4.6.a. Org Manager Job Aid: How to Use Schedules to Transfer a Labor Index for Non-Exempt Employees

There are two ways to create a labor index transfer: create a schedule before a shift has been worked OR change a shift after it has been worked. The easiest way to do an index transfer is by creating a schedule. This allows for an index transfer to be easily applied to one or multiple staff members but is only available to non-exempt (hourly) staff and must be completed in advance of the scheduled work.

⚠️ 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.*
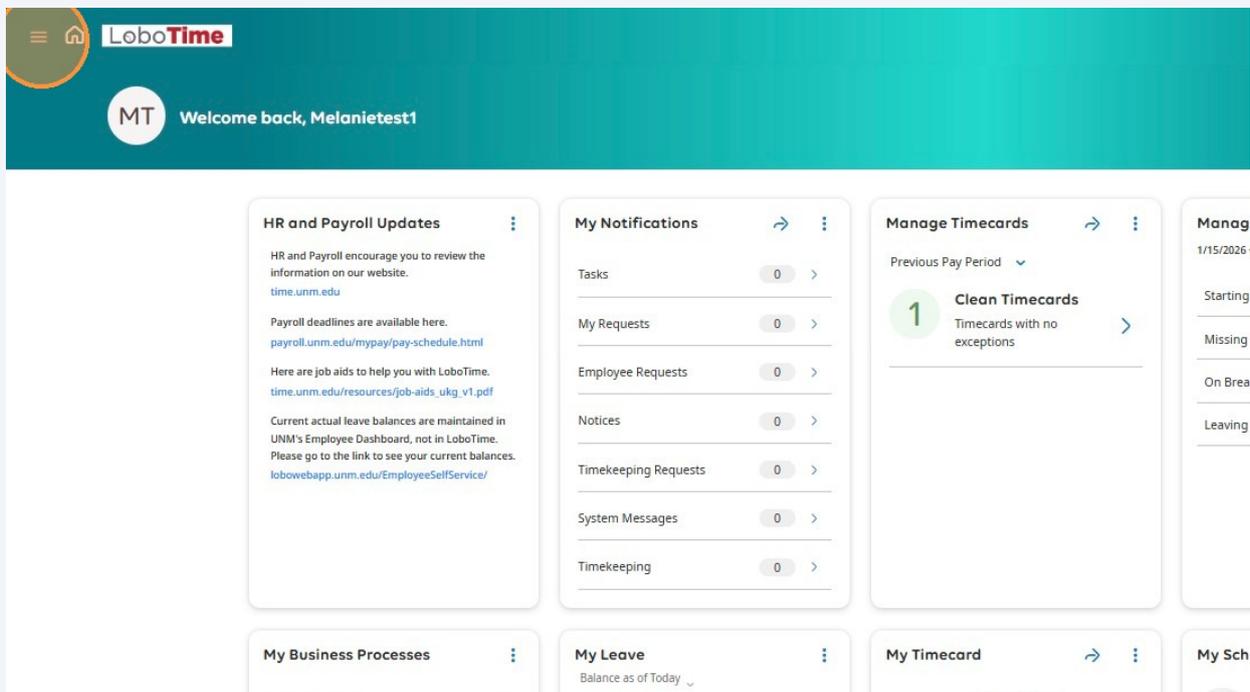
The following steps show how to create an index transfer while creating a schedule. An index transfer while creating a schedule allows the same index transfer to be applied across different days and employees. **This is only available to non-exempt employees and can only be done before a staff member has punched in or out of a particular shift.** If a shift needs an index transfer but already has a punch-in/out, the index transfer must happen via timecard.

2 To create a labor index transfer by creating a schedule, under 'Schedule', click on 'Schedule Planner with Absence Calendar'.

