

PAYCOM – SCHEDULE SETUP-TEMPLATES & GROUPS

This is where you set up the Template and Groups within the template

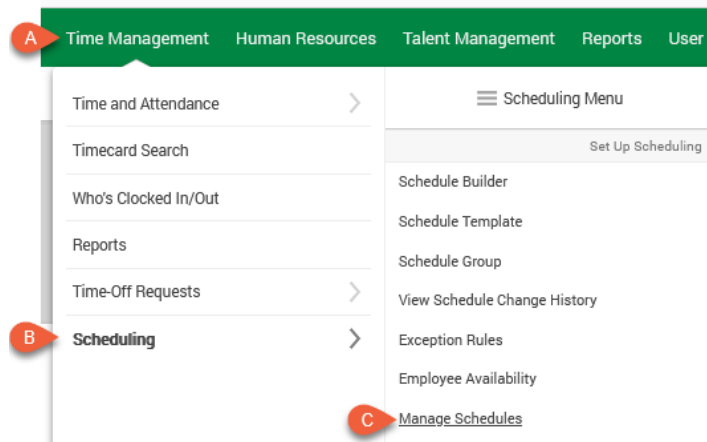
Setting up the Schedule Template is a one-time activity

Setting up the Schedule Groups may need to be edited occasionally as new staff members are added or removed

1

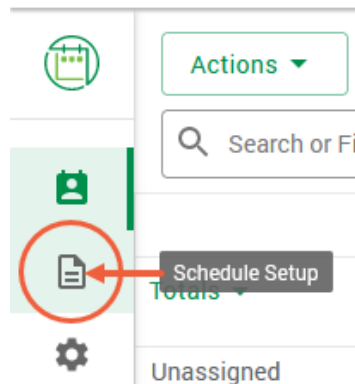
From the main menu of Paycom

- A. Hover over Time Management
- B. Hover over Scheduling
- C. Left click on Manage Schedules



2

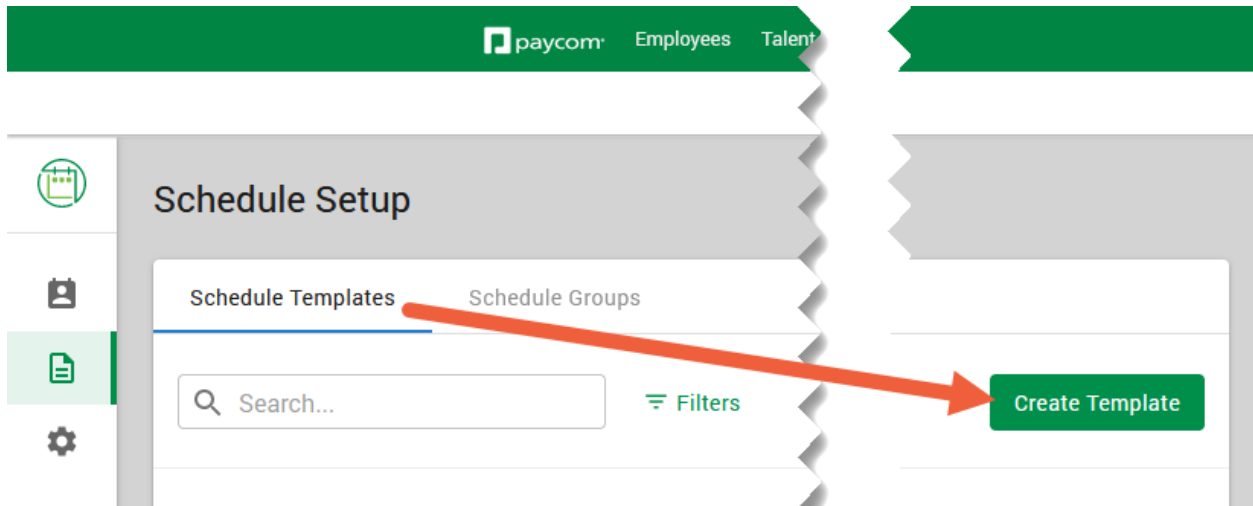
On the left side of the screen, left click on Schedule Setup



SCHEDULE TEMPLATE – ADD NEW TEMPLATE

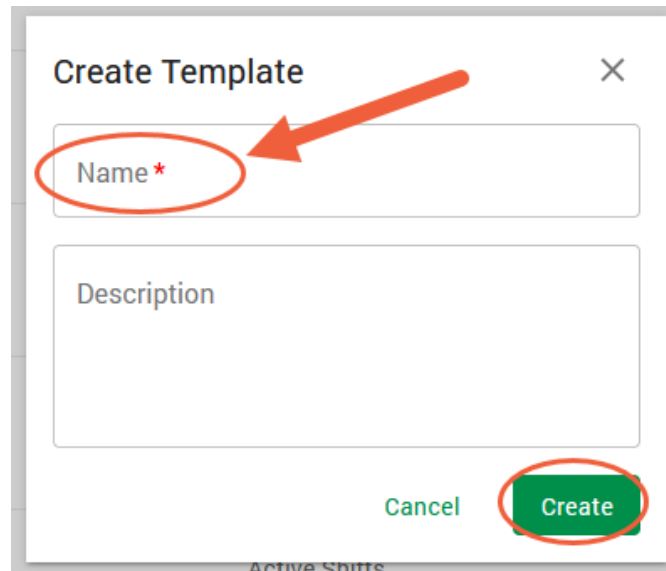
3

The screen should open to the Schedule Templates list. Left click on the Create Template button on the right side of the screen



