UKG – Add/Edit/Delete Paycode Quick Reference Guide

This document explains how add paycode to enter time off for a day or you can convert a shift to a different paycode, edit a paycode or convert a shift to a paycode when working with schedules, and delete paycodes that no longer apply or were entered in error.

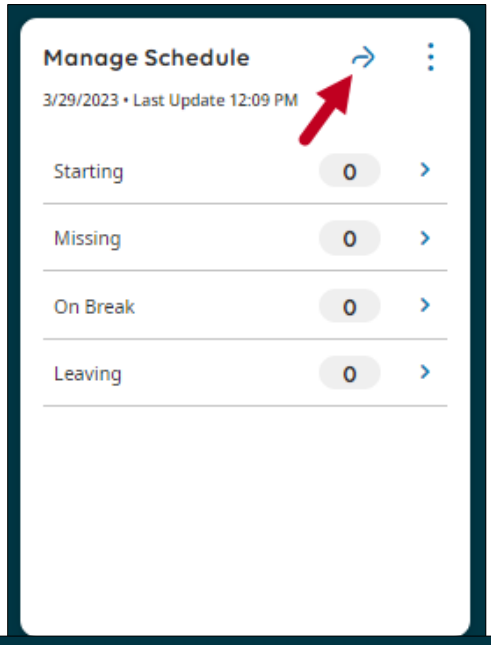
Important

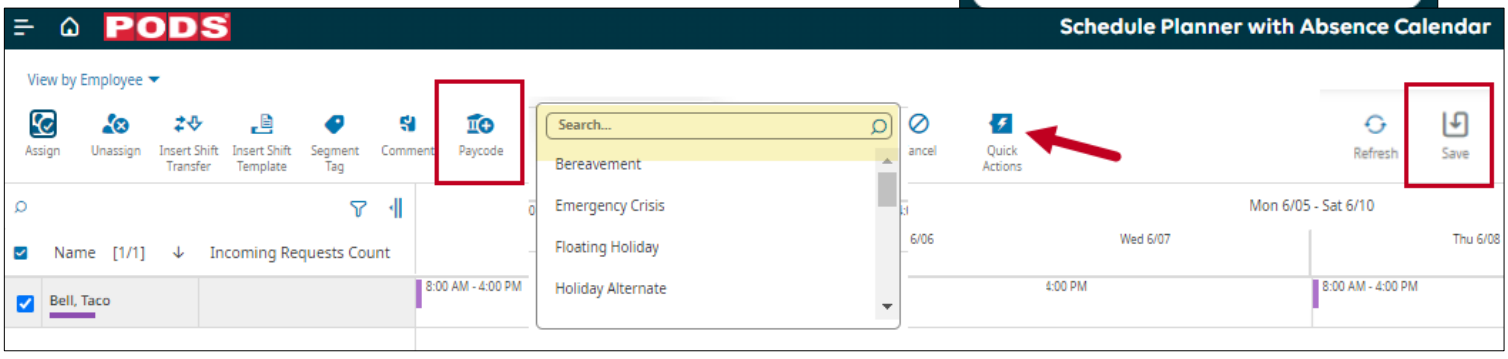
- *Paycodes organize time or money that associates earn and identify spans of time for payroll purposes.*
- *It is imperative correct paycodes are applied to associate shifts when appropriate.*
- *Items cannot be added to or deleted from locked or signed-off days.*

Add a Paycode

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

1. On the **Workforce Management Homepage**, click the **Full Schedule arrow** on the **Manage Schedule tile** to open the **Schedule Planner with Absence Calendar**
2. **Click** the **Quick Actions icon** to expand/collapse the **Quick Actions tools** and **select Paycode** to open the dropdown list
3. **Select** the appropriate **paycode** from the dropdown (i.e. Bereavement, Jury Duty, etc.) then **click** the **shift** on the **schedule grid** to replace
4. **Click** the **Paycode icon** again to deactivate the quick action
5. **Click** the **Save icon** in the upper right corner to save changes to the schedule



