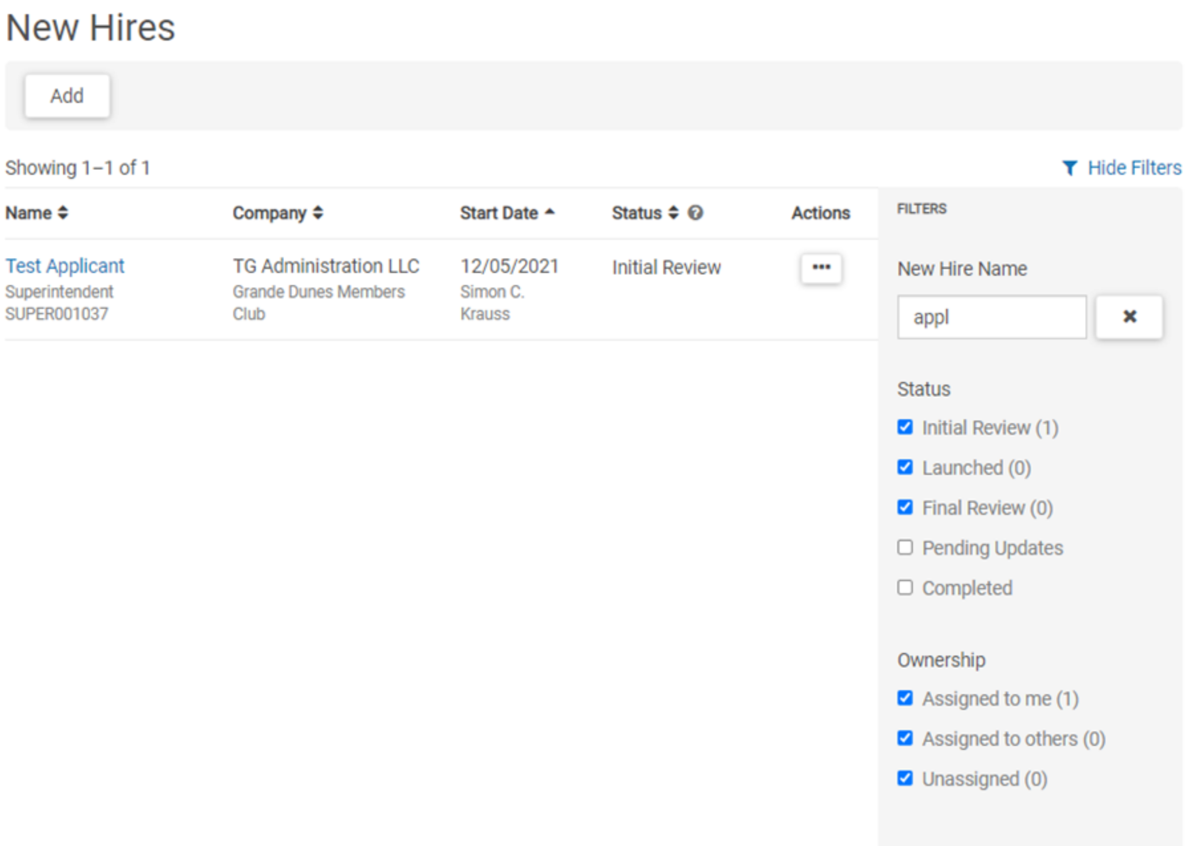
Viewing New Hires

In Onboarding, the new hires can be viewed from the New Hires tab on the left hand side of the screen. In Onboarding, managers are only able to view the new hires that have been assigned to them as the Onboarding Owner. If there are other new hires at the location but the manager is not assigned as the Onboarding Owner, they will not be able to see the new hire or assist with onboarding.

To view the new hires that the manager is able to see, select the New Hires button on the left hand side of the screen. This will open up the New Hires page and show a full list of the new hires that the manager is qualified to see.



On the New Hires page, managers can see the list of new hires, their start date, and their status. They can also filter for the new hires based on name and what stage of the onboarding process they are in.

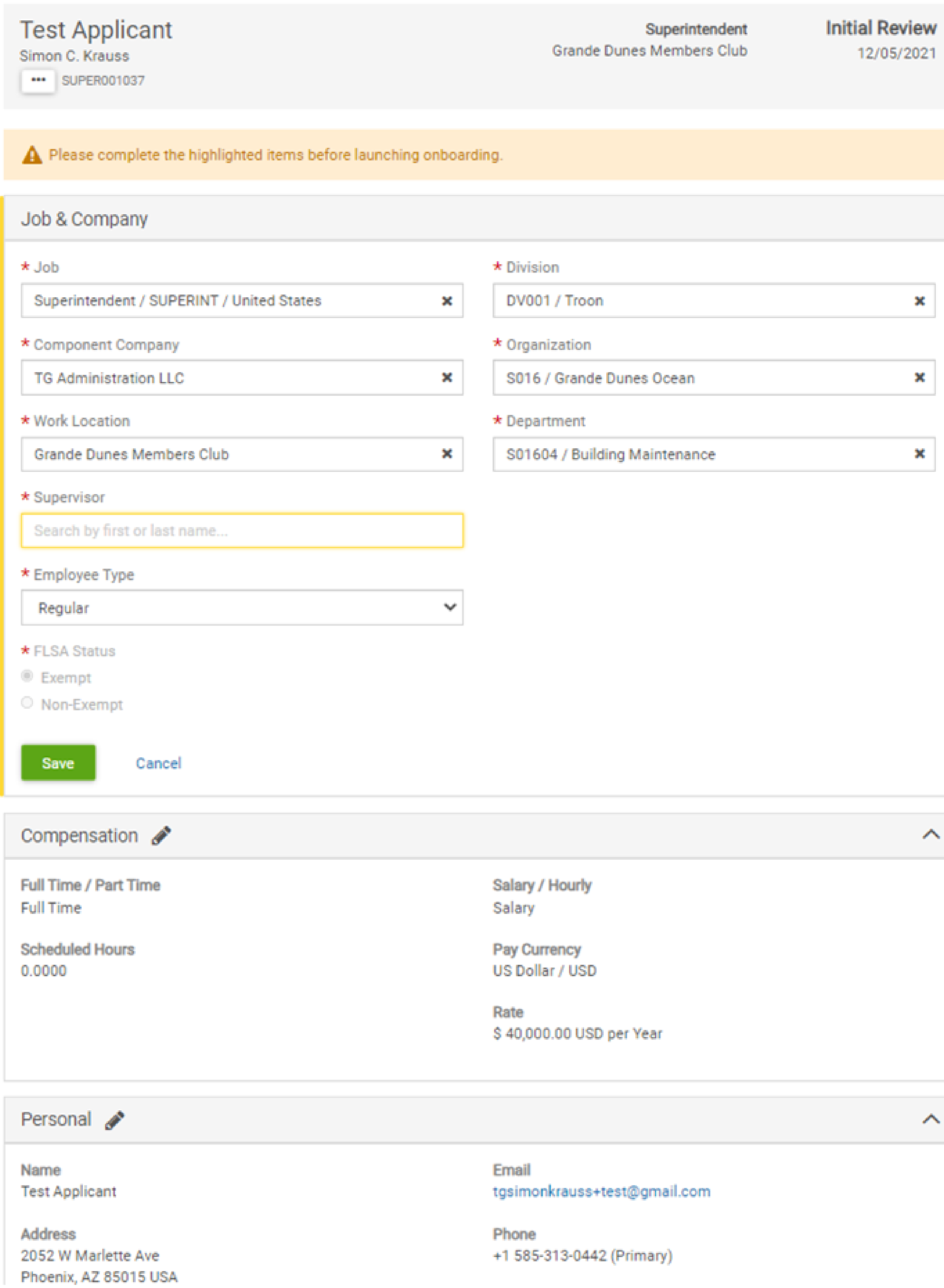


Clicking on the new hires name opens the new hire page where their information can be reviewed and their onboarding launched.

Confirm & Update New Hire Information

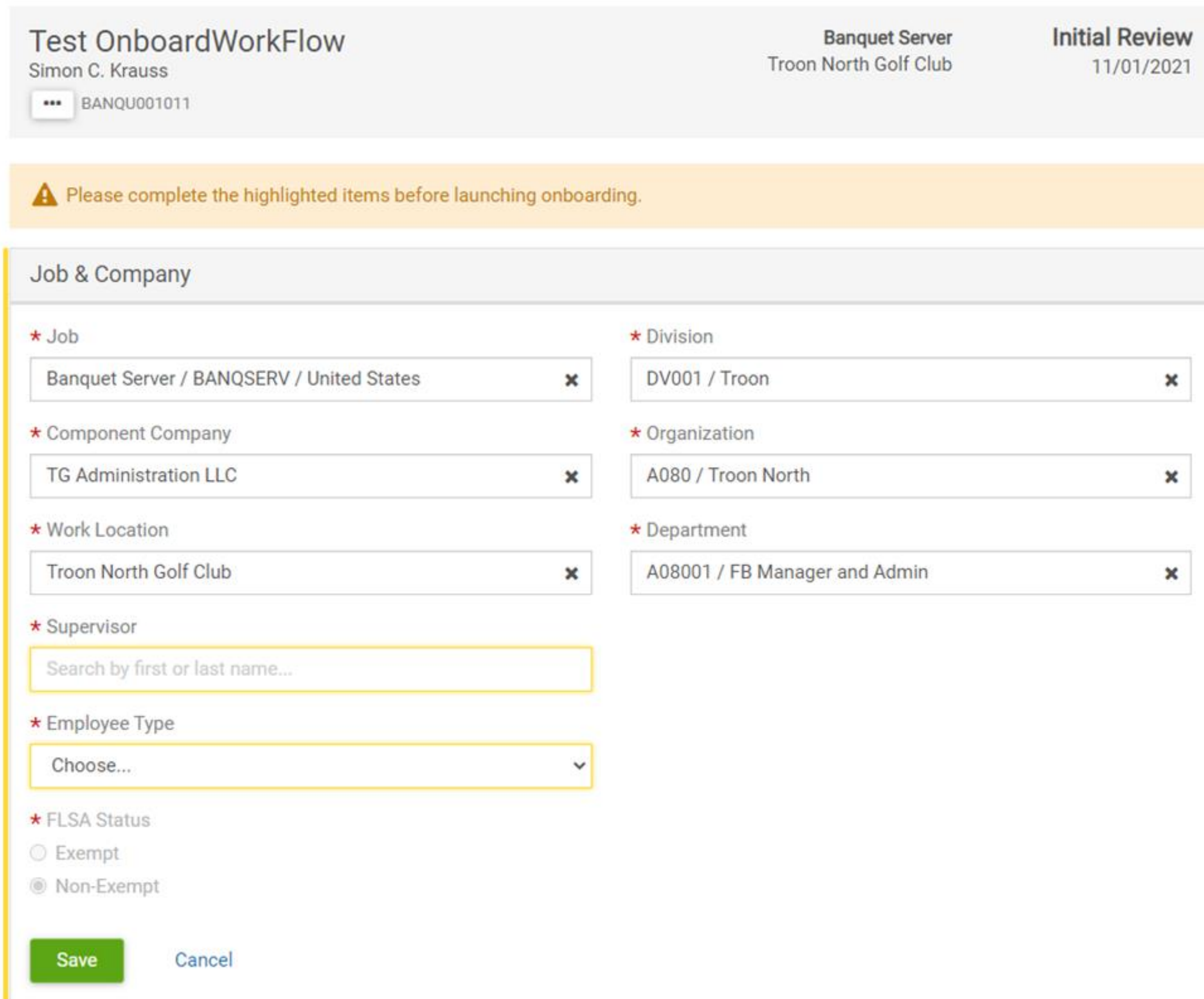
When new hires are hired from Recruiting to Onboarding, the information that was captured during the recruiting process will come over into the Onboarding Gateway. However, there are certain pieces of information that are needed in order to launch onboarding that are not collected in the Recruiting Gateway.

After clicking on the new hires name from the New Hires page, the new hire’s profile page will open. This page will be prepopulated with information that was collected in Recruiting, although some pieces of information will be blank, pieces that are critical in order to launch onboarding will be highlighted in yellow.

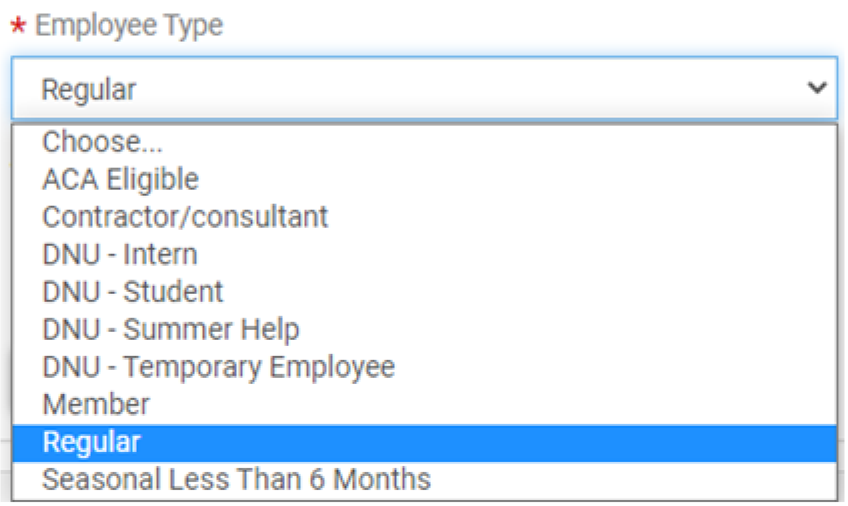

Test Applicant
Simon C. Krauss
SUPER001037
Superintendent
Grande Dunes Members Club
Initial Review
12/05/2021
Please complete the highlighted items before launching onboarding.
Job & Company
* Job
Superintendent / SUPERINT / United States
* Division
DV001 / Troon
* Component Company
TG Administration LLC
* Organization
S016 / Grande Dunes Ocean
* Work Location
Grande Dunes Members Club
* Department
S01604 / Building Maintenance
* Supervisor
Search by first or last name...
* Employee Type
Regular
* FLSA Status
Exempt
Non-Exempt
Save
Cancel
Compensation
Full Time / Part Time
Full Time
Salary / Hourly
Salary
Scheduled Hours
0.0000
Pay Currency
US Dollar / USD
Rate
$ 40,000.00 USD per Year
Personal
Name
Test Applicant
Email
tgsimonkrauss+test@gmail.com
Address
2052 W Marlette Ave
Phoenix, AZ 85015 USA
Phone
+1 585-313-0442 (Primary)

There are four main sections on the new hire's profile in Onboarding:

1. **Job & Company** – Information regarding the job, company, and organizations the new hire will be hired into. Most of the pieces of information will already be filled in and should just be reviewed for accuracy.



The two pieces of missing information that will need to be provided are Supervisor and Employee Type. The Supervisor should be filled in with whomever will be the new hire's direct Supervisor in UKG Pro. The field will search the complete census in UKG Pro so please make sure you are selecting the correct Supervisor.



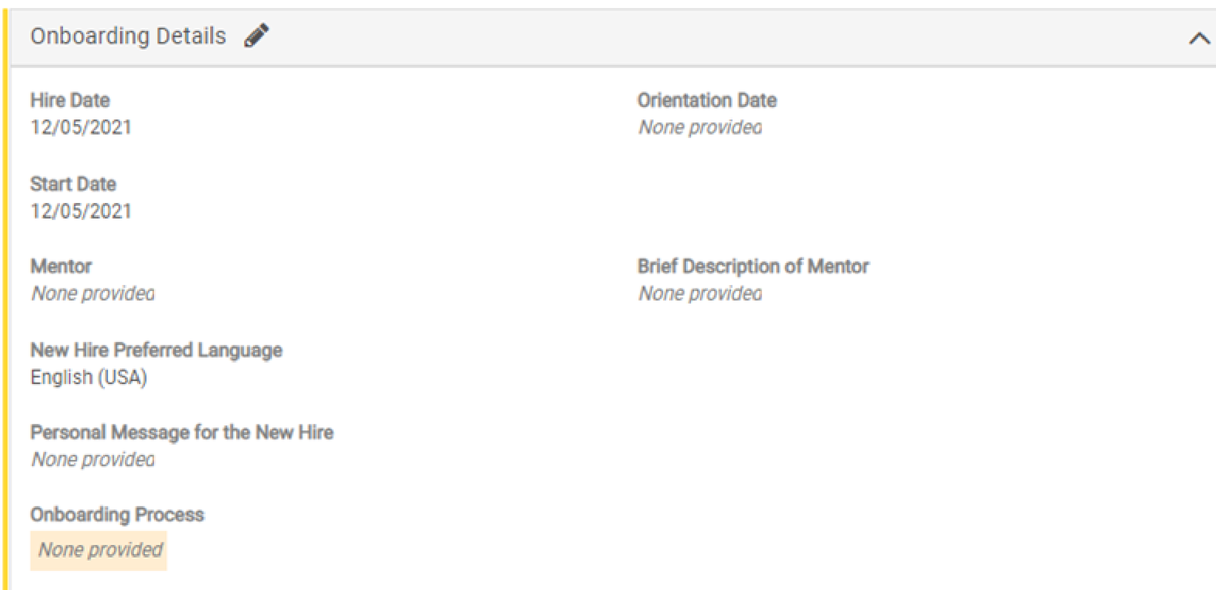
The other section that needs to be filled out is the Employee Type section. The employee type should always be selected as Regular, the only exception is if the new hire is an independent contractor in which case the Contractor/Consultant employee type should be selected.

Once these two fields are updated the section can be saved.

2. **Compensation** – This section contains the compensation information for the new hire. All of this information will be prepopulated with the information from Recruiting and should just be confirmed for accuracy.

2. **Personal** - This section contains the compensation information for the new hire. All of this information will be prepopulated with the information from Recruiting and should just be confirmed for accuracy.

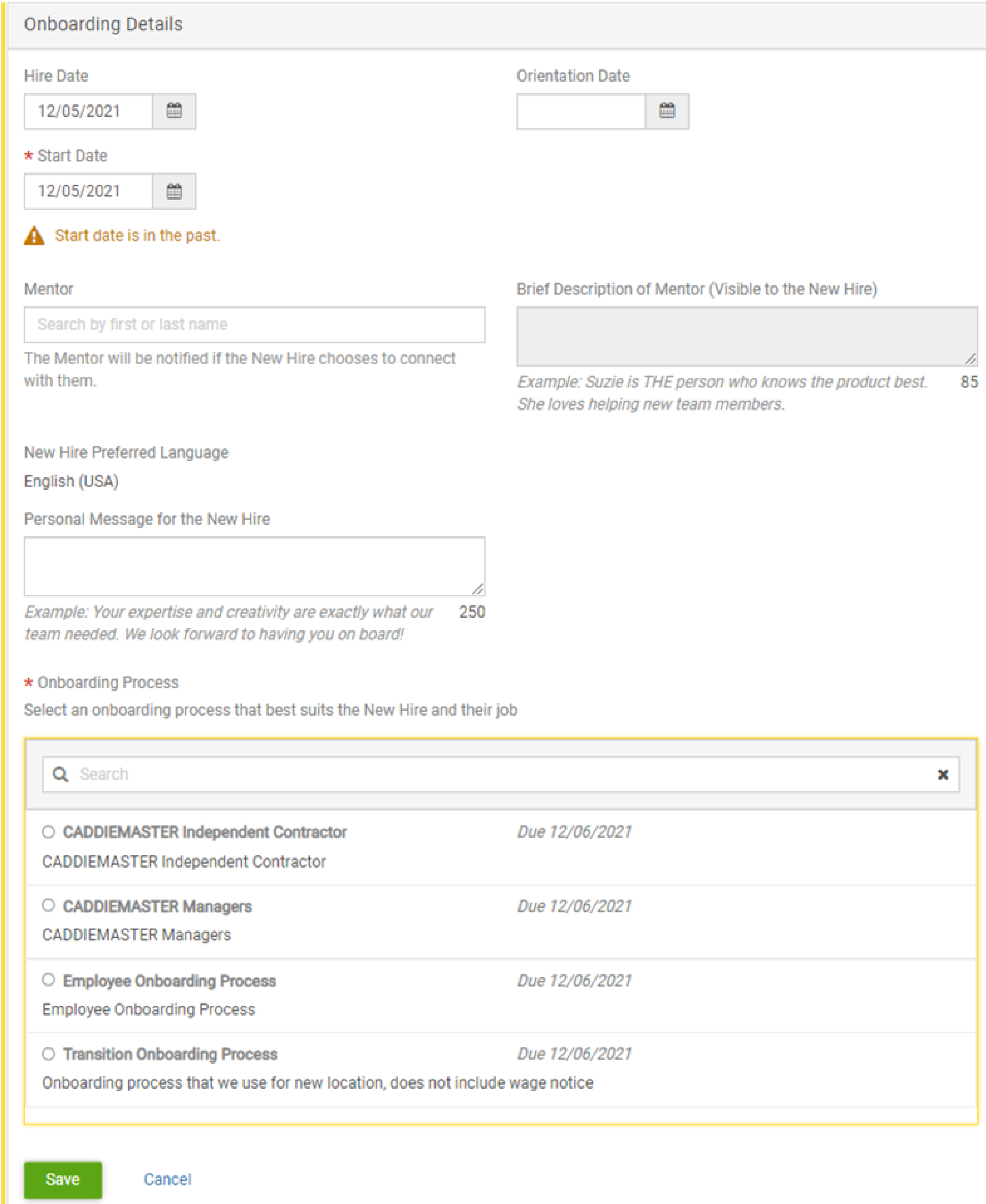
2. **Onboarding Details** – This section contains the information regarding start date and hire date for the new hire, as well as the Onboarding Process that will need to be selected before the new hire's onboarding can be launched.



Launching Onboarding

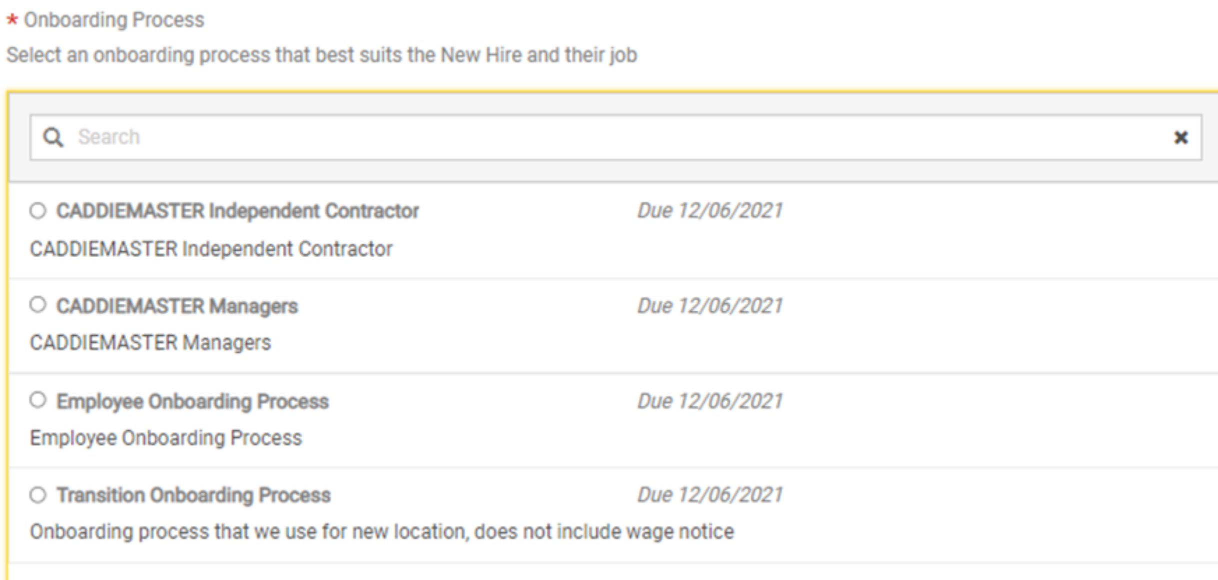
Before the new hire can complete their paperwork and start on their portion of the onboarding process, the manager needs to fill out a few pieces of information in order to launch the onboarding process. First, the manager needs to select the correct onboarding process; then the manager needs to fill out any forms that need to be filled out before the new hire can sign them, such as a State Wage Notice; finally, the manager can use the Launch Onboarding button to send the new hire a link to begin onboarding.

In the Onboarding Details section, the manager will need to select which onboarding process the new hire should go through. The onboarding process determines which set of forms the new hire will need to fill out and what information they will need to provide.

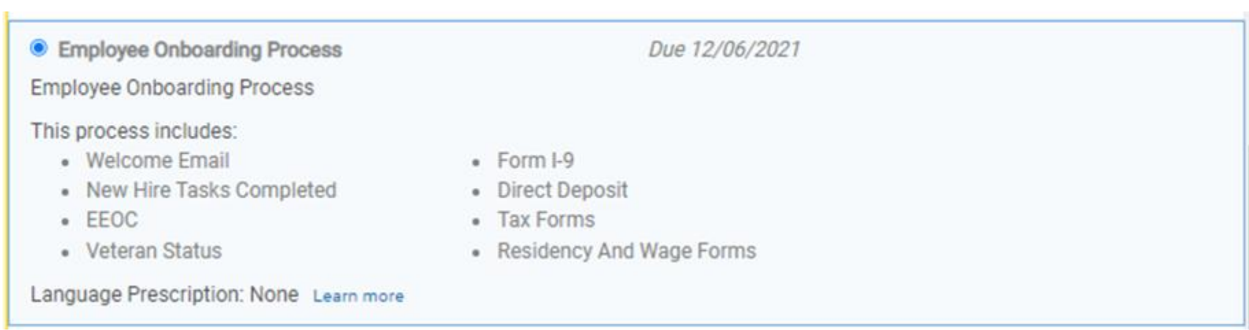


There are four Onboarding Processes that a new hire could go through:

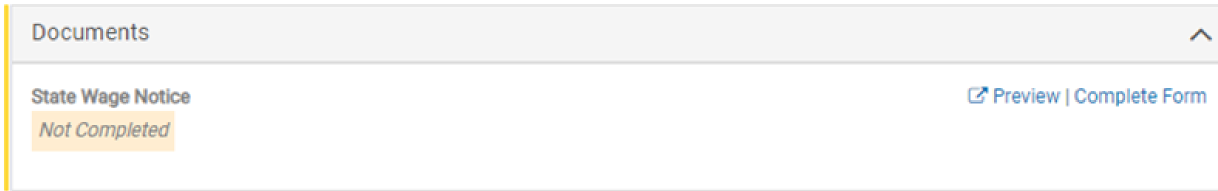
1. Employee Onboarding Process – The standard onboarding process for all employees
2. CADDIEMASTER Managers – This is exclusively for managers at CADDIEMASTER locations
3. CADDIEMASTER Independent Contractors – This is exclusively for Independent Contractors at CADDIEMASTER location
4. Transition Onboarding Process – This is only for new locations that are transitioning to the company, not for new hires



Nearly every new hire, unless specified above, will go through the Employee Onboarding Process. After selecting the process you will see all the forms that are associated with that process



Once an Onboarding Process is selected, the forms that the manager may need to fill out will populate towards the bottom of the screen under the Documents section, notably the State Wage Notice.



The manager will need to select the Complete Form button and fill out all the necessary pieces of information on the form, including OT Rate of Pay, Hourly or Salary selection, and the new hire's pay day. The fields that are required will be marked with a 'Required' tag but there may be other information that managers need to provide depending on the new hire, including Secondary Jobs and Rate.

Required

Required

NOTICE TO EMPLOYEE

Labor Code section 2810.5

EMPLOYEE

Employee Name: Test Applicant

Start Date: 12/5/2021

EMPLOYER

Legal Name of Hiring Employer: TG Administration LLC

Physical Address of Hiring Employer's Main Office:
15044 N Scottsdale Rd Suite 300 Scottsdale Arizona 85254

Hiring Employer's Mailing Address (if different than above):
N/A

Hiring Employer's Telephone Number:
480-606-1000

WAGE INFORMATION

Primary Job: Superintendent Primary Rate of Pay: $ 40,000.00

Primary Overtime Rate of Pay: at least $______ per hour (1 ½ times regular rate), subject to upward adjustments based upon other earnings.

Please see "Secondary Rate Details" section below for other rates of pay for working in other jobs

Rate by (check box):
☐ Hourly
☐ Salary

☐ Employee will be eligible to receive service charge distribution. Service Charge distribution rates are ascertained by calculation. For details of this calculation please see the facilities specific policy on tips and service charges.

