

Guide to Managing Work Rule Transfers

Purpose: Supervisors of employees with OVERNIGHT schedules need to make sure that the correct schedules are used to ensure that employees are paid correctly.

| Reference Guide Details | |
|-------------------------|---|
| Guide Objectives | Upon completion, the user will: <ul style="list-style-type: none"> • Understand the purpose of a Work Rule Transfer • Know how to record a transfer as an employee • Know how to record a transfer on a timecard • Know how to apply a transfer on a schedule |
| Prerequisites | Access to Kronos |
| Kronos Role | Super Users and Supervisors/Managers |
| Revision Date | 07/20/2021 |

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What is a Work Rule Transfer

A work rule transfer is a way for supervisors or administrators to indicate to Kronos that an employee needs to use a set of rules that are not the default. These are used for one time overrides or ongoing overrides.

A few examples of situations where a work rule transfer are used are:

- An employee works a shift with 1 hour lunch deduction instead of .5 hours
- An employee will be changing to overnights and the majority of hours need to credit the next day
- A trade employee asked to work an early shift and will not qualify for overtime for that portion of the shift

A work rule transfer can be made directly to the timecard or on the employees schedule. If the change is ongoing for more than 5 days, the recommendation is to make the update to the schedule.

Work rules are based on union/pay groups so look for codes matching your employees specific group. If you are unsure which code to use, contact a payroll administrator for help.

Transfer on the Timecard

Work rule transfers made on the timecard generally cover an exception or one time occurrence. If you are finding that you are making this update on a regular basis, you may want to consider using the Schedule option for work rule transfers.

For any type of work rule transfer, you can select the appropriate rule from the Transfer column on the appropriate day (1). The dropdown will have any previously selected rules or a search option.

| | Date | Schedule | In | Out | Transfer |
|-----|----------|---------------|--------|---------|---|
| + x | Sun 7/18 | | | | |
| + x | Mon 7/19 | 6:30AM-3:00PM | 4:00AM | 12:30PM | |
| + x | Tue 7/20 | 6:30AM-3:00PM | 4:00AM | 12:30PM | TFAC Trades EarlyStart TFAC Call Back TFAC TH AFSCME Tech |

To search for a work rule, select the Search option in the drop down. You will get a pop up window like this:

- 1 - Click on the Work Rule tab
- 2 - Enter the partial name to search
- 3 - Click on the correct rule
- 4 - Click Apply

The screenshot shows a 'Transfer' window with the following elements:

- Transfer** (Title)
- Name**, **Job**, **Labor Account**, **Work Rule** (Fields)
- Job Transfer**, **Labor Account**, **Work Rule** (Tabs)
- Add Work Rule** (Section Header)
- tfac t** (Search Input)
- TFAC Teamsters**, **TFAC Teamsters OH**, **TFAC Teamsters 1H**, **TFAC Teamsters H**, **TFAC Teamsters HSchIN**, **TFAC Teamsters PT**, **TFAC Teamsters PT SchIN**, **TFAC Teamsters SchIN**, **TFAC Temp Cas**, **TFAC TH AFSCME Tech** (List of Work Rules)
- Apply** (Button)

Remember to save all changes on the timecard!

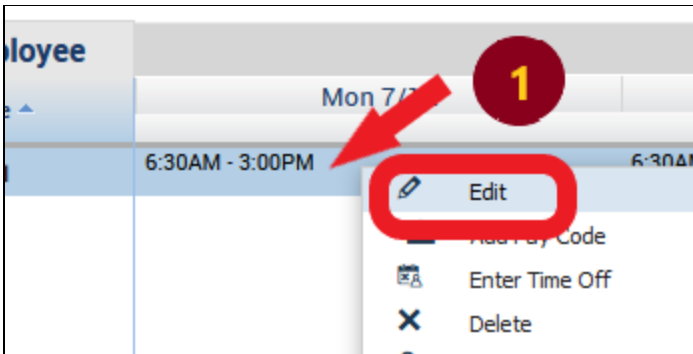
Transfer on a Schedule

If a work rule can be applied on going for an employee, then it is best to apply it to their schedule. This can be done both permanently or temporarily based on how you manage the employee's schedule.