4

The Create Template window will open. Left click on the Name field and type the full name of your location and the left click on Create

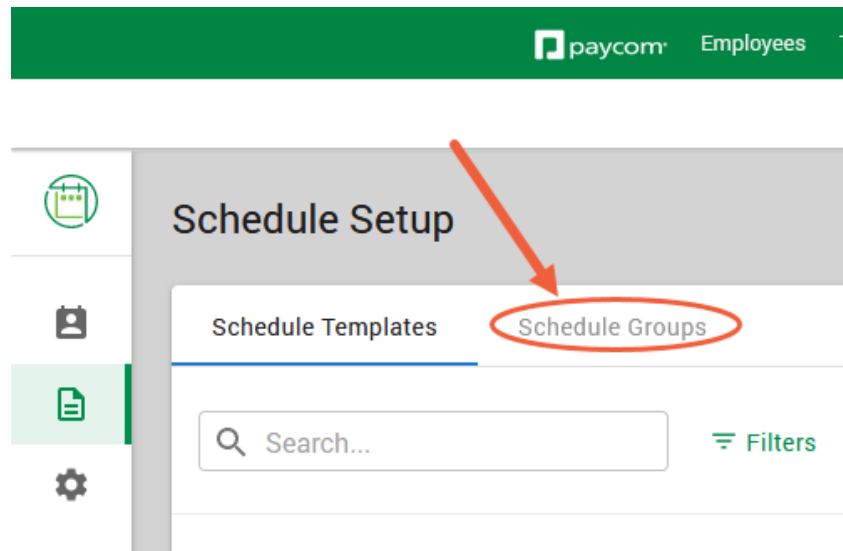


SCHEDULE GROUP – ADDING A GROUP

Once a group is set up the only pieces that would need to be edited are the Approvers and/or the Employees (steps 11 and 12)

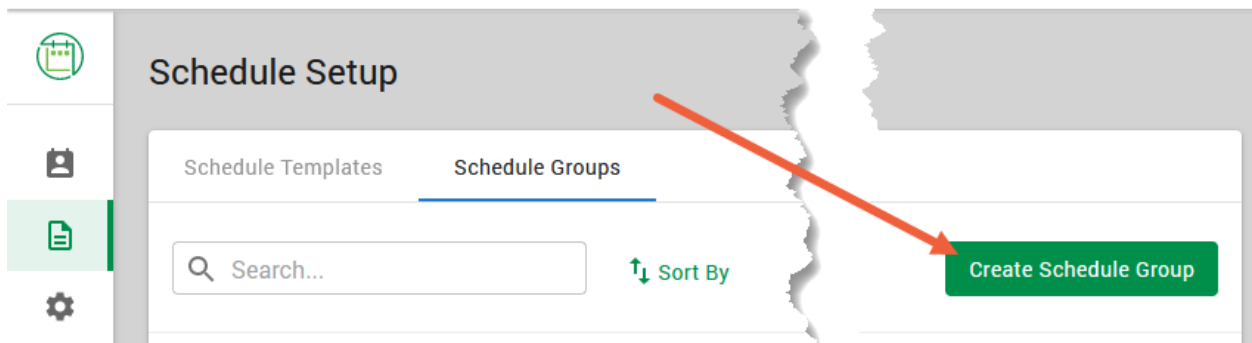
5

To access the Schedule Groups left click on the Schedule Groups tab



6

Left click on Create Schedule Group



7

The Schedule Setup window will open

1. **Name** – Type in the full name of your clinic
2. **Schedule Template** – Left click on the dropdown arrow and select your clinic template
3. **Shift Visibility** – Keep the default settings as they are – no changes
4. **Pad Time-Off** – Select the radio button for Move entire shift to Unassigned
5. **Allocation for Overlapping** – keep the default First Shift selected

The screenshot shows the 'Schedule Setup' interface. At the top left is a '< Back' button. The main title is 'Schedule Setup'. Below the title, there are five numbered callouts:

- 1**: Points to the 'Name *' text input field.
- 2**: Points to the 'Schedule Template' dropdown menu, which contains the text 'Search or Make selection'.
- 3**: Points to the 'Shift Visibility' section, which includes a checkbox for 'Set the number of days in advance recurring shifts can be seen in Employee Self-Service®' and a 'Days *' dropdown menu currently set to '90'.
- 4**: Points to the 'Paid Time-Off' section, which asks 'When an assigned shift has been approved for Paid Time-Off:'. It has three radio button options: 'Keep shift assignment on employee' (selected), 'Post entire shift to Job Board', and 'Move entire shift to Unassigned' (circled in red).
- 5**: Points to the 'Allocation for Overlapping Time' section, which asks 'When shifts overlap the overlapping time applies to this allocation:'. It has two radio button options: 'First Shift' (selected) and 'Last Shift'.