☐ Employee may receive tips. Tips are not fixed and at the discretion of the customer. For details please see the facilities specific policy on tips

☐ Other (provide specifics)____________________

DLSE-NTE (rev 9/2014)

Required

Regular Pay Day

☐ Bi-weekly paid on Friday

☐ Weekly paid on Fridays

Secondary Rate Details:

Secondary Job Rate(s) of Pay:		**Secondary Job Overtime Rate(s) of Pay** (all secondary overtime rates are paid by hour and subject to upward adjustments based upon other earnings)
Job Name	**Rate**	**at Least:**
	$	$ /hour (1 ½ times regular rate)
	$	$ /hour (1 ½ times regular rate)
	$	$ /hour (1 ½ times regular rate)
	$	$ /hour (1 ½ times regular rate)
	$	$ /hour (1 ½ times regular rate)
	$	$ /hour (1 ½ times regular rate)
	$	$ /hour (1 ½ times regular rate)

ACKNOWLEDGEMENT OF RECEIPT

Simon C Krauss	Test Applicant
(PRINT NAME of Employer representative)	(PRINT NAME of Employee)
(SIGNATURE of Employer representative)	(SIGNATURE of Employee)
DATE	DATE

The employee's signature on this notice merely constitutes acknowledgement of receip

DLSE-NTE (rev 9/2014)

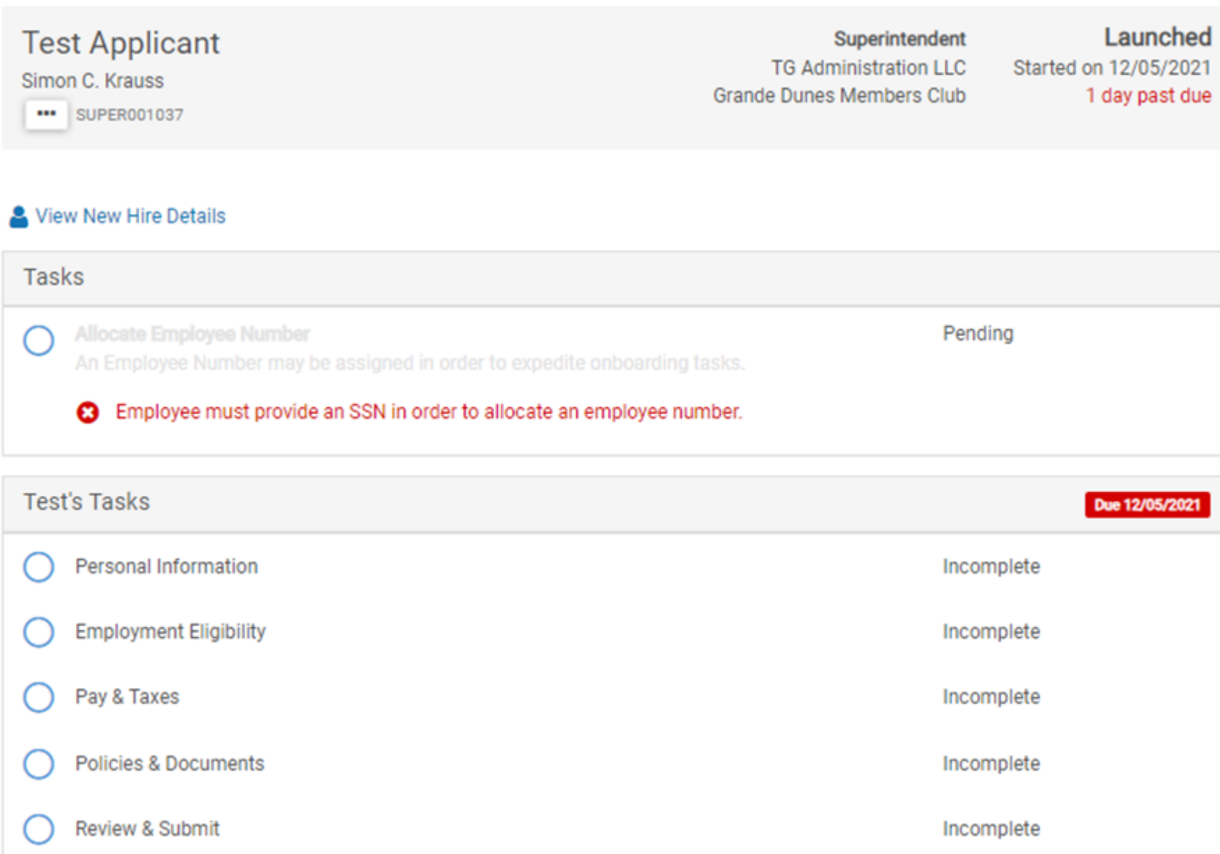
After all the missing information is filled out, the Onboarding Process is selected, and any forms have been filled out, the Launch Onboarding button will appear and the manager can send an email to the new hire to have them start their section of onboarding.

On the Dashboard and on the new hire's profile the status will be updated from Initial Review to Launched.

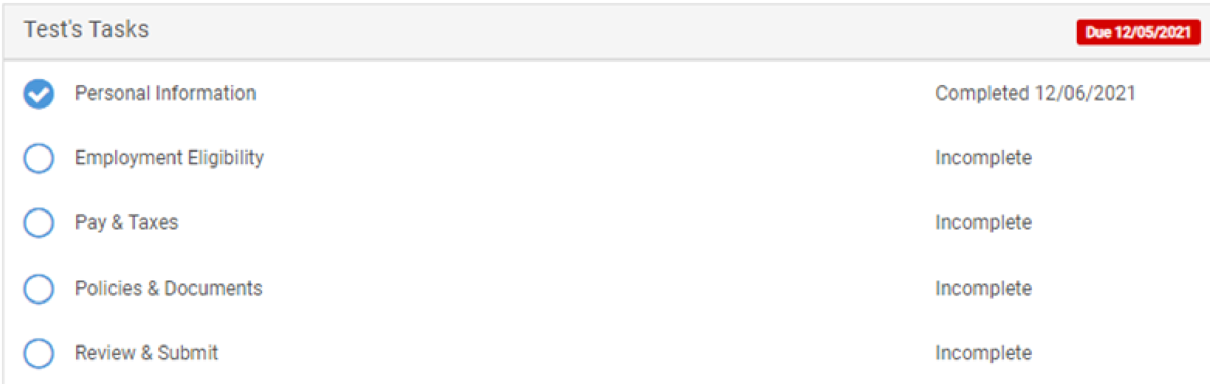
Employee Form Completion

After launching onboarding, the employee will receive a welcome email with instructions for how to reset their password and log into the onboarding section for the first time. The welcome email will go to the email address that the new hire used to create their Presence during the Recruiting process.

Managers can track the new hire's progress in the system by clicking on their profile and viewing their tasks on their profile page.

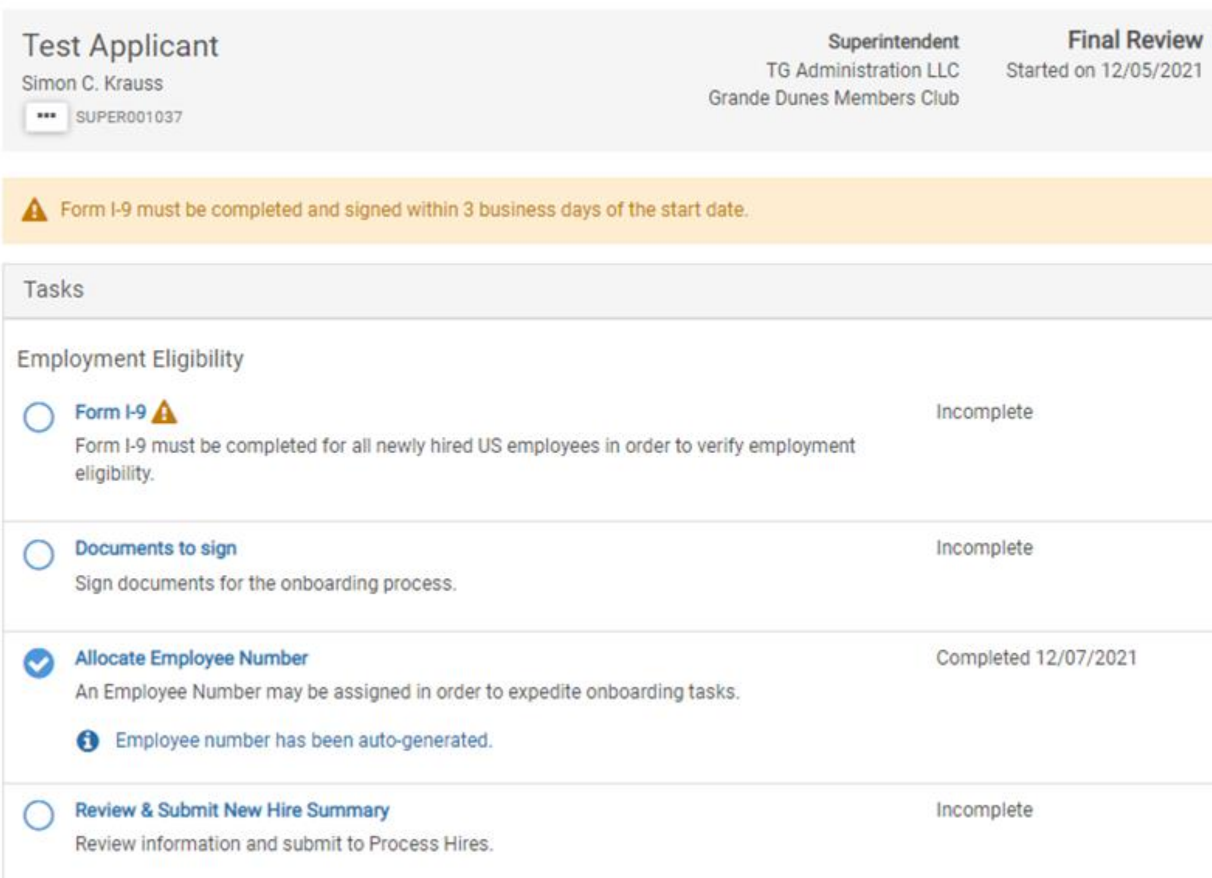


As new hires finish their tasks, they will be marked as complete on their profile page so managers can track which task they are on. These tasks must be done sequentially by the new hire.



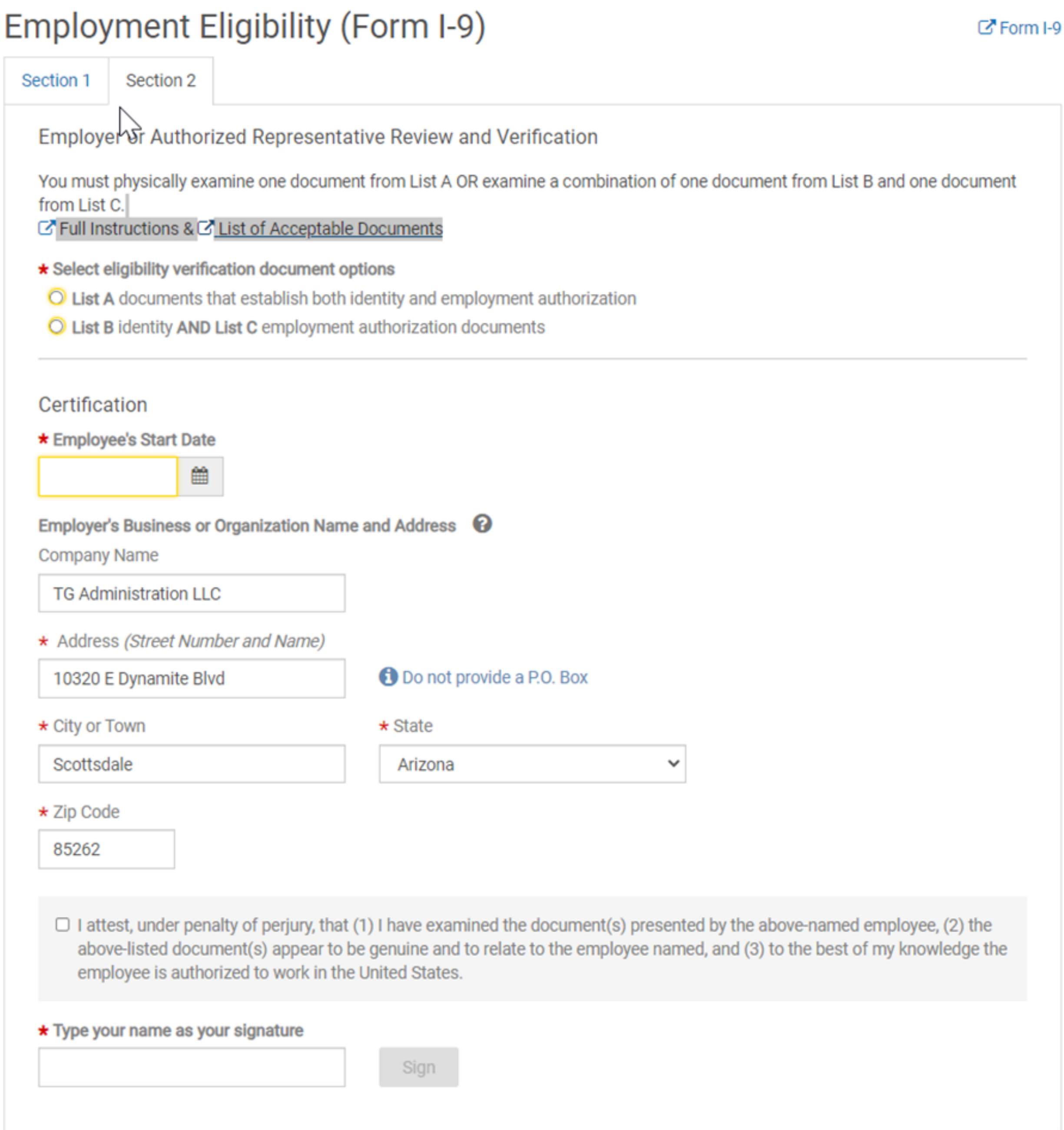
Final Review

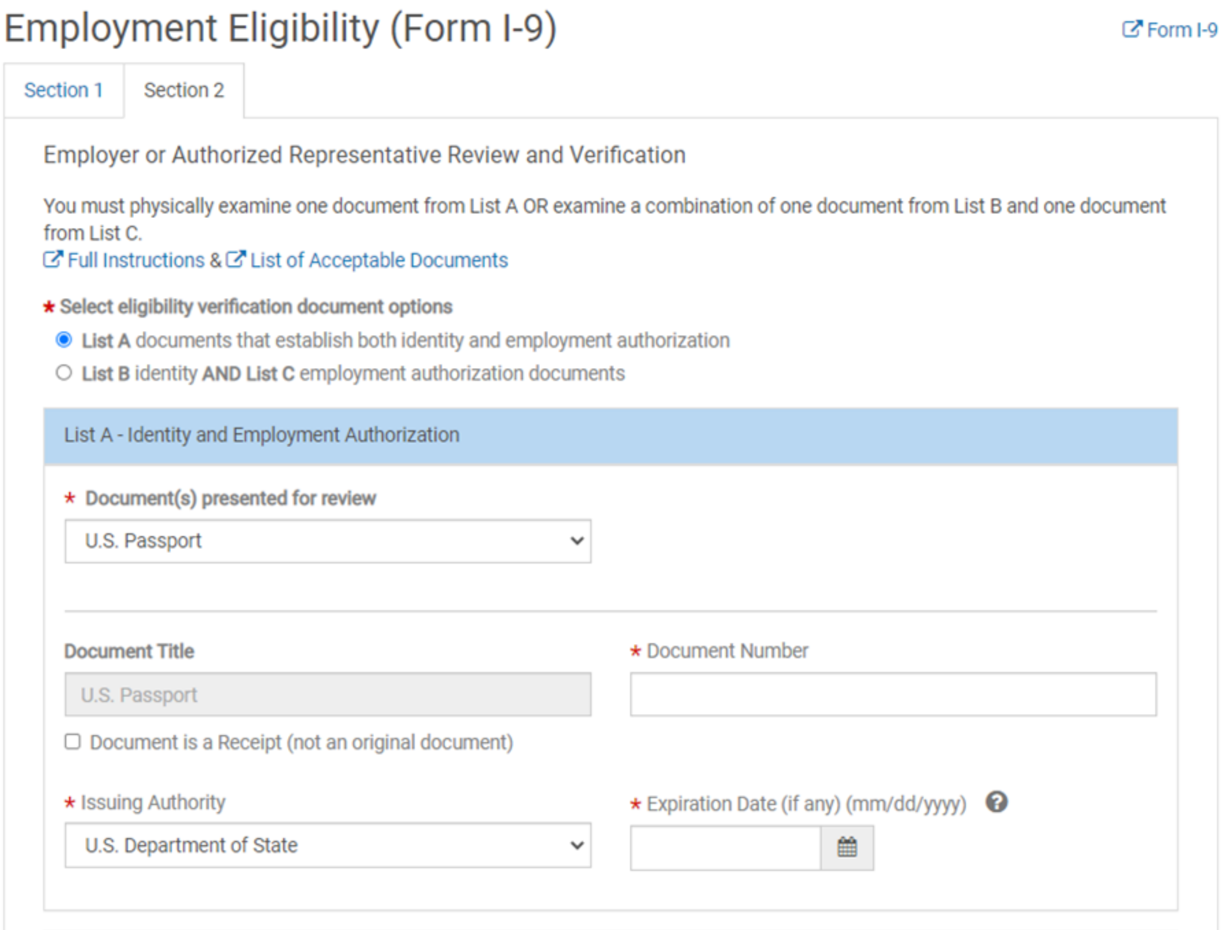
Upon completion of all the forms, the new hire will be moved to the Final Review category where the manager will need to validate the I9, sign any necessary forms, and submit the new hire for processing to the UKG Pro system.



Under the Form I-9 section, the manager must verify the new hire's employment eligibility. Managers must fill out this section within three days of the new hire's start date

The manager should follow the I-9 instructions and complete the section based on the documents provided by the new hire.





Employment Eligibility (Form I-9)

Form I-9

Section 1 | Section 2

Employer or Authorized Representative Review and Verification

You must physically examine one document from List A OR examine a combination of one document from List B and one document from List C.

Full Instructions & List of Acceptable Documents

* Select eligibility verification document options

- List A documents that establish both identity and employment authorization
- List B identity AND List C employment authorization documents

List A - Identity and Employment Authorization

* Document(s) presented for review

U.S. Passport

Document Title

U.S. Passport

Document is a Receipt (not an original document)

* Document Number

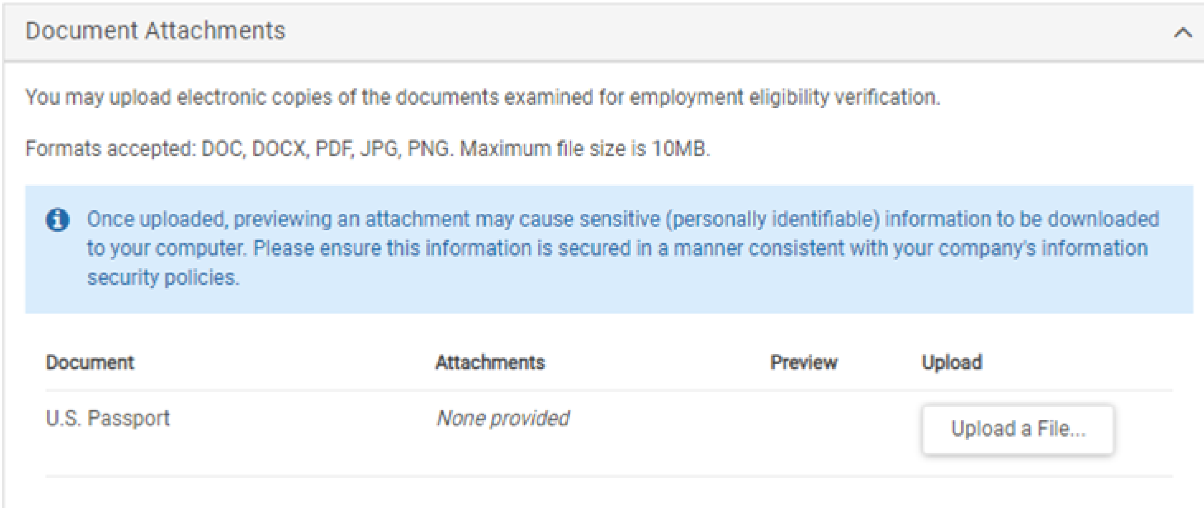
* Issuing Authority

U.S. Department of State

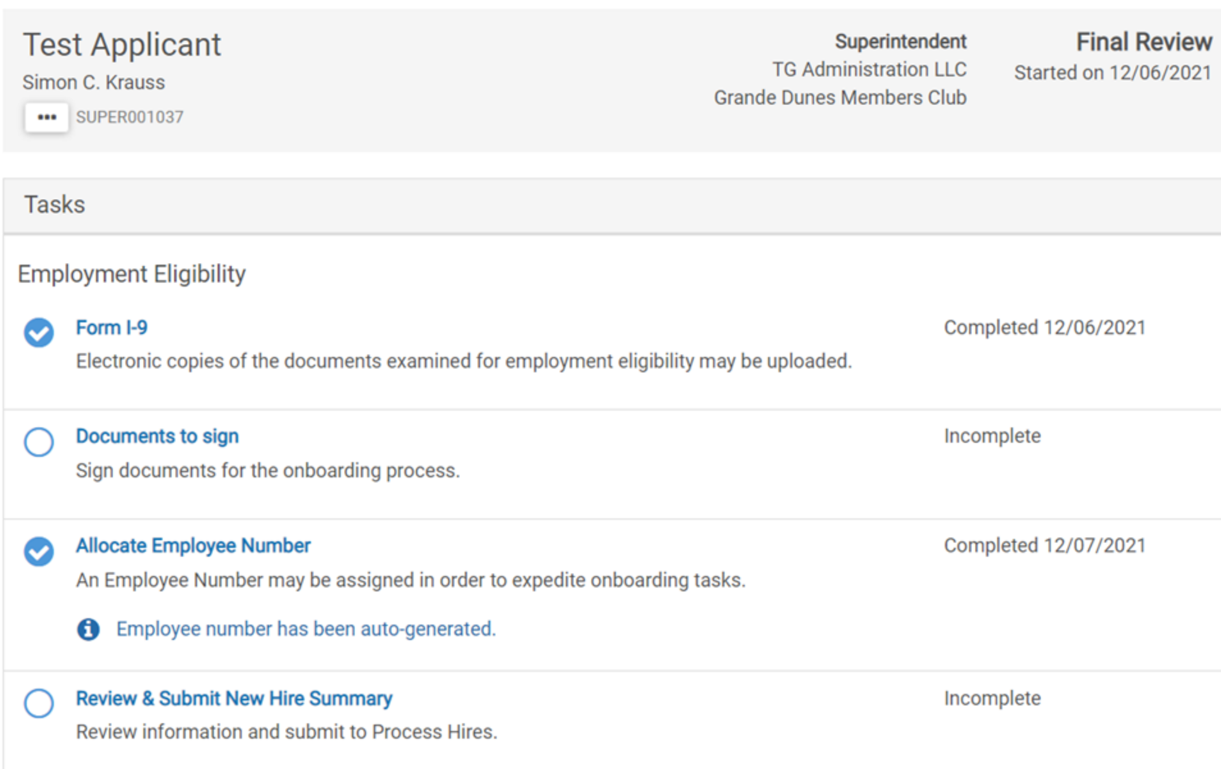
* Expiration Date (if any) (mm/dd/yyyy)

Once all the sections are filled out and completed, the manager will need to type their name in the signature box and click the Sign button to submit the form.

After signing the form, the manager will also be able to upload a picture of the document provided by the new hire and attach it to the I9 page

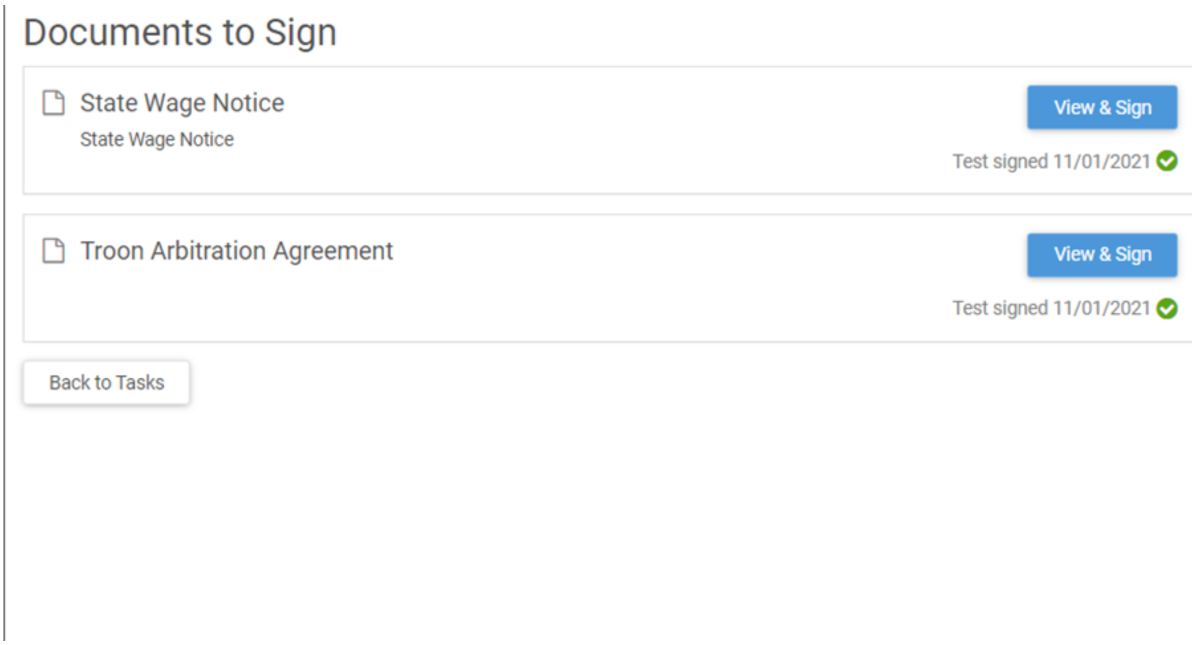


After the employer portion of the I-9 is complete, the I-9 section will be marked as completed

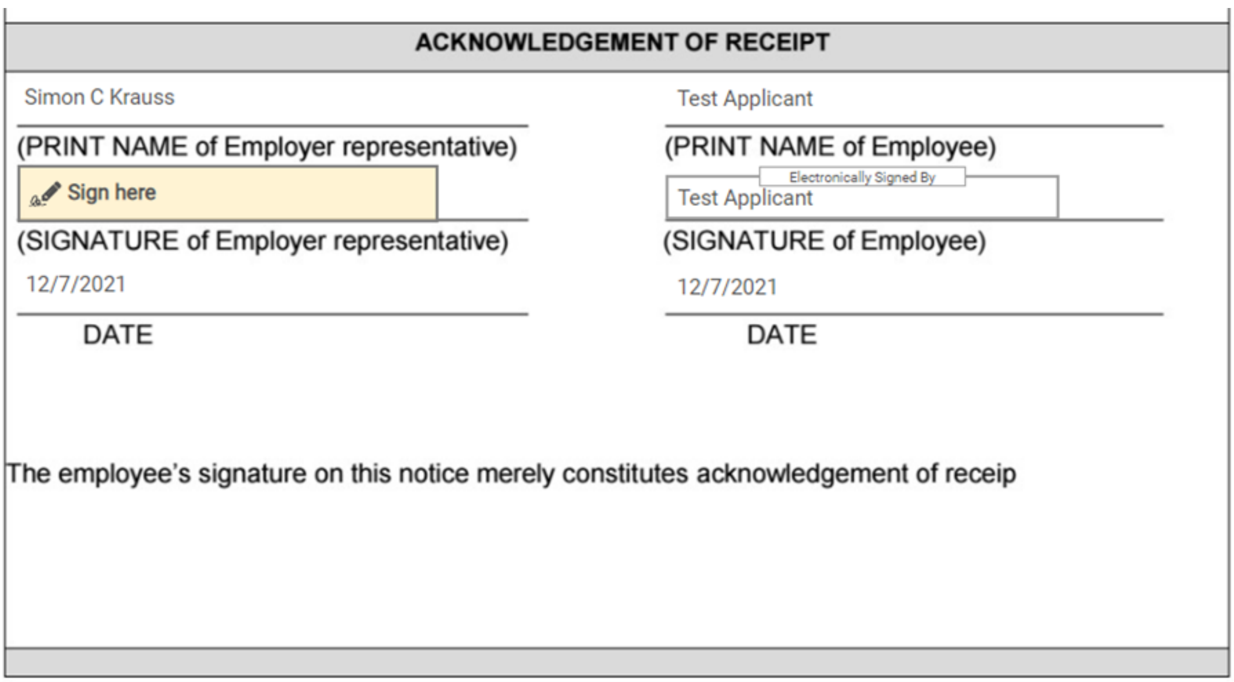


The last step that managers need to complete before submitting the new hire to be processed into UKG Pro is to sign any documents that need a manager signature

Clicking on the Documents to sign section brings the manager to the list of forms that need to be signed



Using the View & Sign button, the manager can access the form and sign the Employer section and complete the onboarding section.