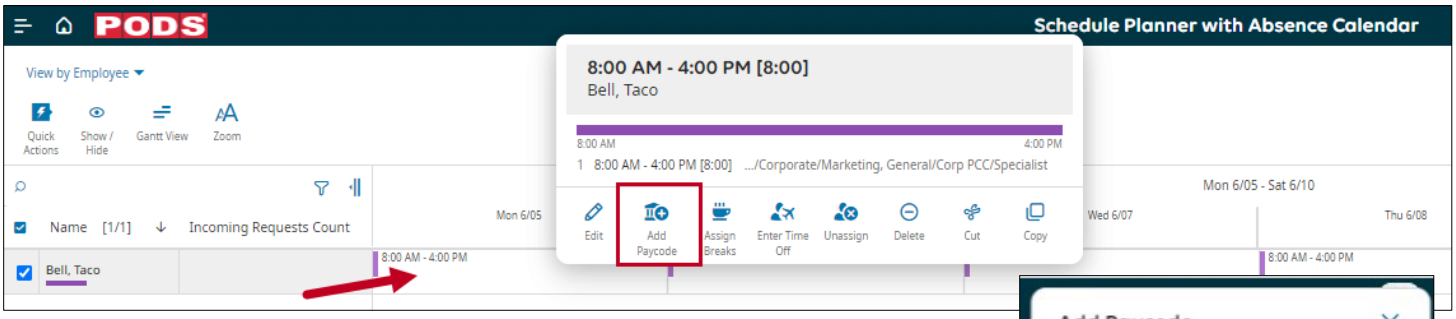


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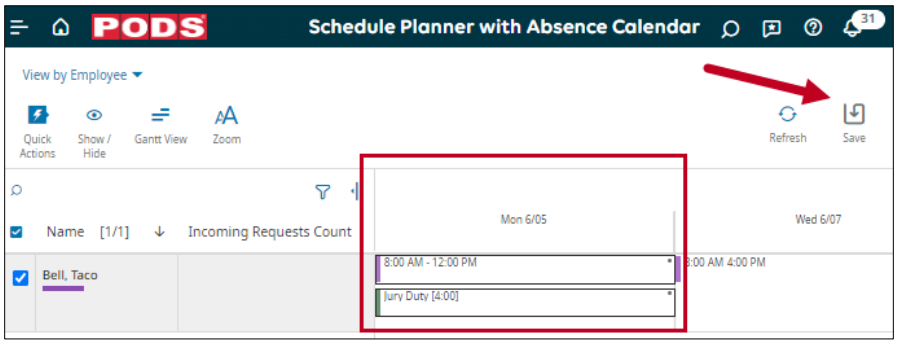
To Add a Paycode from a Glance

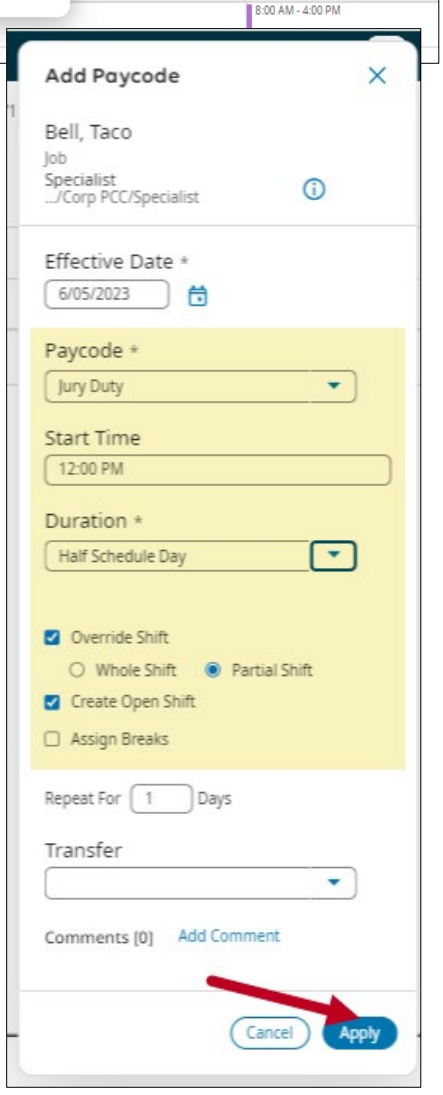
Use the Paycode action available from different glances to access to all options for creating a paycode.