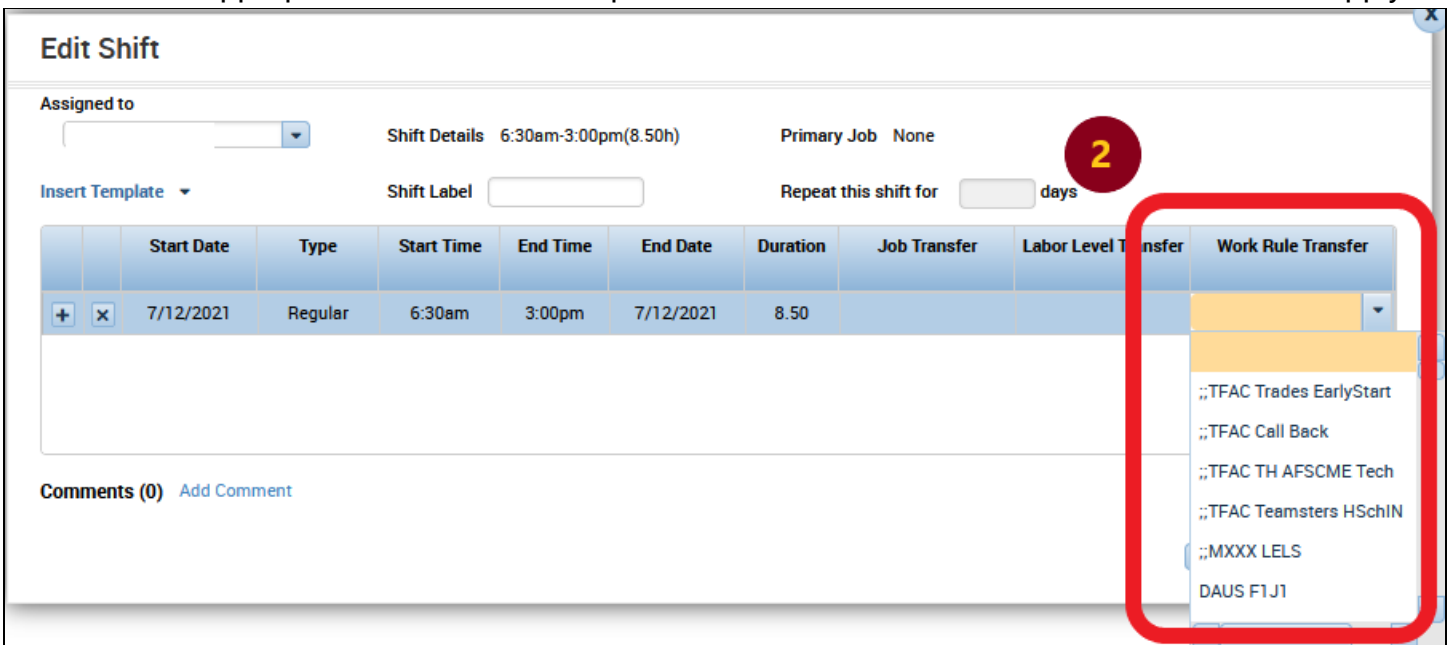
One Time Change

To create a temporary update to individual days, update only the schedule for that day.

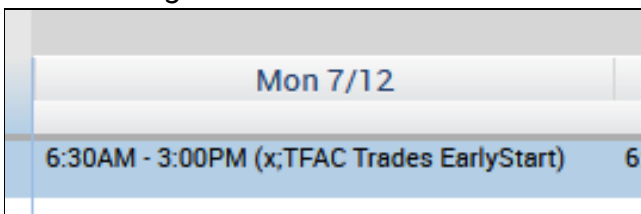
1. Open the employee's schedule and right click on the times for the day being updated.



2. Choose the appropriate rule from the drop down menu in the Work Rule Transfer field. Click apply.



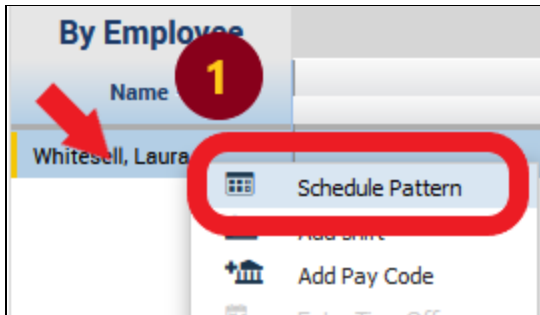
3. The change will reflect on the time for the day. Click on the Save option for the schedule.