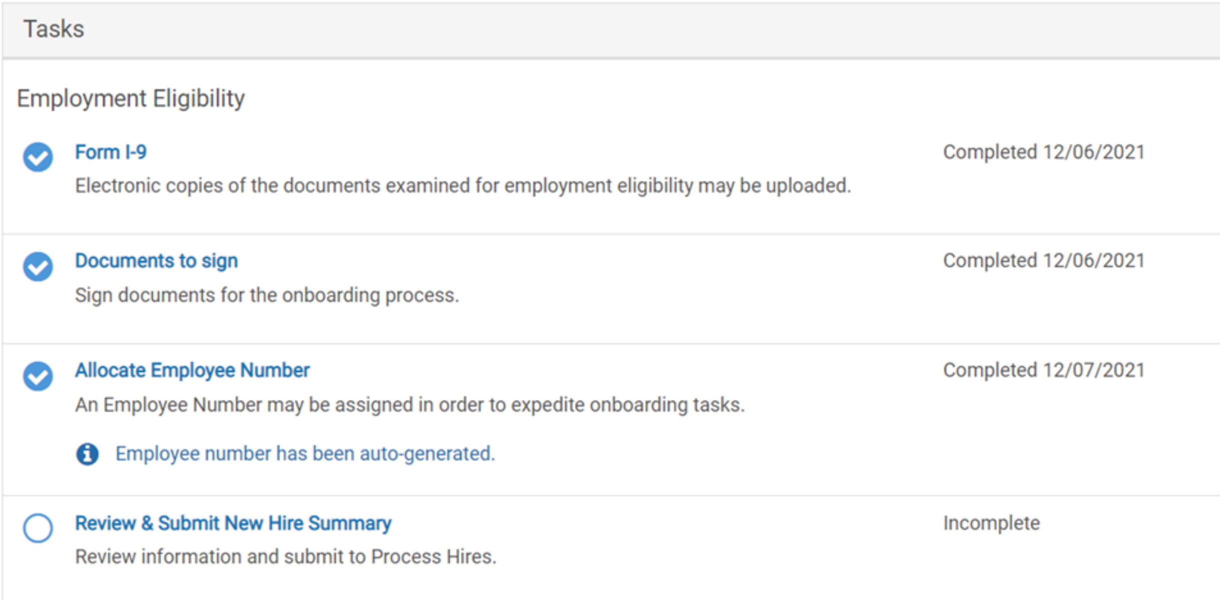
ACKNOWLEDGEMENT OF RECEIPT

Simon C Krauss	Test Applicant
(PRINT NAME of Employer representative)	(PRINT NAME of Employee)
Sign here	Electronically Signed By Test Applicant
(SIGNATURE of Employer representative)	(SIGNATURE of Employee)
12/7/2021	12/7/2021
DATE	DATE

The employee's signature on this notice merely constitutes acknowledgement of receip

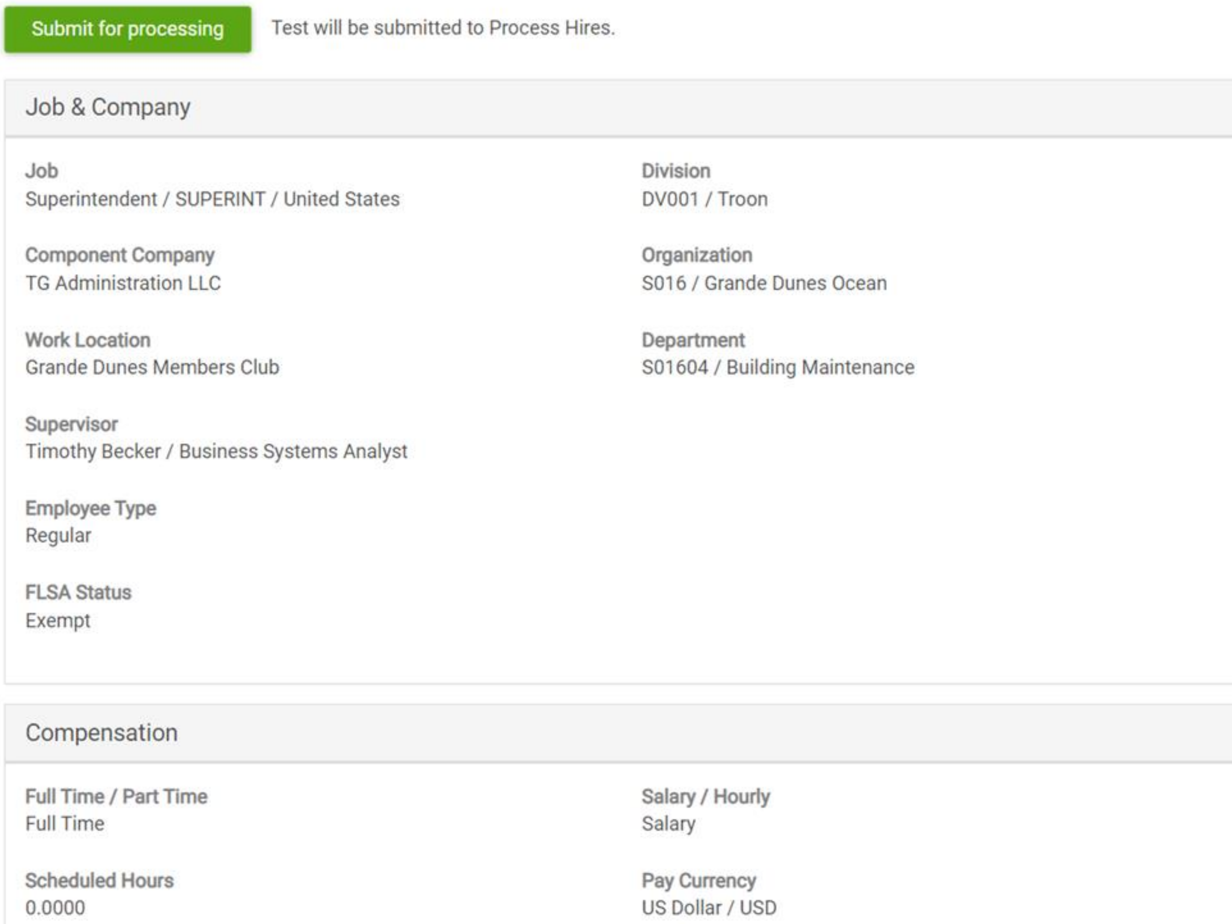
Processing Hires

The last step in the onboarding process is to review the information and submit the new hires to UKG Pro for processing.



The manager can review all the information by access the Review & Submit New Hire section

On the Review & Submit New Hire Summary page, the manager reviews the new hire information to ensure that all the information has been accurately completed.



Once everything is done and information is confirmed, the manager uses the Submit for processing button to submit the new hire to UKG Pro to be processed by payroll.

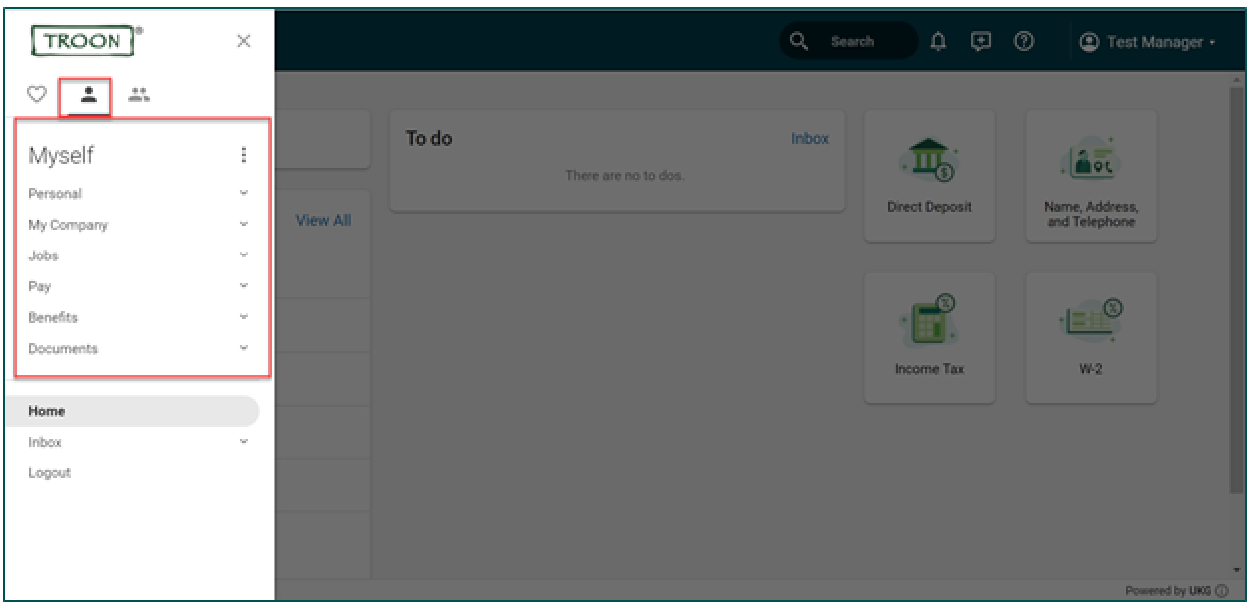
P. Role-Based Security Overview

Navigation/Menu Access

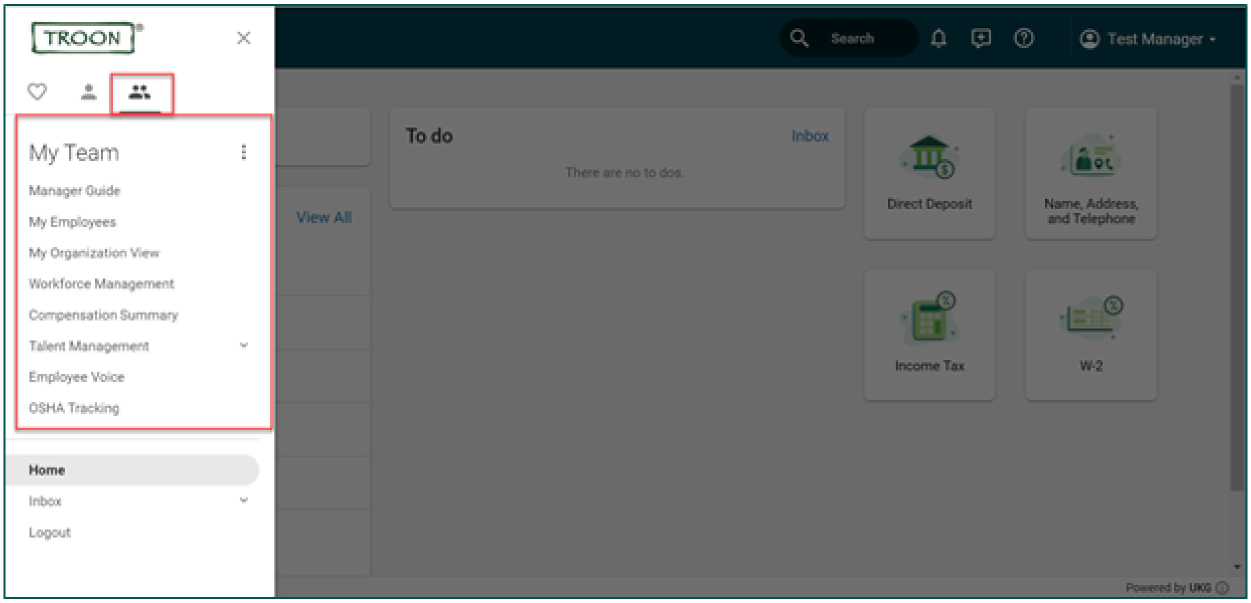
Depending on the **roles** you have been assigned and the access rights/**permissions** contained in those roles, you will have access to certain menus, options, and information in UKG Pro™.

From the **Side Navigation/Hamburger Menu** , you can view the menus available to your role.

By default, all associates have access to the **Myself** menu:

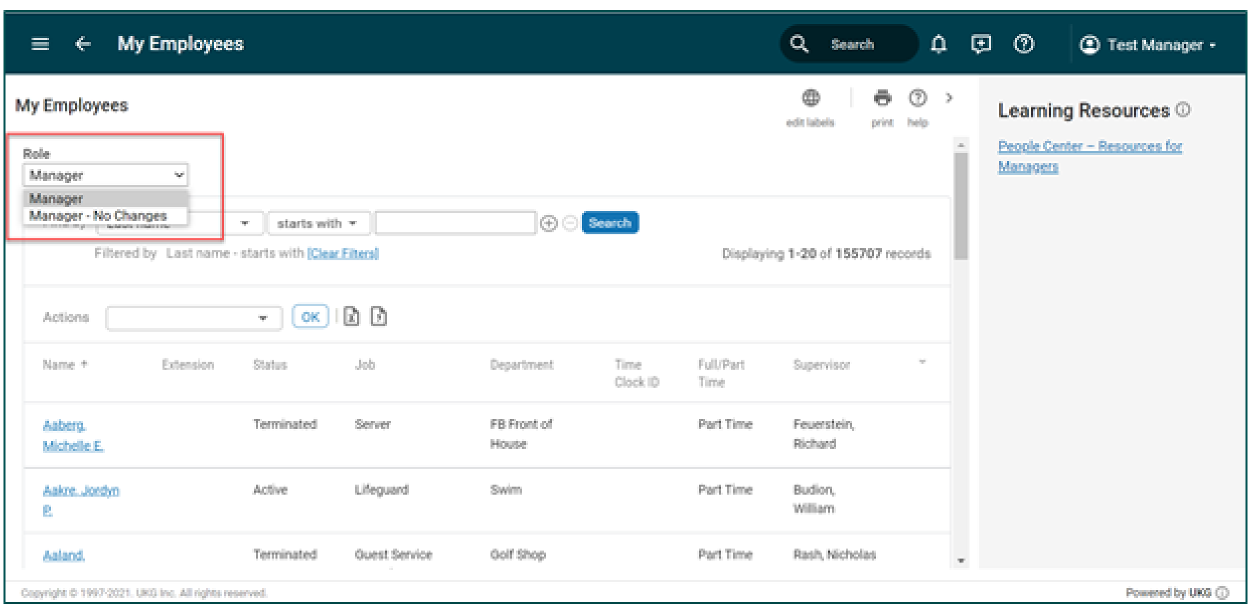


As a Manager, you will typically also have access to the **My Team** menu, from where you can act on your associates.



Roles & Role Permissions/Access

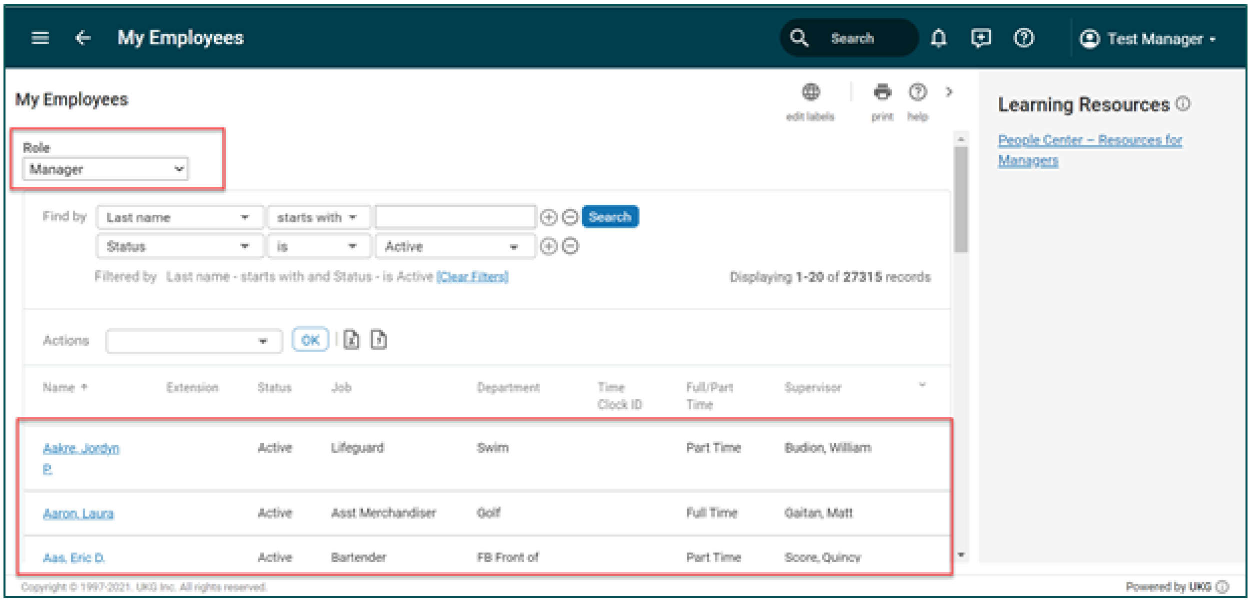
The Role(s) you have been assigned and the permissions assigned to the role(s) will determine how you view and interact with your associate's job records and information in UKG Pro. When interacting with pages, if you have been assigned to multiple roles, you will be able to select a specific **Role** from the available dropdown:



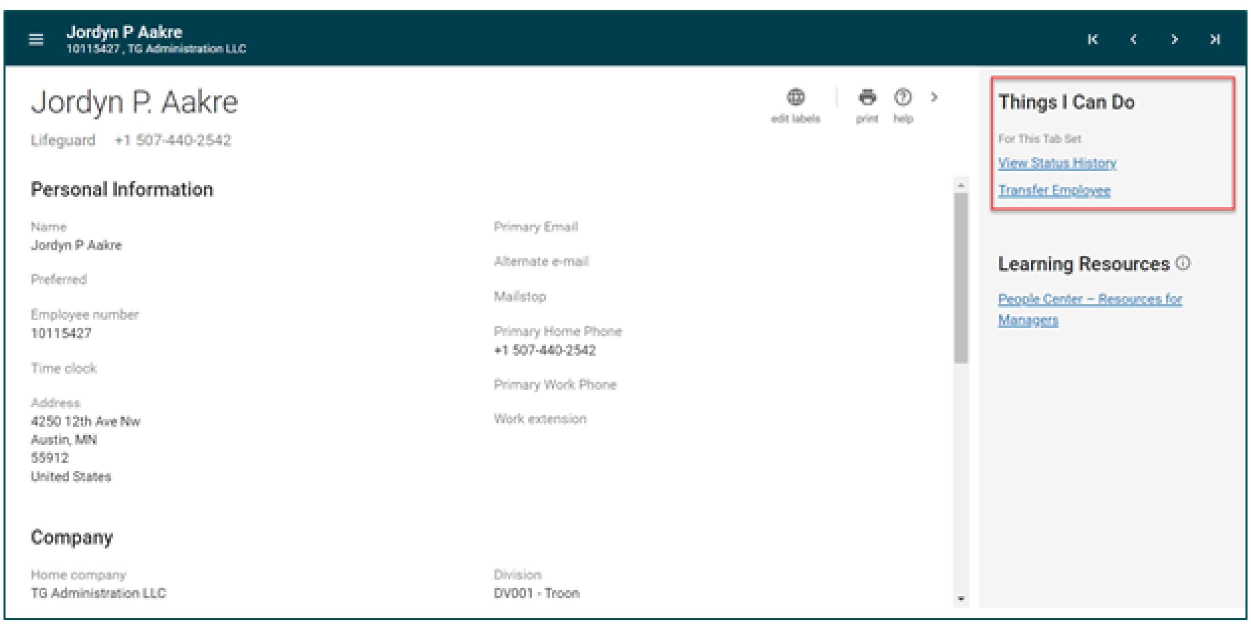
NOTE:

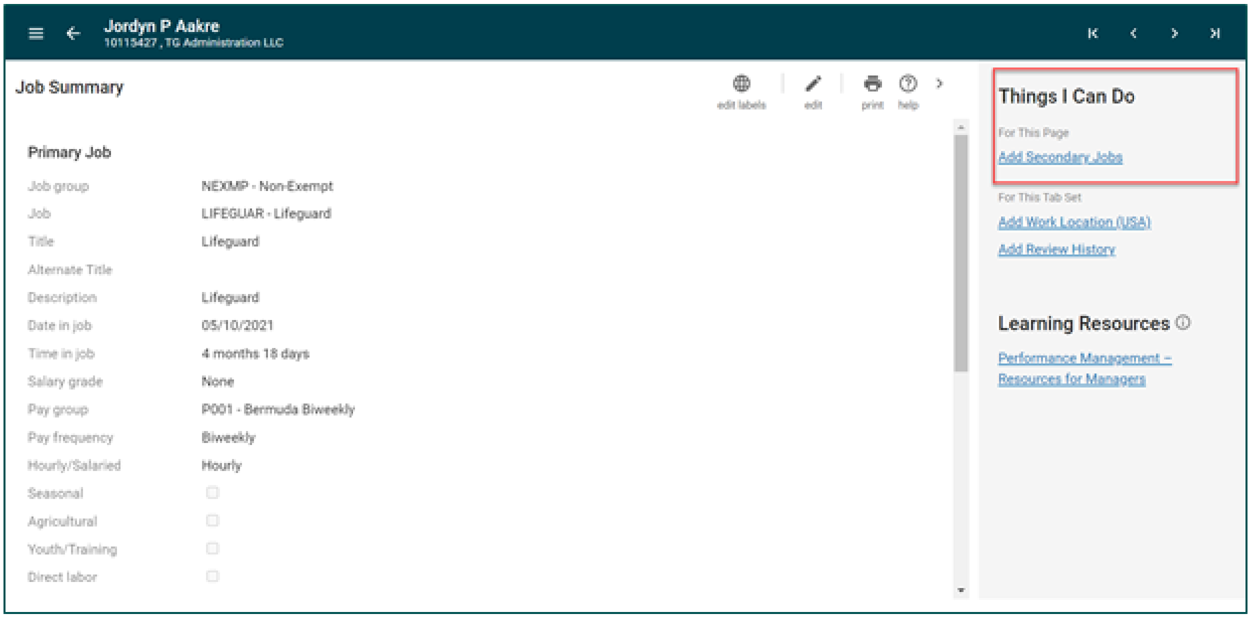
The role you choose from the **Role** dropdowns available on various pages will determine1) the associates you can view and 2) the actions you can perform on their records.

Notice the Active associates you can view with the **Manager** Role:

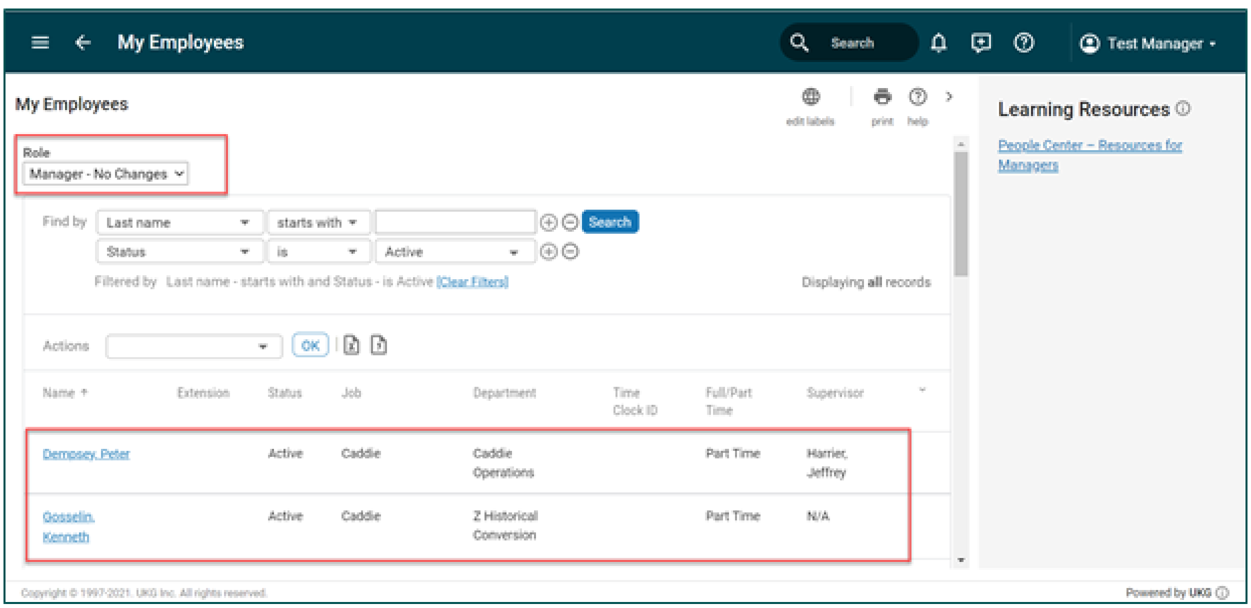


With the **Manager** role selected, you can take certain actions (according to my permissions) on your associates from the **Things I Can Do** menu located on the right side of the page you are viewing.





Notice the Active associates you can view with the **Manager - No Changes** Role:

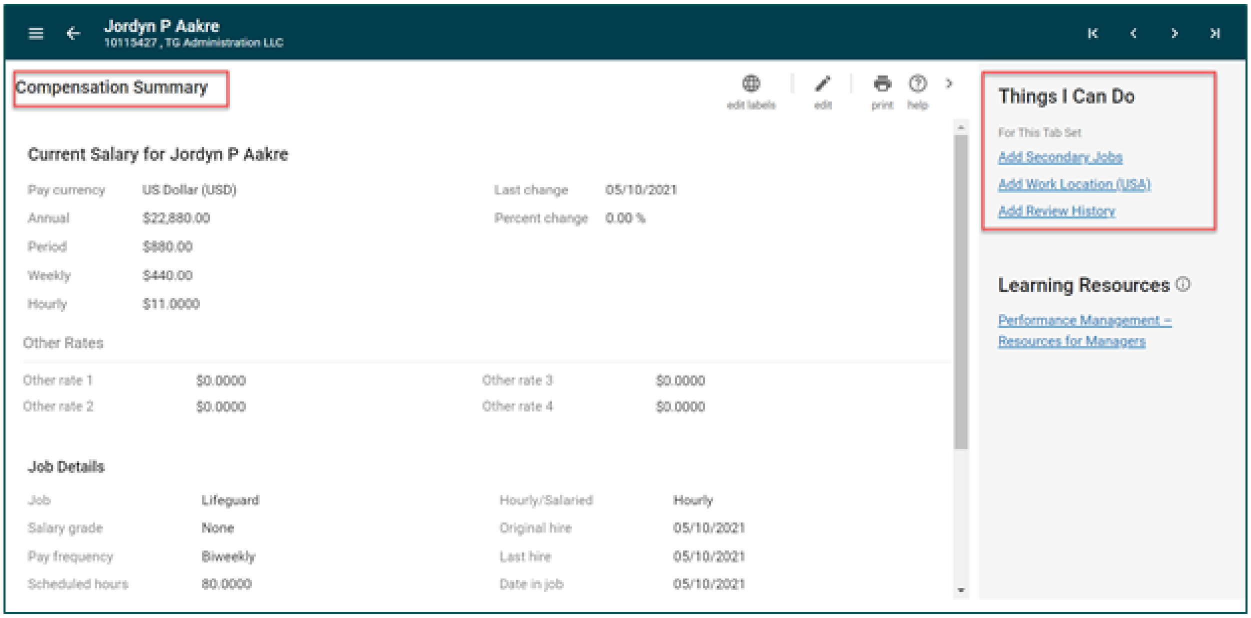


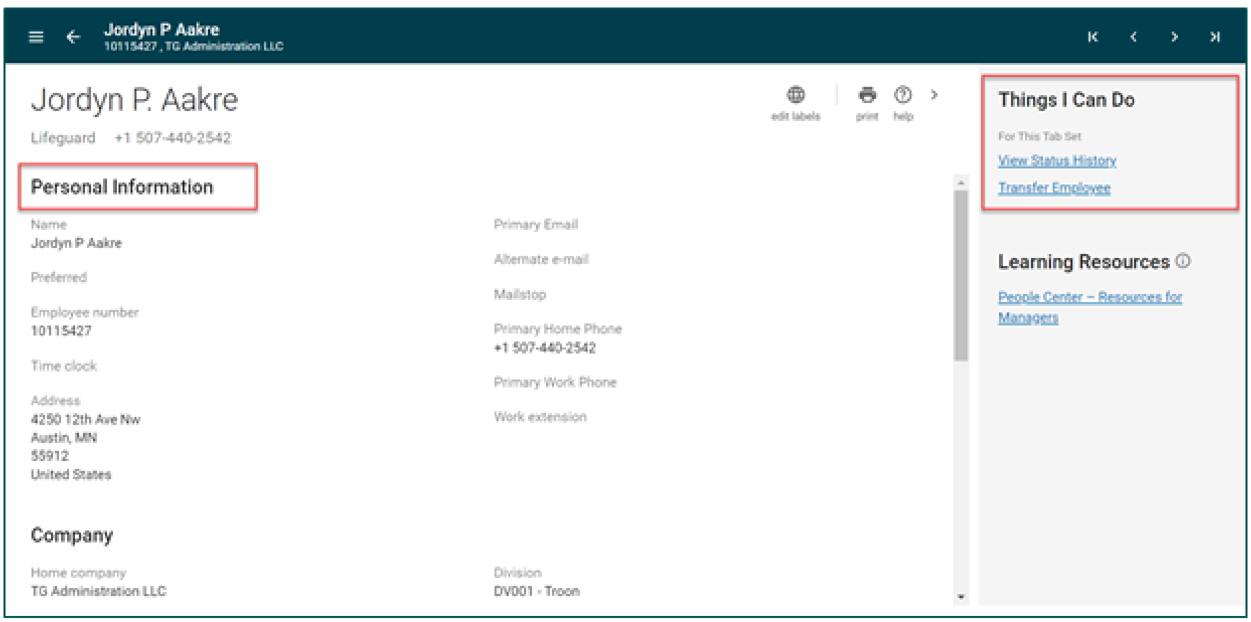
In contrast to the **Manager** role, the **Manager - No Changes** Role **does not** allow you to make any associate data changes:

Additional Information

"Things I Can Do" Menu

The **Things I Can Do** menu and the actions you can take on an associate (depending on the roles and permissions you have been assigned) are specific to the page you are viewing.


Jordyn P Aakre
10115427 , TG Administration LLC
Compensation Summary
edit labels
edit
print
help
Things I Can Do
For This Tab Set
Add Secondary Jobs
Add Work Location (USA)
Add Review History
Learning Resources
Performance Management – Resources for Managers
Current Salary for Jordyn P Aakre
Pay currency US Dollar (USD)
Annual $22,880.00
Period $880.00
Weekly $440.00
Hourly $11.0000
Last change 05/10/2021
Percent change 0.00 %
Other Rates
Other rate 1 $0.0000
Other rate 2 $0.0000
Other rate 3 $0.0000
Other rate 4 $0.0000
Job Details
Job Lifeguard
Salary grade None
Pay frequency Biweekly
Scheduled hours 80.0000
Hourly/Salaried Hourly
Original hire 05/10/2021
Last hire 05/10/2021
Date in job 05/10/2021


Jordyn P Aakre
10115427 , TG Administration LLC
Jordyn P. Aakre
Lifeguard +1 507-440-2542
edit labels
print
help
Things I Can Do
For This Tab Set
View Status History
Transfer Employee
Learning Resources
People Center – Resources for Managers
Personal Information
Name
Jordyn P Aakre
Preferred
Employee number
10115427
Time clock
Address
4250 12th Ave Nw
Austin, MN
55912
United States
Primary Email
Alternate e-mail
Mailstop
Primary Home Phone
+1 507-440-2542
Primary Work Phone
Work extension
Company
Home company
TG Administration LLC
Division
DV001 - Troon

Q. Supervisor Update

Managers can log into UKG and edit an associate's supervisor.

Navigation: Enter the URL provided into the internet web browser. Google Chrome is the most compatible web browser.

