

CalTime: Friendly Name & Work Rule Transfers

How to Perform a Friendly Name Transfer

When an employee works multiple jobs (i.e. student employee), it may be necessary to add a friendly name transfer on the employees timesheet to denote which job they are working. In order to accomplish this, a friendly name" has been designated to represent each of the employee's jobs. Open the employee's timesheet and click the downward arrow in the transfer column for the day you wish to apply the friendly name transfer and select "Search".

Save Actions ▾ Punch ▾ Amount ▾ Accruals ▾ Comment ▾ Approvals ▾							
	Date	Pay Code	Amount	In	Transfer	Out	
X	Sun 1/31						
X	Mon 2/01			7:00AM		3:30PM	
X	Tue 2/02			7:00AM		3:30PM	
X	Wed 2/03			7:00AM		3:30PM	
X	Thu 2/04			7:00AM		3:30PM	
X	Fri 2/05			7:00AM		3:30PM	
X	Sat 2/06						
X	Sun 2/07						
X	Mon 2/08			7:00AM		3:30PM	
X	Tue 2/09			7:00AM		3:30PM	
X	Wed 2/10			7:00AM		3:30PM	
X	Thu 2/11			7:00AM		3:30PM	
X	Fri 2/12			7:00AM		3:30PM	
X	Sat 2/13						

After clicking the search option you will be taken to a transfer screen. After selecting Labor Account, Click on the down arrow on the Job level.

Transfer

Name: Lin. Dolly

Job
Labor Account
Work Rule

Job Transfer | Labor Account | Work Rule

Add Labor Account

Clear All

Job: Employee ID:

Location: LL6:

Project: LL7:

Supervisor ID:

Cancel Apply

With HCM open to the employees record, go to the Payroll tab and copy the friendly name. Paste the friendly name into the Smart Search area. Click on the transfer to insert it into the Job area.

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Job Transfer | Labor Account | Work Rule

Add Labor Account

Job: Employee ID:

Location: Too many entries, refine search.

Project:

Supervisor ID:

Job Transfer | Labor Account | Work Rule

Add Labor Account Clear All

Job: Employee ID:

Location:

Project:

Supervisor ID:

Cancel Apply

Job Transfer | Labor Account | Work Rule

Add Labor Account Clear All

Job: X Employee ID:

Location:

Project:

Supervisor ID:

LL6:

LL7:

Cancel Apply

Note: For Type C employee, the friendly name can be found in HCM under Earnings Distribution.

Click on Apply and the friendly name will be inserted into the transfer area. Click on Save to save your work.

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After clicking "Apply" the transfer should now appear on the employees timesheet. At this time you would want to click the save button in the top left corner.

Date	Pay Code	Amount	In	Transfer	Out
Sat 6/03					
Sun 6/04					
Mon 6/05			7:00AM	JMEPMB-4921U-2/////	3:30PM
Tue 6/06			7:00AM	JLIB-LIFE-BUCHMAN-LJ/////	3:30PM
Wed 6/07			7:00AM	JMEPMB-4921U-2/////	3:30PM
Thu 6/08					
Fri 6/09					

How to Perform a Work Rule Transfer

Overview:

Depending on the population of employees you are responsible for you may have to perform work rule transfers for your employees. A work rule is a compilation of attributes that defines how an employee will be compensated. All employees have default work rules assigned to them which include union affiliation, Fair Labor Standards Act (FLSA) status, compensatory or overtime preference, shift occurrence, shift duration and meal duration. A typical work rule looks like this: PPSM_NonEx_OTP Day 30d SS. This example identifies a CUE-affiliated non-exempt employee who receives compensatory time, works the evening shift and has a thirty-minute meal deduction. The illustration below shows the anatomy of a work rule:

PPSM_NonEx_OTP Day 30d SS

CX	Non-EX	CTP	30d	PFM	Perquisite
Union/rep Code: CX=Clerical TX=UPTE EX=AFSCME SX=AFSCME KB=Skilled Crafts 99=nonrep PA=Police NX=Reg. Nurses HX = Health Care RX = UPTE	FLSA Status: Exempt or Non-exempt	Overtime: CTP=Comp-time Premium OTP = Overtime premium CTD= Comp Time double OTD=Overtime Double CT2=Comp time 2 buck	Shift Type: Day Eve Night Weekend May Include 08,10,12 hour shift length	Meal Deduction: 30,60, or 00	If employee is eligible for a meal perquisite <i>(typically employees that work in food service positions)</i>

Step 1: Determine which work rule your employees is categorized in.

Open the employee's timesheet and hover your cursor over the employees name in the grey box above the employee's timesheet.