For instructions on how to transfer a labor index via timecard, refer to *Org Manager Job Aid: How to Transfer a Labor Index After Worked (applies to exempt and non-exempt employees)*.
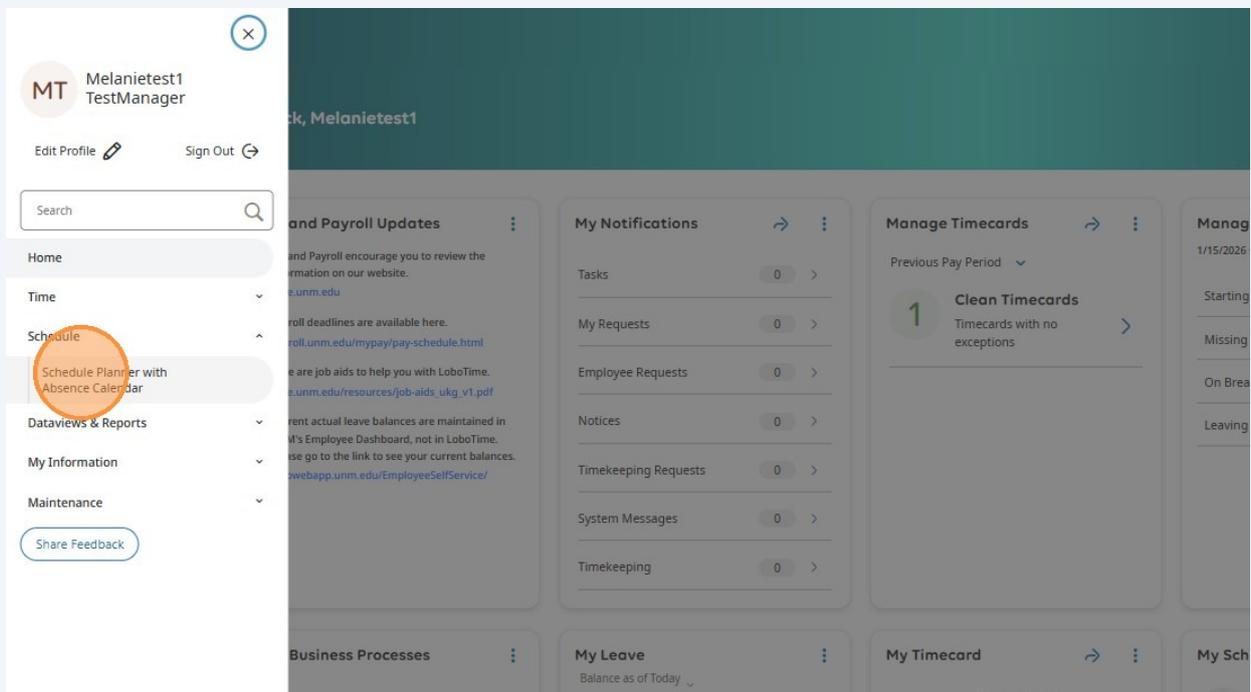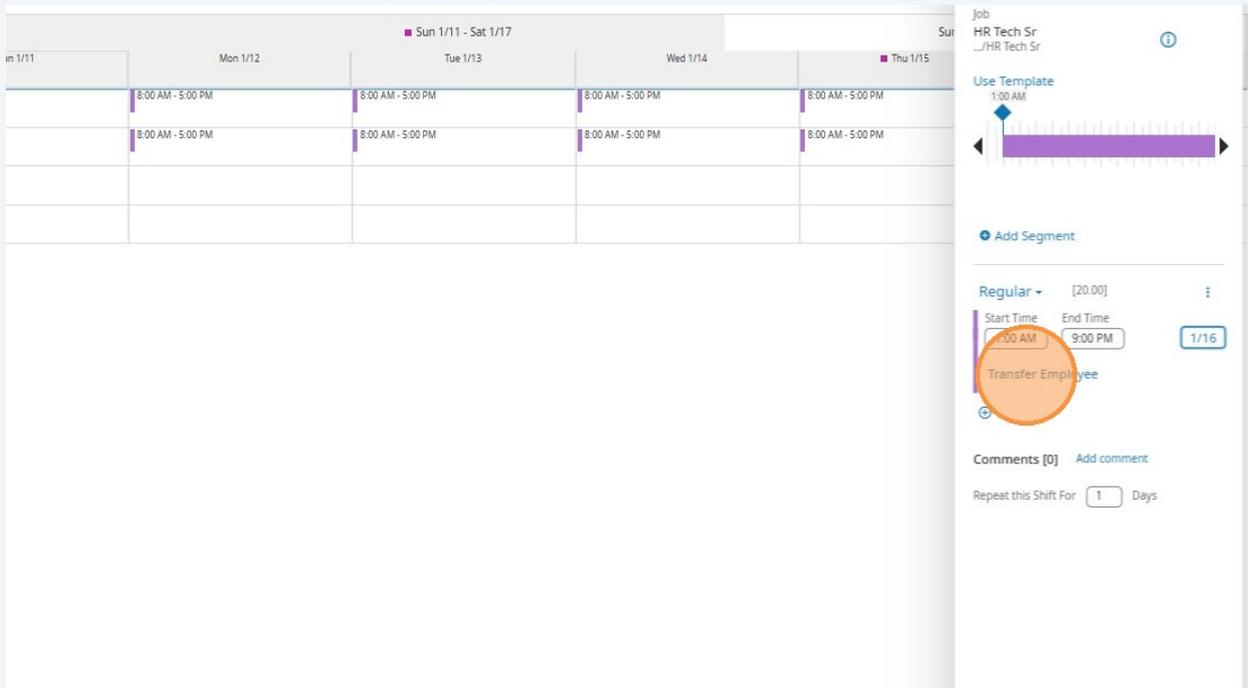