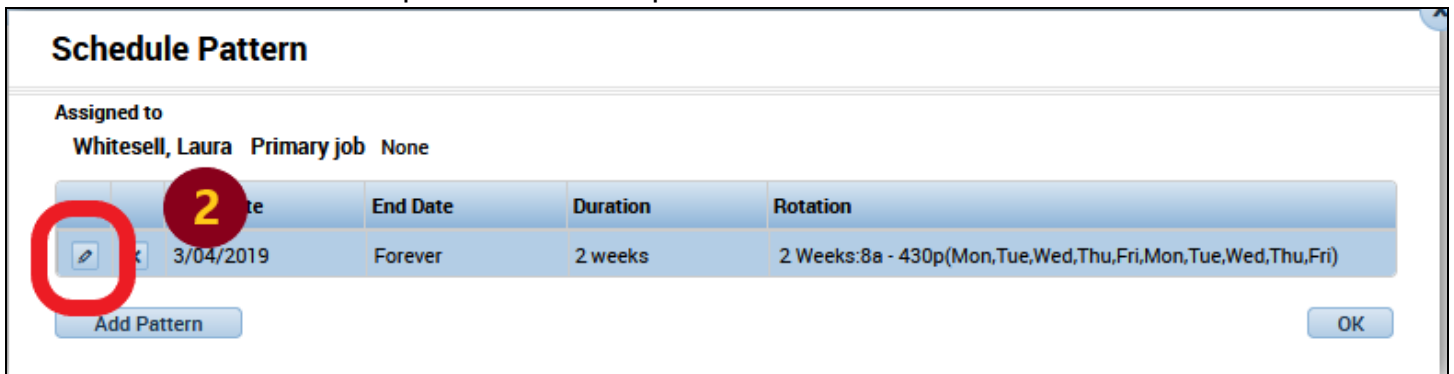
Ongoing Change

To create an ongoing update, change the schedule pattern for the employee.

1 - Open the schedule for the employee and right click on their name. Select Schedule Pattern.



2 - Click on the Edit icon to open the schedule pattern or the Add Pattern to start a new schedule.



3- Adjust the Anchor Date and Start Date as needed. These should be the same and start on a Monday.

4 - If the pattern is ongoing, select the radio button for "Forever". If it is a temporary schedule, enter an end date. Click the Override Other Patterns check box to make this schedule the only one for the employee.

5 - Right click on the time and select Edit Shift. You will get a pop up window. Update any times and Work Rule Transfer as needed (5a). Click apply.

6 - Repeat step 5 on all applicable days.

7 - Click Apply.

Save changes on the schedule by clicking save in the upper right corner.

Schedule Pattern

Assigned to

Smith, Todd Primary job None

| | Start Date | End Date | Duration | Rotation |
|--|------------|----------|----------|--|
| | 3/04/2019 | Forever | 2 weeks | 2 Weeks:8a - 430p(Mon,Tue,Wed,Thu,Fri,Mon,Tue,Wed,Thu,Fri) |

Edit Pattern

Anchor Date: Start Date: End Date:

Define Pattern for: Week(s) Day(s)

Forever Override Other Patterns

Add Shift | Add Pay Code | Shift Template | Pattern Template

| | No. | Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
|--|-----|--------|---------|---------|-----------|----------|---------|----------|
| | 1 | | 8a-430p | 8a-430p | 8a-430p | 8a-430p | 8a-430p | |
| | 2 | | | | | | | |

- Add Shift
- Edit Shift**
- Add Pay Code
- Cut

Edit Shift

Assigned to

Shift Details 6:30am-3:00pm(8.50h)

Primary Job None

Insert Template

Shift Label

Repeat this shift for days

| | Start Date | Type | Start Time | End Time | End Date | Duration | Job Transfer | Labor Level Transfer | Work Rule Transfer |
|--|------------|---------|------------|----------|-----------|----------|--------------|----------------------|--------------------|
| | 7/12/2021 | Regular | 6:30am | 3:00pm | 7/12/2021 | 8.50 | | | |

Comments (0) [Add Comment](#)

- ;;TFAC Trades EarlyStart
- ;;TFAC Call Beck
- ;;TFAC TH AFSCME Tech
- ;;TFAC Teamsters HSCHIN
- ;;MXXX LELS
- DAUS F1J1

Specific Examples

Work Rule Transfers for Overnight Shifts

Overnight shifts are set up using a work rule that helps the system calculate hours correctly. This is displayed on the timecard in a couple of different ways.

