

Transfers (floating Hours)

- This job aid explains how to transfer (float) your hours to a different cost center, work rule, position, or activity.
- Transfers can be completed at the timeclock, punch tile or the timecard.
- Transfers are done using the Transfer Panel.
- The last five transfers made will be saved in the list.

Transfer Panel/Types:

- **Business structure** – used for **Cost Center** transfers using the business structure *key fields are: location (Process Level) and Department
- **Work Rule** – Use to transfer your punches (hours worked) to the correct pay code/pay rule for the type of shift you work. This functionality helps ensure more accurate pay and reduces the need to complete pay code edits while reconciling timecards. See instructions below on how to find your Pay Rule (needed for Work Rule Transfers).

Shifts that use Work Rules:

- 102-Meeting - Class
 - 104-Office Time
 - 108-Orientation
 - 140-Office Work
 - 306-Adder Lead Pay
 - 308-Adder - Charge Pay
 - 310-Adder Preceptor Pay
 - 314-Adder - Charge Pay – Core
 - 340-Adder On Call Extra Pay
 - 350-Adder - Floor Finisher
 - 416-Call - Off Premise *(pays off premise and call backs)
 - 422-Call - Off Premise Holiday*maps with 416.
 - 420--Call - Off Premise Low Need *(pays off premise and call backs)
 - 424-Call - Off Premise Hol Low N *maps with 420
 - 434-Call - On Premise
- **Labor category** – used for transfer of hours to a different **Position** or **Activity Code**.
** NOTE: When floating to another position a business structure transfer AND a labor category transfer are both needed to float your hours correctly.

Example of Business Structure String view in MyTime for Employee

Primary Job
 1/24/2022 - Forever
 FHS/Fairview Southdale Hospital/ED/ED
 Svcs/5445 Emergency Room/ED Tech

FHS	Fairview Southdale Hospital	ED	ED Svcs	5445 Emergency Room	ED Tech
Fairview	Location - often referred to as Process Level	Service line Area	Department Group	4-digit department number	This is a grouping of job titles and is not the HR Job or Position code

How to transfer time via the Punch Tile:

1. In the Punch tile, select the **Transfer** menu.
2. The last five transfers you made are listed. If the transfer you want is not listed, select **Search**.
3. From the Transfer Panel, select the applicable type displayed in blue and follow the transfer steps as outlined below.
4. Select **Apply**. Then select the **Punch** button.

The screenshot displays the MyTime interface for an employee. At the top, a header shows 'HT' and 'Welcome back, HOURLY EE'. The main area is divided into four panels: 'Punch', 'My Timecard', 'My Time Off', and 'My Schedule'. The 'Punch' panel shows the last punch time and a dropdown for 'Type' set to 'Shift In'. Below it is a 'Recent Transfers' section with a red '2' notification and an 'Add Transfer' button with a red '1' notification. The 'My Timecard' panel shows 'Exceptions' with a red '3' notification, and a table of hours: Actual Hours (89.00 Hrs), Scheduled Hours (88.00 Hrs), and Week to Date (16.00 Hrs). The 'My Time Off' panel shows a reason for time off, dates, and a 'Sync with My Calendar' toggle. The 'My Schedule' panel shows a weekly schedule for 2/17 - 2/23. On the right side, a 'Transfer' panel is open, showing options to 'Add Business Structure', 'Add Work Rule', and 'Add Labor Category'. A red '3' notification is visible in the top right corner of the Transfer panel.

How to transfer time via the Timecard:

1. Access your timecard (My Timecard Tile or Main Menu > My Information > My Timecard).
2. Select the cell next to the out punch in the **Transfer** column.
3. The last five transfers you made are listed. If the transfer you want is not listed, select **Search**.
4. The transfer panel opens, follow the steps as outlined.

		Date	Schedule	Absence	Pay Code	Amount	In	Transfer	Out
+	🗑️	Mon 2/07			106-Specia...	8.00			
+	🗑️						7:00 AM		3:30 PM
+	🗑️	Tue 2/08	7:00 AM - 3:30 PM				7:00 AM		3:30 PM
+	🗑️	Wed 2/09	7:00 AM - 3:30 PM				7:00 AM		3:30 PM
+	🗑️	Thu 2/10	7:00 AM - 3:30 PM				7:00 AM		3:30 PM
+	🗑️	Fri 2/11	7:00 AM - 3:30 PM				7:00 AM	;N40-N-FT-FMN8-2-Charge... ;N40-N-FT-FMN8-2-Charge... FHS/UMMC University Campus/Surgery/Surg Svcs/... ;N40-N-FT-FMN8-2-Meeting... ;;;B0017... FHS/UMMC University Campus/ED/ED Svcs/5445 E...	3:30 PM
+	🗑️	Sat 2/12	7:00 AM - 3:30 PM				7:00 AM		
+	🗑️	Sun 2/13	7:00 AM - 3:30 PM				7:00 AM		
+	🗑️	Mon 2/14	7:00 AM - 3:30 PM				7:00 AM		
+	🗑️	Tue 2/15	7:00 AM - 3:30 PM	🚫				Search...	

To add a partial transfer, or transfer in the middle of a shift:

1. Add a new row in the timecard by selecting the **Add Row +** icon to the left of the date of the transfer.
2. Enter the transfer start time in the **In** punch column. Do not enter the **Out** punch.
3. Select the **Transfer** cell next to the **Out** punch column.
4. Select the appropriate transfer using the **Transfer Panel** steps.
5. Enter the **Out** punch of the time the transfer ended.
6. The system will generate purple times during the shift to complete the necessary shift segments. Be sure to review the **Totals** tab to verify the hours earned under each transfer.