3 Click on the small calendar icon to make sure the correct schedule period is selected.
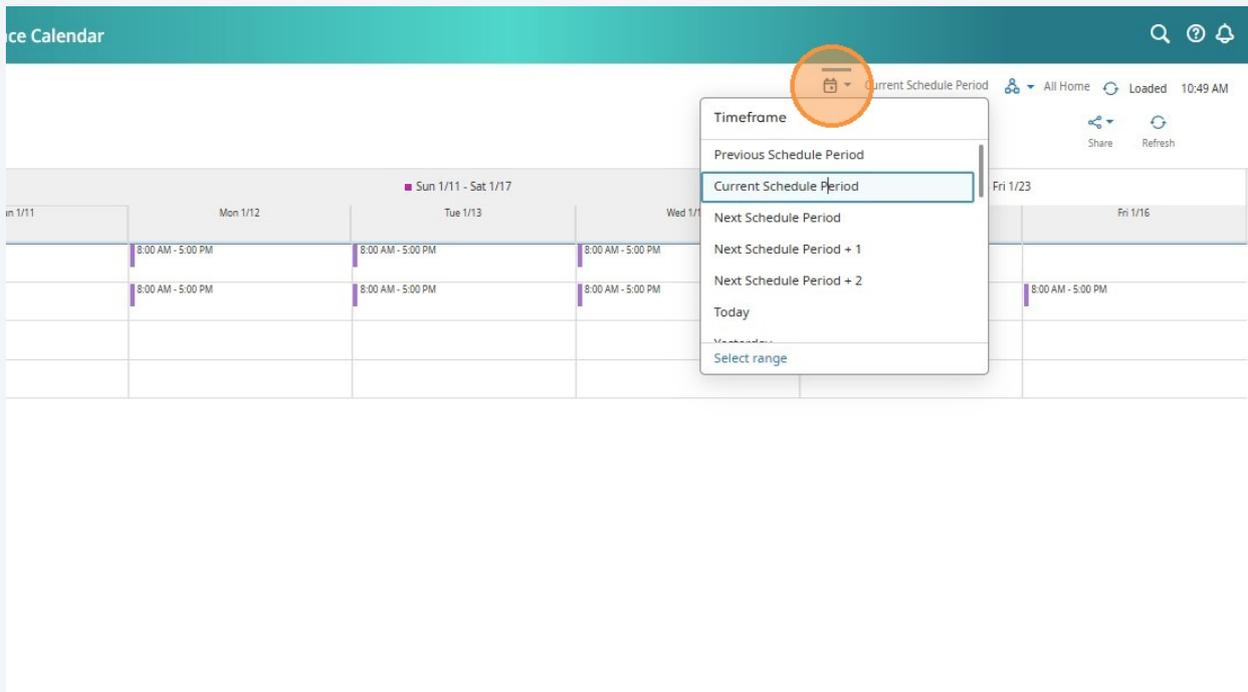
4 An index transfer is completed the same way for both pre-existing scheduled shifts and newly created ones. In both cases, double-click on the shift to open the shift details and click 'Transfer Employee'.