1. **Right-click** an **employee, a shift, or an empty date cell** to open the summary pop-up
2. Click **Paycode** to open the **Paycode Panel** on the right side



3. **Complete** all the necessary **fields** with the available information and **click apply**
4. **Click Save** to store the updated paycode information in the selected shift





Tip: *Depending on which entity your right clicked (employee, shift, or empty date cell) different options are available in the Add Paycode panel.*

Entity appropriate options will default. You can modify any default option as necessary.

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Edit a Paycode

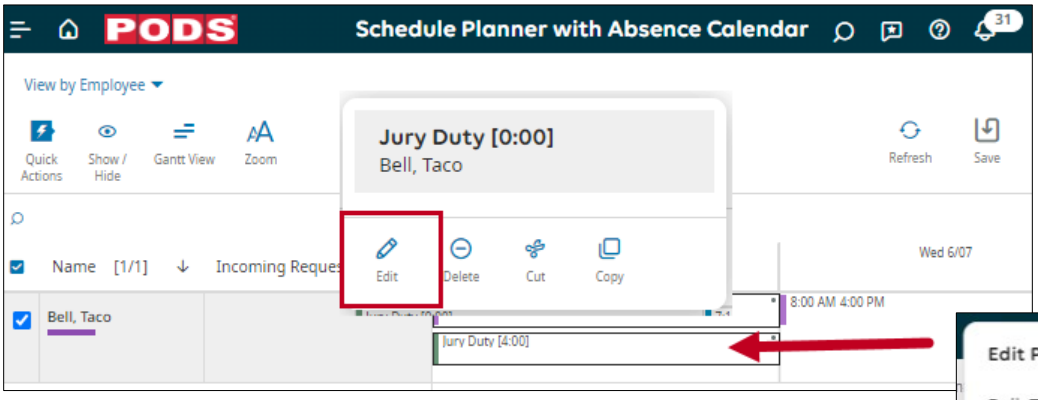
Paycode Types

There are three basic paycode types:

- **Time-based –** Based on a value for time (duration).
- **Money-based –** Defined as an amount of money and is not tied to time Example: An employee receives a fixed amount of money as a bonus
- **Cascading paycode –** A dependent relationship with another paycode and can only appear when there are inadequate accruals for the originally selected paycode

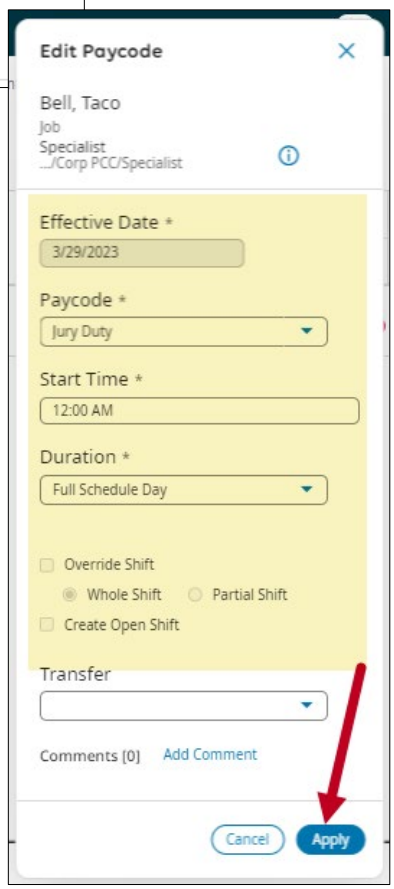
Edit a Paycode

1. On the **Workforce Management Homepage**, click the **Full Schedule arrow** on the **Manage Schedule tile** to open the **Schedule Planner with Absence Calendar**
2. **Right-click** the applicable paycode and select Edit from the pop-up to open the Edit Paycode Panel