1. The date for punches will include a "+". This indicates the hours start on that day but actually count toward the next day. In this example, hours starting on 7/08 will count toward 7/09.
2. The Transfer code should display "TXXX Group SchIN" using Trades, TMS, or CS for the specific group.
3. The schedule will have a double arrow indicating that hours on that day belong to the next day. Similar to the "+" indicator.

| | Date | Schedule | In | Out | Transfer | Pay | Amo... | Shift | Daily | Period |
|-----|-----------|-------------------|---------|--------|---------------------|-----|--------|-------|-------|--------|
| + X | Wed 7/08+ | 11:00PM-7:30... ⇄ | 10:58PM | 7:29AM | ::TXXX Trades SchIN | | | 7.98 | 8.0 | 24.0 |
| + X | Thu 7/09+ | 11:00PM-7:30... ⇄ | 11:00PM | 7:30AM | ::TXXX Trades SchIN | | | 8.0 | 7.98 | 31.98 |
| + X | Fri 7/10 | | | | | | | | 8.0 | 39.98 |
| + X | Sat 7/11 | | | | | | | | | 39.98 |
| + X | Sun 7/12+ | 11:00PM-7:30... ⇄ | 11:00PM | 7:30AM | ::TXXX Trades SchIN | | | 8.0 | | 39.98 |
| + X | Mon 7/13+ | 11:00PM-7:30... ⇄ | 11:00PM | 7:30AM | ::TXXX Trades SchIN | | | 8.0 | 8.0 | 47.98 |
| + X | Tue 7/14+ | 11:00PM-7:30... ⇄ | 11:00PM | 7:30AM | ::TXXX Trades SchIN | | | 8.0 | 8.0 | 55.98 |
| + X | Wed 7/15+ | 11:00PM-7:30... ⇄ | 11:00PM | 7:30AM | ::TXXX Trades SchIN | | | 8.0 | 8.0 | 63.98 |
| + X | Thu 7/16+ | 11:00PM-7:30... ⇄ | 11:00PM | 7:30AM | ::TXXX Trades SchIN | | | 8.0 | 8.0 | 71.98 |
| + X | Fri 7/17 | | | | | | | | 8.0 | 79.98 |
| + X | Sat 7/18 | | | | | | | | | 79.98 |
| + X | Sun 7/19 | 11:00PM-7:30... ⇄ | | | | | | | | 79.98 |
| + X | Mon 7/20 | | | | | | | | | |

| Accruals | | Debit-Credit | | Totals | Audits | Historical Corrections | |
|----------|-----|------------------------------|-------------|--------|--------|------------------------|--|
| All | | All | | | | | |
| Location | Job | Account | Pay Code | Amount | Wages | | |
| | | TFAC/Z0414/10303/212993/0/-/ | 3rdShift1.0 | 79.98 | \$0.00 | | |
| | | TFAC/Z0414/10303/212993/0/-/ | Regular | 79.98 | \$0.00 | | |

Hours entered on Sunday (7/19 in this example) will display on the next pay period. Any hours entered and saved will not display in the pay period they do not belong in so if a supervisor reviewing the time card for PPD 7/6-7/19 and adds time on 7/19, those hours will be blank on the view for PPD 7/6-7/19 and display on the time card for PPD 7/20-8/2.

| | | | | | | | | | | |
|-----|----------|-----------------|--|--|--|--|--|--|-----|-------|
| + X | Fri 7/17 | | | | | | | | 8.0 | 79.98 |
| + X | Sat 7/18 | | | | | | | | | 79.98 |
| + X | Sun 7/19 | 11:00PM-7:30... | | | | | | | ?? | 79.98 |
| + X | Mon 7/20 | | | | | | | | | |

Accruals Debit-Credit Totals Audits Historical Corrections

All All

2 of 3 2818423 Loaded: 2:52 PM Next Pay Period 3 Employee(s)

View Approve Timecard Sign Off Accruals Actions Print Timecard Refresh Calculate Totals

| Date | Schedule | In | Out | Transfer | Pay Code | Amo... | Shift | Daily | Period |
|-----------|-----------------|---------|--------|---------------------|----------|--------|-------|-------|--------|
| Sun 7/19+ | 11:00PM-7:30... | 11:00PM | 7:30AM | ;;TXXX Trades SchIN | | | 8.0 | | |
| Mon 7/20 | 11:00PM-7:30... | | | | | | | 8.0 | 8.0 |
| Tue 7/21 | 11:00PM-7:30... | | | | | | | | 8.0 |
| Wed 7/22 | 11:00PM-7:30... | | | | | | | | 8.0 |
| Thu 7/23 | 11:00PM-7:30... | | | | | | | | 8.0 |

Trades Early Start

If a Trade employee requests to temporarily start before 6am and the supervisor approves, then the supervisor will need to adjust the timecard or schedule for the employee and add a work rule transfer. The work rule that should be used will be "TFAC Trades EarlyStart".