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TIMECARD

Loaded: 2:59PM

Name & ID Haggarty001, Carl 009906001
 Time Period Current Pay Period

Save Actions Punch Amount Accruals Comment Approvals				Haggarty001, Carl	
Date	Pay Code	Amount		In	Out
Sun 1/31					
Mon 2/01					
Tue 2/02					
Wed 2/03					
Thu 2/04					
Fri 2/05					
Sat 2/06					
Sun 2/07					
Mon 2/08					
Tue 2/09					
Wed 2/10					
Thu 2/11				7:00AM	3:30PM
Fri 2/12				7:00AM	3:30PM
Sat 2/13					

Haggarty001, Carl
Pay Rule:
CX_NonEx_OTP Day 30d
 beginning of time-forever

Employment Terms:
 Exempt 8 Hour Holiday ET
 3/26/2015-forever

Primary Account(s):
 1/01/2013-forever
 STDT 3-LIB-CLLAW/-/009915001/009906001/Training Set 001/-
 STDT 3-LIB-CLLAW/-/Parkinson001, Deborah/Haggarty001, Carl
 /Training Set for the 001 Employee Set/-

Daily: 0.0 Weekly: 0.0 Per Pay Period: 0.0

Step 2: Select the date you would like to apply the work rule transfer and click the downward arrow in the transfer column. Select search.

As an example our user is going to trade shifts with a co-worker for the evening shift Friday 2/5 and so they need to be able earn shift differential. To input the work rule transfer for this change you would want to click the downward arrow in the transfer column for the Friday 2/5 and select "Search".

TIMECARD

Last Saved: 3:23PM

Name & ID Haggarty001, Carl 009906001
 Time Period Current Pay Period

Save Actions Punch Amount Accruals Comment Approvals				In	Transfer	Out
Sun 1/31						
Mon 2/01				7:00AM		3:30PM
Tue 2/02				7:00AM		3:30PM
Wed 2/03				7:00AM		3:30PM
Thu 2/04				7:00AM		3:30PM
Fri 2/05				3:30PM		12:00AM
Sat 2/06						
Sun 2/07						
Mon 2/08				7:00AM		3:30PM
Tue 2/09				7:00AM		3:30PM
Wed 2/10				7:00AM		3:30PM
Thu 2/11				7:00AM		3:30PM
Fri 2/12				7:00AM		3:30PM
Sat 2/13						

;CX_NonEx_OTP Eve 30d
 STDT 2-LIB-CLLAW/////

LIBRARIAN-MOFFIT/////

LIBRARIAN-DOE/////

TDT2-ADMTEL-CLLAW/////

Search... Alt-S

A "Select Transfer" screen will open. drop down box in the bottom left corner titled "Work Rule" which you will want to click to access the work rules list. Since our example user normally has a work rule of CX_NonEx_OTP Day 30d and they will be covering for an evening shift we want to give them the CX_NonEx_OTP Eve 30d work rule. Once that has been selected click "OK" at the bottom of the "Select Transfer" screen to add the work rule transfer for the selected shift.

Transfer

Name	Lin, Dolly
Job	
Labor Account	
Work Rule	PPSM_NonEx_OTP Day 60d SS

Job Transfer | Labor Account | **Work Rule**

Add Work Rule Clear All

Search List

- PPSM_NonEx_OTP Day 00d SS
- PPSM_NonEx_OTP Day 30d
- PPSM_NonEx_OTP Day 30d PFM
- PPSM_NonEx_OTP Day 30d PFM SS
- PPSM_NonEx_OTP Day 30d SS
- PPSM_NonEx_OTP Day 60d
- PPSM_NonEx_OTP Day 60d PFM
- PPSM_NonEx_OTP Day 60d PFM SS
- PPSM_NonEx_OTP Day 60d SS
- PPSM_NonEx_OTP Day CR

After you get back to the user's main timesheet page click the save button at the top left corner of the timesheet and the change will be complete. At this point you should see the timesheet as follows as well as 8 hours of shift differential listed in the "Totals & Schedules" tab at the bottom of the screen.

<input type="checkbox"/>	<input type="checkbox"/>	Thu 6/08				
<input type="checkbox"/>	<input type="checkbox"/>	Fri 6/09		7:00AM	;;PPSM_NonEx_OTP Day 60d SS	4:00PM
<input type="checkbox"/>	<input type="checkbox"/>	Sat 6/10				

TOTALS & SCHEDULE			ACCRUALS	AUDITS
All				
Account	Pay Code	Amount		
...LLAW/-/009915001/009906001/Training Set 001/-	Shift Diff Evening	8.0		
...LLAW/-/009915001/009906001/Training Set 001/-	Regular	80.0		