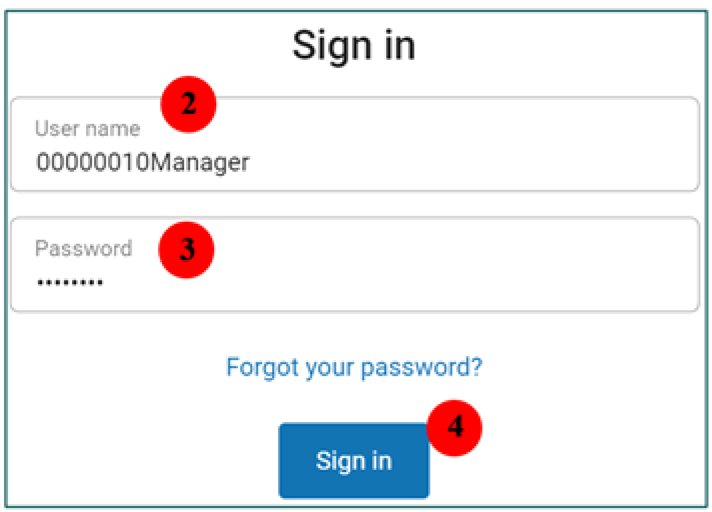
1. Go to the Troon UKG site: https://n35.ultipro.com

2. Enter your provided username

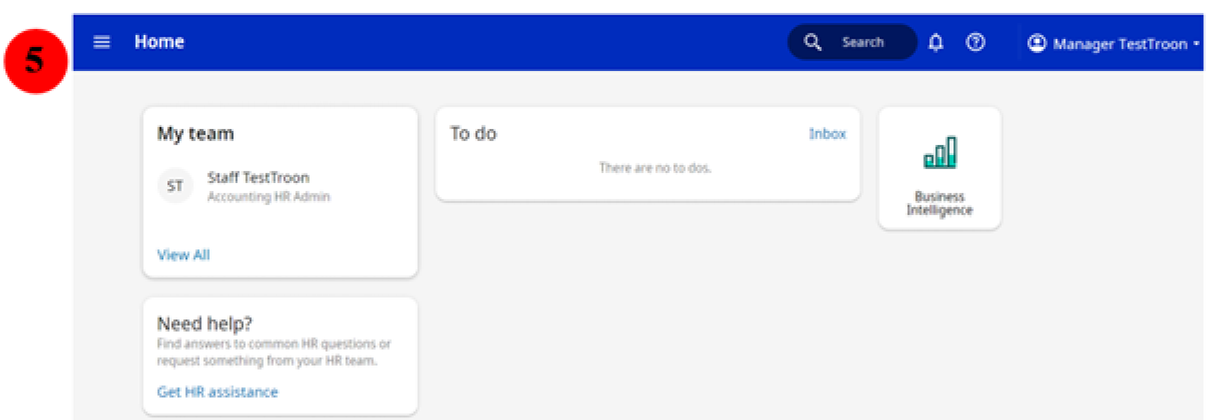
3. Enter your password

Note: If you haven't logged in before your default password is your date of birth in the format MMDDYYYY

4. Click Sign in

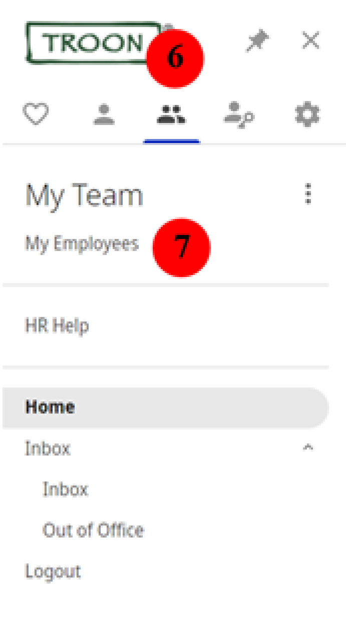


5. Click on Menu in the upper left-hand corner



6. Select the “My Team” tab

7. Select “My Employees”

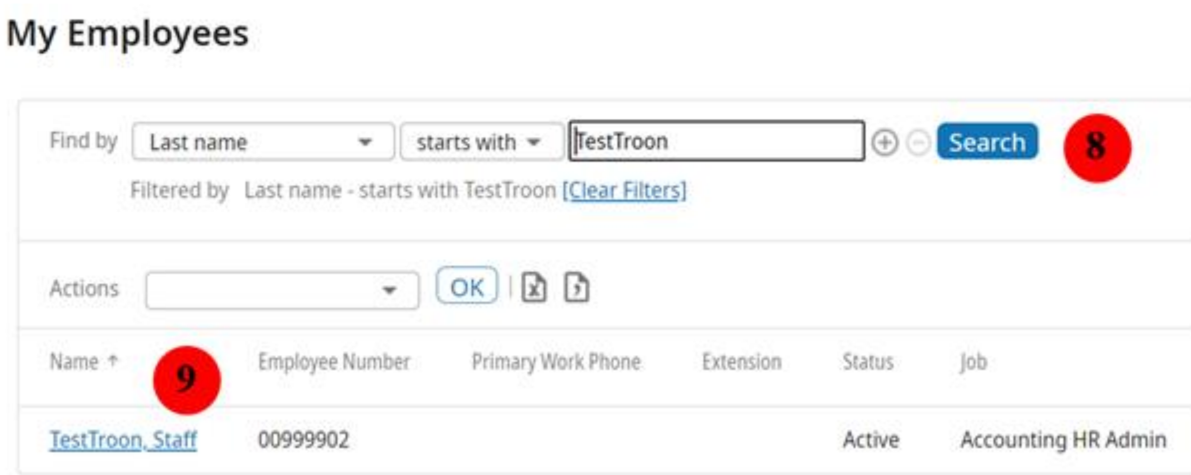


8. Search for an employee

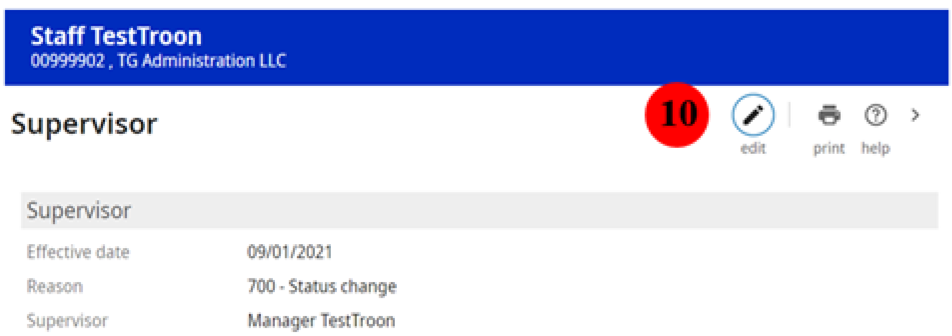
Note: You can leave the fields blank and click search. This will allow you to view all of the associates that you have access to.

9. Select the employee by clicking on their name

Note: To show all of the supervisor fields like Job, Location, Company, etc. Select the Icon on the far righthand side and you will be able to display these fields.



10. Select the edit button at the top of the "Change Supervisor" page

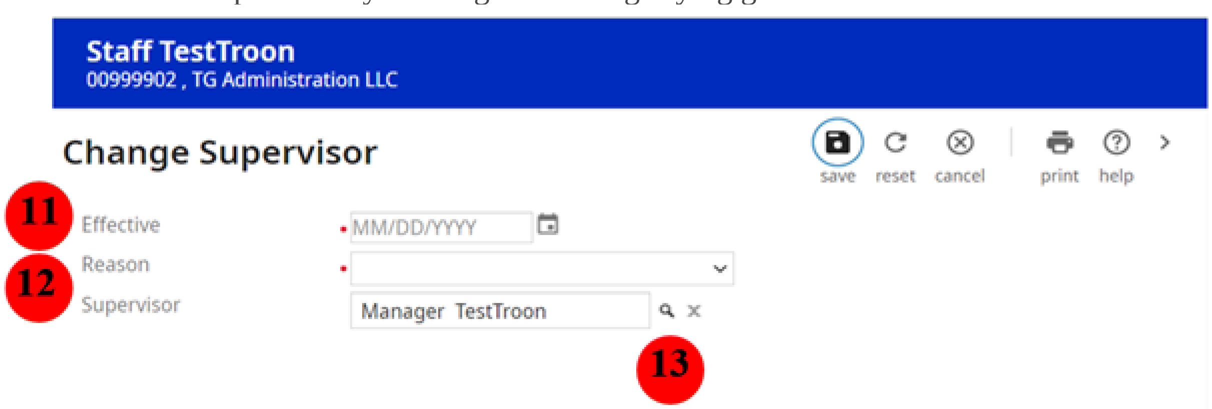


11. Enter an effective date for the change

12. Enter a reason

Note: In this case the reason should be "Supervisor Update"

13. Select a new supervisor by clicking on the magnifying glass

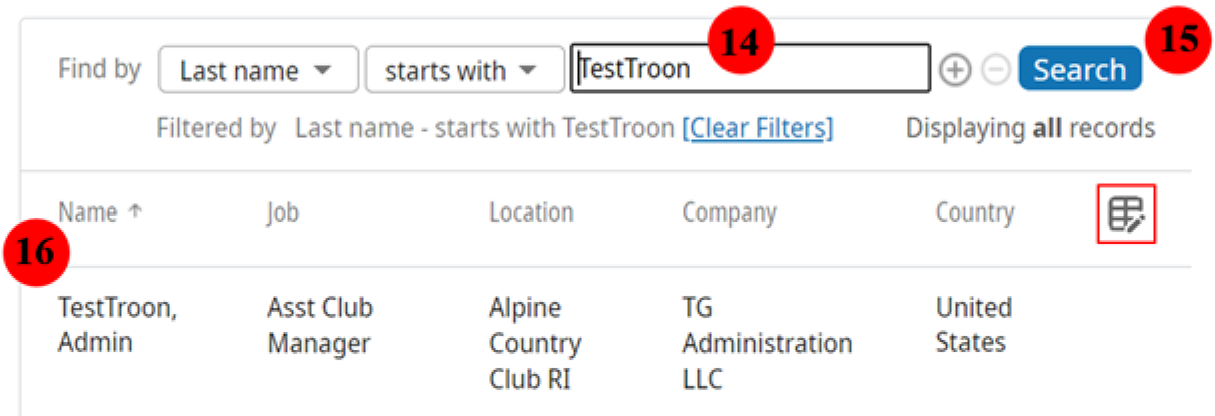


14. Type the last name of the new supervisor

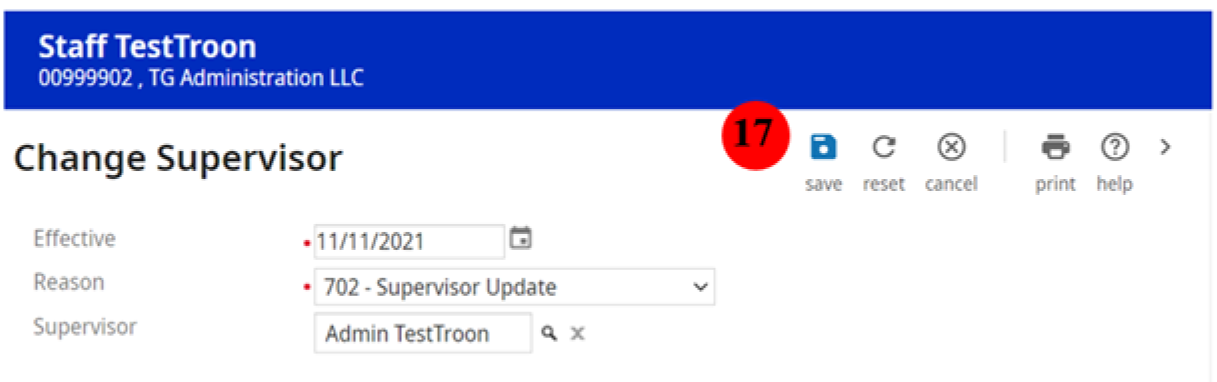
15. Click Search

16. Select the new supervisor

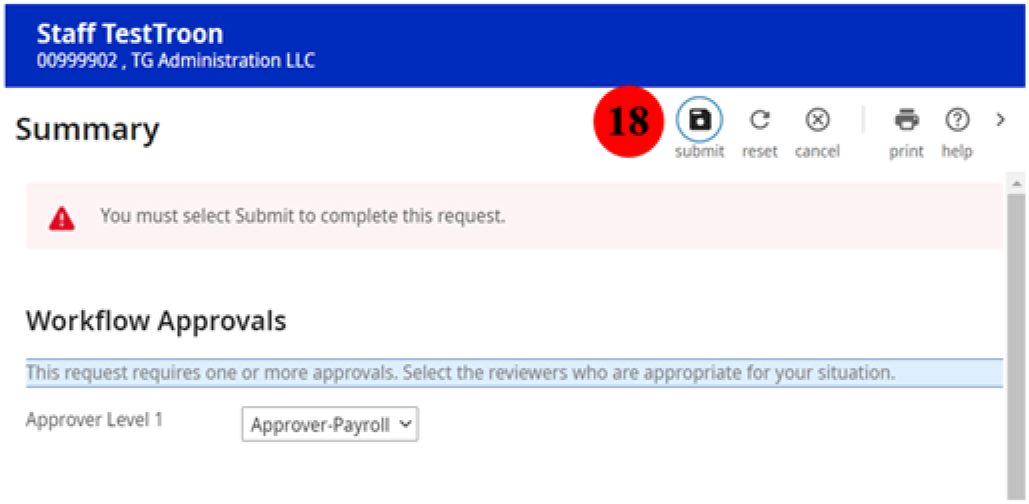
Note: To show all of the supervisor fields like Job, Location, Company, etc. Select the Icon on the far righthand side and you will be able to display these fields.



17. Click Save



18. You will then be redirected to a summary page where you will be able to see the approver for the request and the updates you are making to the profile. Once you have reviewed, click Submit.



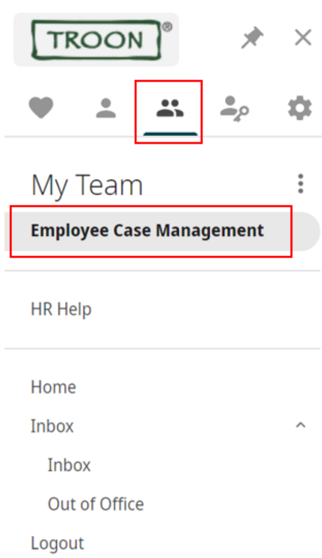
Please note that the request will then go through an approval workflow before the change is made in the system. This could take up to 48 hours.

Additional Information

Need Help?

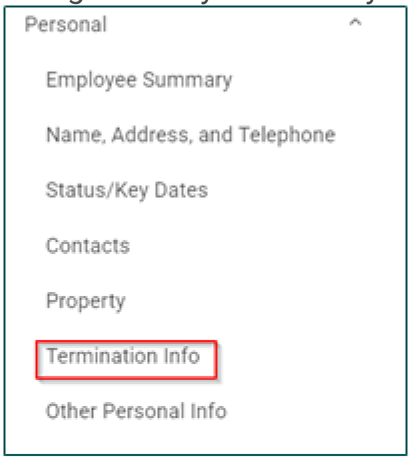
Click on the Employee Case Management link and complete a form to receive additional help.

Navigation: Menu > My Team> Employee Case Management



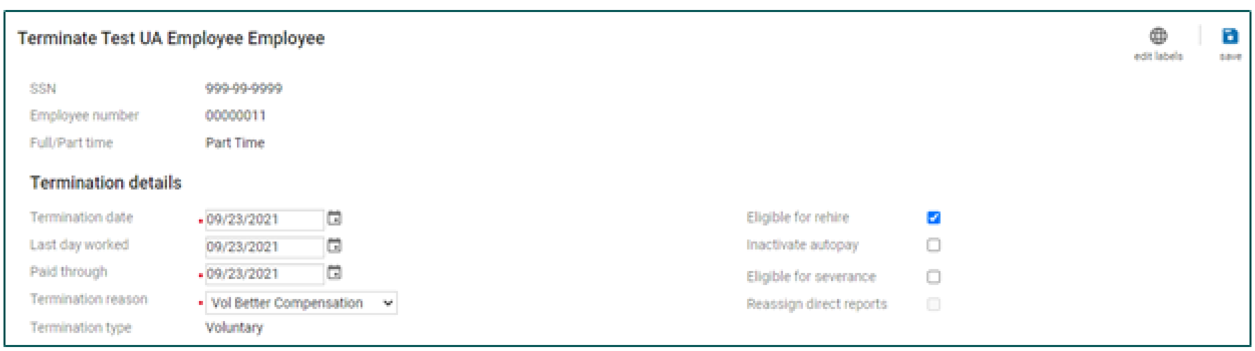
R. Terminate Employee

Navigation: My Team > My Employees > Select employee > Personal > Termination Info



From **Termination Info Page**, see below steps:

1. Click Terminate Employee on right-hand top corner
2. Enter Termination date
3. Enter Last day worked
4. Enter paid through
5. Select Termination reason
6. Click if the employee is eligible for rehire
7. Click Inactivate autopay, if applicable
8. Click Eligible for severance, if applicable
9. Click **Save** in top right-hand corner



Additional Terminate Employee Information

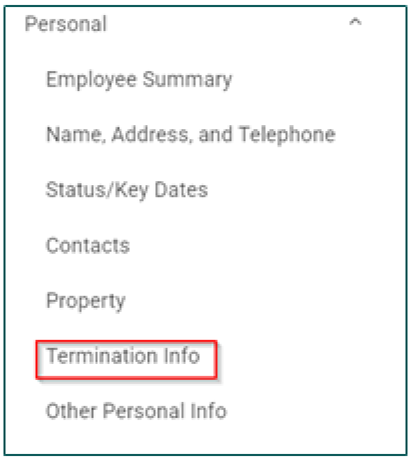
- Last day worked and Paid automatically populate with the termination date.
- Last day worked can be on termination date or before.
- Paid through can be on or after termination date. Scenarios will vary based on organization.
- Termination type is populated based on termination reason selection.

- Eligible for rehire will vary based on organization. Involuntary and Voluntary reasons typically drive this flag.

View Employee Termination Info

Managers can view a terminated associate record by selecting the associate's termination information.

Navigation: My Team > My Employees > Select employee > Personal > Termination Info



S. Getting Started with Workforce Management (Dimensions)

This guide explains how to log on and get started with UKG Dimensions on your desktop.

To access the application:

1. To access Dimensions, log onto UKG Pro and then select **My Team > Workforce Management**.

Note:

Password requirements, such as required characters and case-sensitivity, vary according to organizational needs. Check with your Application Administrator for your user name and password, and to identify your application's password requirements.

2. Signing Out of the application:

- Closes your session
- Signals to the application that you no longer require access to any of its components
- Prevents other people from accessing your information

Recommended Practice

UKG recommends that you always end your work session by tapping the Log off link to avoid unauthorized access.

Home Page Overview:

The Dimensions home page is composed of tiles, which are containers that display a summary of content from product components. You can click a tile to perform a function such as submit a PTO request. You can also navigate to application-specific components, and take actions on schedules, timecards, and other items that you may use regularly.

Home Page Actions:

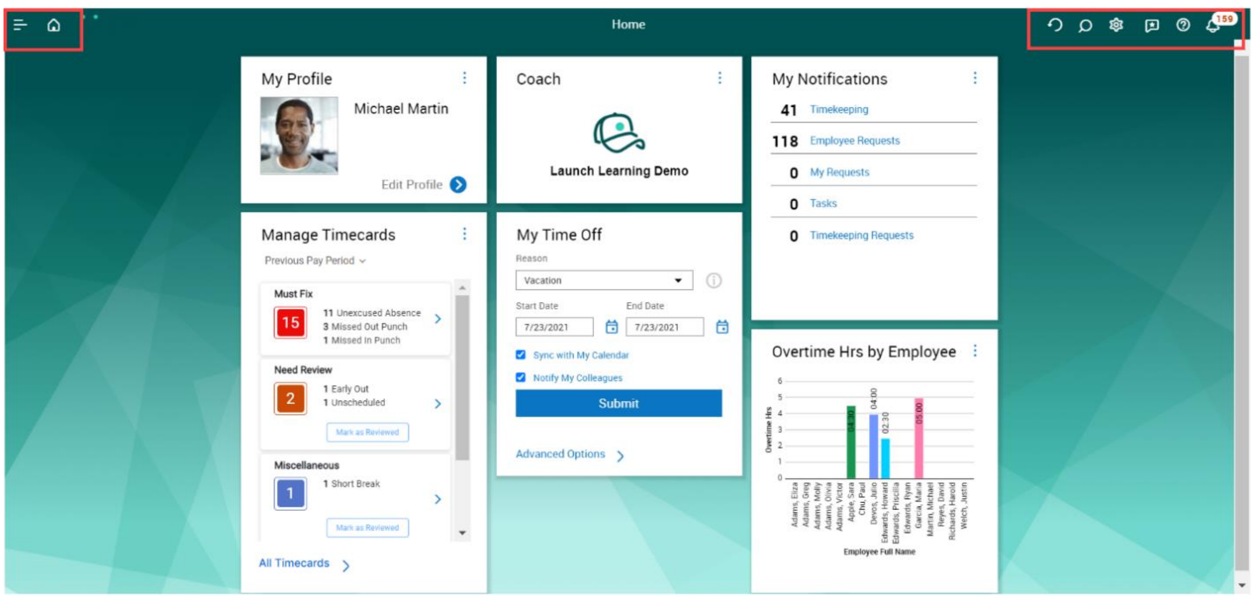
Click **Restore** to restore the Home Page to its original configuration. The Restore button turns orange to indicate that it is active, and changes have occurred. If you click Restore, you will only see Application tiles, not charts.

Click the **Main Menu** to open the main menu and access your employees' timecards, schedules, and Dataviews & Reports within the application.

Click **Settings** at the top right of the screen to access the Tile library and add or remove tiles to and from your Home page.

Click the question mark at the top right of the screen to get online help.

Click **Alert** at the top right of the screen to see alerts and notifications in the application.

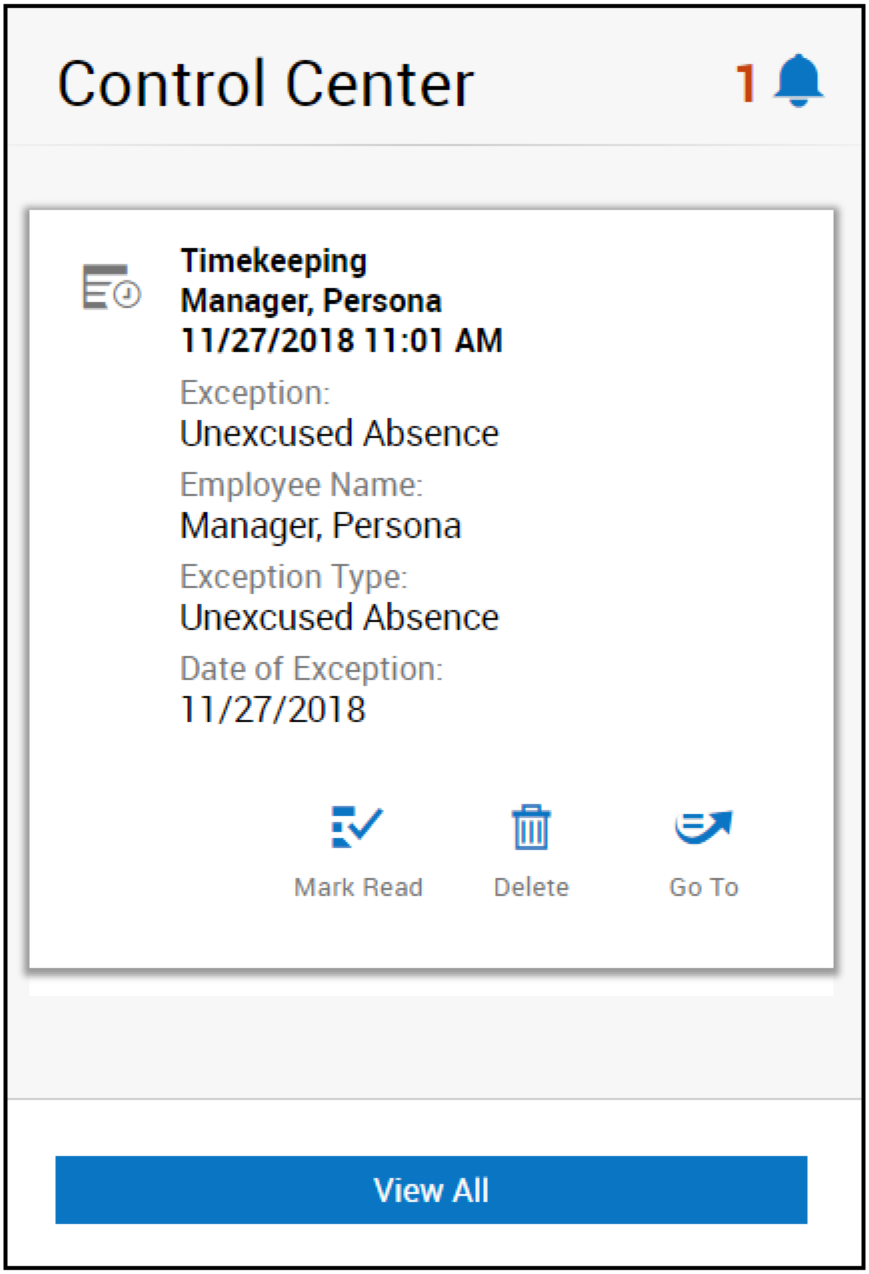


Click the title of a chart to go to the related Dataview

Review Notifications in Control Center

This job aid explains how you review received messages using Control Center.

Control Center Overview:



Control Center is your messaging inbox and it is easily accessible from anywhere in the system.

Bell Icon

A Bell Icon appears in every view in the system. The number next to the icon indicates the number of new notifications in Control Center since the last time you visited.

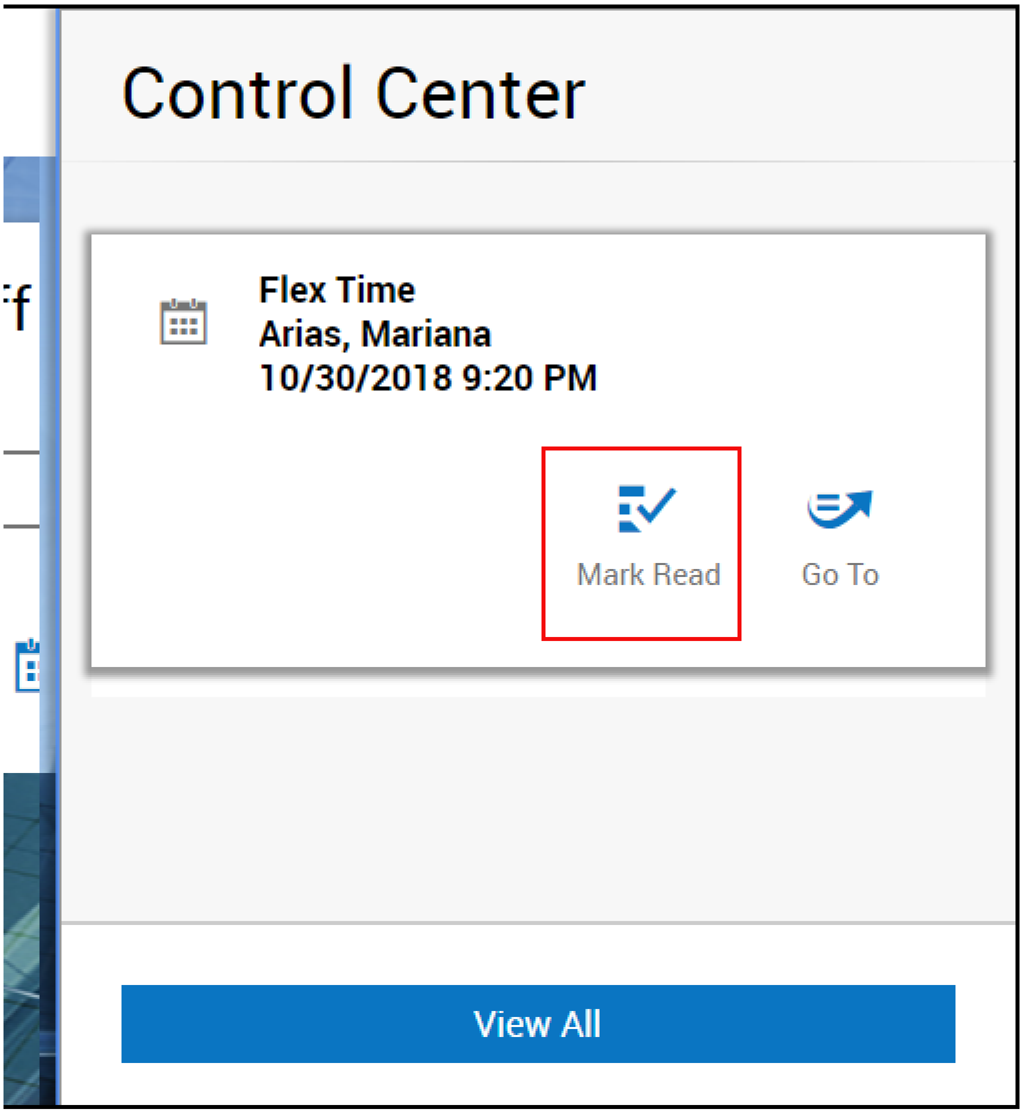
Preview Panel

Selecting the bell icon brings up the Preview Panel which lets you preview new items and expose quick actions.

View All

At the bottom of the preview panel, the View All button provides access the full Control Center.

Review Notifications:



1.Click on the Control Center alert icon

2. The Notifications panel will open.
3. Select **Mark Read** to mark the notification as read and dismiss it from Control Center.

To review notification details:

4. Click **View All** button or select a category from the My Notifications tile on your Home page.
5. The Control Center page will open, and more details of the notifications can be reviewed.