In this example, the employee and supervisor agreed that the employee would start at 4am based on the employee's request. If the employee starts their shift early but the supervisor has not added the proper code, the daily totals will show 2 hours OT and 6 Regular.

| Date | Shift | Start | End | Code | OT | Reg | Total |
|----------|---------------|--------|---------|--------------------------|------|------|-------|
| Mon 7/19 | 6:30AM-3:00PM | 4:00AM | 12:30PM | | 8.0 | 8.0 | 8.0 |
| Tue 7/20 | 6:30AM-3:00PM | 4:00AM | 12:30PM | ::TFAC Trades EarlyStart | 8.0 | 8.0 | 16.0 |
| Wed 7/21 | 6:30AM-3:00PM | 4:00AM | 2:30PM | ::TFAC Trades EarlyStart | 10.0 | 10.0 | 26.0 |

| Accruals | | Debit-Credit | | Totals | | Audits | | Historical Corrections | |
|----------|-----|------------------------------|----------|--------|--------|--------|--|------------------------|--|
| Daily | All | Totals for 7/19/2021 | | | | | | | |
| Location | Job | Account | Pay Code | Amount | Wages | | | | |
| | | TFAC/Z0411/10282/235794/0/-/ | Overtime | 2.0 | \$0.00 | | | | |
| | | TFAC/Z0411/10282/235794/0/-/ | Regular | 6.0 | \$0.00 | | | | |

If the supervisor correctly adds the work rule transfer, then the totals for the day will show 8 Regular.

| Date | Shift | Start | End | Code | OT | Reg | Total |
|----------|---------------|--------|---------|--------------------------|------|------|-------|
| Tue 7/20 | 6:30AM-3:00PM | 4:00AM | 12:30PM | ::TFAC Trades EarlyStart | 8.0 | 8.0 | 16.0 |
| Wed 7/21 | 6:30AM-3:00PM | 4:00AM | 2:30PM | ::TFAC Trades EarlyStart | 10.0 | 10.0 | 26.0 |

| Accruals | | Debit-Credit | | Totals | | Audits | | Historical Corrections | |
|----------|-----|------------------------------|----------|--------|--------|--------|--|------------------------|--|
| Daily | All | Totals for 7/20/2021 | | | | | | | |
| Location | Job | Account | Pay Code | Amount | Wages | | | | |
| | | TFAC/Z0411/10282/235794/0/-/ | Regular | 8.0 | \$0.00 | | | | |

If the employee works overtime on a day that has an EarlyStart rule, they will still have OT but not for the time prior to 6am.

| Date | Shift | Start | End | Code | OT | Reg | Total |
|----------|---------------|--------|---------|--------------------------|------|------|-------|
| Tue 7/20 | 6:30AM-3:00PM | 4:00AM | 12:30PM | ::TFAC Trades EarlyStart | 8.0 | 8.0 | 16.0 |
| Wed 7/21 | 6:30AM-3:00PM | 4:00AM | 2:30PM | ::TFAC Trades EarlyStart | 10.0 | 10.0 | 26.0 |

| Accruals | | Debit-Credit | | Totals | | Audits | | Historical Corrections | |
|----------|-----|------------------------------|----------|--------|--------|--------|--|------------------------|--|
| Daily | All | Totals for 7/21/2021 | | | | | | | |
| Location | Job | Account | Pay Code | Amount | Wages | | | | |
| | | TFAC/Z0411/10282/235794/0/-/ | Overtime | 2.0 | \$0.00 | | | | |
| | | TFAC/Z0411/10282/235794/0/-/ | Regular | 8.0 | \$0.00 | | | | |

Lunch Patterns

The most common lunch deduction is ½ hour each day. Some schedules require an employee to have a 1hr lunch or a 0hr lunch deduction. These can be achieved by adding the proper work rule to the time card or schedule for the employee.

When the lunch deduction is different from the default, then the schedule should be updated so it is an ongoing change. In this example, the employee has a 1 hr lunch break during the week and a 0hr break during the 12hr shifts. This is managed on the schedule.

| 6/20 - 6/26 | | 6/27 - 7/03 | |
|---|---|---|---|
| Fri 6/25 | Sat 6/26 | Sun 6/27 | Mon 6/28 |
| 7:00AM - 4:00PM (x,TFAC Civil Service 1H) | 6:00AM - 6:00PM (x,TFAC Civil Service 0H) | 6:00AM - 6:00PM (x,TFAC Civil Service 0H) | 7:00AM - 4:00PM (x,TFAC Civil Service 1H) |

If an employee has worked through their ½ hour lunch and needs to be credited for their work, then the supervisor should use the “Cancel Lunch Deduction” options. The work rule transfers should be used for agreed schedule changes that are temporary or ongoing updates to the employee’s schedule.