Primary Work Group Job Aid

Establishing & Maintaining Primary Work Group for Operations

What is a *Primary Work Group*?

In Operations, primary work group represents the type of work that a team member is doing during their scheduled time at Medline. This is a concept that was first introduced in Shiftboard but will now carry over to UKG. Ensuring that each team member is assigned to the correct primary work group allows managers to properly schedule using Advanced Scheduler and allows team members to participate in self-scheduling opportunities in the correct departments in the warehouse.

What is the Value of a Work Group?

Assigning a work group is critically important when posting pick-up shift opportunities. We want to ensure a shift is only available for team members who qualify to complete the specific ProTrack activities. By placing team members in appropriate work group(s) based on experience, it will only allow that sub-section of team members to view additional shift opportunities. UKG managers, please exercise caution when selecting team member(s) to work a shift for a specified work group. Double-check qualifications or requirements before granting final pick-up shift approval.

We have 15 work groups in Operations to choose from:

- Shipping (Dock)
    - Areas include the Shipping Dock and LUM
- Receiving
    - Areas include the Receiving Team
- NON MHE Put Pick Pack
    - Areas include Repack Pick, G2P Picking, Conveyor Picking, Zone Route Starter Pick
- MHE
    - Areas include Reach Truck, OP, Walkie on the Picking and Putaway Team
    - MHE work groups include
        - MHE Pick Walkie Shipping
        - MHE OP Shipping
        - MHE Replens Replenishment
        - MHE Pick Put Receiving
        - MHE Receiving
        - MHE Pick Put

- Inventory
  - Areas include the Inventory Team
- General
  - Areas include General (I.E. Housekeeping, Box Making, Tote Cleaning, Palletizing)
- Maintenance
  - Areas include the Maintenance Team
- Clerical
  - Areas include Clerical Work (I.E. Coordinators, Warehouse Clerks)
- Lumper (Transship Only)
- Transship 2 (Transship Only)

When does the primary work group get established?

Primary work group gets established for each role at the time of hire. During the open requisition process, local HR will work closely with the hiring managers to select the proper work group that seat will fill.

For detailed instructions on the steps in Workday, please visit the Workday Resource Center on The Source.

How can I update the primary work group?

When a change is needed, this needs to be done in Workday. The direct Supervisor / Manager will execute a Job Change selecting the Change Organization Assignments option. This will allow you to update the primary work group.

What happens if a team member needs to be in multiple work groups?

Team members with tenure and experience in multiple departments may need to be represented in multiple work groups in order to ensure they can take advantage of all self-scheduling options available for those groups.

It is important to note that the team member's primary work group should always represent the work they do for the majority of the time they are scheduled. Additional work groups can be maintained in UKG but should not supplement for a primary work group change. In the below example, a team member with a primary work group of Shipping also has the skills and experience to operate in the General group. Here are the steps to take to add this group in UKG:

1. Using the search at the top right hand of your main screen, enter the employee number or employee name and select enter. Once you locate the correct employee from the search results, click their name and navigate to the GoTo Menu. Select People.
2. When you are in the People Editor, navigate under the Timekeeping menu and select Employee Role.
3. Once this menu opens you will see an area called Employee Job Transfer Set. All team members will have a job transfer set preloaded into UKG from Workday. If you notice that a team member doesn't have a job transfer set in UKG, please open a ticket with the HR Zendesk.
4. Click on the current employee job transfer set and select the blue edit box below to add the new work group.
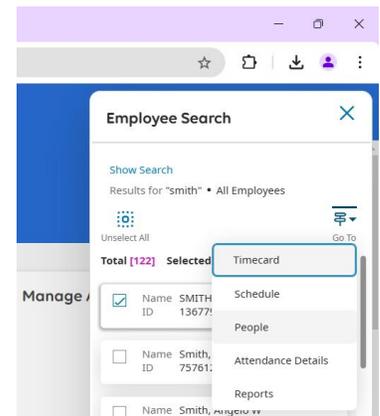
		Employee Job Transfer Set *	Manager Additions	Effective Date *
+		782747 EJTS	All Organizational Groups	12/09/2024
+				
+	⊖			