Filter Notifications:

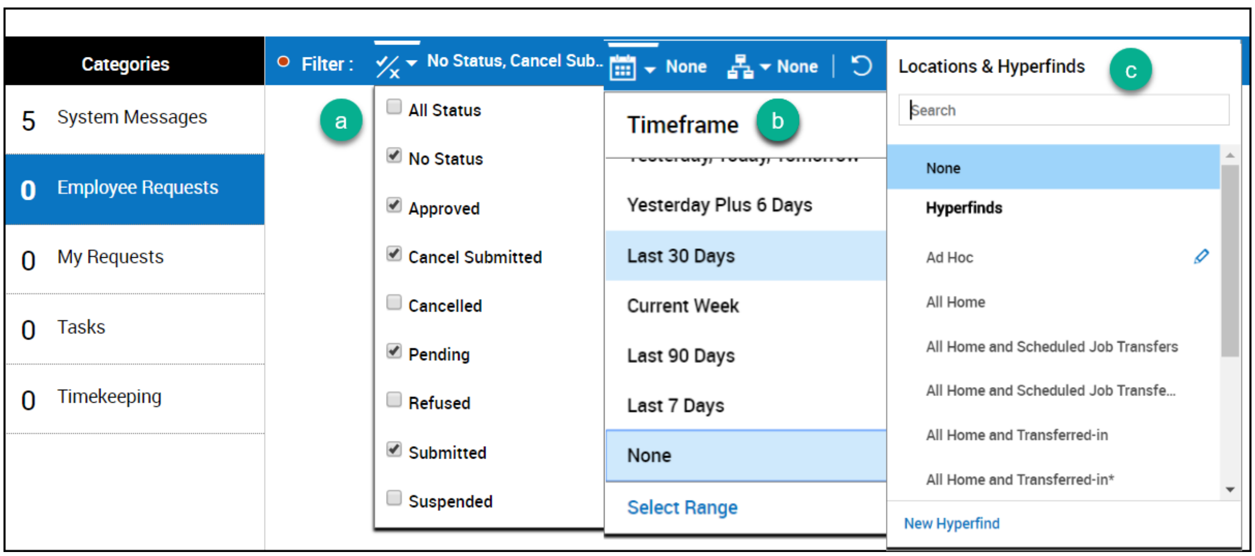
If you have many notifications to review:

6. Select a notification category.
7. Select Filtering options as desired:

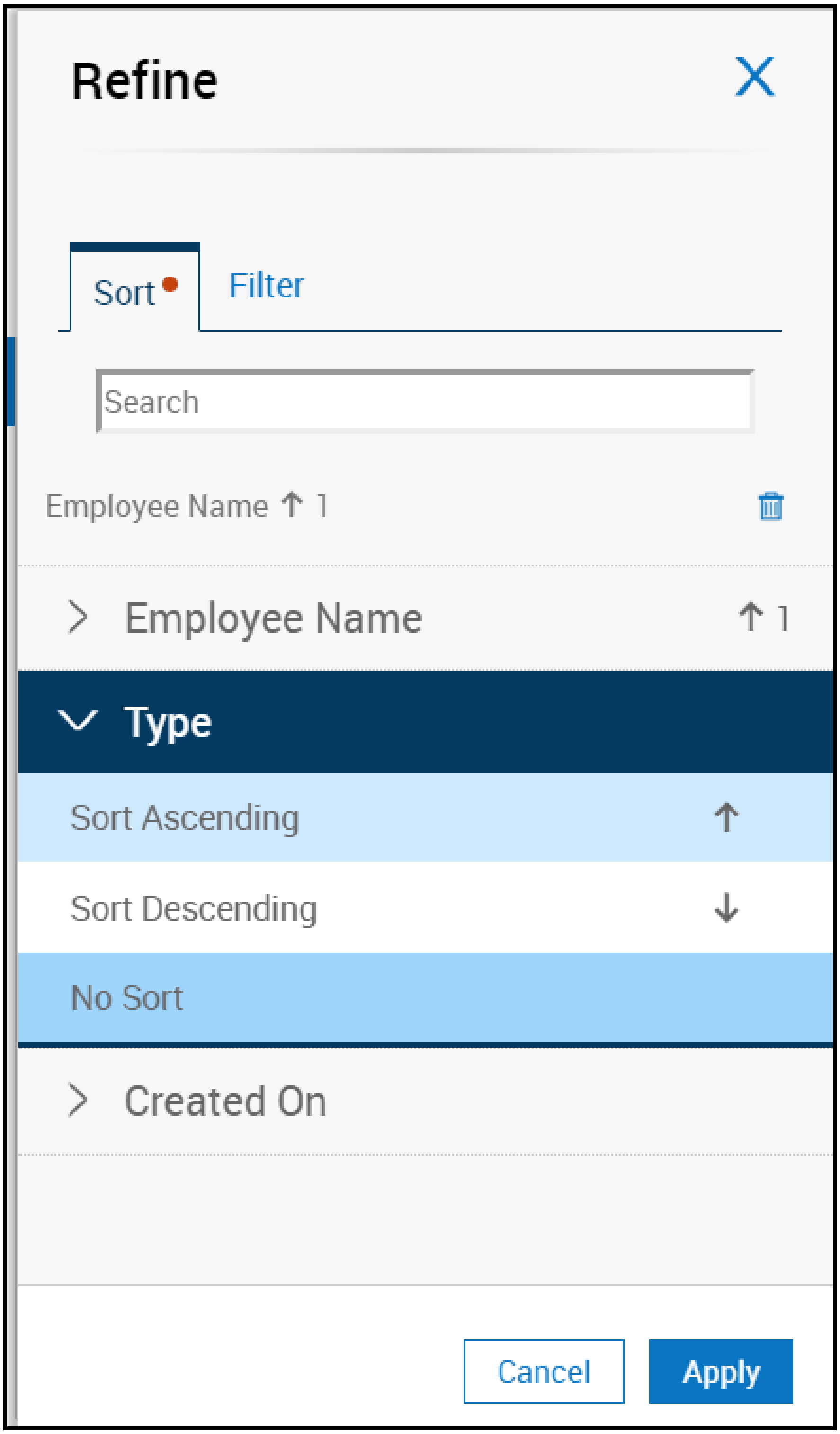
a. Select one or more **Statuses** from the drop-down.

b. Select a **Timeframe**. Select one of the listed timeframes or **Select range** to select a custom range.

c. Select a **Hyperfind**.



Sort Notifications:



8. Select **Refine**.
9. Select the **Sort** tab.
10. Select a data type and either:
- Select ascending
- Select descending

- Select No sort to stop sorting by this value.

11. Repeat Step 3 as needed.

You can select one or more sort values. The order in which you select the values is the order in which they will be sorted.

The arrows indicate if the value is sorted by ascending or descending, and the number indicates the sort order.

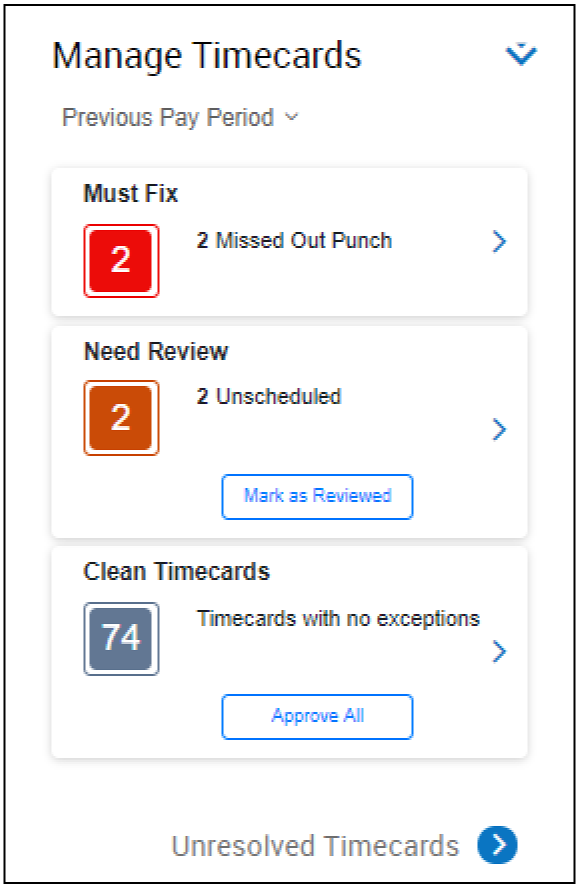
12. Select **Apply**.

T. Timekeeping Guide for Managers

Table of Contents

Using the Manage Timecard Tile

Managers get an updated, dashboard view of employee exceptions and act on them in a timely manner



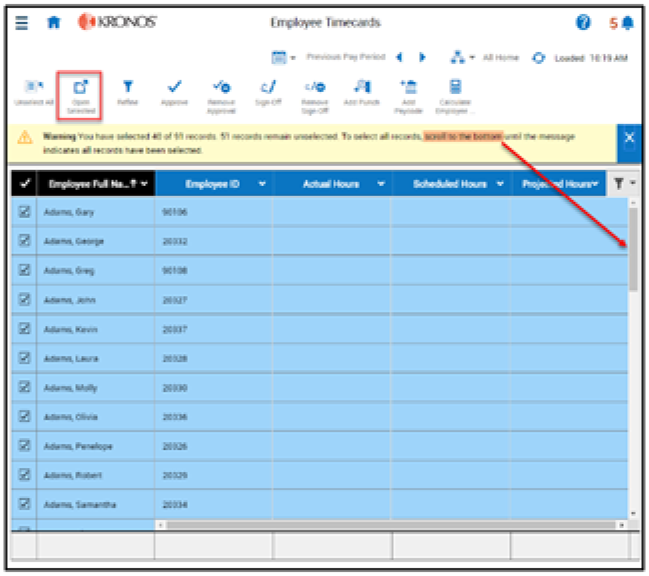
1. Access the home page and locate the **Manage Timecards** tile
2. Select either **Current** or **Previous Pay Period**
3. Locate the exception category section to manage. Click the **right-facing arrow** to open and edit timecard data
4. In the **Must Fix** category, select the **right-facing arrow** to make necessary edits to timecards
5. If configured, use **Mark as Reviewed** to approve **Pending Changes**
6. If configured, use **Approve All** to approve **Clean Timecards**

Reviewing Timecards - Section 1

Employee timecards can be accessed via mobile device view or desktop view. The application will show the list of employees a bit differently depending on the device you use.

The **Employee Timecards summary page** is a Dataview that enables you to review the overall status of your employees' timecards. The **Employee Timecards detail page** includes timecards for the employees selected from the Employee Timecard summary page.

Accessing your employees’ timecards



1. Select the **Main Menu** > **Time** > **Employee Timecards**. You will be directed to the Employee Timecards Summary Page.

2. Scroll down the page to search for the employee that you wish to view the timecard for, and then select their name.

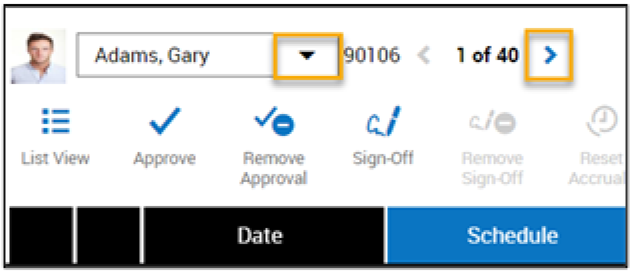
3.

Use Select All to select all employees. After you select all employees, you might see a warning message indicating that not all employees have been selected.

4. This will only appear if you have more than 40 employees on your list. Scroll to the bottom of the page to select all the remaining employees before proceeding.
5. Select Open Selected.
6.

In the Employee Timecard details page, select **Select Timeframe** for the time to display and **Select Hyperfind** for the appropriate search criteria.

7. If you wish to switch to a different employee, select a different employee in the name selection field. You can do this in several ways:



Select the down arrow next to the first employee's name to open the employee list. Scroll down to select a new employee.

- Select the **Next Employee** or **Previous Employee** arrows to view the next or previous employee's timecard.

Interpreting Timecard Indicators

Timecard Cell Colors

Cells and text in the timecard sometimes have colors with meaning

Cell Color	Meaning
Yellow background	Timecard approved by employee but not manager
Light purple background	Timecard approved by manager but not by employee
Green background	Timecard approved by both employee and manager
Gray crosshatch	Timecard has been signed off
Blue background	Total cannot be edited
Black	Used for all events in the timecard that are not system-generated
Purple	System-entered text that can be modified. For example, a system entered pay code for missing time

Timecard Grid

The timecard contains several indicators and icons to help guide you to where you want to go.

Icon	Description

Adds a blank row after the selected row on the hourly timecard

Deletes the selected row on the hourly timecard

Indicates that a comment has been added

Indicates that a note has been added

Indicates that a schedule transfer has been made

A punch or pay code has been edited by someone other than the employee. The corresponding glance provides the name of the person who made the edit

Displays in the **Date** cell of an hourly timecard or **Project** cell in the project timecard to indicate that the timecard was edited after the pay period was signed off (historical correction)

Displays in the **In** or **Out** cell of an hourly timecard or **Date** cell in the project timecard to indicate that an edit was made after the timecard was signed off (historical correction)

Overtime is reviewed or approved

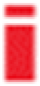
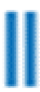
Overtime is pending

An on-call shift is scheduled

Depending on how the timecard is configured, timecard edits waiting for manager approval may not appear in the timecard, but the **View Pending** indicator is available in the action bar. When a manager of employee selects this indicator, the pending edits are visible

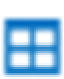
Timecard Exception Indicators

Icons are used as indicators within the timecard to call attention to these exceptions:

Icon	Description
	The cell is solid red when there is a missed in or out punch
	Action is required for an exception on this day
	When the system generates an exception, the icon is red with a white line near the top. Depending on your configuration, the system might automatically add an auto-resolved pay code to the timecard if an exception occurs because of missing time, such as a late punch or absence
	When a manager marks an exception as reviewed or justifies a missing time exception, the icon color changes to green
	When an employee justifies a missing time exception, the icon color changes to red with two white lines
	If there is more than one exception, the color reflects the most sever state of all the exceptions, and the white lines are diagonal
	If an absence has been excused, icon is blue with three horizontal lines
	When an exception or punch is system-generated, the icon is purple with one diagonal line and the punch displays in purple
	Holiday exceptions

Timecard Actions

The following are timecard icons you can use

Icon	**Description**
	**Approve** – Indicates that the timecard is complete, accurate, and ready for signoff. After the timecard is signed off, you cannot remove the approval
	**List View** – Changes the timecard view from table to list view. Toggles with the Table View
	**Table View** – Changes the timecard view from list vie to table view. Toggles with List Vies

Sign-Off – Payroll executes Sign-Off

Rules Analysis – Opens the Rule Analysis Report so you can review how the system interprets pay rules, work rules, and other factors in its calculations

View Moved Amounts – Opens the View Move Amounts panel, where you can view or delete moved amounts for the selected timeframe

Remove Approval – This indicator becomes active after you approve a timecard so you can remove an approval to make edits. After the timecard is signed off, however, you cannot remove the approval

Remove Sign Off – this indicator becomes active after you sign off a timecard so you can remove a signoff to make edits

GoTo – Opens the Schedule, People Information, Attendance Details, or Reports for the selected timecard

Calculate Totals - Forces the timecard to calculate totals. After you calculate totals, the Calculate Totals icon turns blue

Save – Saves the displayed timecard. After you save your timecard, the Save icon turns blue

Using Timecard add-ons

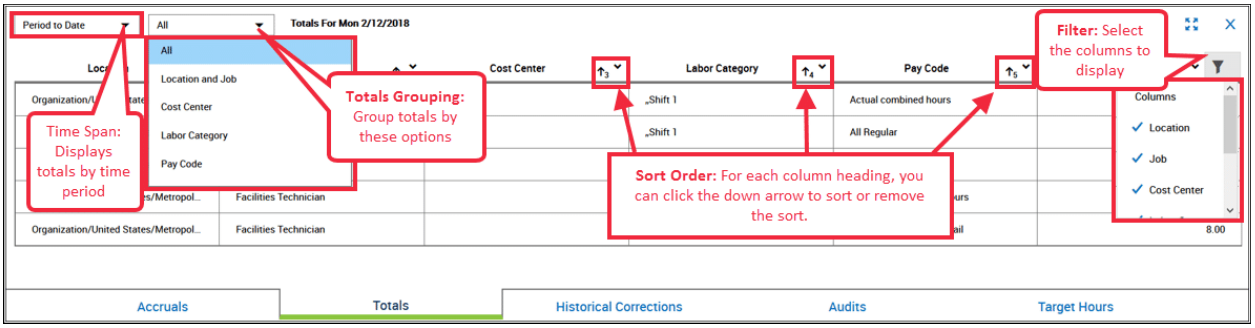
Several add-ons or tabs can appear at the bottom of the timecard:

- **Accruals** — Displays the accruals information such as sick, PTO, and vacation. The information that appears depends on the time period that you select in the timecard.
- **Totals** — Displays totals for selected time spans and timecard columns.
- **Historical Corrections** — Enables you to verify the results of pending and saved historical corrections.

- **Audits** — Displays audit details, including comments, corrections, requests, timecard sign-offs and approvals that have been posted to a timecard.

When viewing add-ons, note the following:

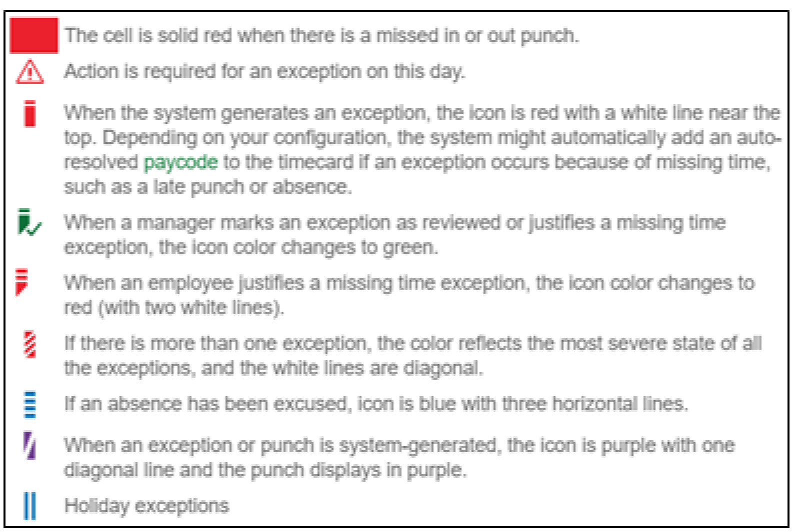
- You can change the order of the column width.
- Select the maximize-minimize icon to maximize the tabs area and select it again to minimize it.
- Select **X** to close the add-on.



Resolving Timecard Exceptions - Section 2

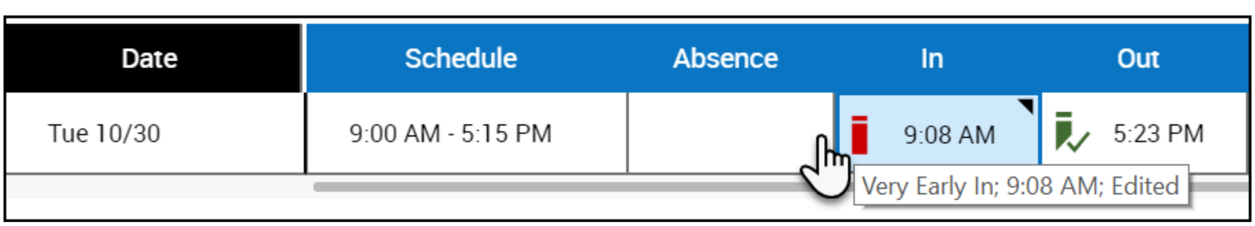
When employees deviate from their expected time, the system generates an exception. Exceptions can be day-based or segment-level. Day-based exceptions (such as short shift or unscheduled) affect the entire day. Segment-level exceptions affect only part of the day.

Although the actual exceptions configured vary by company, the following are common exceptions and their visual indicators:



Marking exceptions as reviewed

Right-click on the exception indicator corresponding to the exception.



2. Select **Mark as Reviewed** to show that you know about the exception but have decided to take no further action. The color of the exception changes to green and the Mark as Reviewed button changes to **Unmark as Reviewed**, which you can use if you change your mind.

Adding comments to an exception

1. Select and right-click the exception, then select **Comments**.

2. In the **Comments** panel:

- If there are multiple events in a single cell, the **Comment On** drop-down list appears. Select an event from the list, for example, a cell that has an unscheduled punch identifies two events: punch and unscheduled.

- Select a comment from the **Select a Comment** drop-down list. You can also enter some letters to search for a comment.
- If needed, add a note in the **Type a note (optional)** box.
- Optionally, select **Add Another Note**, enter a note in the text box and then select **Add**.

3. When finished, select **Apply** and then select **Save**.

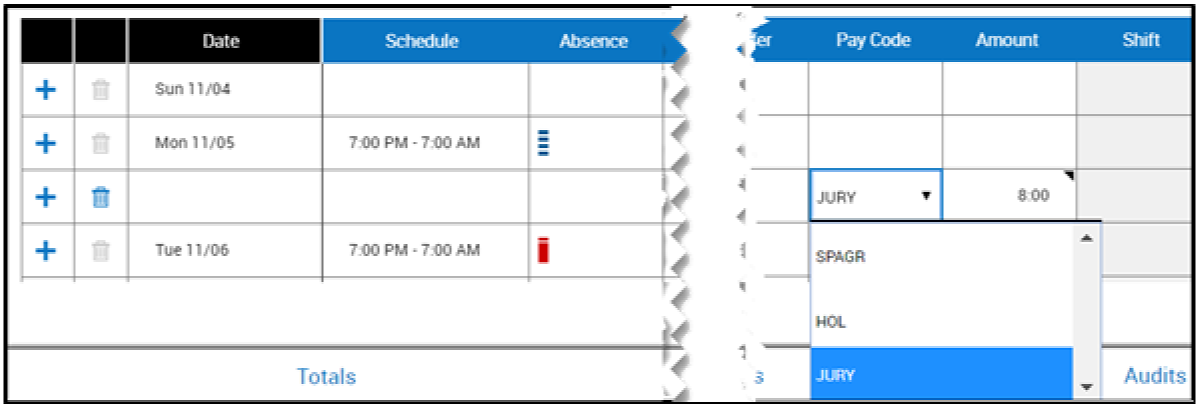
Date	Schedule	Absence	In	Out
Tue 10/30	9:00 AM - 5:15 PM		9:08 AM	5:23 PM

The Absence column identifies absence exceptions. Adding a pay code is a way to resolve unexcused absence exceptions.

1. In the timecard grid, select a **Pay code** menu, then select a pay code from the drop-down list. Note that you cannot add a pay code to a row that includes a punch.

- To add a pay code on the same day that has a punch, select the Add Row icon and enter the pay code on the new row.
- Pay code examples: (1) **GS Golf** for group services or (2) **Tips Charged** for tips charged to a credit card or member account that needs to be paid to the employee, or (3) **Commission** or (4) **Lesson**

2. Enter the dollar amount as a positive or negative amount in the **Amount** column. For example, 50.25



Select **Save** .

Adding or Editing Punches

1. Select a cell in the **In** or **Out** column.

2. Type in the time using your keyboard. Enter times in the standard time format of AM/PM or 24-hour format. You can type the time in multiple ways such as: **8a** for 8am; **455p** for 4:55pm; **9:05a** for 9:05am; **10:36pm** for 10:36pm.

3. Select **Save**.

If you need to add more detail to the punch:

1. Right-click a cell in the **In** or **Out** column. The **Punch Actions** glance opens.

2. If the cell already contains a punch, the glance displays the current information about the punch: date, time, override, time zone, exceptions, last edit date and the last person who edited it.

3. In the Punch Actions glance, select **Edit.**

4. In the Punch panel, enter the following information as needed:

Time (hh:mm) * — You cannot leave this field blank.

Transfer — Select the arrow to open the Transfer glance where you can search for and select the business structure, work rule, cost center or labor category for the transfer.

Override — Select whether the time should be considered as an In-punch or an Out-punch by the system.

Time Zone — Select the applicable time zone. Use this if you have employees who work in different locations that have different time zones. For example, employee works in Tallahassee, FL but sometimes travels to New Orleans, LA.

Cancel Deductions — Select one of the listed deduction rules. This is used when the employee has an automatically deducted meal break and does not punch in/out for breaks. If the employee skips a meal, the manager can cancel the deduction to pay the employee for the mealtime.

Exceptions — If there is an exception trigged by the system, the exception name is displayed. You cannot edit this.

Comments — If there is a comment added to the time, the comment is displayed. You can add comments if needed.

5. Select **Apply**. And then select **Save**.

Note: Manager edited punches appear with a black triangle in the upper right corner and are date and time stamped for audit purposes.

Date	Schedule	Absence	In	Out
Mon 3/04	7:30 AM - 4:00 PM		8:00 AM	4:00 PM

Deleting punches

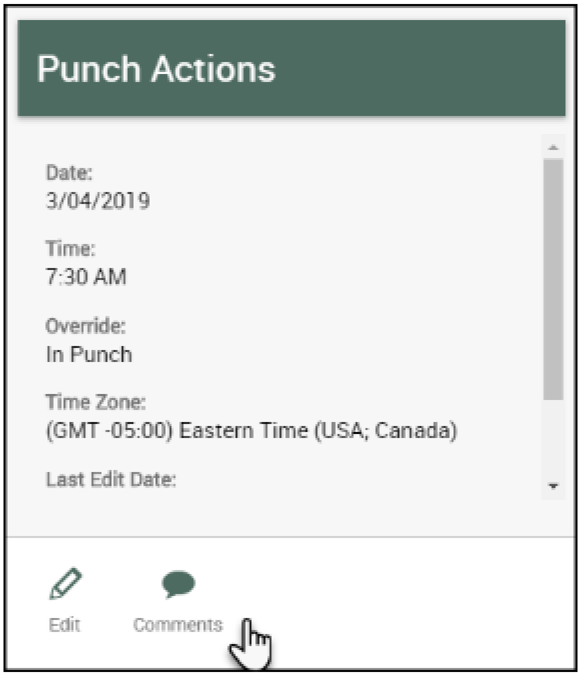
1. Select the punch, then press **Delete** on your keyboard.

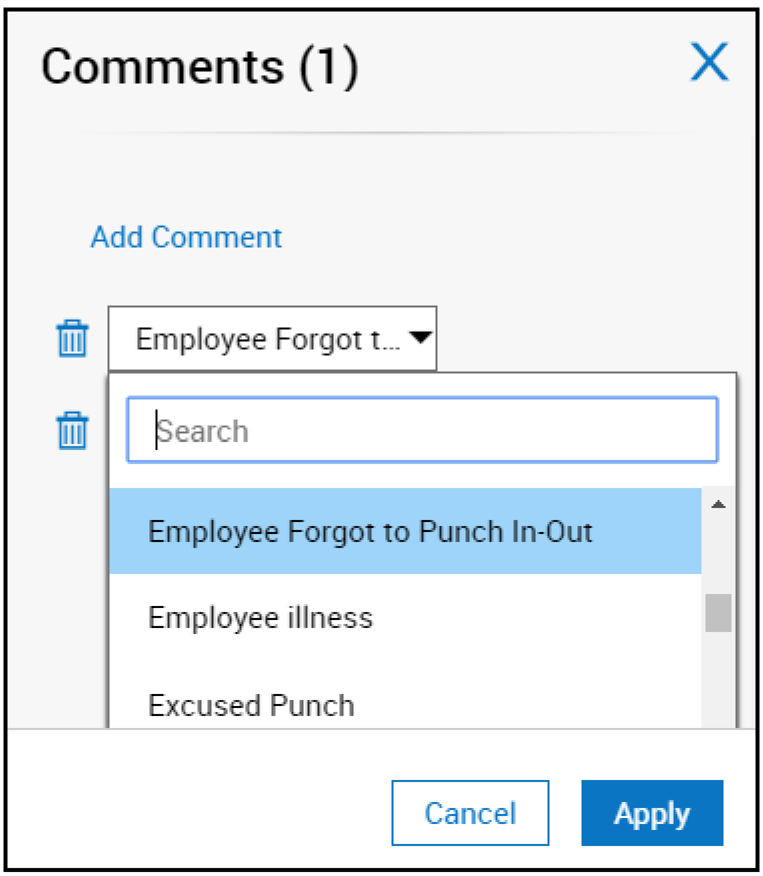
2. Select **Save**.

Adding Comments to the Timecard - Section 3

To add a comment and note to the timecard:

1. Right-click on the punch you wish to comment.





2. In the Punch Actions menu, select Comment.

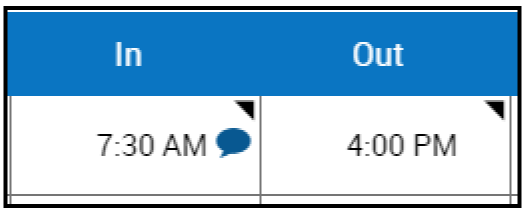
3. If the punch you are commenting on has an exception, you will see the option to attach the comment to the punch time or the exception.

4. Select the most appropriate comment from the list.

5. Select **Add** when finished.

Note: You can add more than one comment and note to the same punch.

6. Select **Apply**, and then select **Save** in the timecard.
7. Comments will appear in the timecard with a blue bubble indicator.



Transferring Employee Time in the Timecard - Section 4

Every employee has a primary job, which is the derived value for business structure (job), labor categories, and the cost center linked to the business structure. Troon will not be using the cost center option.

You can transfer a punch, pay code, or project from the primary job to a different location in business structure, work rule, cost center, or labor category.

Transfers saved on the employee schedule will automatically appear in the timecard.

Transfer a full shift

1. Select the **Transfer** column.

2. Select the arrow. The last five transfers you made are listed. If the transfer you want is not listed, select **Search**. The transfer panel opens.

3. Select the appropriate transfer, and the select **Save**.

Transfer a partial shift

1. Add a new row in the timecard by selecting the **plus sign** to the left of the date of the transfer

2. Enter the transfer time in the **In punch** column.

3. Select the **transfer** menu immediately after the in-punch.

4. Select the appropriate transfer and then enter the out-punch of the time the transfer ended.

Note: The system will add purple times during the shift to complete the necessary shift segments. Be sure to review the timecard totals to verify the hours earned under each transfer.