5 Click on 'Add labor category'.

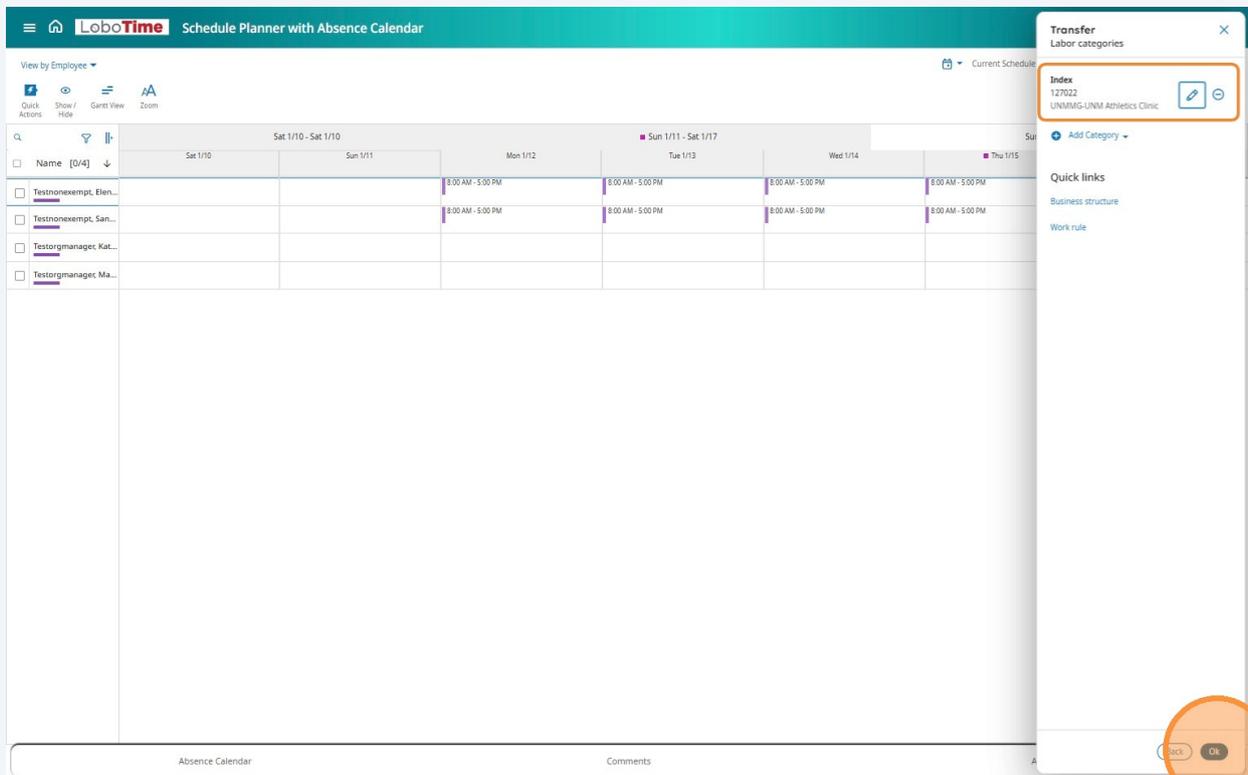**6** Click on 'Add Index'.

