

4.6.b. Org Manager Job Aid: How to Transfer a Labor Index After Worked for Non-Exempt Employees

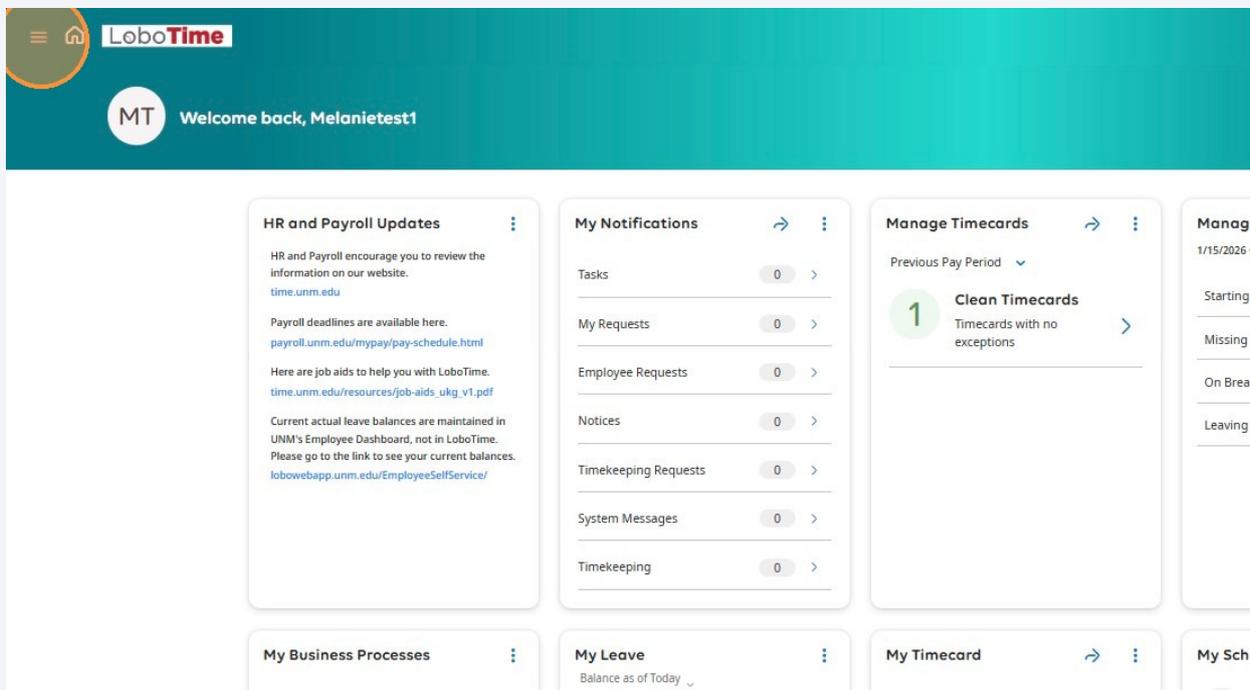
There are two ways to create a labor index transfer for non-exempt employees: create a schedule before a shift has been worked OR change a shift after it has been worked.



Labor index transfers should occur only if the labor distribution for an employee in Banner needs to be temporarily modified. If the labor distribution for an employee in Banner is not accurate, it should be corrected via Labor Distribution EPAF. LoboTime will automatically apply the labor distribution for each employee as entered in Banner.

1 Login to LoboTime. Click on the three stacked bars in the upper left corner.

For instructions on logging into LoboTime, refer to *Supervisor Job Aid: General Access & Dashboard*.