		Date	Schedule	Absence	In	Out	Transfer	In
+		Mon 6/17						
+		Tue 6/18	7:00 AM - 8:30 PM		7:00 AM	11:00 AM		12:00 PM
+					3:00 PM			

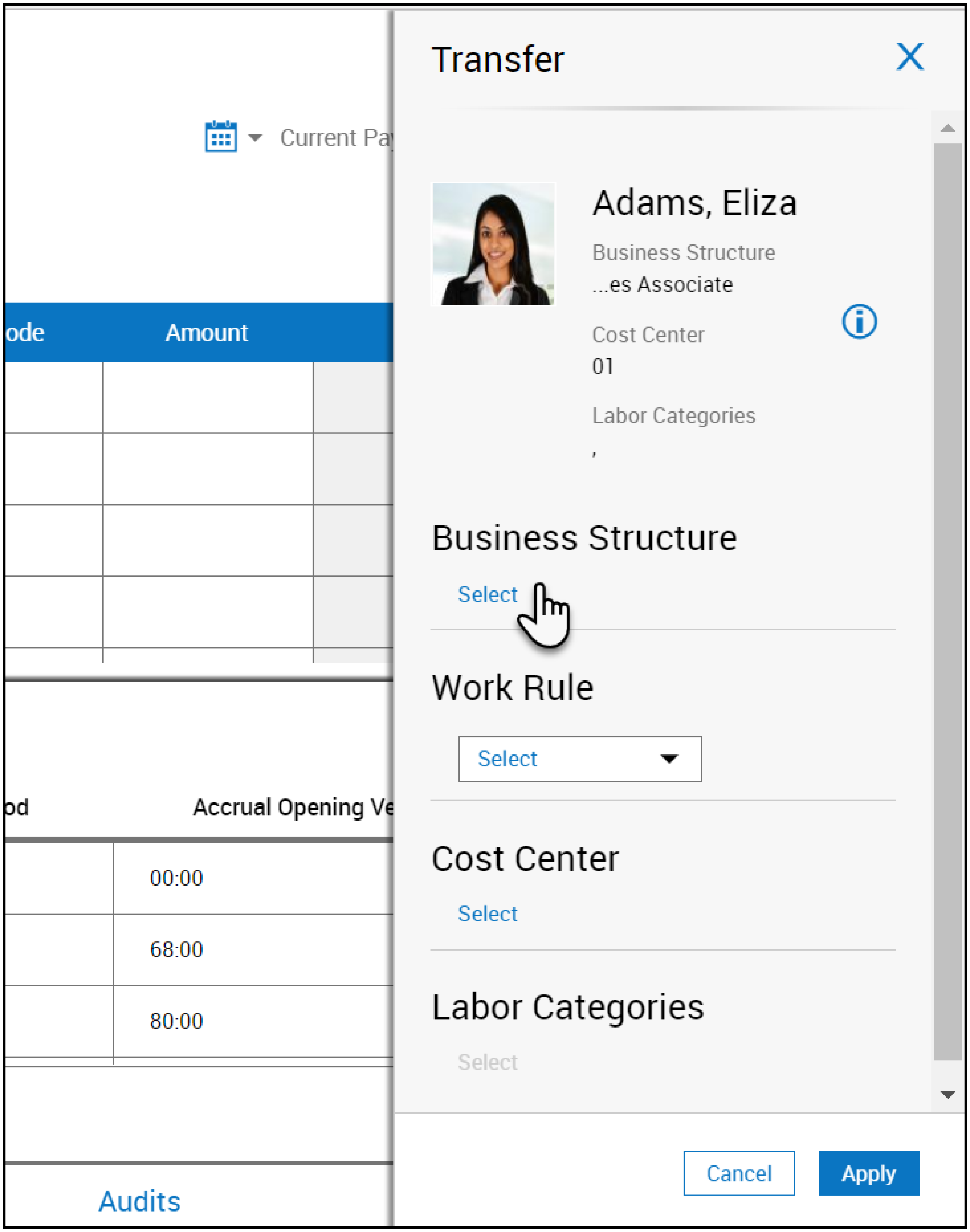
Types of transfers - Section 5

Business Structure

The business structure defines where employees can work.

1. Select **Select**.

2. In the **Business Structure** area, use the arrows to select the various levels of the business structure. To move back, use the left arrow. You can also enter all or part of the desired business structure in the Search box, then select **Search**



3. When finished, select **Apply**.

4. To remove the business structure, select **Clear Business Structure**.

Work Rule

The work rule defines how the employee's shift is calculated.

1. Select a new work rule from the drop-down box. You can also enter all or part of the desired work rule in the **Search** box.

Payer Cost Center

The payer cost center defines who pays for the employee's work.

1. Select **Select**.

2. In the **Cost Center** area, select Cost Center radio button.

3. Select the **down arrow** Icon and select from the list of available cost centers. You can also enter part or all of a cost center in the Search box.

4. Select **Apply**.

Labor Categories

The labor category defines the work that employees can do within an organization.

1. Select **Select**.

2. In the Labor Category area, select a **labor category** from the drop-down list. You can also enter part or all of a labor category in the Search box.

3. When finished, select **Apply**.

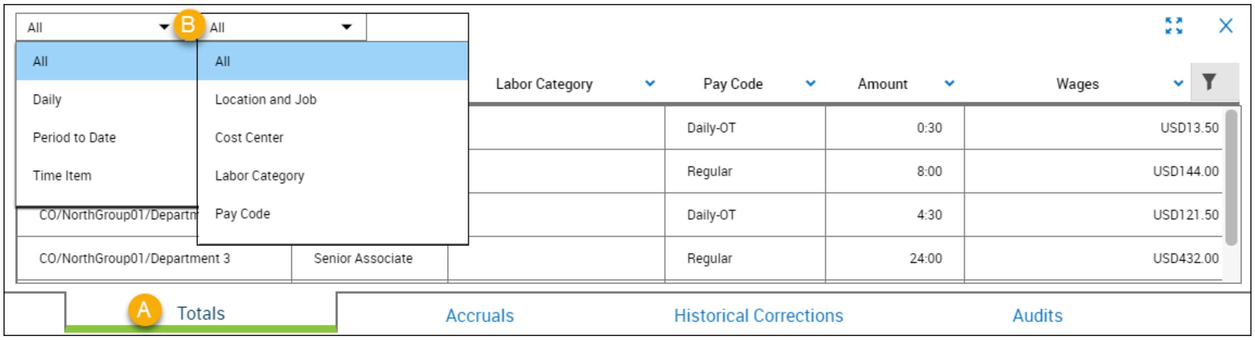
Reviewing Timecard Totals - Section 6

It is necessary to review your employee's timecard totals before you approve the timecard.

1. At the bottom of the timecard, select the **Totals** tab (A).

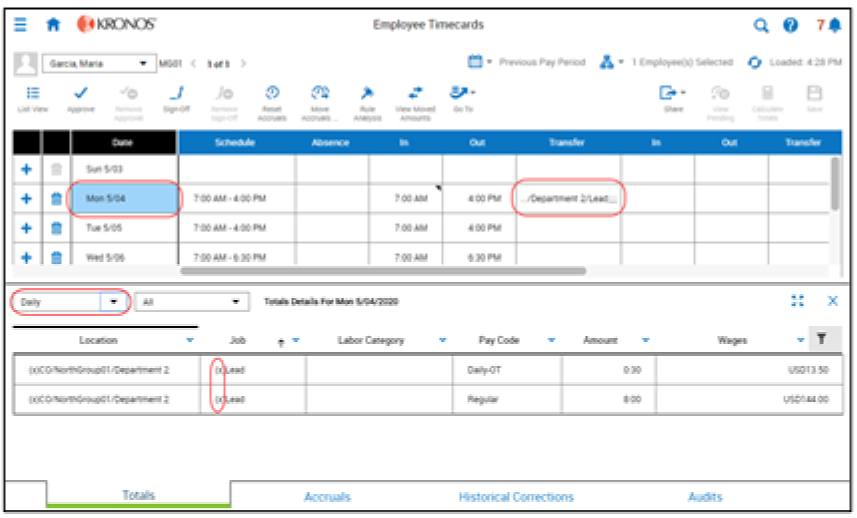
2. Select the Timeframe and select how you would like to break up the totals (B). You can view totals by: **Location and Job, Labor Category, Cost Center, and Pay Code.**

Note: The **Daily and Period to Date** time frames will show totals based on the date you select in the timecard.



From the column menu, select how you would like to sort the totals. For example, in descending order.

3. If the employee was transferred during any shift within a date in the selected timeframe of the timecard, the totals will display a (x) symbol indicating the transferred account totals separate from the others.



Approve Employee Timecards - Section 7

This job aid explains how you can approve employee timecards at the end of the pay period for payroll processing.

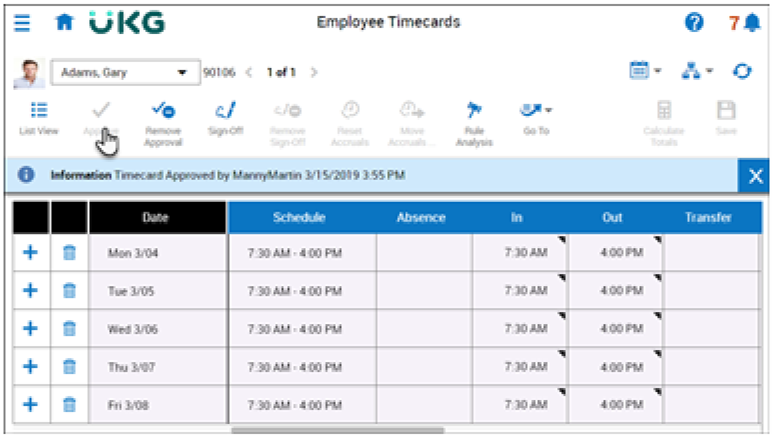
About Approvals

- Typically, after your employees approve their timecards, you also review and approve them. Depending on your access, you may also be able remove your approval to edit employee timecards or even edit them without removing your approval.
- Before payroll processing begins, a sign-off is applied to the timecard (typically by a Payroll Manager). You cannot remove the approval after the timecard is signed off unless the signoff is removed first.

To approve a single timecard:

7. Open a timecard and select the appropriate timeframe.

8. Make sure the timecard is accurate.



9. Select **Approve.**

Verify your Approval in the Table view

The background color of the timecard changes, depending on who has approved it:

- Yellow Background – Timecard approved by employee but not by manager.
- Light Purple Background – Timecard approved by manager but not employee.

- Green Background – Timecard approved by both employee and manager.
- Gray Crosshatch – Timecard has been signed off.

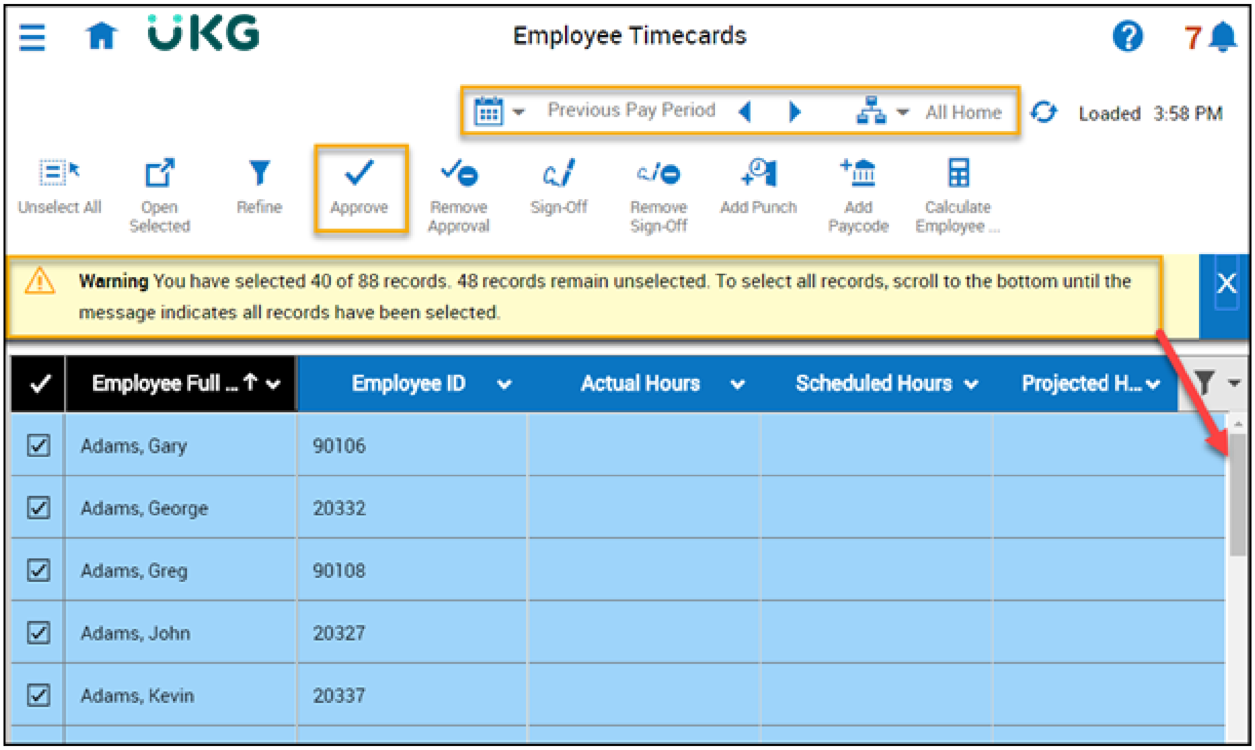
To approve multiple employee timecards:

1. Select the **Main Menu > Time > Employee Timecards** or open any of your available **Employee Dataviews.**

2. Select the appropriate timeframe and search criteria that you wish to approve.

3. Select the one or more check boxes next to the employee's names. To select all the employees, click **Select All.**

4. If you have more than 40 employees, scroll down to the bottom of your employee list to be sure that you selected all the employees before submitting approval.
5. Click **Approve.**



Using Dataviews - Section 8

A Dataview is a configurable tool that gives you immediate access for analyzing data and taking actions on a group of employees.

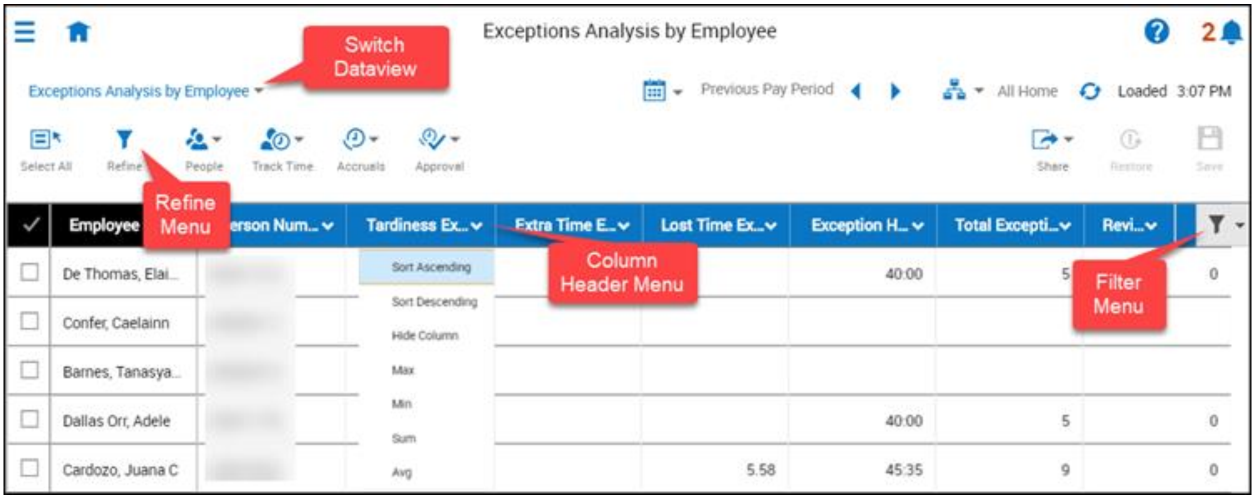
1. Select **Main Menu** > **Dataviews & Reports** > **Dataview Library.**

2. On the Dataview Library page, select the name of the Dataview that you want to review.

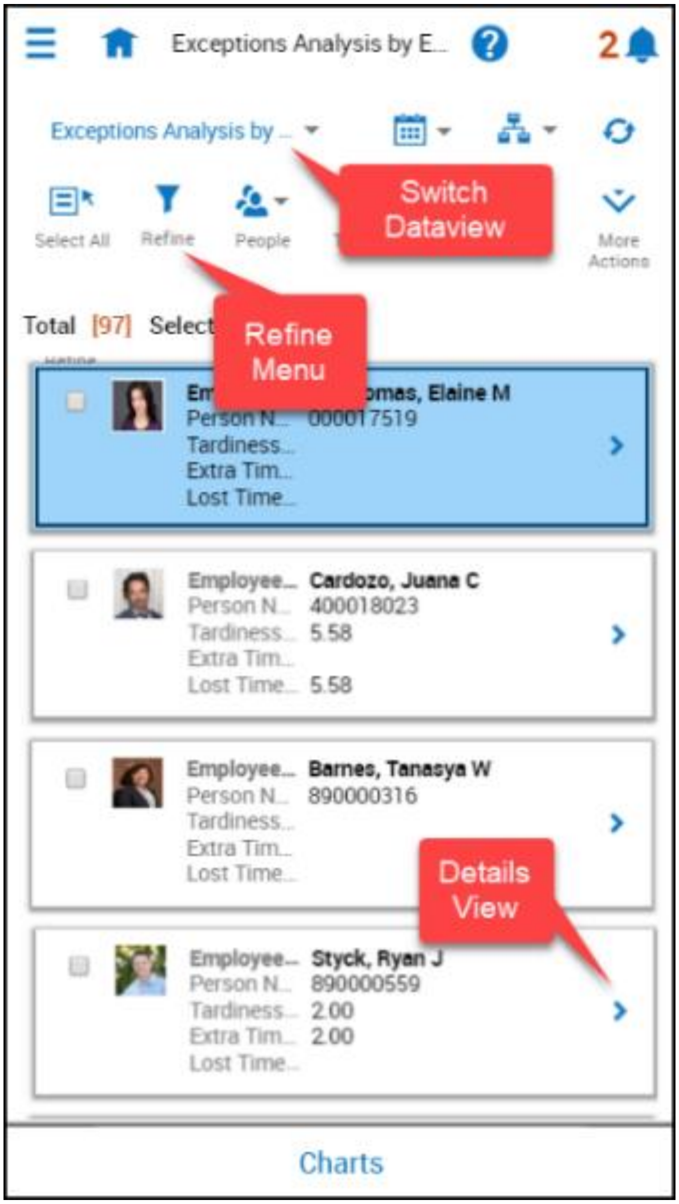
3. In the Dataview, select **Select Timeframe** to select the dates that you want to view.

4. Select **Select Hyperfind** to select the employees or location in your organization that you want to analyze, for example, All Home.

Grid view is used typically for desktop screen resolutions above 768 pixels



List view is used typically for mobile screen resolutions.



Personalizing a Dataview

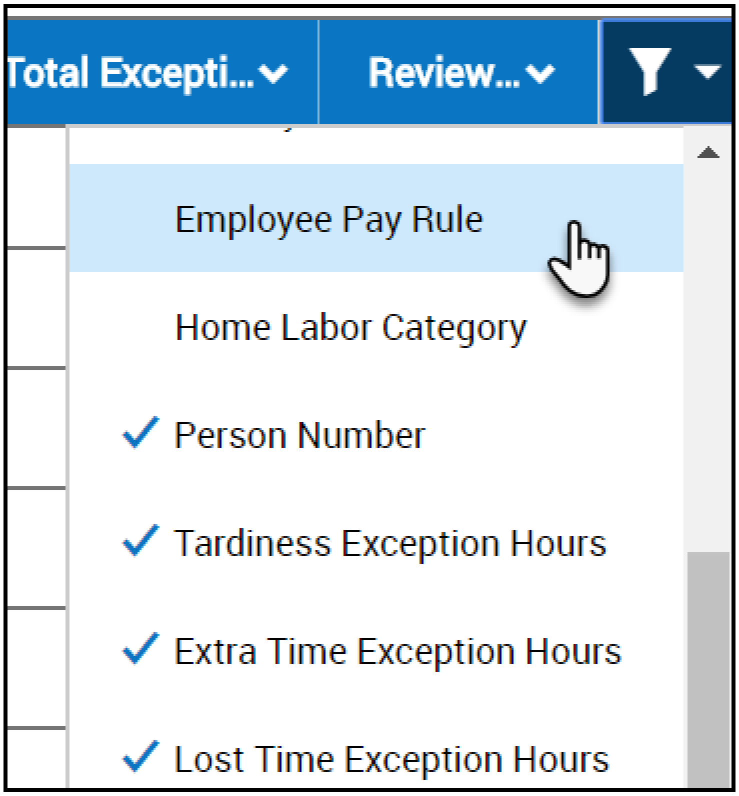
Customize a dataview to show just what you need to see. You can show or hide columns, sort, group by data values, and calculate values in dataviews to reveal valuable information.

Filtering columns

You can show or hide the columns in the Dataview, and arrange data using sort and group using the Filter and Refine options.

1. Select the **Filter** icon to the right of the columns to display the list of columns that are available to show or hide within the Dataview.

2. Select each column you want to show or clear each checked column you want to hide.



Sorting, Filtering, Grouping and Calculating using Refine

You can use the Refine menu slider on both the List view and Table View.

1. Select the **Refine** icon from the Action bar.

2. The Refine slider opens on the right to reveal a set of tools to Sort, Filter, Group, or Calculate data.

Sorting Columns

Use Sort to control the order of the data that is displayed in the Dataview.

In the Refine slider:

1. Select the Sort tab.

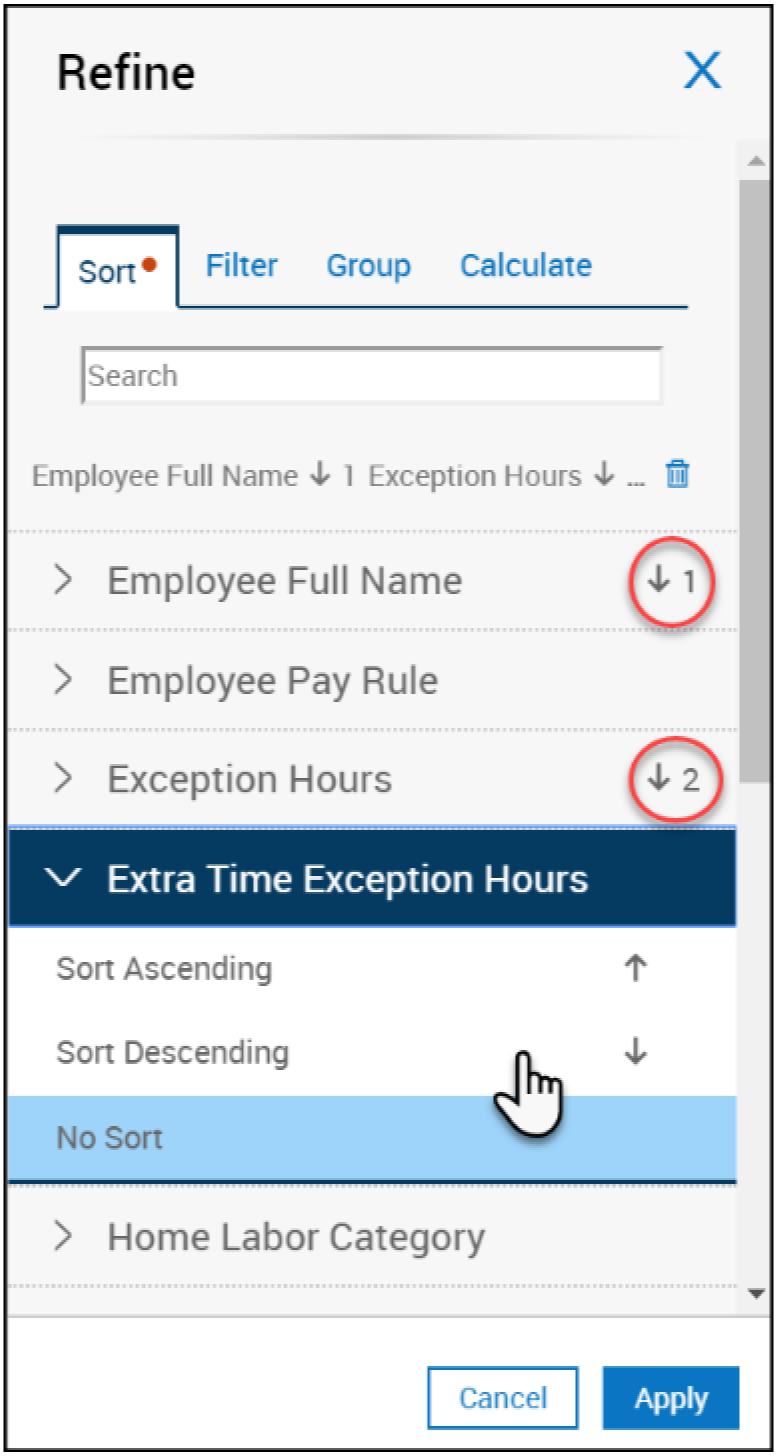
2. Expand the column by which you want to sort.

3. Select Sort Ascending, Sort Descending, or No Sort. Note: choose No sort to remove sorting.

4. Select **Apply.**

- The Sort Ascending arrow or Sort Descending arrow appears next to the column name to indicate that the column is sorted in ascending or descending order.

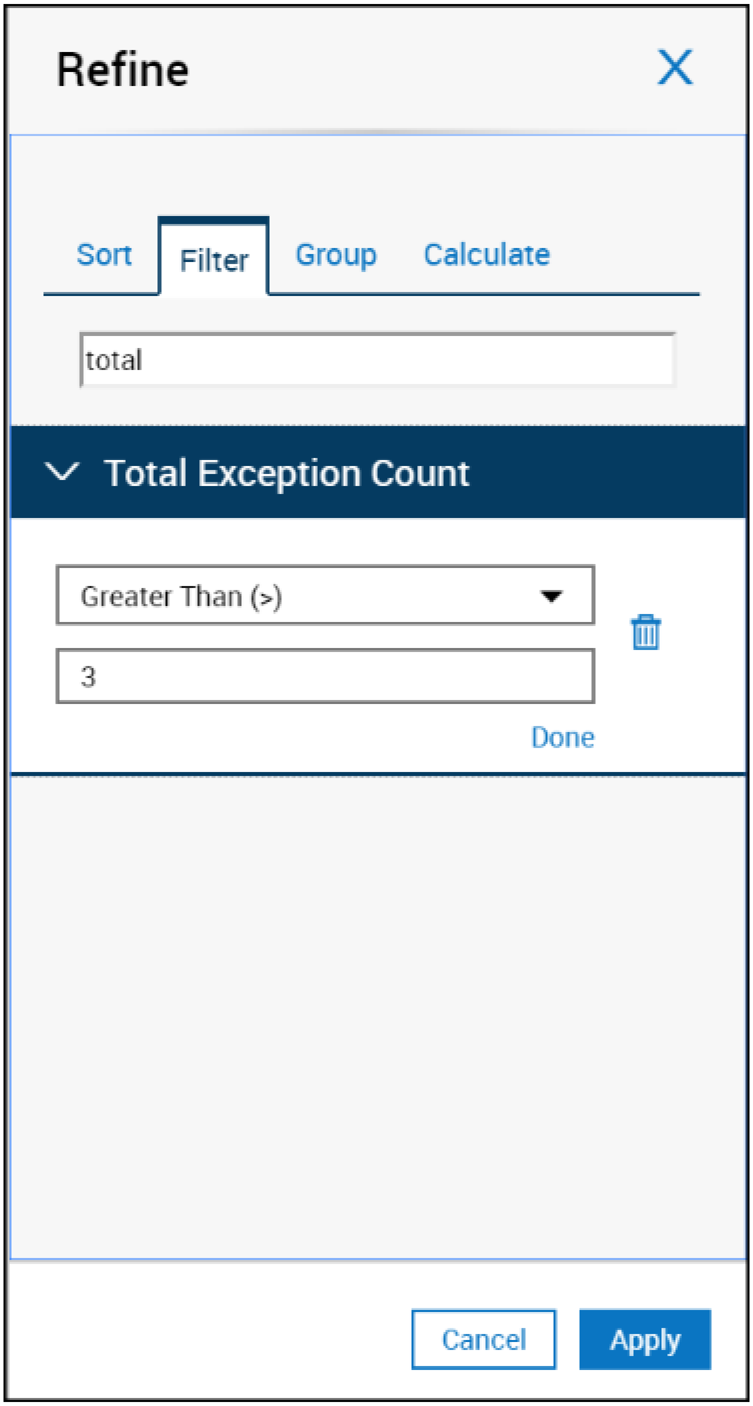
- If you sort using multiple columns, a number will appear next to the sorted columns to indicate the sort order (example: 1, 2, 3…).



Filtering Columns

Select a filter to narrow the results in the Dataview to the specific items that you are interested in viewing, such as the number of part-time employees, or the top ten employees with exceptions.

1. In the Refine slider, select the **Filter** tab.
2. Select the column that you want to filter. You can select multiple filters at the same time.
3. Type the value for the filter.
4. Select **Done.**
5. Select **Apply.**



Removing filters

1. Select **Filter** on the far-right side of the column headers.
2. Select **Clear all filters.**

Grouping by Column Values

Use Group to group the records that share a specific attribute, such as the same Primary Labor Account.

From the **Refine** menu slider:

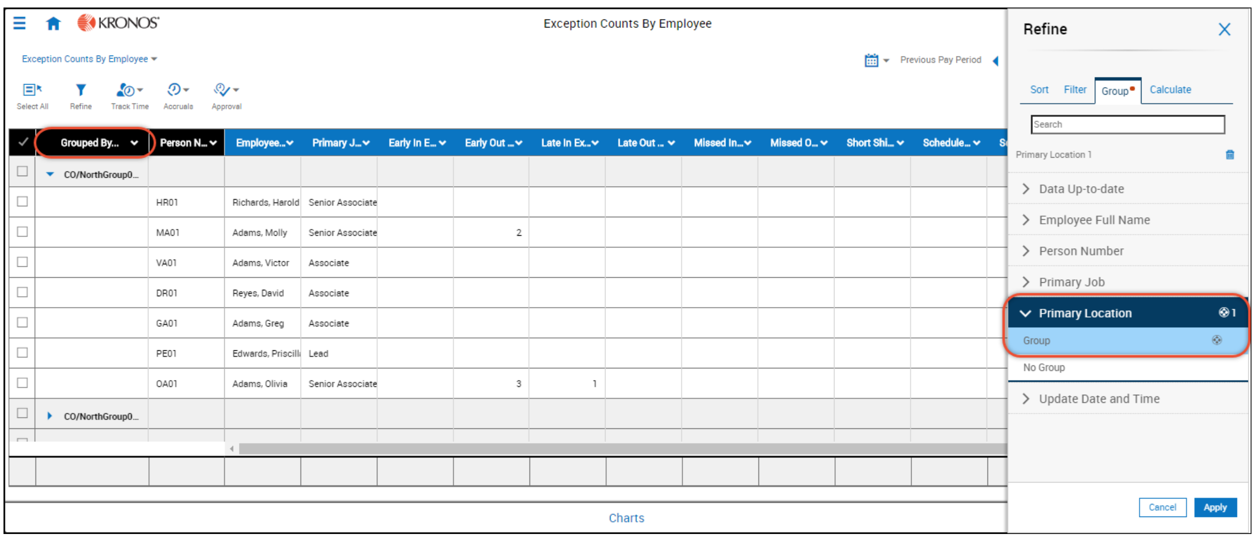
1. Select **Group** and the column you want to use for grouping.

