



How to Use Employee Groups

- Employee Groups are used to filter staff based on personal preference. It is also used with **Advanced Scheduler** to place staff in groups for self-scheduling.

Adding Employees to Groups

- Navigation: Homepage > Main Menu > Schedule > AS Schedule Planner**

The screenshot displays the AS Schedule Planner interface. On the left is a navigation menu with the following items: Home, Time, Schedule, AS Schedule Planner (highlighted in yellow), Staffing Dashboard, Workforce Planning, Dataviews & Reports, My Information, and Maintenance. At the bottom of the menu is a 'Share Feedback' button. The main content area is divided into four panels:

- My Notifications:** A list of notification categories with counts and arrows: Tasks (0), My Requests (0), Employee Requests (1), Timekeeping (0), Open Shift Requests (0), Shift Swap (0), and Request to Cover (0).
- Manage Timecards:** Shows 'Current Pay Period' and two key metrics: '5 Must Fix' (5 Unexcused Absence) and '71 Clean Timecards' (Timecards with no exceptions).
- Manage Schedule:** Displays the date '2/04/2025' and 'Last Update 9:51 AM'. It lists schedule categories with counts: Starting (0), Missing (0), On Break (0), and Leaving (0).
- My Accruals:** Shows 'Balance as of Today' with 'PPTO 39.35' (Hour) and 'PTO' (Hour). It also lists 'Available Balance', 'Pending Grants', and 'Planned Takings', all showing a value of 39.35. A 'Time-Off Request' link is at the bottom.



- Make sure that you are on the **Current Schedule Period**.
- Select the **Location** that you intend to set groups in.

- Under the **View By** drop down, select **Schedule Group**.

- Right click on the employee(s)
 - Multiple employees can be selected using the checkboxes on the far left of the scheduler.
- Select **Add to Group**.
- Select **Group** that you wish to add Employee(s) to.
- Select **Apply**.
- Individual employees can be in multiple groups.



UKG AS Schedule Planner

View by Schedule Group Current Schedule Period

Quick Actions: Show/Hide, Gantt View, Zoom, Tools, Generate Schedule, Load Groups

Name [0/75]	Phone Nu...	Primary Job	S 29	M 30	T 31	W 01	T 02	F 03	S 04	S 05	M 06	T 07	W 08	T 09	F 10	S 11	S 12	M 13	T 14	W 15	T 16	F 17	S 18	S 19	M 20	T 21	W 22	T 23	F 24	S 25	S 26	M 27	T 28	W 29	T 30	F 31	S		
Open Shifts [0]																																							
Ungrouped Employee...																																							
No Inheritance																																							
<input type="checkbox"/>	Adams	CNA																																					
<input type="checkbox"/>	Bailey	RN																																					
<input type="checkbox"/>	Beane	CNA	OT	OT	OT	OT																																	
<input type="checkbox"/>	Bohannon	RN																																					
<input type="checkbox"/>	Boman	RN																																					
<input type="checkbox"/>	Brooks	RN																																					
<input type="checkbox"/>	Caine	PCT																																					
<input type="checkbox"/>	Cannon	RN																																					
<input type="checkbox"/>	Capes	RN																																					
<input type="checkbox"/>	Chandler	PCT																																					
<input type="checkbox"/>	Chastang	RN																																					
<input type="checkbox"/>	Clements	PCT																																					
<input type="checkbox"/>	Craig	CNA																																					
<input type="checkbox"/>	Croom	RN																																					
<input type="checkbox"/>	Davis	CNA																																					

Time Off Request - Heal...
Submit

Add to Group

Job: RN

Group: Chemo Nurse

Search...

- Chemo Nurse
- Contract
- Critical Care Internship
- CRRT
- Day Shift RN LPN CNA
- Days
- ECHMO
- Evenings
- Night Shift RN LPN CNA
- Nights
- Orientation
- PRN
- RRT
- Schedule Group A
- Schedule Group B
- Schedule Group C
- Schedule Group D

Cancel Apply



Removing Employees from Groups

- **Navigation: Homepage > Main Menu > Schedule > AS Schedule Planner**
- Make sure that you are on the **Current Schedule Period**.
- Select the **Location** that you intend to set groups in.
- Under the **View By** drop down, select **Schedule Group**.
- Right click on the employee(s). Multiple employees can be selected using the checkboxes on the far left of the scheduler.
- Select **Remove from Group**.

A screenshot of the AS Schedule Planner interface. The top section shows a blurred header with the text 'CNA' and 'USA/907/NURSING/907641-Prov 12th Floor/CNA'. Below this, the 'Employee ID' is also blurred. Other fields include 'Expected Weekly Hours' (0.00), 'Hire Date' (2/26/2024), 'Phone Number', and 'Primary Job' (CNA). At the bottom, there is a toolbar with ten icons: 'Schedule Pattern', 'Add to Group', 'Remove from...' (highlighted in yellow), 'Add Shift', 'Add Paycode', 'Enter Time Off', 'Lock', 'Unlock', 'Insert shift transfer', and 'GoTo'. The number '14' is visible in the top right corner of the interface.