7   The search function works with numbers or keywords. Type in the necessary information to find the correct index and select it.
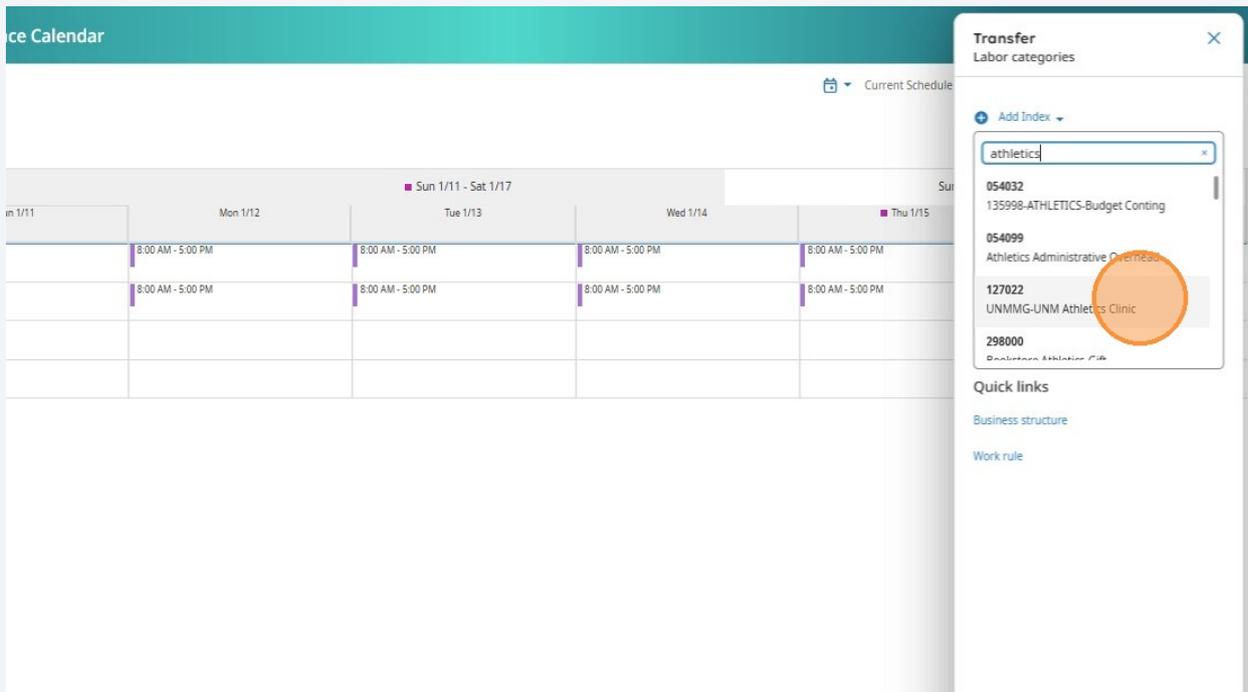
8   Once an index has been selected, it will display in grey under the Index header. Once the correct index is showing under the Index header, click 'Ok'.

9 The index information will show again under the 'Transfer' header. If the information looks accurate, click 'Apply'.

10 Under the 'Add Shift' or 'Edit Shift' header, the section of the shift that has been allocated to a different index will show along with the start and end time of the shift. If everything looks accurate, click 'Apply'.

11 All shifts with an index change will display with a different color (blue in the example below) and will include a very small icon of two arrows pointing in opposite directions. This indicates that a shift has had an index change.

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.