2. Select **Apply**.

3. The selected column is hidden, and the unique values contained within the column form groups. If preferred, you can show the column again by selecting **Filter** on the far-right side of the column headers and checking the column header name.

4. If you select an additional column to group by, it becomes secondary to the first grouping, and so on, following the order in which they are chosen.

5. All groups containing duplicate values are contained within their own section header.



To cancel grouping

1. From the **Refine** slider, select Group and expand the column for which you want cancel grouping.

2. Select **No Group.**

Note: You can also group directly from the dataview by using the column header drop-down list to select Group by this column.

Calculating and Summarizing Data

You can apply summarizations to each of the columns in the table. The available summarizations are Count, Sum, Average, Minimum, Maximum, and None.

1. **In the Refine Slider, select the Calculate tab.**

2. Expand the column header to which you want to apply a calculation.

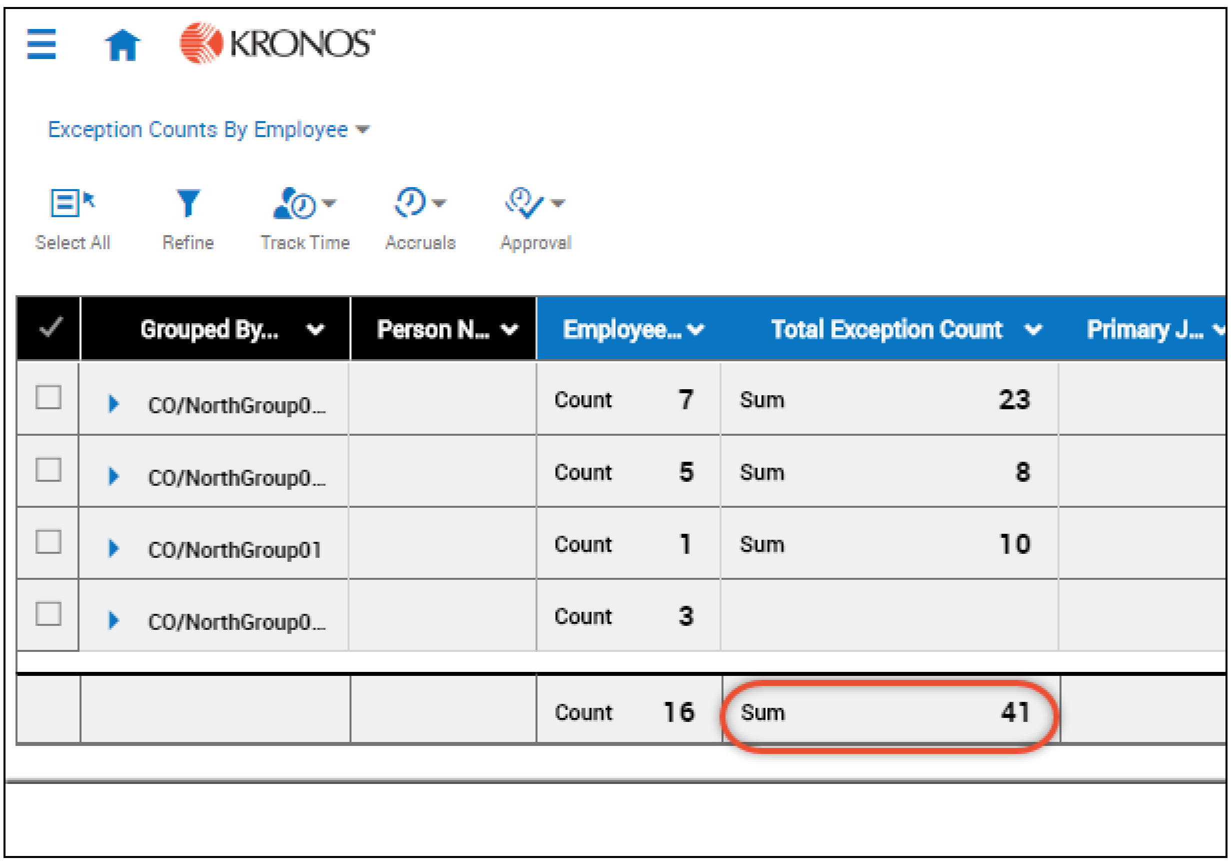
3. Select the calculation that you want to apply.

4. Select **Apply**.

Note: You can also apply a calculation from the column header. Select the drop-down list and select the calculation you want to apply.

Summarization and grouping

If you group data, and one of the columns has a summarization applied, a sub-total row appears for each group that summarizes the data in that group. For example, if a collection of employees appears in the Total # of Worked Hours column, and SUM has been applied, if you group by an employee attribute such as Labor Category, for every unique Labor Category each employee falls into, a sub-total line appears.



To save a Dataview

1. After you change a Dataview:

- The Dataview Name changes color.

- **Save** changes color to indicate it is active.

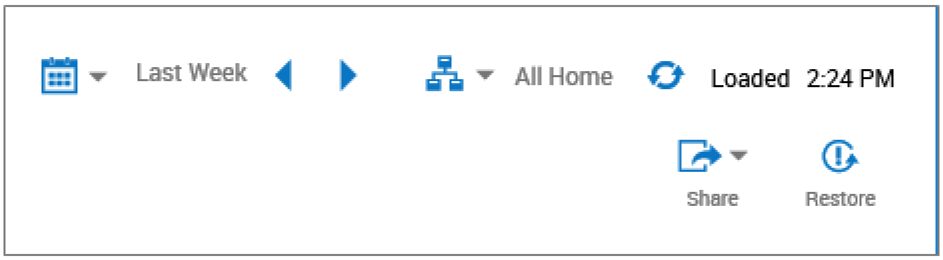
2. Select the **Save icon** to save the changes.

If you don't save your changes you will lose them. If you save your changes, you will overwrite the original settings or a previously saved Dataview.

To restore a Dataview

1. Save the Dataview you have been customizing.

2. Select **Restore.**



- A warning message launches stating that you will return to the original or previous settings and lose all the changes you have made.

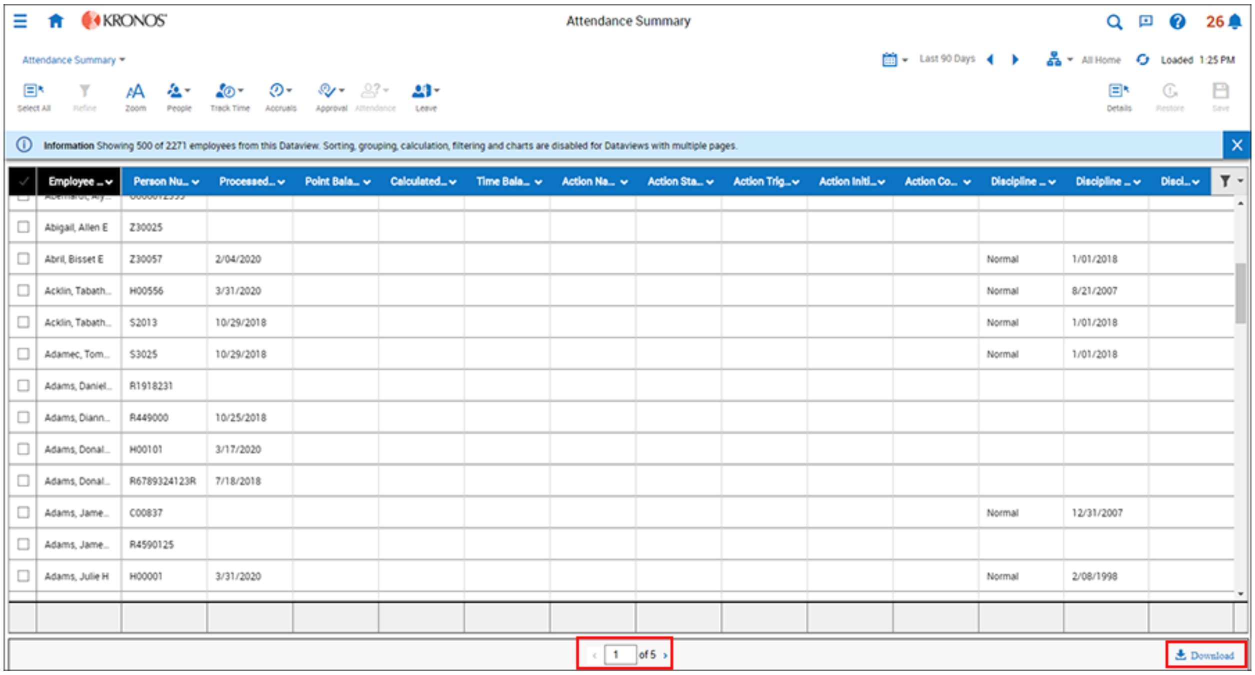
3. Select **OK** on the warning message.

Dataview Pagination

Dataviews that return data for more than 3500 employees, such as Employee/Employee Time Series Dataviews will be rendered in the Dataview user interface in a new mode that breaks the data in pages.

- Each page will return data for 1000 employees/locations per page.
- The user can navigate between the pages or jump to a specific page.
- The user can choose to initiate the Dataview download functionality at any point.

Note: The data return trigger can be set to lower than 3500 employees/locations.



The following Dataview functions will be **enabled** when pagination mode is initiated:

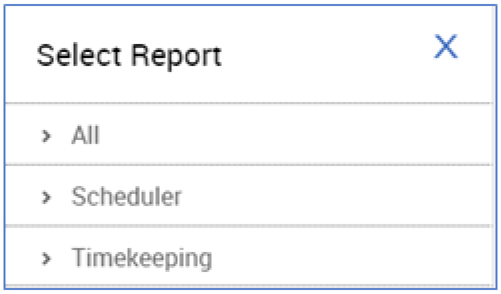
- Show/Hide data columns
- Right-click actions (example **Go To** controls)
- Select employees and perform actions

Note: The user may change the Hyperfind/selected locations to view a Dataview in normal, non-paginated mode.

Using Reports - Section 9

Running a report

1. Access the Main Menu > Dataviews & Reports > **Report Library**.
2. Select the **Run Report icon.**
3. In the **Select Report** panel, select a category to display the list of reports that you can run.



4. Select a report and select **Select.**

5. **I**n the selected report panel, enter the applicable report parameters. Note that many of the parameters are specific to the report you are running, but the following parameters are common to most reports:

- **Timeframe**

- Previous, Current, or Next Pay Period
- Previous, Current, or Next Schedule Period
- Week to Date
- Last Week
- Yesterday

- Yesterday, Today, Tomorrow
- Yesterday plus 6 Days
- Last 30 Days
- Current Week
- Last 90 Days

You can also select **Select Range** and select the start and end date. Note that the range must be under 365 days.

- **Hyperfind**

When you select **Select Hyperfind,** the **Locations & Hyperfinds** panel opens. Here you can select from:

- **Locations**

All Home Locations — Finds current employees assigned to locations to which the manager has access.

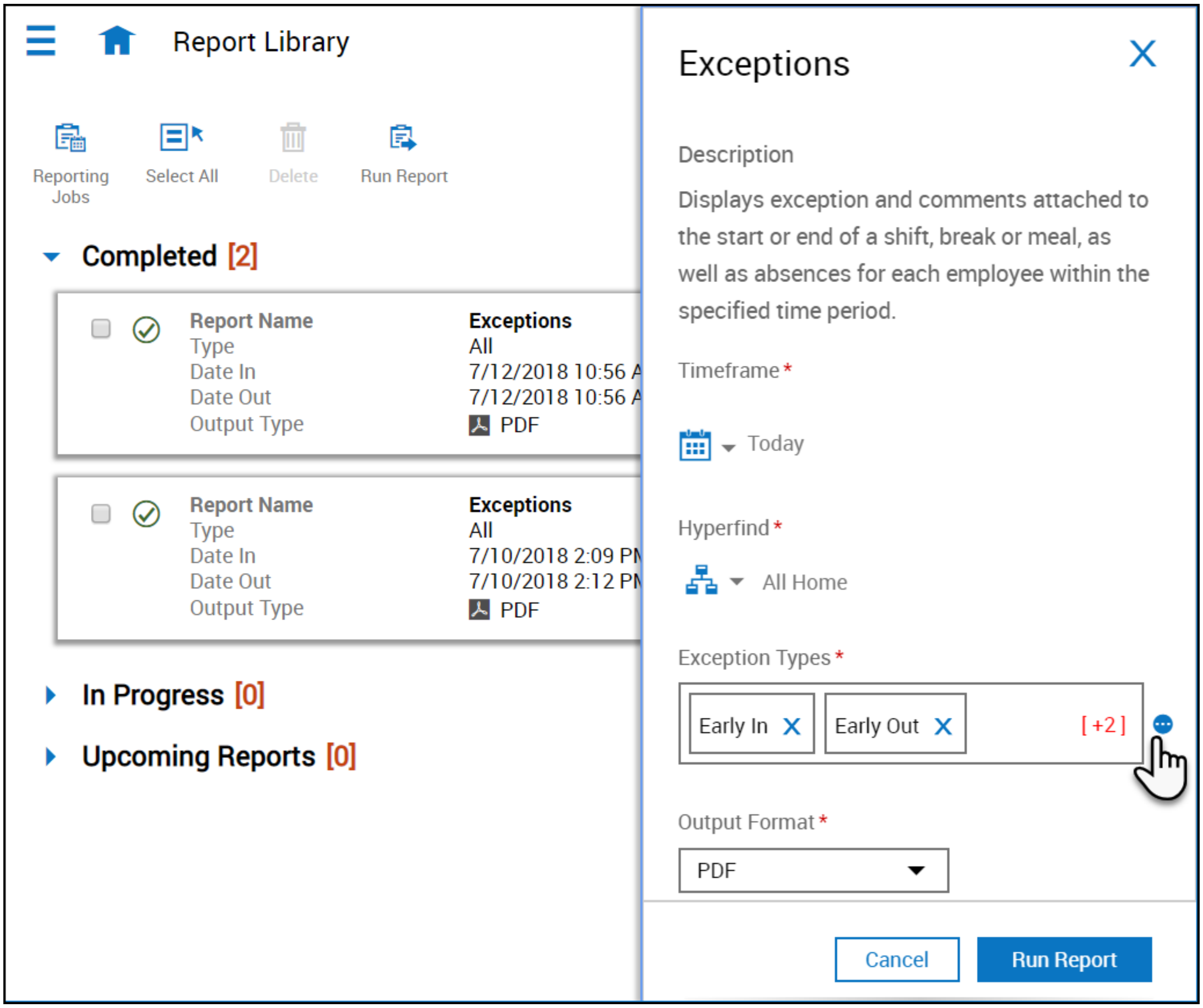
- **Hyperfinds**

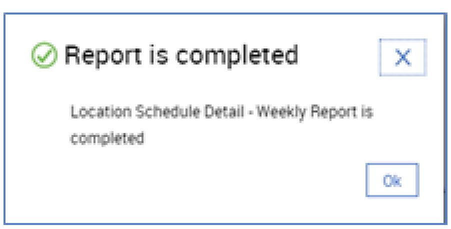
All Home — Finds active employees who are part of your employee group.

All Home and Scheduled Job Transfers* — Finds:

In addition to your employee group, this includes employees whose primary job is different, but who are scheduled to transfer into your employee group or location.

- **Output format**
- PDF
- Excel
- Interactive





6. Select **Run Report.** The following message appears:

In Progress. Report is running.

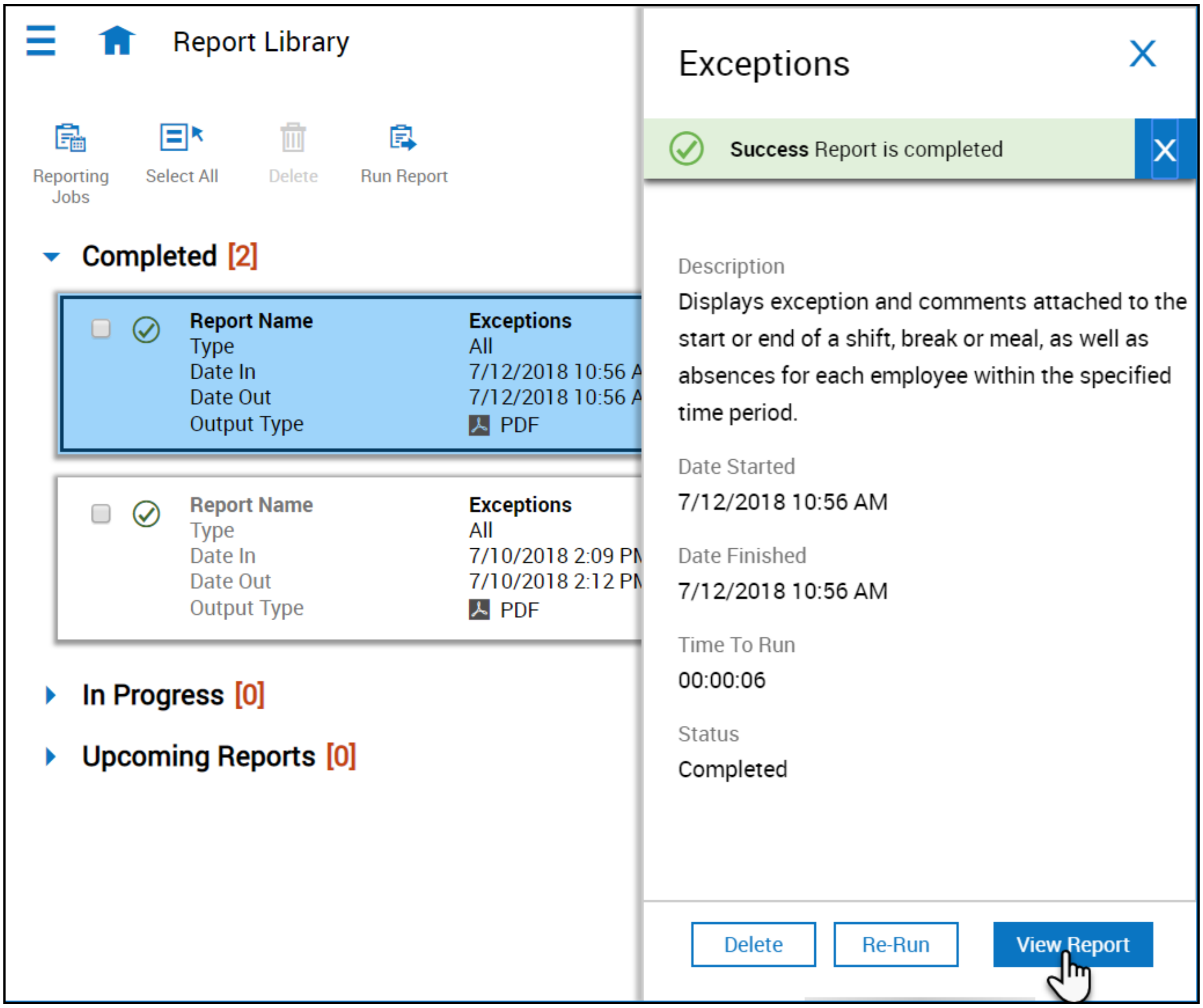
7. When the report finished, the following success message appears.

8. Select **OK** to open the report.

Re-running Reports

1. Access the Main Menu > Dataviews & Reports > Report Library.

2. From **Report Library**, locate a report and select the right arrow .



3. From the panel, you can:

- **View a report**
- **Re-run a report**
- **Delete a report**

4. Select Re-run.

5. Review and, if necessary, change the report parameters.

6. Select the Output format

- PDF
- Excel
- Interactive

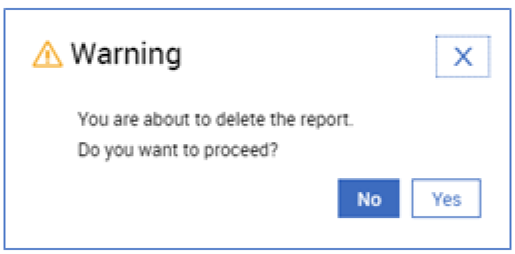
7. Select **Run Report.**

8. When the report is finished, select **OK** to open the report.

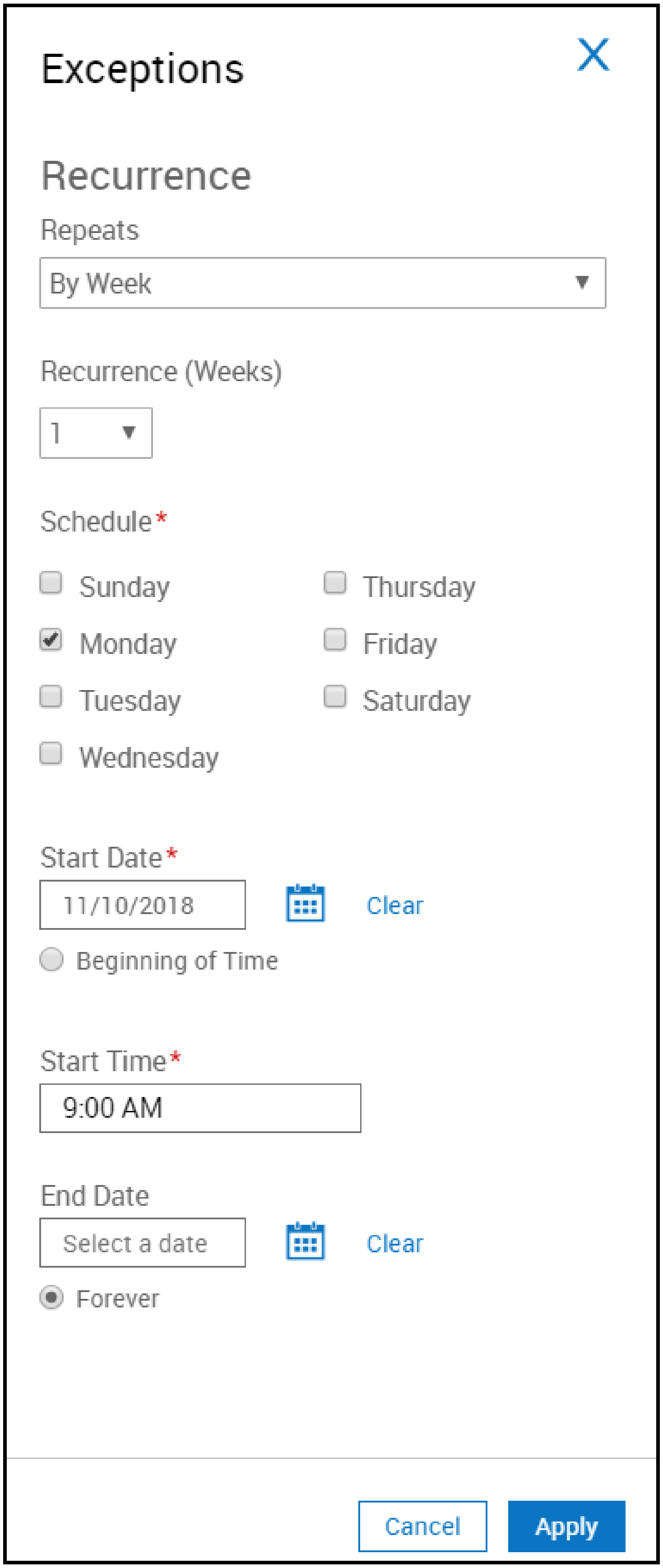
Deleting reports

1. Select a report from your Report Library and select **Delete.**

2. When the Warning message appears, select **Yes**.



Scheduling Reports


Exceptions
Recurrence
Repeats
By Week
Recurrence (Weeks)
1
Schedule*
Sunday
Thursday
Monday
Friday
Tuesday
Saturday
Wednesday
Start Date*
11/10/2018
Clear
Beginning of Time
Start Time*
9:00 AM
End Date
Select a date
Clear
Forever
Cancel
Apply

1. From your Report Library, select **Reporting Jobs** .

2. In the Reporting Jobs page, select **Schedule Report**.

3. In the Select Report panel, select a category and report and then select **Select**.

4. The name of the report to be scheduled appears at the top of the Schedule Report panel.

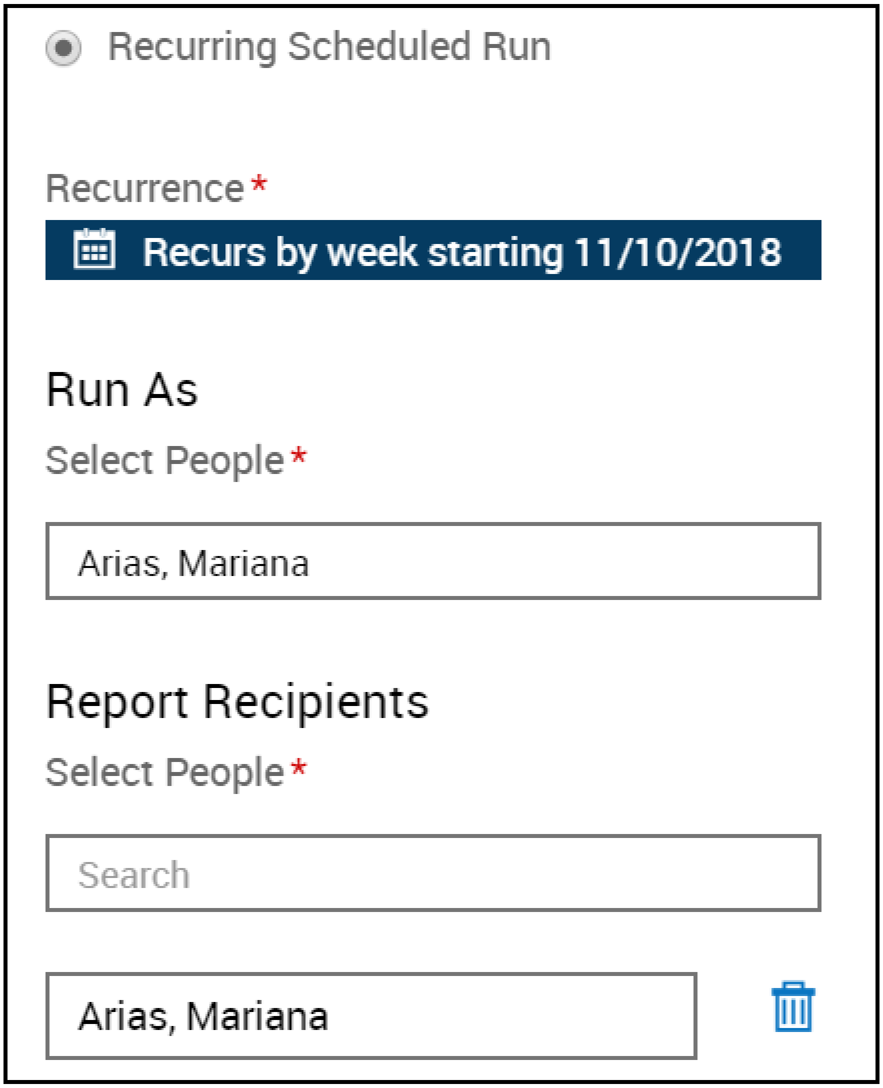
5. Enter a name for your scheduled report job.

6. In the Report Parameters section, select the applicable parameters. Note that some of the parameters are specific to the report selected.

7. In the Schedule area select **Recurring Scheduled Run**.

8. Select the **calendar** icon and then select how often you wish to schedule the report to run in the Recurrence panel.

9. Select **Apply**.



10. In the **Run As** and **Report Recipients** section, select your name in order to receive the report as scheduled.

11. Select **Schedule Report**. You will see a confirmation message appear.

12. Select **My Reports** to return to your Report Library.

U. Basic Scheduling Guide for Managers

Table of Contents

Manage Schedule Tile - Section 1

The Manage Schedule tile is a quick view to employees' schedules. You can also access the full schedule from the Manage Schedule tile.