- Select the group that you wish to remove employee(s) from.

The screenshot shows the UKG AS Schedule Planner interface. The main window displays a grid of employee schedules for various groups. A dialog box titled "Remove from Group" is open on the right side. The dialog shows the job title "CNA" and the group "Chemo Nurse" selected in a dropdown menu. The "End Date" is set to "Forever". The "Apply" button is highlighted in yellow.

Name	Primary Job	Sun 2/09	Mon 2/10	Tue 2/11	Wed 2/12	Thu 2/13	Fri 2/14	Sat 2/15	Sun 2/16	Mon 2/17	Tue 2/18	Wed 2/19	Thu 2/20	Fri 2/21	Sat 2/22	Sun 2/23	Mon 2/24	Tue 2/25	Wed 2/26	Thu 2/27	Fri 2/28	Sat 3/01	Sun 3/02	Mon 3/03	Tue 3/04	Wed 3/05	Thu 3/06	Fri 3/07	Sat 3/08	Sun 3/09	Mon 3/10	Tue 3/11	Wed 3/12	Thu 3/13	Fri 3/14	Sat 3/15		
Open Shifts [0]																																						
<input type="checkbox"/> Walker	PCT																																					
<input type="checkbox"/> Watts	RN																																					
<input type="checkbox"/> Wright	RN																																					
<input type="checkbox"/> Young	RN																																					
Chemo Nurse [9]																																						
<i>Partial Group / No Inertia</i>																																						
<input type="checkbox"/> Boman	RN																																					
<input type="checkbox"/> Smith	RN																																					
<input type="checkbox"/> Smith	CNA																																					
<input type="checkbox"/> Soneboulam	RN																																					
<input type="checkbox"/> Suggs	CNA																																					
<input type="checkbox"/> Tain	RN																																					
<input type="checkbox"/> Taylor	RN																																					
<input type="checkbox"/> Test	RN																																					
<input type="checkbox"/> Test	RN MGR																																					
Nights [1]																																						
<i>Partial Group / No Inertia</i>																																						
<input type="checkbox"/> Boman	RN																																					

- Select **Apply**.



How to View by Schedule Groups

- **Navigation: Homepage > Main Menu > Schedule > AS Schedule Planner**
- Make sure that you are on the **Current Schedule Period**.
- Select the **Location** that you intend to set groups in.
- Under the **View By** drop down, select **Schedule Group**.
- Ungrouped employees will appear at the top of the list.
- Collapse and expand groups using the arrow icon to the left of the group name.



- If an employee is in multiple groups, then they will appear multiple times on the schedule.

View by Schedule Group ▾

Next Schedule Period Selected Locations Loaded 9:59 AM

Quick Actions Show/Hide Gantt View Zoom Tools Generate Schedule Load Groups Share Refresh Save

	Sun 2/09 - Sat 2/15							Sun 2/16 - Sat 2/22							Sun 2/23 - Sat 3/01							Sun 3/02 - Sat 3/08							Sun 3/09 - Sat 3/15							Sun 3/16 - Sat 3/22																		
<input type="checkbox"/> Name [0/72] ↓	Phone Nu...	Primary Job	S 09	M 10	T 11	W 12	T 13	F 14	S 15	S 16	M 17	T 18	W 19	T 20	F 21	S 22	S 23	M 24	T 25	W 26	T 27	F 28	S 01	S 02	M 03	T 04	W 05	T 06	F 07	S 08	S 09	M 10	T 11	W 12	T 13	F 14	S 15	S 16	M 17	T 18	W 19	T 20	F 21	S 22										
Open Shifts [0]																																																						
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<input type="checkbox"/>	Wright	RN																																																				
<input type="checkbox"/>	Young	RN																																																				
Chemo Nurse [1]																																																						
Partial Group / No Inheritance...																																																						
<input type="checkbox"/>	Boman	RN																																																				
<input type="checkbox"/>	Smith	RN																																																				
<input type="checkbox"/>	Smith	CNA																																																				
<input type="checkbox"/>	Soneboulam	RN																																																				
<input type="checkbox"/>	Suggs	CNA																																																				
<input type="checkbox"/>	Taine	RN																																																				
<input type="checkbox"/>	Taylor	RN																																																				
<input type="checkbox"/>	Test	RN																																																				
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Nights [1]																																																						
Partial Group / No Inheritance...																																																						
<input type="checkbox"/>	Boman	RN																																																				

- All other scheduler functions will work the same (i.e., Quick actions, Schedule Generator, Schedule Posting, Daily Coverage, Audit, etc.).