UKG – Timecard Shift Transfers
Quick Reference Guide – People Leaders

This document explains how to transfer employee time on the timecard to accommodate changes in job role and/or location (business structure) for a specified timeframe.

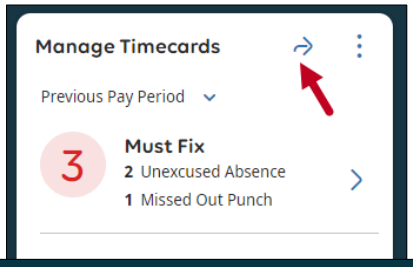
Important

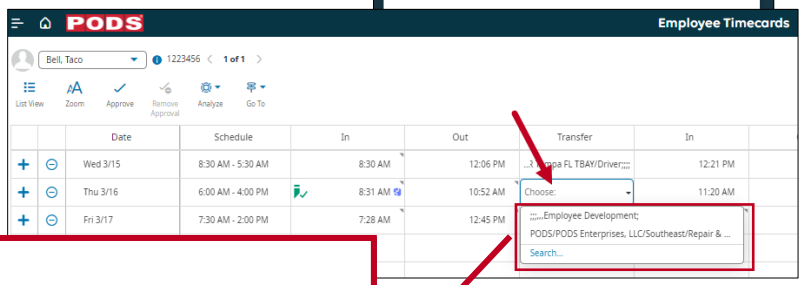
- *Shift Transfers reflect **TEMPORARY** changes in assignment. Permanent job transfers need to be completed using the procedures outlined in the **Job/Org Change Quick Reference Guide***
- *Transfers saved on the employee schedule are automatically reflected on the timecard. The process below applies only to transfers that have NOT been saved on the employee schedule and need to be adjusted on the timecard.*

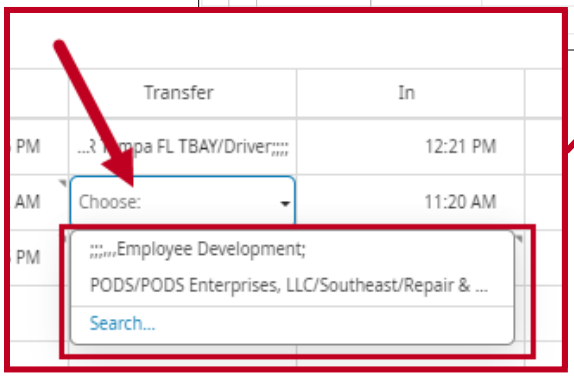
Timecard Shift Transfers

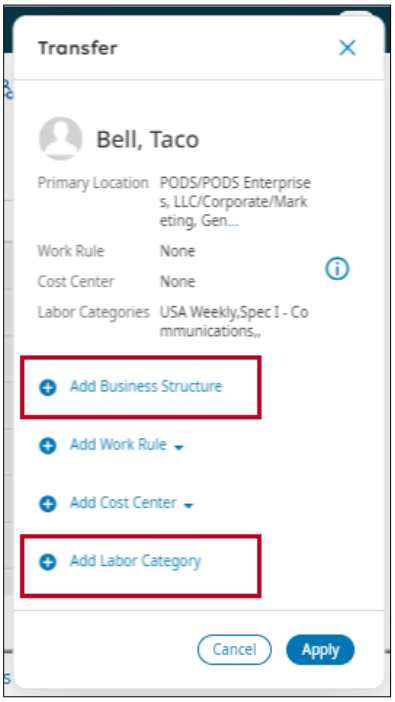
Transfer a Full Shift in the Timecard – Transfer a punch, paycode, or project from the primary job to a different location, job, or labor category.

1. From the **Workforce Management Homepage click** the **All Timecards** link on the **Manage Timecards** tile to locate & open the employee timecard(s) requiring transfer(s)
2. **Click** in the **Transfer column** and **select** one of the **options** displayed OR **click** on **Search** to open the **Transfer panel** on the right
3. In the **Transfer panel select**
   a. **Add Business Structure =** Location and/or Job Title: i.e. Driver, SCW, Manager, etc.
   b. **Add Labor Category =** Type of job worked: i.e. City Service, Container Assembly, Lead, etc.
4. **Click Apply** after all transfer criteria have been added
5. **Click Save** in the upper right corner of the page to save the transfer to the timecard