		Date	Schedule	Absence	In	Out	Transfer	Pay Code	Amount
+	🗑️	Sun 10/10							
+	🗑️	Mon 10/11	07:00 - 16:00		07:00	16:00			
+	🗑️	Tue 10/12	07:00 - 16:00		09:00		Choose:		
							Search...		

Review timecard totals after transfer:

To review the hours allocated to each shift transfer:

1. Select the **Totals** tab.
2. Review the row with the **(X)** indicating a transfer. (NOTE: x displays for cost center, labor category, position transfers. Work rule transfers will not display with an x).

		Fri 2/11	7:00 AM - 3:30 PM			7:00 AM	;N40-N-FT-FMN8-2-Charge;;
		Sat 2/12	7:00 AM - 3:30 PM			7:00 AM	...:D/ED Svcs/5421 ED Preadmissions/F
		Sun 2/13	7:00 AM - 3:30 PM			7:00 AM	
All	All						
		Location	Job	Cost Center			
		FHS/UMMC University Campus/ED/ED Svcs/5445 Emergency Room	RN	101205445			
		FHS/UMMC University Campus/ED/ED Svcs/5445 Emergency Room	RN	101205445			
		FHS/UMMC University Campus/ED/ED Svcs/5445 Emergency Room	RN	101205445			
		FHS/UMMC University Campus/ED/ED Svcs/5445 Emergency Room	RN	101205445			
		FHS/UMMC University Campus/ED/ED Svcs/5445 Emergency Room	RN	101205445			
		(x)FHS/UMMC University Campus/ED/ED Svcs/5421 ED Preadmissions	(x)RN	(x)101205421			
		(x)FHS/UMMC University Campus/ED/ED Svcs/5421 ED Preadmissions	(x)RN	(x)101205421			
		Totals		Accruals			

Transfer Business Structure – Cost Center Transfer

Example: Employee transferring from FHS/**Fairview Southdale Hospital**/ED/ED Svcs/5445 Emerg ...**St. Johns ED**.

1. From the Transfer panel, select **Business Structure**.
2. The current Job will display (primary position location and job grouping).
3. Click the information icon **i** to view the entire business structure string.
4. Clear out the Job box
5. In the location box, type the department number to transfer (e.g., 5445).
6. Scroll through the list and **select the correct location**.
NOTE: if you do not see the applicable job select "Other"
7. Select **Apply** to make the change.
8. Select **Save**.

Transfer
✕

Business Structure

Current Job

ED Tech

Fairview Sout... 5445 Emergen... i

Location

5445 ✕

🔍

Job

All Jobs 🔍

Jobs with location: "5445" [83]

🔵

ED Tech

St Johns H... 5445 Emer...

i

Transfer Work Rule

1. Prerequisite Step to find your Pay Rule.
2. From the Main Menu > Dataview > My Profile

The screenshot shows the 'Fairview' application interface. At the top, there is a navigation bar with 'My Profile' selected. Below the navigation bar, there are icons for 'Select All', 'Refine', and 'Zoom'. A table of employee records is displayed with columns: Employee ID, Employee Function, Primary Location, Primary Job, Home Labor Category, Badge Number, and Pay Rule. The 'Pay Rule' column for the selected employee is highlighted with a red box.

✓	Employee ID	Employee Fu...	Primary Locatio...	Primary Job	Home Labor Ca...	Badge Number	Pay Rule
<input type="checkbox"/>	HOURLYTRAIN	TRAINING, HOURLY...	FHS/UMMC Univer...	RN	TRAINING HOURLY...	9999999	N40-N-FT-FMN8-2

3. From the Transfer column panel, select Add Work Rule.
4. In the search box, enter all or part of the desired work rule in the Search box. The work rule name corresponds to the employee's pay rule. To find the pay rule, right click on the employee's name within the timecard or expand the columns in the schedule.
5. Select **Apply** to make the change.
6. Select **Save**.

The screenshot shows the 'Transfer' dialog box for the employee 'TRAINING, EXEMPT EE'. The dialog displays the following information:

- Primary Location: FHS/UMMC University Campus/ED/ED Svcs/544 5 Emergenc...
- Work Rule: None
- Cost Center: 101205445
- Labor Categories: TRAINING EXEMPT1.0.0, MANAGER TRAINING

Below the information, there are two buttons: '+ Add Business Structure' and '+ Add Work Rule'. The 'Add Work Rule' button is selected, and a search box is visible. The search results show a list of work rules:

- 0-ST Assign Pay Rule
- 0-ST Work Rule
- 434 ON-CALL ON PREMISE FME0
- 434 ON-CALL ON PREMISE FMN4
- 434 ON-CALL ON PREMISE FMN8
- 434 ON-CALL ON PREMISE OSN4

Labor Category – Position Transfer

1. Double Click employee. Edit Shift slider appears.
2. Select Transfer Employee.
3. Transfer menu opens, select Add **Labor Category**.
4. Select Add Position Number.
5. Select the Applicable position number (NOTE: if the record is blank, this indicates you **do not** have a position record in Lawson to transfer hours to).
6. Select **Apply**.
7. You will also need to do a business structure transfer when floating your position. Refer to instructions above

The screenshot shows the 'Transfer' dialog box for 'Labor Categories'. The dialog displays the following information:

- Labor Categories

Below the information, there is a button: '+ Add Position Number'. The 'Add Position Number' button is selected, and a search box is visible. The search results show a list of position numbers:

- TRAINING HOURLY1
- TRAINING HOURLY1
- TRAINING HOURLY2
- TRAINING HOURLY2

Labor Category – Activity Transfer

1. Double Click employee. Edit Shift slider appears.
2. Select Transfer Employee.
3. Transfer menu opens, select Add **Labor Category**.
4. Select Add Activity.
5. Enter the activity code.
6. Select **Apply**.