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

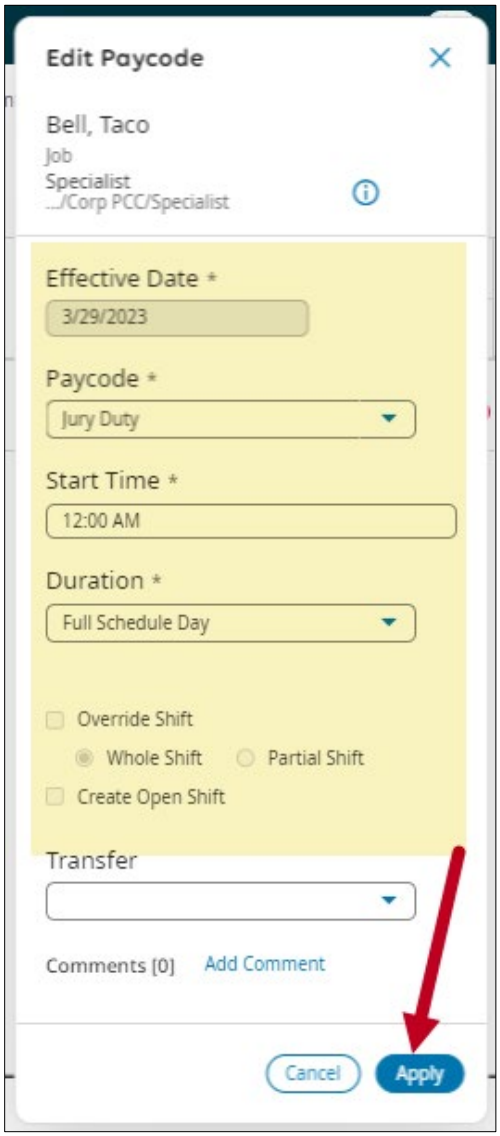
3. **Edit** the **paycode options** in the panel as necessary, these options are dynamic and will reflect your previous selections in the panel
   a. **Effective Date** to define when to apply the paycode
   b. **Paycode**
   c. **Start Time**
   d. **Duration** (for Time-based paycodes) — Select a symbolic value to tell the system to automatically calculate the duration.
      - **Full or Half Schedule Day** — The sum or half of the sum of all shifts during the day. Selectable even if the employee has no shifts; if so, the amount is 0:00. Full Schedule Day accounts for breaks, shift differentials, and overtime
      - **Full or Half Pattern Day** — The sum or half of the sum of all shifts of all patterns associated with the employee on that day. The Amount dynamically updates after changes to the pattern. Selectable even if the employee is not associated with a pattern; if so, the amount is 0:00
      - **Specify Amount -** Enter a duration as Amount Hours (hh:mm). Amount Hours (for Specify Amount): Enter the number



of hours. For money based paycodes, specify the amount of pay

- **Define overrides**
  - **Override shift –** Paycode edit replaces a shift. Example: Set a Vacation paycode to override a shift
    - **Whole Shift** – Removes the shift and replaces it with the paycode
    - **Partial Shift** – Creates a segment within the existing shift or segment and replaces that part of the shift with the paycode

4. **Select Apply** and then **select Save** in the upper right corner to save the changes



***Tip:** To apply the paycode AND keep the shift, deselect the Override Shift option.*

If an associate has more than on scheduled shift during a day, a paycode edit overrides only the first shift that day.

NOTE: USE THE FOLLOWING FORMATTING FOR THE SPECIFIED PAYCODES

- For days (d.dd), enter a number between 0 and 1, or select a symbolic value.
- For money, enter a positive or negative number.
- For hours (hh:mm), enter a positive or negative number, or select a symbolic value.
- For cascading days, enter a number between 0 and 1. Not available from the By Employment Terms view.

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Delete a Paycode

Delete – You can delete paycodes that no longer apply or were entered in error.

1. On the **Workforce Management Homepage**, click the **Full Schedule arrow** on the **Manage Schedule tile** to open the **Schedule Planner with Absence Calendar**
2. **Right-click** any **paycode** in the schedule to open the shift pop-up and **select Delete**
3. **Click Save** to save the changes

Tip: *If you have several paycodes to delete, us the Quick Actions Delete to delete all paycodes at one time.*

Retrieve Paycode Deleted by Mistake – The schedule does not have an "un-do" command, but there are ways to retrieve an item deleted by mistake. Follow the process below after deleting a paycode in the schedule by mistake.

1. **Select Refresh** if you have not saved the schedule changes to reload the last saved version

IMPORTANT: Refresh removes all changes since the last save.

2. If you did save changes and the deleted item was **part of a schedule pattern**, **right-click** the applicable **cell** in the schedule grid and **select Restore**
3. If you did save changes and the deleted item was **inherited from a schedule group or employment terms group**, **right-click** the **applicable cell** in the schedule grid and **select Reinherit**
4. **Click Save** to save the updates