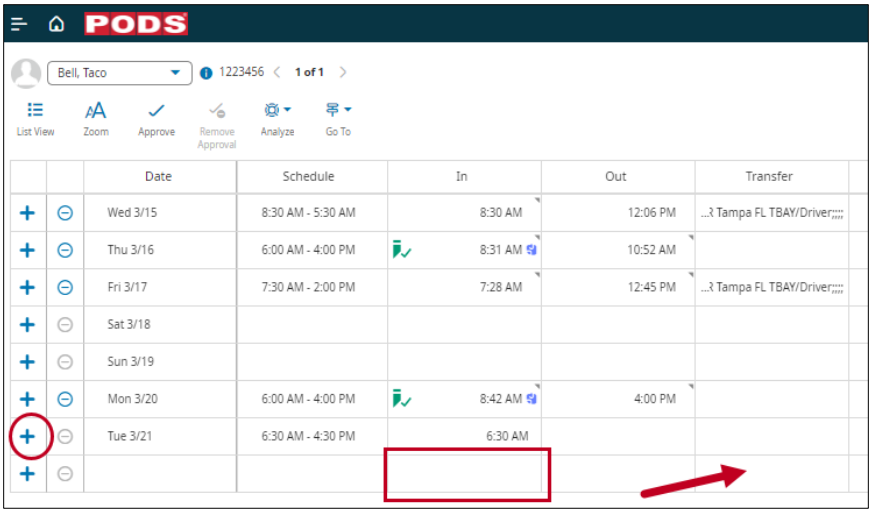
***Tip: Business Structure AND Labor Categories** can be used together for transfers involving both location/job title and job type.*

EXAMPLE

- ***Business Structure** = Driver based out of Tampa working in Sarasota for the day*
- ***Labor Category** = Driver performing City Service job(s) for the morning*
- ***Both Business Structure & Labor Category** = Driver working in the SC doing PODzilla repair for a few hours*
- ***Labor Category (Employee Development)** = New Drivers in PODS New Hire training program*

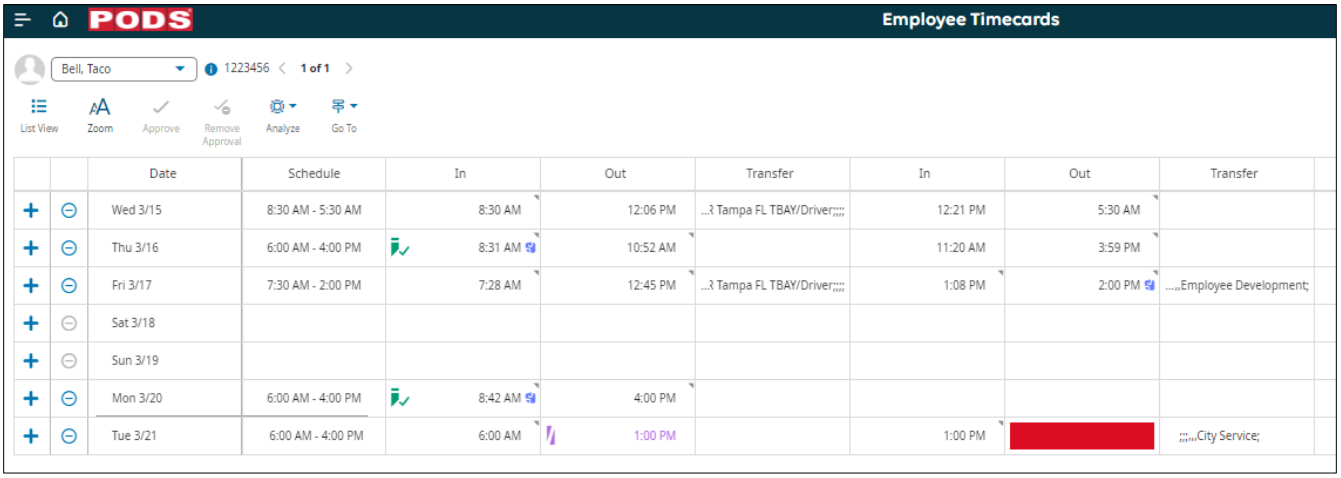
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Add a Partial Transfer/Transfer in the Middle of a Shift – A transfer of partial transfer can be added in the middle of a shift for a specific need.

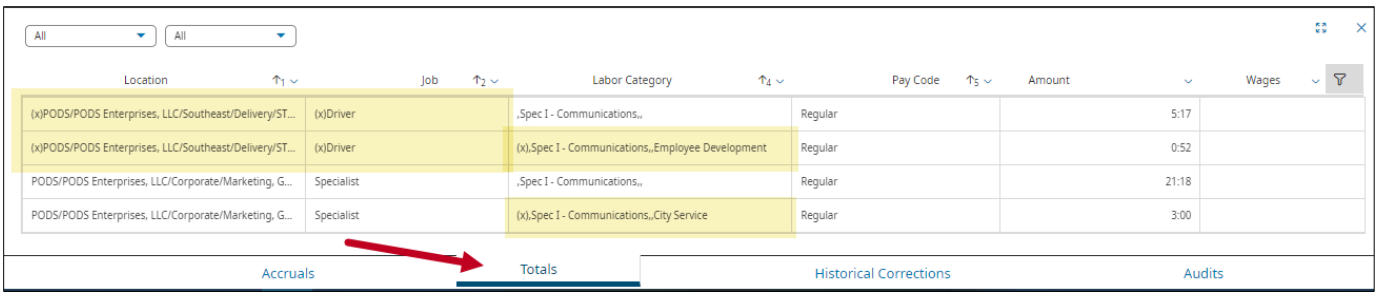


1. Add a new row in the timecard by **selecting** the **+ sign** to the left of the date of the transfer
2. **Enter** the transfer **time in** the **In punch** column
3. **Click** the **Transfer** cell immediately after the In punch and open the Transfer panel
4. **Select** the appropriate **transfer criteria** (as outlined in the Transfer a Full Shift section of this document)
5. **Enter** the **Out punch** of the time the transfer ended