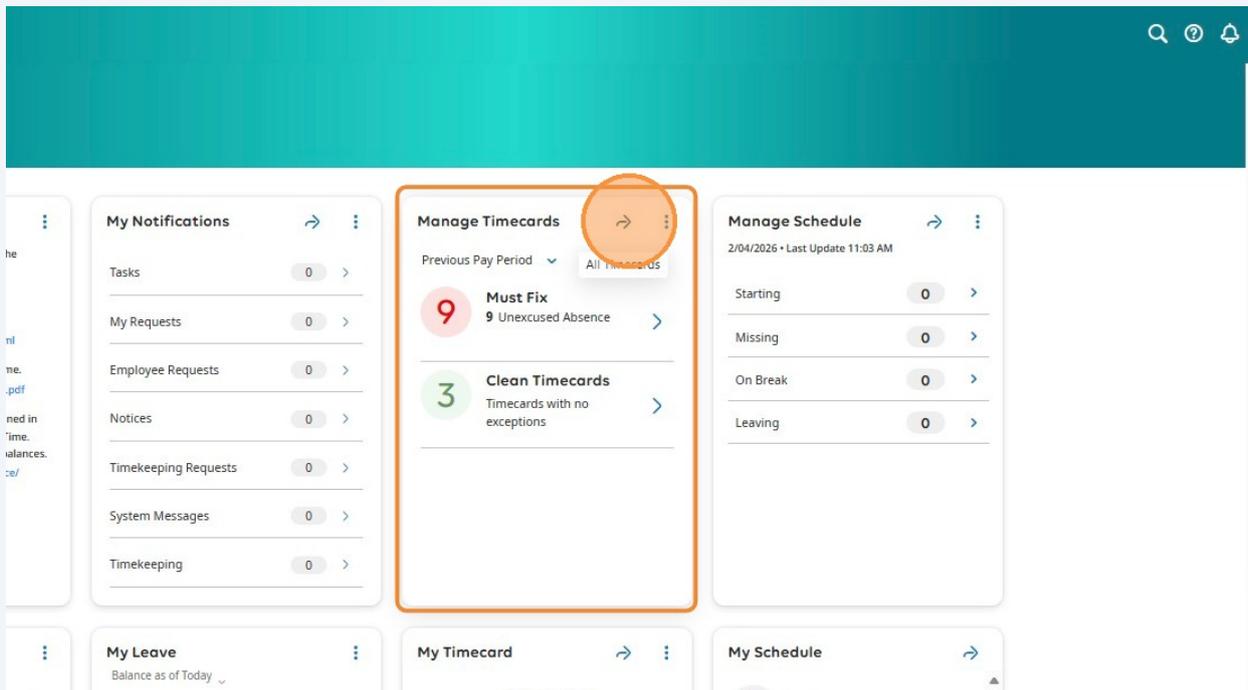


The following steps show how to create a labor index transfer via timecard. This can only be done after a shift has an in/out punch. **Index transfers via timecard require individual manual adjustment for each shift segment and for each staff member.**

2

To create a labor index transfer for non-exempt employees, navigate to all employee timecards by clicking on the arrow in the 'Manage Timecards' tile.

For instructions on how to transfer a labor index via timecard, refer to *Org Manager Job Aid: How to Use Schedules to Transfer a Labor Index (applies to non-exempt employees only)*.



3

Click the down arrow of the dropdown menu to select the appropriate employee. Once selected, click in the 'Transfer' cell next to the clock in/out that needs to have a different index. There are two Transfer column headers, **make sure to select the appropriate one**. In this example, the index associated with hours worked from 1:00 - 5:00 pm on Monday, January 12 need to be changed, so the second Transfer column cell is selected.

The screenshot shows the LoboTime Employee timecards interface. At the top, there is a header with the LoboTime logo and 'Employee timecards'. Below the header, there is a search bar and a dropdown menu for employee selection. The dropdown menu is open, showing a list of employees: Testnonexempt, Elenatest1 (checked), Testnonexempt, Sandratest1, Testorgmanager, Katherinetest1, and Testorgmanager, Marleentest1. Below the dropdown, there is a table with columns: Absence, In, Out, Transfer, In, Out, Transfer, and Pay code. The table shows data for various dates from Monday 1/12 to Wednesday 1/21. The cell in the second Transfer column for Monday 1/12, corresponding to the 1:00 PM - 5:00 PM shift, is highlighted with an orange box.

4

The currently assigned index will show first. In the example below, it is ;;;127022;,. To select a different index, click on 'Search...'

The screenshot shows a detailed view of the timecard interface. It features a table with columns: Schedule, Absence, In, Out, Transfer, In, Out, Transfer, Pay code, Amount, and Shift. The table shows data for various dates from Monday 1/12 to Wednesday 1/21. The cell in the second Transfer column for Monday 1/12, corresponding to the 1:00 PM - 5:00 PM shift, is highlighted with an orange box. A dropdown menu is open over this cell, showing the currently assigned index: ;;;127022;,. Below the index, there is a 'Search...' option. An orange arrow points from the 'Search...' option to the text below. The text below the table reads: 'The first number is the currently assigned index. To change, click on 'Search''.