The Manage Schedule tile may include the following:

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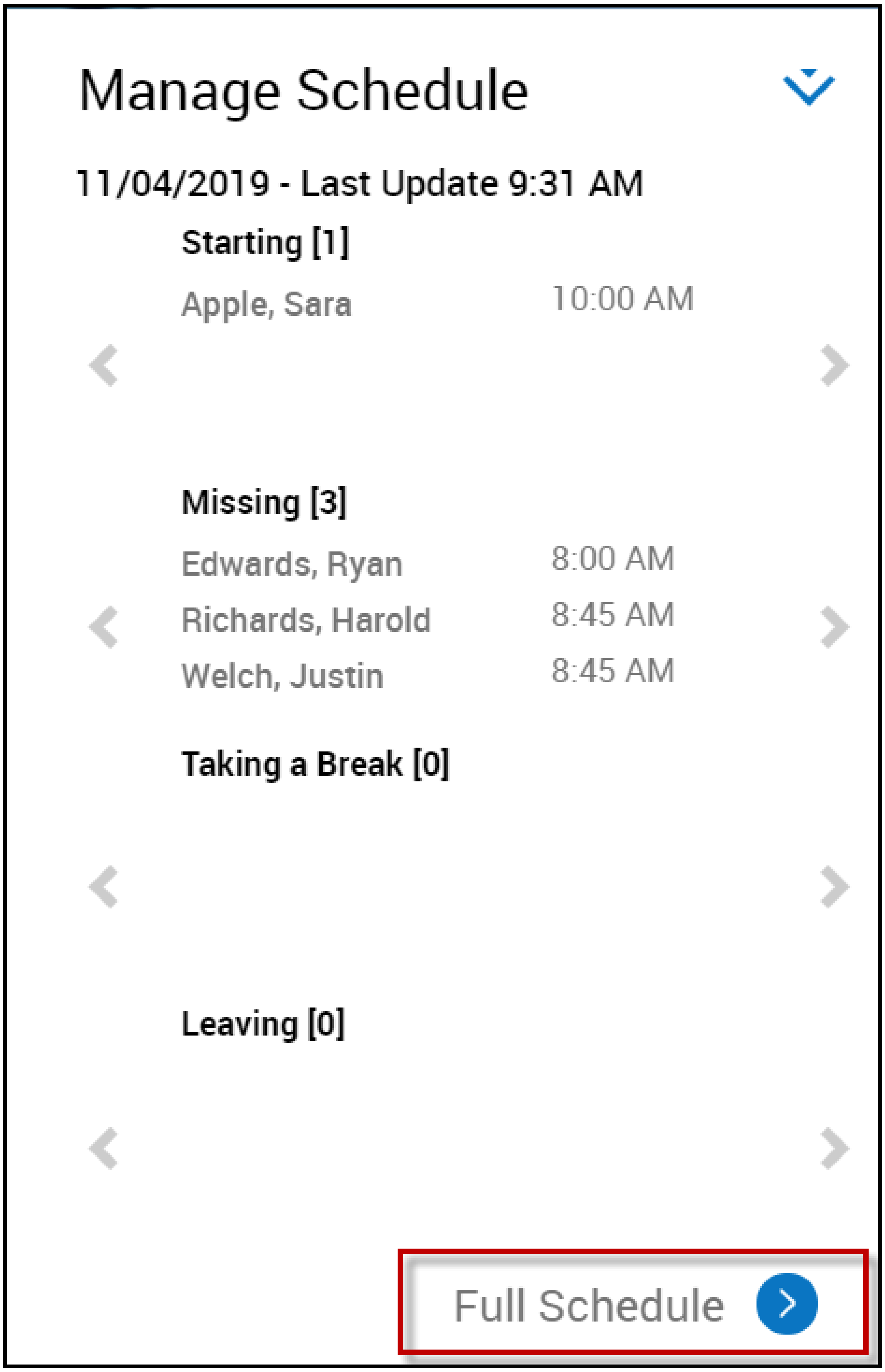
The Manage Schedule tile may include the following:

1. **Starting** shows the employees who are scheduled to start their shift soon.
2. **Missing** shows the employees who were scheduled to start recently but who did not punch in.
3. **Taking a Break** shows the employees who are taking (or about to take) a scheduled break.
4. **Leaving** shows the employees who are scheduled to leave soon.



5. You can also access a schedule view by selecting the **Full Schedule** link at the bottom of the tile.

Reviewing the Schedule - Section 2

Context controls

Select Timeframe — Defines the dates that are loaded. You can only act on the loaded dates in the schedule. To load different dates, select the button.

Select Hyperfind — Displays the employees that are loaded. You can only act on loaded employees. You can load all the employees

Refresh and save controls

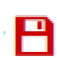
Loaded at— Displays the time that the schedule was last loaded or when the most recent **Refresh** was applied, whichever is later. This icon spins when the schedule is loading and stops when loading is complete

Refresh— Reloads the schedule data from the database. If there are unsaved changes, a warning box opens:

- To discard unsaved changes, select **Yes**.
- To save changes, select **No**.

Save— The color indicates whether you have unsaved changes:

- If gray, **Save** is **not** enabled: The schedule has no changes to save.



- If red, **Save** is enabled: **Select** to save changes.

View By

To select how employees and their schedules are arranged on the screen, select one of these views:

Employee shows the schedule of each employee as a row sorted alphabetically (by default).

Show/Hide (display options)

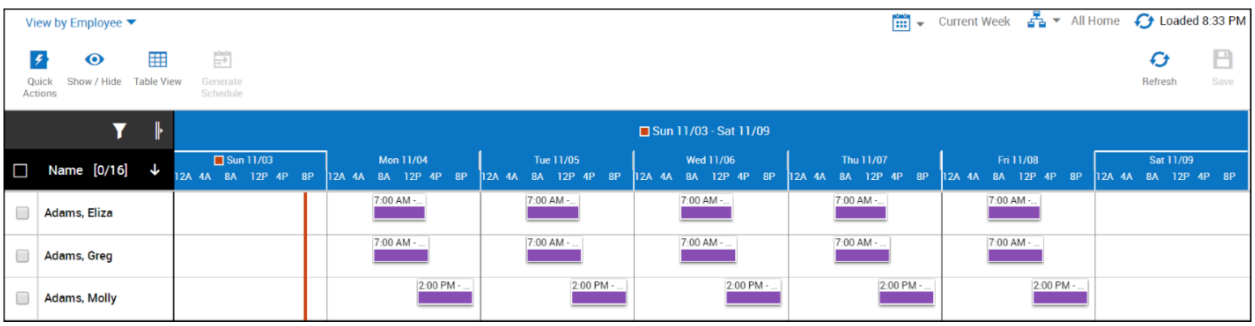
Select Show/Hide - In the Show/Hide panel, select from the list of options to adjust the appearance of the schedule. When finished, **select Apply**.

Gantt view and Table view

The **Gantt View** and **Table View** toggle on the action bar.

Gantt View

To use the Gantt view, **select Gantt View** (available only for displays of one week or less).This view shows shifts, breaks, and other time-related entities with their length proportional to their duration. The left border of the entity aligns with the start time; the right border aligns with the end time. This view shows the current time as a vertical red line.



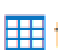
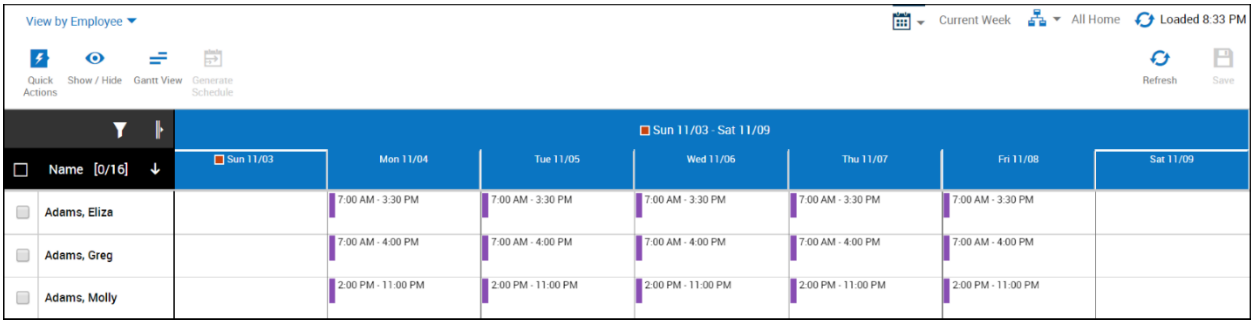


Table View

To use the Table view, **select Table View**

The Table view can display much longer periods of time. It is a simplified version of the Gantt view: less data rich, but sometimes easier to read and work with. This view does not show breaks, but it shows the entire shift as being on the day when the shift starts, even if the shift spans midnight.



Current time and visual cues

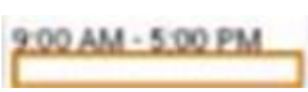
The red squares in the date headers show the current week and current day. Select any day header or a week header to display only that time frame.

The vertical red line extending from the top to the bottom of the schedule shows the current time on the current day (only available in the Gantt view). It moves continuously toward the right.

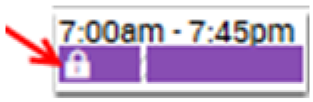
Other visual cues

The Dataview column controls at the top of the name column allow you to select the columns to show, and to collapse and expand the columns.

Select a row to highlight the employee name, making shifts, pay codes, availability, and other information easier to associate with an employee. Identifies the open shift summary row and displays the total [number] of open shifts in the loaded timeframe. Select to expand the open shift rows of the schedule. Select to collapse the open shifts rows.



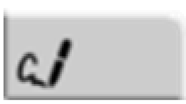
Open shifts (shifts that are not assigned to an employee) appear at the top row of the schedule on the date when they occur.



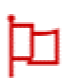
The locked icon on a shift indicates the shift is locked and cannot be modified or removed without unlocking it. The icon can also appear on a cell, indicating that no entity can be added, removed or modified in that cell without first unlocking it. Locked cells are gray.

The comment icon indicates the shift or pay code has a comment attached. Hold the cursor over the shift to see the details, including the comment.

The transfer icon indicates that the shift (or a segment of the shift as shown here) is not the primary job, primary labor category, or primary work rule of the employee assigned.

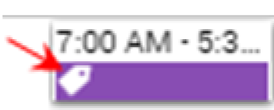


The signed off icon (enlarged here for clarity) indicates that the day is locked by the payroll department and impossible for the scheduling manager to change. No schedule item can be added, deleted, or modified on this day.

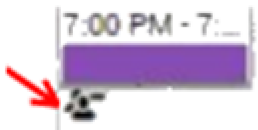


Holidays are indicated by a red flag icon in the date header.

Schedule tags appear as a thin colored bar near the bottom of a date cell that identifies additional custom characteristics of a schedule day. The text under the tag shows the name of the tag; hold the cursor over the colored bar to see more details



Segment tags appear as an icon on a shift or shift segment. They identify additional custom characteristics of that shift or segment. Hold the cursor over the tag icon to see more details for the tag.



The people icon flags the shifts of employees who are no longer part of the schedule group. For example, if there is a change to the group (or the employees were removed from a group) on a day in the loaded period, this icon indicates that the employees are no longer part of this group.

Employee Availability

Available — Employee is available to work during this time.

Preferred — Employee prefers to work during this time. Employees indicate when they prefer to w they prefer to work. Preferred availability can be assigned only to employees, not to locations and not globally.

Preferred Time Off — Employee prefers not to work during this time. Employees indicate w   indicate when they prefer not to work. Preferred Time Off availability can be assigned only to employees, not to locations and not globally.

Unavailable — Employee is not available to work. If employees are scheduled when unavailabl unavailable, the system can generate a schedule rule violation.

Unknown — Employee is not certain about their availability. If employees do not know their availa their availability but want to be considered for work, enter their availability as Unknown.

Shift and job color coding

Each job can be defined to display as a unique color in the Schedule Planner (Gantt view only). By color-coding each job, you can easily identify job distribution — including transfers and open shifts — at a glance. **Note:** The color definitions are made for your organization in the Application Setup component. If your organization does not define colors for specific jobs, the default colors display: purple for regular job and blue for transfers.

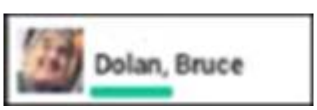
When a shift is assigned, the job displays as the defined solid job color. For open shifts, the job displays as an open box with the border in the job color. After you assign an open shift, the job color becomes solid. For multiple segments, each segment displays the applicable color.

Regular Shift

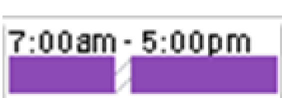
Open Shift

Transfer

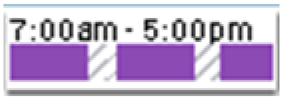
Specific cues are as follows:



The color of the employee's primary job is displayed in the line below the employee's name.



Assigned shifts and shift segments are displayed in the defined color of the job.



Breaks have gray, diagonal stripes.

Transferred shifts and shift segments display in the defined job color.

Pay codes are green.

Open shifts are displayed as an open box with the border in the job color.

Locked cells are shaded gray and display a Locked icon in the corner. No schedule item can be added, deleted, or modified on this day, unless it is first unlocked.

Rule violation indicators

The following icons display in the Severity column of the Rule Violation add-on to indicate the highest rule violation affecting an employee. A dot beside the icon means that there are more than one rule violation affecting the employee's schedule.

Informational — A rule has been broken, but at the lowest level of severity. You can save the schedule and continue without responding to the violation.

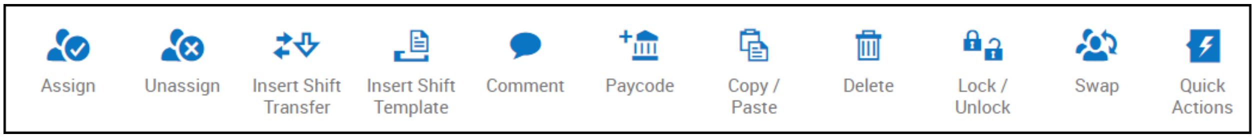
Warning — You can save the schedule and continue without responding to the violation

 **No Save** — The schedule cannot be saved with this severity of rule violation.

Quick Actions

Quick Actions operate a little differently from other buttons and controls:

- **Select Quick Actions** and select a Quick Action.
- **Select** the item you want to modify or act on. If the action is associated with two items, you must also **select** the second item.



Example: Open the **Quick Actions** action bar, select **Copy / Paste**, then **select** the item to copy and **select** the target cell to paste it in. To paste the same item in many cells, just continue **selecting** the target cells one by one. The software pastes the copied item in each cell as you **select**.

When you select a Quick Action, it remains enabled until you disable it. You can continue **selecting** additional days or shifts to apply the same action. There is no need to select the Quick Action icon again when you do this.

Note: When a Quick Action is enabled, the Information Bar just above the Quick Actions action bar tells you what to do next.

- When **you** are finished with a Quick Action, **select** it again to disable it. If you do not disable it, the **next** item you select will have the selected Quick Action applied to it.

The following is a list of all Quick Actions included in the software.

Assign

What: Assigns open shifts to employees.

How: **Select** the open shift, then **select** the employee. Repeat as needed.

If break rules are violated, reassign the breaks:

- **Right-click** the shift.
- Select **Assign Breaks** in the glance.

Note: If the employee’s primary job does not match the job of the open shift, the segment becomes a transfer job. Work rule or labor level transfers remain the same.

Unassign

What: Unassigns an assigned shift to create an open shift.

How: **Select** an assigned shift. An open shift is created, having the same job as the shift did before you unassigned it. **Select** additional assigned shifts as needed to unassign them as well.

Insert Shift Transfer

What: Changes the job for a shift; all segments of the selected shift are assigned the selected job. Other data associated with the shift remain unchanged.

How:

- Select the job from the list. The list contains only jobs that are included in your current transfer set.
- **Select** one or more scheduled shifts.

Insert Comment

What: Assigns a comment to a shift or a pay code

How: Select the comment from the list that appears, then **select** a shift or a pay code. **Select** other entities as needed to assign the same comment to them.

Note: Search for a comment by typing any part of it in the search box.

Paycode

What: Replaces an assigned shift with a pay code.

How: Select the pay code, then **select** an assigned shift:

- The pay code replaces the entire duration of the shift.
- The system automatically creates an open (unassigned) shift with the same start and end time as the replaced shift.
- **Select** additional shifts as needed to replace them with the same pay code.
- Note: You cannot replace an empty cell, a shift segment, a locked shift, or a shift during a locked or signed-off day.

Copy / Paste

What: Copies and pastes a shift, a pay code, a tag, availability or any combination of these items.

How: On the Copy / Paste select the date cell containing the item or items to copy, then **select** the date cell where you want the copied item or items to appear. Repeat to paste the same item or items in another cell.

Delete

What: Deletes a shift or a pay code.

How: **Select** the item to delete. Repeat to delete additional items.

To restore items deleted by mistake, do not save but instead select **Refresh**

Warning: When you refresh the page, you lose all changes since the last save.

Lock / Unlock

What: Locks or unlocks a shift. (You cannot lock or unlock days with this quick action.)

How: **Select** an unlocked shift to lock it, or a locked shift to unlock it. **You can select** additional shifts to lock or unlock as needed.

Swap

What: Swap shifts or days with no shifts.

How: **Select** the first item, then select the second item. Repeat as needed.

Note:

You can swap:

- Shifts or days with no shifts between two employees on the same day. Both employees must be qualified and available.
- Two items between two employees on different days.
- A shift for a pay code between two employees on the same day.
- A pay code for a shift between two employees on the same day
- Swaps between different days do not overwrite other items on the same day.

You cannot swap:

- Items with a group
- Items between the same employee
- Locked shifts
- Pay codes

Adding a Scheduled Shift - Section 3

Create a shift by typing (table view only)

Select 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, select the cell and type "day12".

A start time and an end time separated by a hyphen. Use standard time-of-day format. For example, select 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. **Select** Insert Shift Template . The Insert Shift Template panel opens.
3. Select the shift template from the list. You can also use the Search box to locate the appropriate shift template.
4. Select Save when finished.

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

Create a shift with all options available

1. **Right-click** a date cell in the schedule,
2. **Select** Add Shift in the Employee glance.
3. 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.

Modifying Scheduled Shifts - Section 4

In the Tabular view

Adjust start and end times of shift segments

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.

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

Copy and paste a shift

You can copy a shift and paste it somewhere else in the schedule.

1. Right-click a shift and select **Copy**.

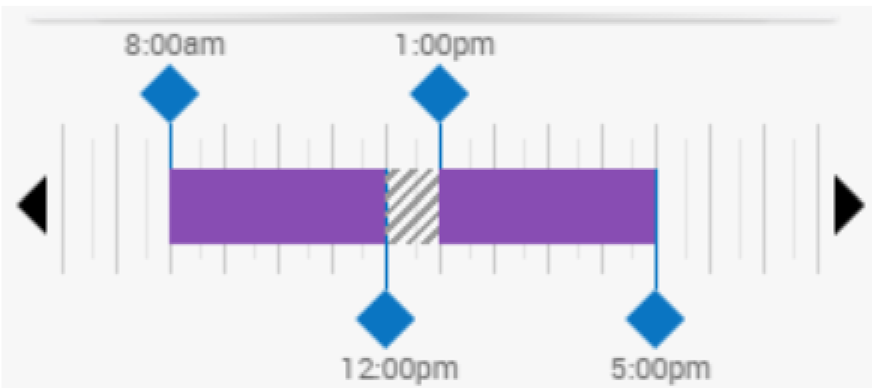
2. Right-click any unlocked day in the schedule and select **Paste**. You can repeat this step as many times as needed to paste the same shift anywhere.

3. **Save** your changes.

In the Gantt view

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.



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.

Move a shift to a different day or another employee

1. In the Gantt 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.

Adding Comments to the Schedule - Section 5

In the Shift Edit panel, 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.

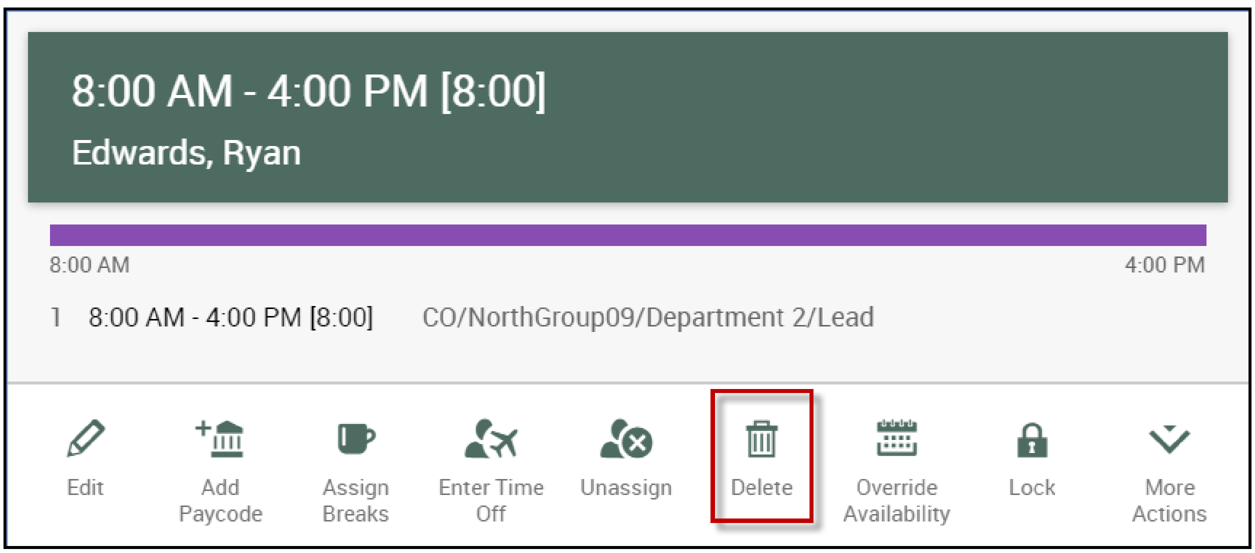
- To delete a comment or a note, select the next to it.
- Shifts with comments attached appear like this on the schedule:

- Select **Apply** when you are done.
- **Save** your changes

Deleting Scheduled Shifts - Section 6

Delete a shift from the glance

1. **Right-click** any shift in the schedule. The Employee glance appears.



2. Select **Delete**.
3. **Save** your changes.

Note: You cannot delete shifts that are locked or on locked or signed off days.

Note: If you have many shifts to delete, save time by using the Quick Action Delete instead.

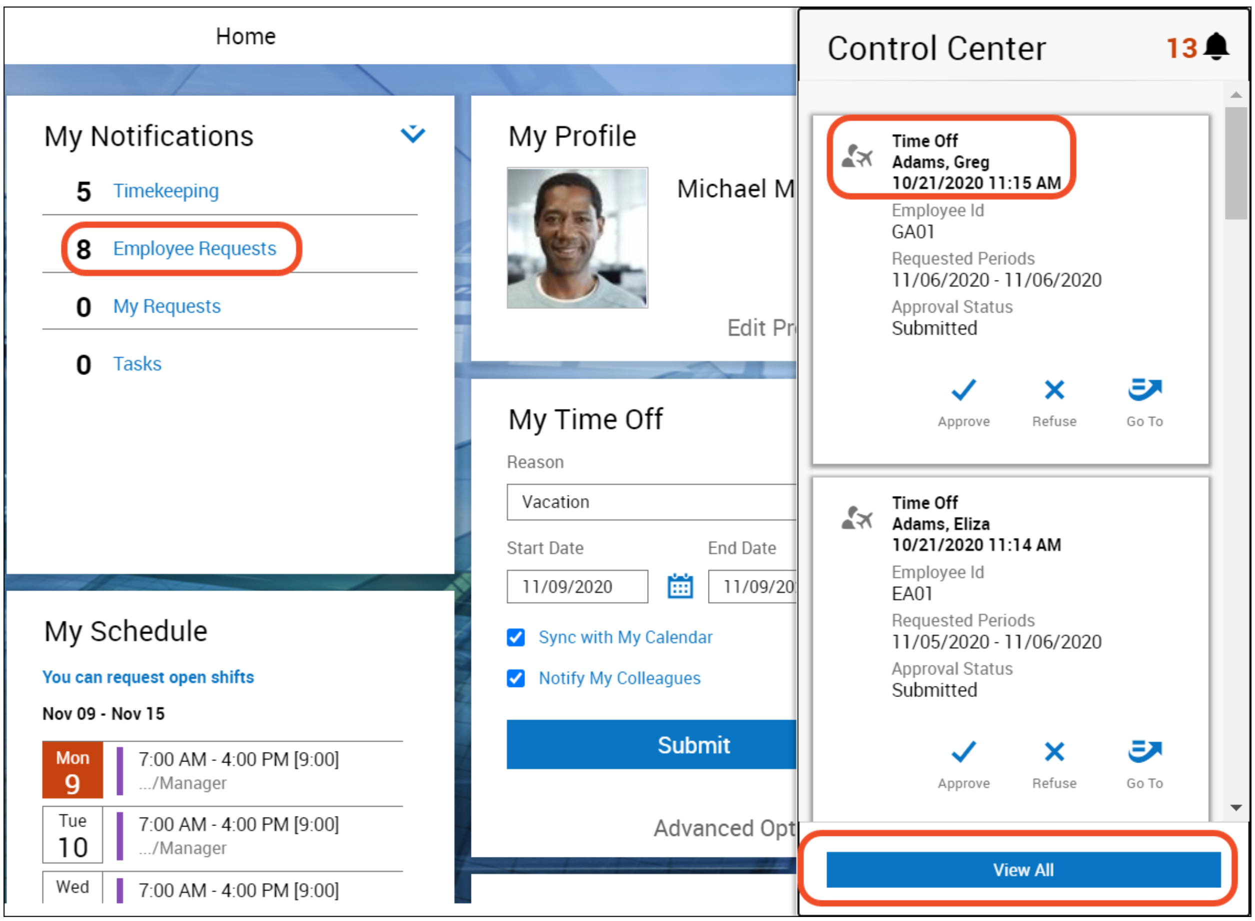
Manage Employee Time Off Requests - Section 7

This job aid explains how to locate time off requests that have been submitted by your employees and how to approve, reject, or mark them as pending, if necessary.

Locate Employee Time Off Requests

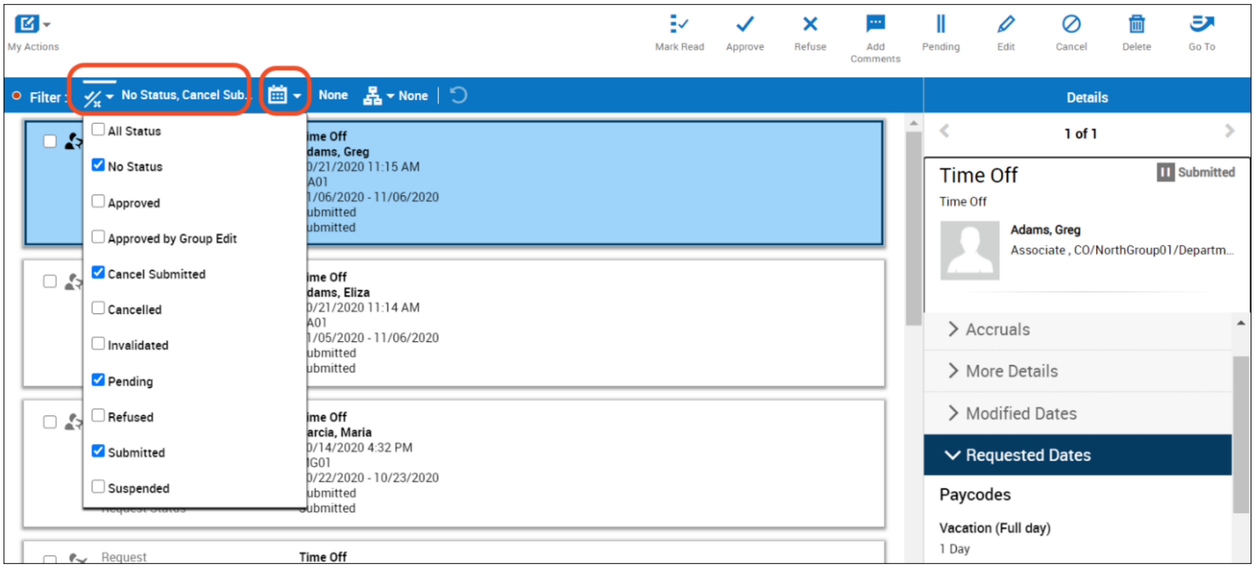
All submitted employee time off requests are directed to the manager or managers defined for each employee. Using Control Center, you can review notification details, filter and sort notifications and take action on the pending requests.

1. Locate the **My Notifications** tile on your Home page and select **Employee Requests** or click on the **Bell** icon in the upper right corner of the page and select the **View All** button.



2. From the blue Filter menu, select the **Status** filter and select the request status checkboxes that you wish to display. In this example, employee requests that are **Approved, Pending and Submitted** will be displayed.

3. From the Calendar menu select the dates that you wish to manage requests. This applies to the **Submitted** date, not the dates the employee is requesting off.



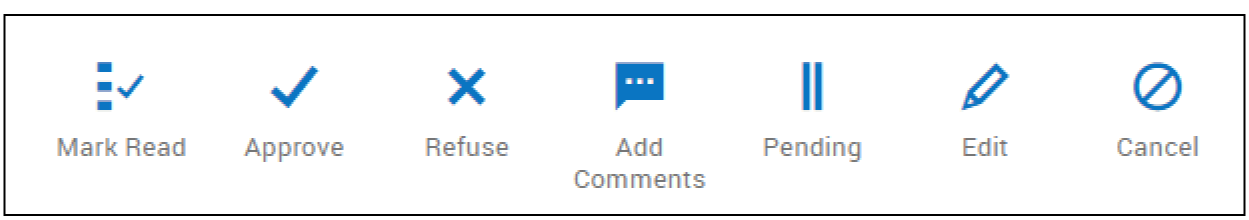
Respond to Time Off Requests in Control Center

1. Review each request details by selecting the request (shown with a blue highlight) and selecting the menus in the Details panel.
2. When you are ready to take action on a request, simply select it and the use the icons on the top:

- Click **Approve** to approve a request.
- Click **Refuse** to reject a request.

- Click **Add Comments** to provide more information back to the employee.
- Click **Mark as Pending** to leave the request in a pending status to come back later.
- Click **Cancel** if you need to cancel the request on behalf of the employee.

3. A confirmation message will appear at the top of the screen indicating that your action was successful.
4. Employees and managers will receive notifications when requests change status.



Respond to Time Off Requests in the Schedule using Absence Calendar

1. Access the applicable schedule under **Main Menu** > **Schedule**.
2. In the Current Schedule, select the **Absence Calendar** tab at the bottom of the page.
3. In the Absence Calendar, click a date with a black dot to see an employee request. **Note:** You can use the **Incoming Requests Count** column to sort all requests up to the top of the schedule.
4. If you have multiple requests and don't need to review the details, use **Approve** in the Quick Actions tool bar to approve the requests. Otherwise, in the schedule grid, right-click the submitted time-off request to open the Time Off window.
5. When you are ready to take action on the request, simply select one of the actions:

- Click **Approve** to approve a request.

- Click **Refuse** to reject a request.
- Click **Cancel** if you need to cancel the request on behalf of the employee.
- Click **More Actions** to **Add a Comment** or to **Edit** the request.