NOTE: The system will add times during the shift to complete the necessary shift segments. Be sure to review the timecard totals to verify the hours earned under each transfer.



Review Transfer Totals – Use the Totals tab at the bottom of the timecard to review transfer category totals. The row with the X denotes transfers

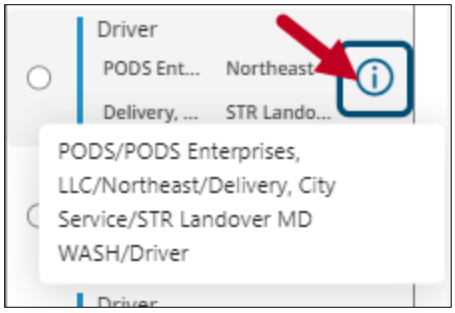


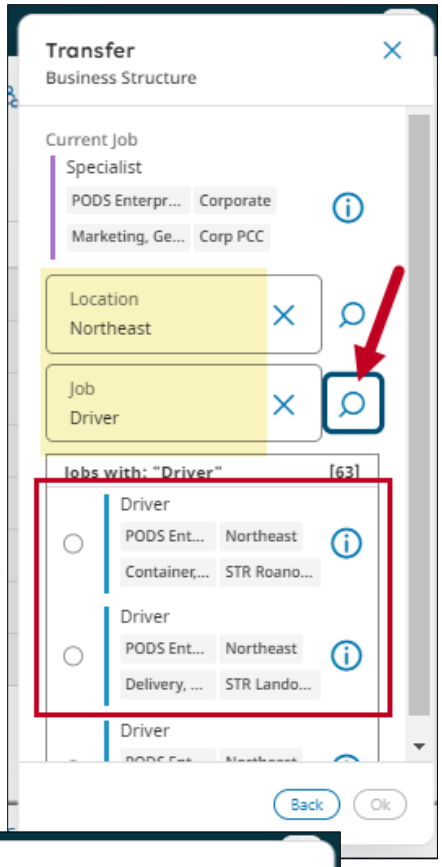
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Using the Business Structure and Labor Categories in the Transfer Panel

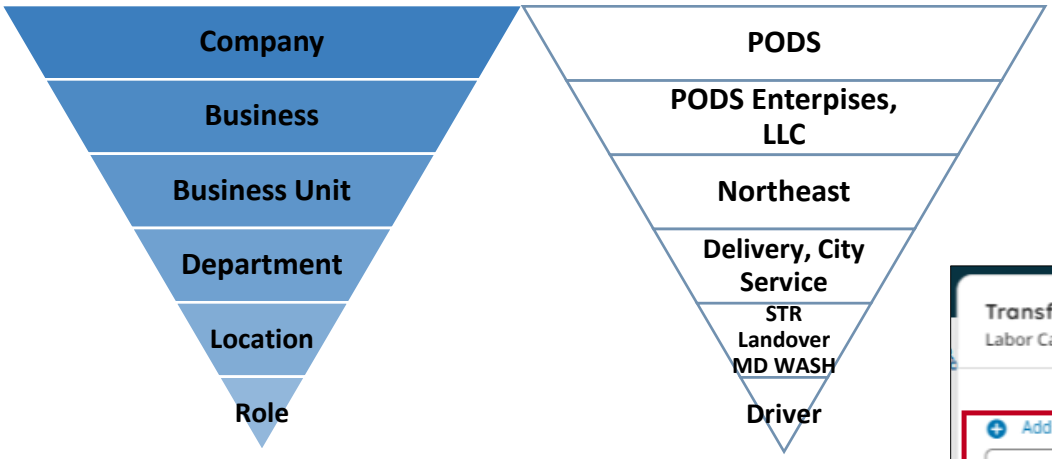
Business Structure – defines where employees can work and the job titles

1. In the **Business Structure panel**, based on the current job, **select** the same job in a **different location** or a **different job** in the same location OR **enter search** criteria in the fields and click the search button**.**
2. **Select results** from the dropdown list
3. **Click** the **info icon** next to any result to view full result details





*Tip: **Location** listings are organized from the highest level business entity narrowing to a specific role.*



Labor Categories – defines the type of work the employee is doing

1. **Select** the **type of work** from the dropdown list OR **enter search criteria** in the search field