The UKG system can be a bit particular when copying scheduled shifts. When selecting a shift to copy, do not left-click the shift—use only a right-click. The copy function will not work if the shift is first selected with a left click. If this happens, simply left-click a different cell, then right-click the shift you want to copy.
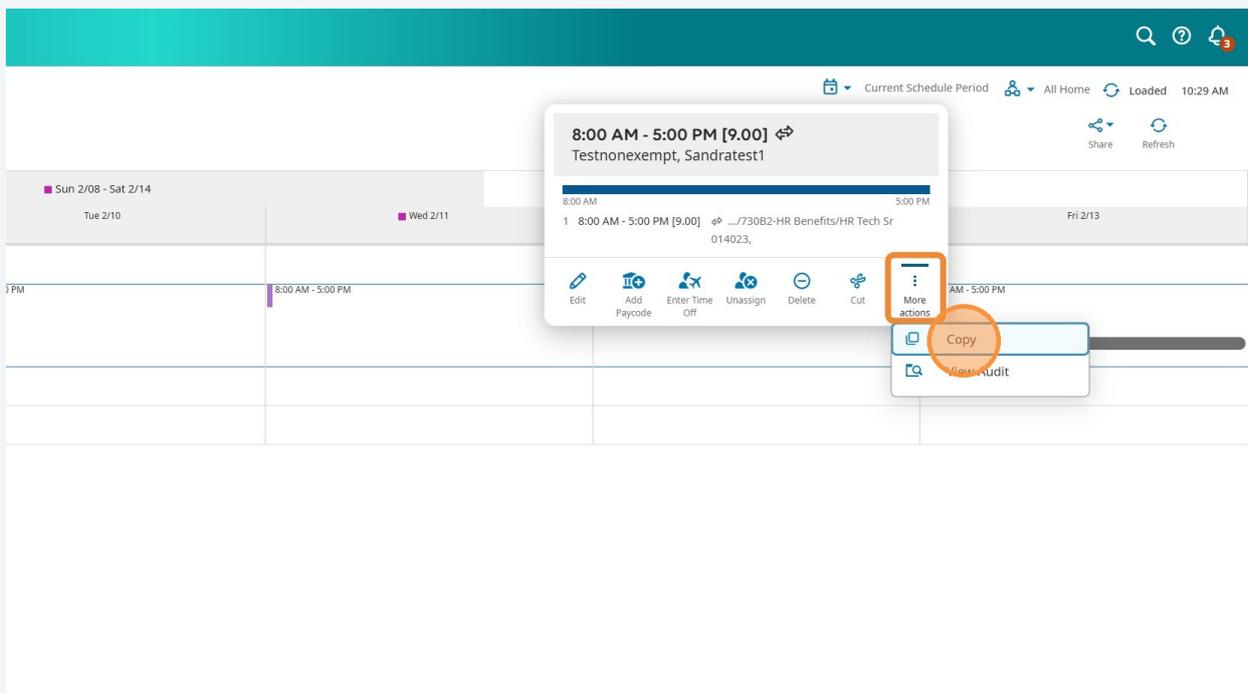
