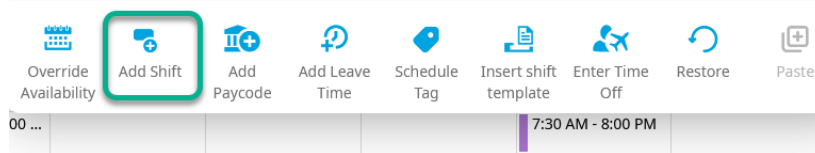


Location (Business Structure) Transfers in the Schedule

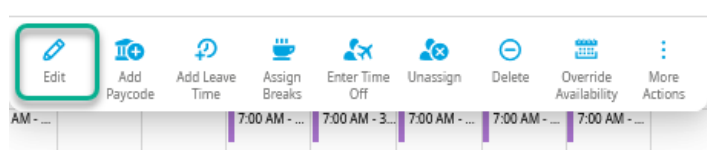
This job aid is to illustrate how to add a business structure transfer to a schedule.

1. If a schedule does not exist, right click on the day and select **Add Shift**



- a. Enter the start and end time of the shift. Go to Step 3.

2. If a schedule exists, right click on the scheduled shift, then select **Edit**, or double click on the scheduled shift.



3. Select **Add Business Structure** to schedule the employee in a different job/department. You can also add a **Work Rule**, for Charge Pay, Education, or Orientation shifts. In this scenario, the employee is working in a different department.

Primary Location **NURSING/3353 5S-BEH AVIORAL HEALTH/RN**

Work Rule **None**

Cost Center **3353**

Labor Categories ...

+ Add Business Structure

+ Add Work Rule

4. For Business Structure Transfers, the system displays employee's primary location and job and transfer options within primary location (dept) or for primary job (in this case, an RN).

The screenshot displays two panels. The left panel, titled "Current Job", shows the employee's current role as "RN" with details "HUH 1000 NURSING" and "3353 5S-BEHAV...". Below this are two input fields: "Location" with the value "3353 5S-BEHAVIORAL" and "Job" with the value "RN". Each field has a magnifying glass icon to its right. The right panel shows two lists of transfer options. The top list, "Jobs with location: '3353 5S-B...' [66]", includes roles like "Coord", "EDU", and "Mgr", all with details "HUH 1000 NURSING" and "3353 5S-BE...". The bottom list, "Jobs with: 'RN' [213]", includes roles like "RN" with details "HUH 1000 NURSING" and "3354 SW-ST..." or "3070 EMER...". A "Show Next 3 Results" link is visible between the two lists.

- a. Scroll to find the job or replace the employee's primary location with the number code or name of the department and click on the magnifying glass (in this example type "3S"). The RN job in Dept 3S-NICU will be displayed if RN remains in the **Job** field.

This screenshot shows the "Current Job" panel with the "Location" field updated to "3s" and the "Job" field still set to "RN". The magnifying glass icon next to the "Location" field is highlighted with a blue square. Below, the "Jobs with location: '3s' [1]" list shows a single result: "RN" with details "HUH 1000 WOMANCHI..." and "3333 3S-NIC...". At the bottom of the list, there is a message "Can't find your job?" and a link "Change Location".

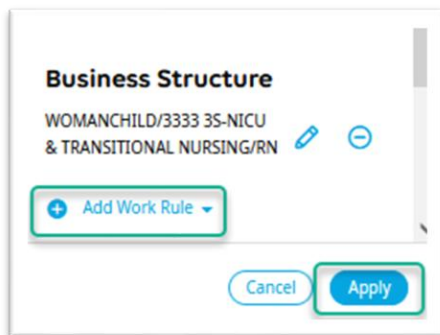
- i. If the employee is transferring to a different job as well as department, enter that generic job code, or click the “X” to clear the employee’s primary job. When the magnifying job is selected, all the available jobs in the department will be displayed.

The screenshot shows a mobile application interface for job selection. At the top, under 'Current Job', the selected job is 'RN' with details 'HUH 1000 NURSING' and '3353 5S-BEHA...'. Below this is a 'Location' field with the value '3s'. A 'Job' field is highlighted with a green box, showing 'All Jobs' and a magnifying glass icon. Below the job field, a list titled 'Jobs with location: "3s" [8]' displays four job categories: 'EDU', 'LPN', 'Mqr', and 'ORIENT'. Each category has a radio button, a job code 'HUH 1000 WOMANC...', and a truncated job title '3333 3S-NI...'. An information icon is next to each job entry.

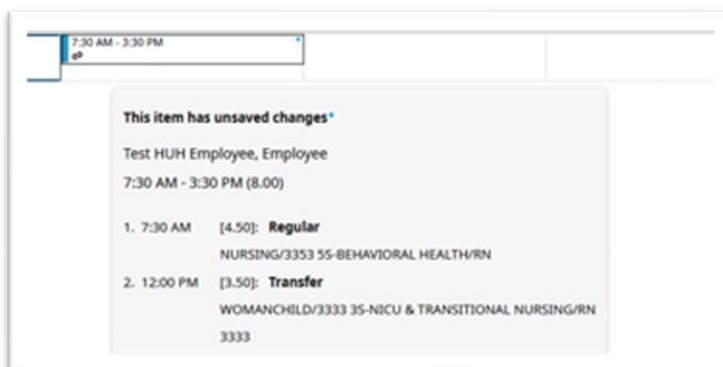
- b. Select the appropriate job, and click **Ok**

The screenshot shows the same job selection interface, but now the 'RN' job is selected with a blue dot. The list title is 'Jobs with location: "3s" [1]'. Below the list, there is a message 'Can't find your job?' with a link 'Change Location'. At the bottom, there is a 'Browse Entire List' link and two buttons: 'Back' and 'Ok'.

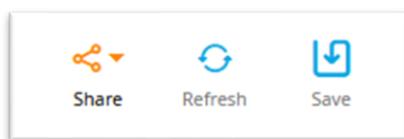
5. Select **Apply** to add the transfer. Or select Add Work Rule, to add a work rule transfer if also needed, such as if the employee was being oriented in that department or working as a charge nurse.



6. Select **Apply** to update the Schedule.
7. The schedule will show in a different color, and the transfer arrows will display. You can hover over the schedule to see the multiple segments and the transfer.



8. Save the Schedule



© 2020-2021 UKG Inc. All rights reserved. For a full list of UKG trademarks, visit www.ukg.com/trademarks. All other trademarks, if any, are the property of their respective owners. No part of this document or its content may be reproduced in any form or by any means or stored in a database or retrieval system without the prior written authorization of UKG Inc. ("UKG"). Information in this document is subject to change without notice. The document and its content are confidential information of UKG and may not be disseminated to any third party. Nothing herein constitutes legal advice, tax advice, or any other advice. All legal or tax questions or concerns should be directed to your legal counsel or tax consultant.

Liability/Disclaimer

UKG makes no representation or warranties with respect to the accuracy or completeness of the document or its content and specifically disclaims any responsibility or representation for other vendors' software. The terms and conditions of your agreement with us regarding the software or services provided by us, which is the subject of the documentation contained herein, govern this document or content. All company, organization, person, and event references are fictional. Any resemblance to actual companies, organizations, persons, and events is entirely coincidental.