5 Click on 'Add labor category'.

The screenshot shows a time tracking interface. The main table has columns for In, Out, Transfer, Pay code, and Amount. A dropdown menu is open over the Transfer column, showing options like 'Choose:', ';;:127022;', and 'Search...'. The sidebar on the right is titled 'Transfer' and shows the user 'Testnonexempt, Elenatest1'. The 'Add labor category' button is highlighted with an orange circle.

In	Out	Transfer	In	Out	Transfer	Pay code	Amount	Sh
8:00 AM	12:00 PM	;;:127022,;	1:00 PM	5:00 PM	Choose:			
8:00 AM	12:00 PM		1:00 PM	5:00 PM	;;:127022,;			
8:00 AM	12:00 PM		1:00 PM	5:00 PM	Search...			
8:00 AM	12:00 PM		1:00 PM	5:00 PM				
						Sick Leave	8.00	
						Martin Luther ...	8.00	

6 Click on 'Add Index'.

The screenshot shows the same time tracking interface as above. The sidebar on the right is titled 'Transfer' and shows the user 'Testnonexempt, Elenatest1'. The 'Add Index' button is highlighted with an orange circle.

In	Out	Transfer	In	Out	Transfer	Pay code	Amount	Sh
8:00 AM	12:00 PM	;;:127022,;	1:00 PM	5:00 PM	Choose:			
8:00 AM	12:00 PM		1:00 PM	5:00 PM	;;:127022,;			
8:00 AM	12:00 PM		1:00 PM	5:00 PM	Search...			
8:00 AM	12:00 PM		1:00 PM	5:00 PM				
						Sick Leave	8.00	
						Martin Luther ...	8.00	

7

The search function works with numbers or keywords. Type in the necessary information to find the correct index and select it. Once the correct index has been selected, click 'Ok'.

The screenshot displays the LoboTime Employee timecards interface. The main table shows a grid of dates from Sat 1/10 to Fri 1/23, with columns for Date, Schedule, Absence, In, Out, Transfer, In, Out, Transfer, Pay code, and Amount. A search dropdown is open over the 'Transfer' column for the date Mon 1/12, showing a search bar with 'adm' and a list of results including '011000 161211-REGISTRAR ADM-General Actv', '011003 Taos Admissions Office', '014023 HSC Clinical Administration', and '033030'. A 'Transfer' dialog box is also open on the right, showing the same search results. The dialog has a search bar with 'adm' and a list of results. The 'OK' button is highlighted in orange.

Date	Schedule	Absence	In	Out	Transfer	In	Out	Transfer	Pay code	Amount
Sat 1/10										
Sun 1/11										
Mon 1/12	8:00 AM - 5:00 PM		8:00 AM	12:00 PM	127022	1:00 PM	5:00 PM	Choose...		
Tue 1/13	8:00 AM - 5:00 PM		8:00 AM	12:00 PM		1:00 PM	5:00 PM	127022		
Wed 1/14	8:00 AM - 5:00 PM		8:00 AM	12:00 PM		1:00 PM	5:00 PM			
Thu 1/15	8:00 AM - 5:00 PM		8:00 AM	12:00 PM		1:00 PM	5:00 PM			
Fri 1/16	8:00 AM - 5:00 PM									
Sat 1/17									Sick Leave	8.00
Sun 1/18										
Mon 1/19									Martin Luther ...	8.00
Tue 1/20										
Wed 1/21										
Thu 1/22										
Fri 1/23										

8

Once an index has been selected, it will display in grey under the Index header. Once the correct index is showing under the Index header, click 'Apply'.

The screenshot displays a software interface with a grid on the left and a sidebar on the right. The grid has columns for time intervals: :00 AM - 5:00 PM, 8:00 AM, 12:00 PM, 1:00 PM, and 5:00 PM. A dropdown menu is open over the grid, showing a search field and a 'Choose:' option. The sidebar, titled 'Labor categories', contains an 'Index' section with the value '011000' and a sub-entry '161211-REGISTRAR ADMI-General Activ'. An 'Apply' button is highlighted in the bottom right corner of the sidebar.