12 Once a shift is set up with a labor index transfer, it can easily be copied to other days or to different employees' schedules. To copy a shift that includes a labor index transfer, first **right-click** the shift you want to copy. In the example below, the shift with the index transfer on Thursday, 02/12, will be copied.
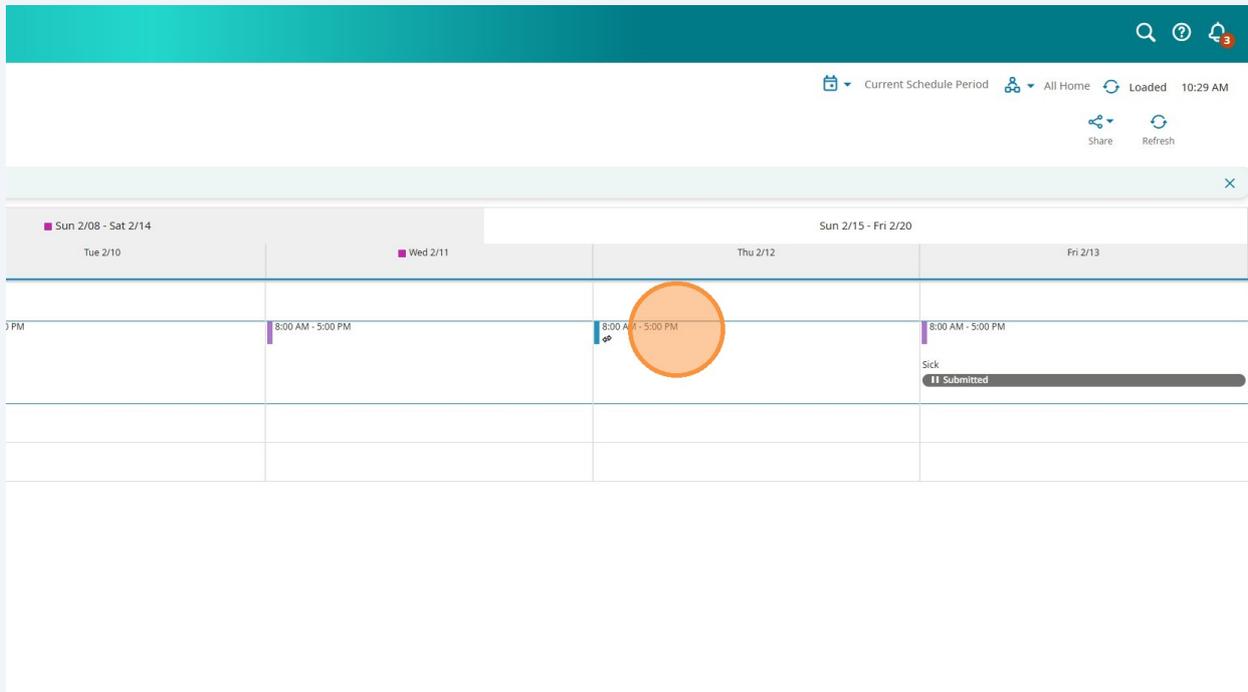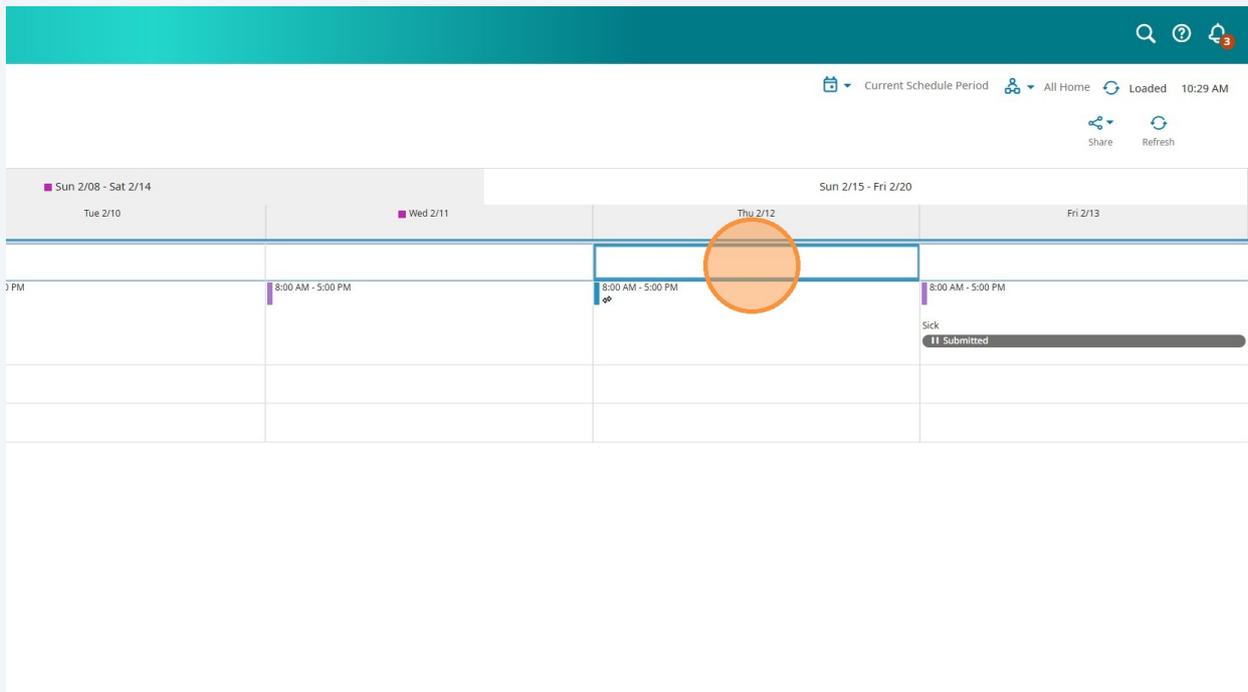