8

The Schedule Setup window – Cont'd

1. Auto Assign Labor Allocation from Schedule – uncheck all the boxes
2. Auto Remove Shift – All of these boxes will remain checked
3. Additional Options – Keep the default check boxes checked (2 & 3) and add a check the last box (Enable warning when...)
4. Recurring Assignments – The default radio button of One-Time Assignments will remain selected

1 Auto-Assign Labor Allocation from Schedule
When an employee clocks in to the following punch, but Labor Allocation is not specified, the shift's Labor Allocation will be automatically assigned:

In Day In Lunch In Break Hours Dollars

2 Auto Remove Shift
When employees have the following statuses their shifts will automatically be removed:

Terminated Deceased Retired Inactive On Leave

3 Additional Options

- Automatically removed shifts will post to the job board
- Schedule exchanges between employees must be approved by an approver
- Enable a warning when assigning a shift that overlaps with another shift
- Allow supervisors and employees to send schedules to timecard
- Enable a warning when scheduling an employee with pending or approved time-off

4 Recurring Assignments
If Recurring Assignments is selected the user will have the ability to include future occurrences when assigning or reassigning the shift to an employee

One-Time Assignments Recurring Assignments

9

Schedule Notifications – These defaults are set and should remain as they are

Schedule Notifications

3 Assigned



10

Approvers – This gives the supervisors access to approve shift exchanges between employees assigned to this schedule group. Multiple supervisors can be assigned to one group.

Employees – Select the employees that you would like to assign this schedule group to. If the employee is not in this group, then they cannot have shifts assigned to them

Approvers ⓘ + Add Approvers

No Active Approvers Set

Employees ⓘ + Add Employees

No Employees Assigned

11

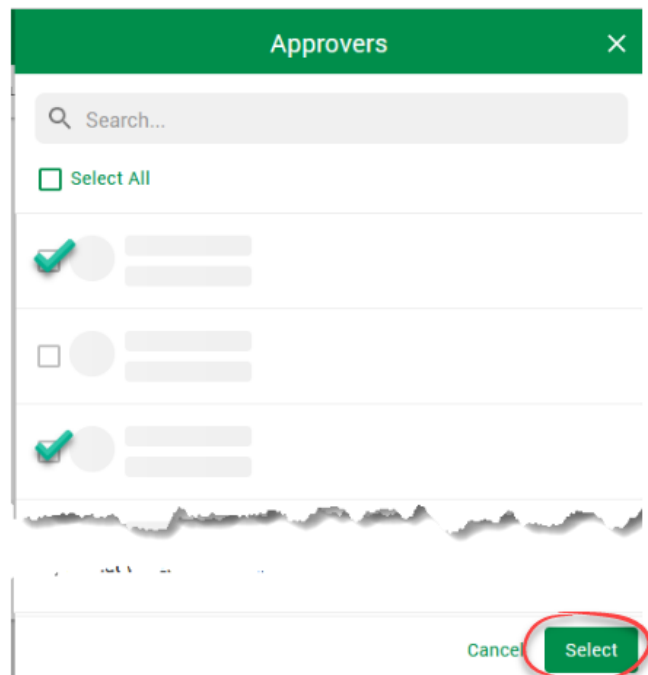
To select the Approvers, left click on Add Approvers. The Approvers window will open with a list of supervisors. Select the people you want to be approvers for this group and then click on Select.

Approvers ⓘ + Add Approvers

No Active Approvers Set

Employees ⓘ + Add Employees

No Employees Assigned



12

To select employees, left click on Add Employees. The Select Employees window will open with a list of employees you have approval access to. Select the people you want to be able to schedule shifts for and then click on Apply.

The image shows a user interface for adding employees. On the left, there are two sections: 'Approvers' with a '+ Add Approvers' button and 'Employees' with a '+ Add Employees' button circled in red. Below the 'Employees' section, it says 'No Employees Assigned'. On the right, a modal window titled 'Select Employees' is open. It has a search bar, a 'Select All' checkbox, and a 'Filters' icon. Below these are three employee entries, each with a checkbox and a name field. The first and third entries have green checkmarks, while the second has an empty checkbox. At the bottom right of the modal, there are 'Cancel' and 'Apply' buttons, with the 'Apply' button circled in red.

13

Once all the settings have been adjusted, left click on Create to make sure the settings are saved

The image shows the final configuration screen. On the left, there are two sections: 'Approvers' with a '+ Add Approvers' button and 'Employees' with a '+ Add Employees' button. Below the 'Approvers' section, there is a button labeled 'RUSHING, TAMI' with an 'X' icon. Below the 'Employees' section, it says '2 Employees Assigned'. On the right, there is a 'Create' button circled in red.