Time Interval	8:00 AM	12:00 PM	1:00 PM	5:00 PM
:00 AM - 5:00 PM		127022		
:00 AM - 5:00 PM				
:00 AM - 5:00 PM				
:00 AM - 5:00 PM				
:00 AM - 5:00 PM				
Sick Leave 8.00				
Martin Luther ... 8.00				

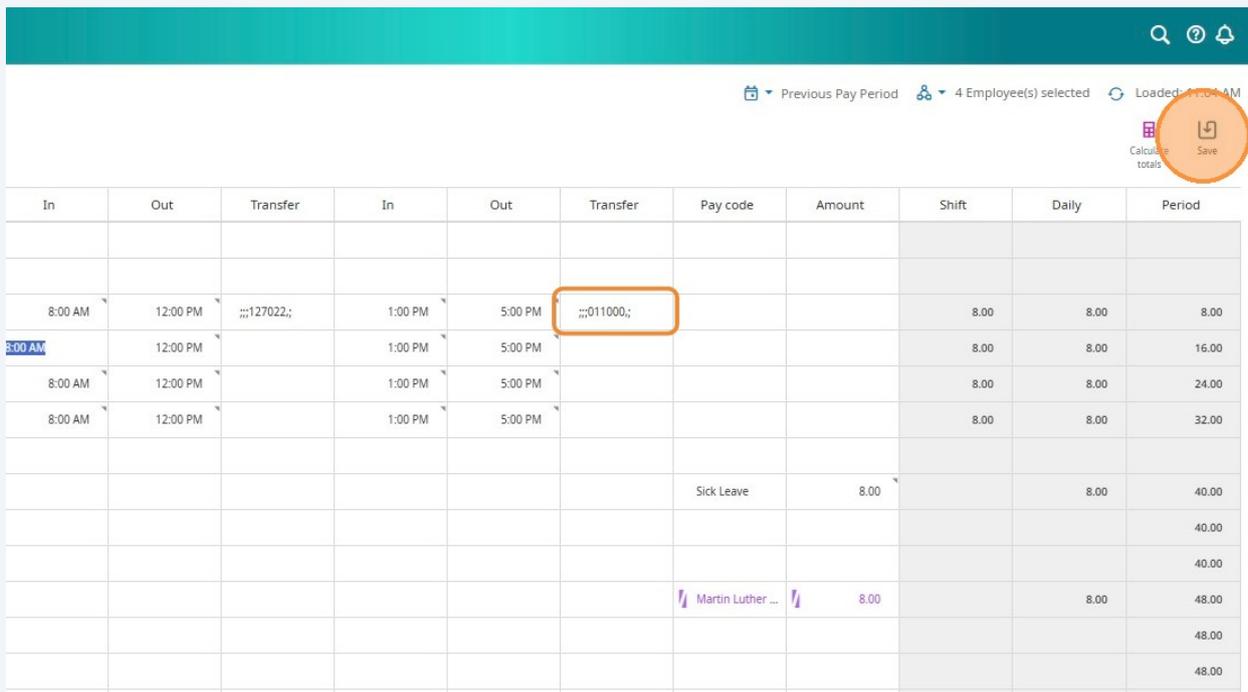
9 The new index will show in the Transfer cell.

Be sure to click 'Save' to save all index changes. Multiple changes can be made before clicking 'Save'. However, if 'Save' is not clicked, none of the index changes will be saved.

--End--

Related job aid:

Org Manager Job Aid: How to Use Schedules to Transfer a Labor Index (applies to non-exempt employees only)



Previous Pay Period 4 Employee(s) selected Loaded: 11:00 AM

In	Out	Transfer	In	Out	Transfer	Pay code	Amount	Shift	Daily	Period
8:00 AM	12:00 PM	:::127022;	1:00 PM	5:00 PM	:::011000;			8.00	8.00	8.00
8:00 AM	12:00 PM		1:00 PM	5:00 PM				8.00	8.00	16.00
8:00 AM	12:00 PM		1:00 PM	5:00 PM				8.00	8.00	24.00
8:00 AM	12:00 PM		1:00 PM	5:00 PM				8.00	8.00	32.00
						Sick Leave	8.00		8.00	40.00
										40.00
										40.00
						Martin Luther ...	8.00		8.00	48.00
										48.00
										48.00