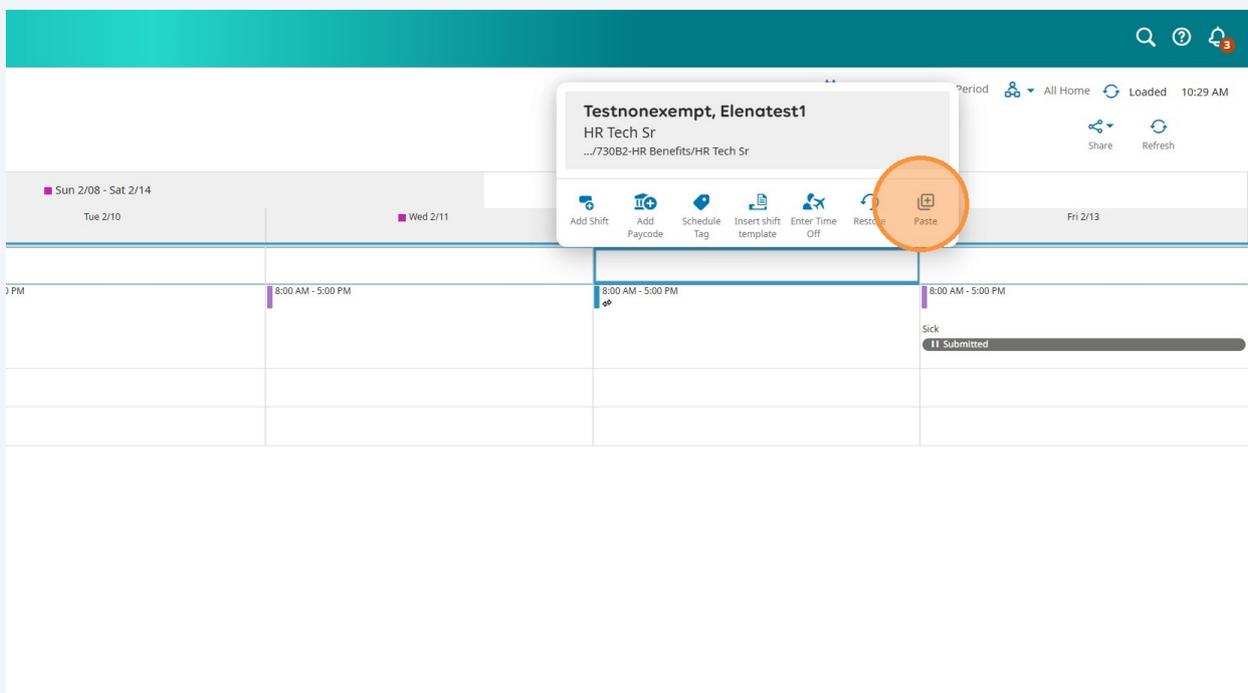**13** Click on 'More actions' and then click on 'Copy'.

14 **Right click** in the cell that will receive the copied shift. In the example below, the copied shift is for the same day (02/12) but a different employee.

15 Click 'Paste' to copy the schedule over.

16 The copied shift will display in the new cell. In the example below, both the first and second employees listed have the same shift with the same index transfer on 02/12. The same shift can be copied across multiple days and/or employees.

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

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Related job aid:

Org Manager Job Aid: How to Transfer a Labor Index After Worked (applies to exempt and non-exempt employees)