Set up Transfers and temporary store assignments

TimeForge helps you dynamically meet your staffing needs by allowing you to temporarily transfer employees and shifts to different departments or locations. The day after the transferred shift ends, the employee assigned to the shift will automatically be removed from the temporary store assignment.

This guide will show you how to properly set up your TimeForge account to allow transfers.

Configure your settings to enable Transfers

Before you can use Transfers, you'll need to make sure your settings are configured correctly. The settings that enable and control Transfers are found at the Location level under **Set Up > Settings**.

At minimum, the option to **Allow transfers** must be set to **Yes**.

Additionally, to view **outbound transfers**, at least one of the following must also be set to **Yes** at the Corporate level under **Set Up > Company Settings**:

1. Show attendance for locations outside Home Location
2. Show attendance departments outside Home Department

Attendance

Show attendance for locations outside Home Location
Shows attendance from other locations, if the employee's Home Location is the same as the manager.

Yes

Show attendance departments outside Home Department
Shows attendance from other departments, if the employee's Home Department is the same as the manager.

Yes

Set home departments and locations on employees

After you configure your TimeForge account to enable Transfers, you'll need to make sure the employees you want to transfer are set up with the correct Home Locations and Home Departments. This will allow you to see transferred employees and where they came from when you're looking at a schedule.

To do this, **edit** the employee to bring up their information:

Employee Information: ◀ Janie Melnitz ▶

Employee	Information	Locations	Human Resources	Availability	Schedules	Attendance	Leave Types	Activities

Basic Employee Information

First Name *
Janie

Middle Name

Last Name *
Melnitz

Birthday

Monthly

Minimum Hours

Maximum Hours

Minimum Shifts

Maximum Shifts

Weekly

Minimum Hours
20.0

Maximum Hours
40.0

Minimum Shifts

Maximum Shifts

Set the employee's home department

1. Scroll down to the section titled Employee Departments
2. Select the Home Department from the dropdown menu
3. Check the departments the employee will transfer between

Set the employee's home location

1. Click the Locations tab
2. Set the default or home location from the dropdown menu
3. Check the locations the employee will transfer between
4. Click the Save button at the bottom of the page when finished

Transfer an employee

When you're creating an employee schedule, you can now create shifts and then choose to transfer those shifts to schedules in different departments or locations, allowing you to temporarily reallocate labor as needed. The employee assigned to the shift will be transferred to the chosen department and location for the duration of the shift.

The day after the transferred shift ends, the employee will be automatically removed from the temporary store assignment -- no further action is required on your part.

How to transfer an employee shift:

1. In your schedule, make sure you're under the Weekly View.
2. Click **Add Shift** for the employee you want to transfer on the date you want the transfer to occur.
3. Fill out the transfer information, including the location and schedule to transfer the shift to (required).
4. When you're finished, don't forget to save!

💡 The location/department you are trying to transfer the shift to MUST have a schedule, otherwise you will not be able to complete the transfer.

Transfers show blue arrows next to them, and hovering over the text will show you information about the transferred shift:

Schedule

Customer Service - Schedule from 09/10/2019 to 09/13/2019
Dates: Tue 09/10/19 - Fri 09/13/19
Filters: Customer Service
Filter Shifts
Schedule by: ○ Employee   ● Position   ○ Time
Show: ● Times   ○ Hours   ○ Cost

09/11/2019 [📅] [Update]

☐ Collapse Groups   ☐ Show Special Shifts   ☐ Group Summaries   September 10 - September 13
(Hidden shifts are not shown)

POSITION (ADD EMPLOYEE)	TUE 09/10	WED 09/11	THU 09/12	FRI 09/13
⊟ Administrative Assistant				
Janie Melnitz Edit Hours		Add Shift	Add Shift	Add Shift
Ralph Stanz Edit Hours	8:00a-5:00p ➡ From Operations	Add Shift 8:00a-5:00p ➡ From	Add Shift 8:00a-5:00p ➡ From	Add Shift 8:00a-4:00p ➡ From

Transferred out of Operations and into Customer Service (Manhattan Main Office)

Changes to the employee's profile

When an employee is transferred to another location's schedule, their profile information will show a **Temporary Duty Date**. This date can be found in the first tab, under Basic Employee Information.

Once the temporary store assignment ends, the employee will effectively be "terminated" from that store, resulting in a **Termination Date**. This simply removes them from the store they were temporarily assigned to.

These values (Temporary Duty Date and Termination Date) are updated each time an employee is temporarily reassigned -- and each time the temporary assignment ends, respectively.

Social Security Number
123456789 [?]

Cell Number
555-555-5555 [?]

Designation
Full Time ▾ [?]

Hire Date
09/01/2018 [📅] [?]

Internal Number
[ ] [?]

Internal Password
[ ] [?]

Overtime
--Choose-- ▾ [?]

Payroll ID
[ ] [?]

Holiday Calendar
--Choose-- ▾ [?]

Age Rule
None ▾ [?]

Termination Date
09/13/2019 [📅] [?]

Temporary Duty Date
09/12/2019 [📅] [?]

Eligible for Rehire
● Yes ○ No [?]

Ineligible Reason
[ ] [?]

TimeForge Id: 89896957 [?]

☐ Copy the schedule, nightly, to be the attendance for this staff member (only use if the staff member does not clock in)?