↗ Override Wage & Work Rules   Edit

5. The organizational group editor will open and allow you to select through the business structure to the correct work group at the correct location. It is extremely important to ensure you are selecting the correct location. Once all selections are made, select save.
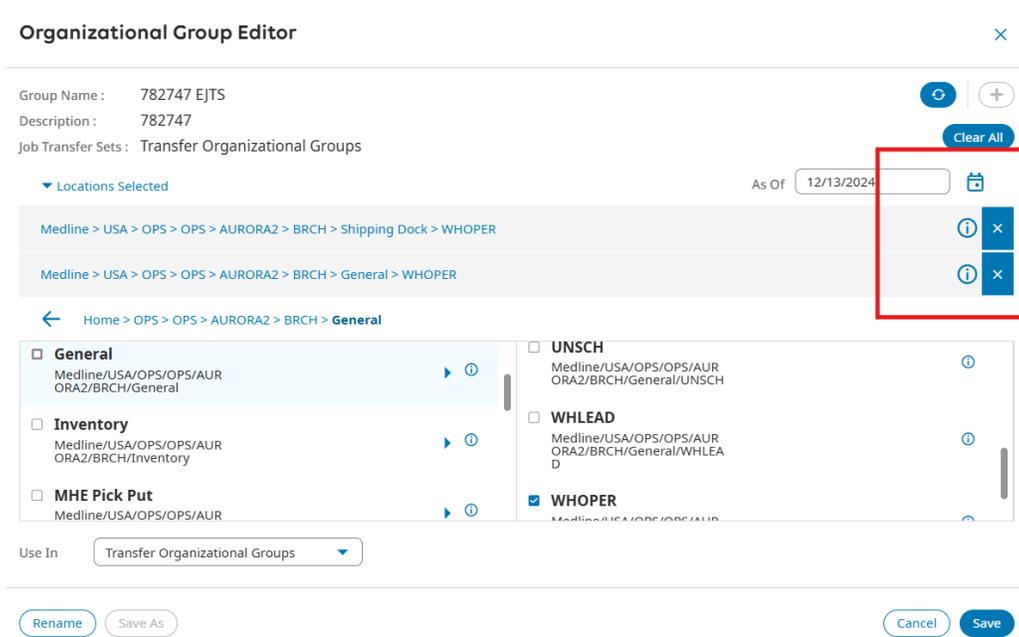
6. You will be taken back to the People Editor where you will also need to ensure you select save at the top right corner of the page.

7. Changes to additional work groups can also be made in this same place. If you have multiple work groups, following this same step above will get you to the organizational group editor where you can use the X next to the additional group to remove. **PLEASE NOTE**: You cannot change primary work groups this way. You will see the primary work group here but edits using this process will be refreshed overnight with the feed from Workday.
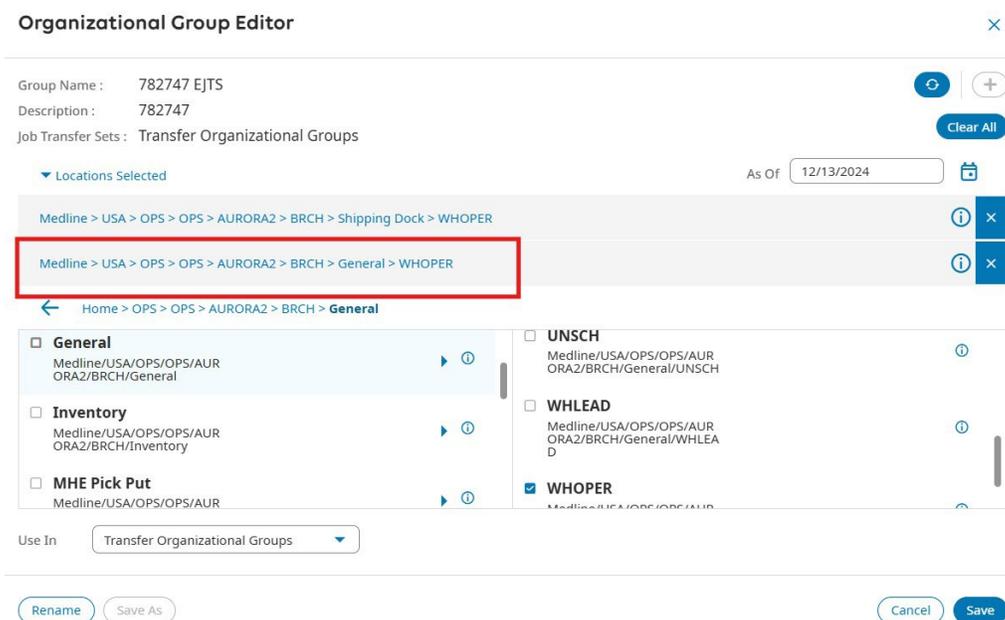
8. If multiple team members need work group updates a ticket can be submitted to the HR Zendesk.