

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**.

Home Locations and Transfers

Allow transfers

Allows scheduled employees to be transferred to other locations or departments.

Yes

Only Home Location managers can schedule transferred employees

Gives control of transferred employees to the Home Location managers.

No

Lock employees outside of their Home Location

Locks and hides employees from the Employee List at other locations.

No

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 Employee Departments

Default / Home Department: Customer Service **2**

☐ All Departments

☒ Customer Service **3** ☐ Kitchen

☒ Operations ☐ Research and Development

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

Employee Information: ◀ Janie Melnitz ▶

Employee Information: ◀ Janie Melnitz ▶

Employee Information **Locations** Human Resources Availability Schedules Attendance Leave Types Activities

1

2 Default / Home Location: Manhattan Main Office

☐ All Locations

☒ Brooklyn Office Employee Information ☒ Jersey Location Employee Information ☐ Learning Center Employee Information

3 ☒ Manhattan Main Office Employee Information ☐ Manhattan Office 2 Employee Information ☐ Manhattan Office 3 Employee Information

☐ NMG Grocery, Inc. Employee Information ☐ North Office - Spooky Employee Information ☐ Queens Office Employee Information

☐ Research Center West Employee Information ☐ University Location Employee Information

To remove this employee from a location, please make sure that no future schedules or templates use this employee in the locations.

☐ Copy pay rates and locations from this location to all assigned locations. ?

4 Save Cancel

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!

EDIT SHIFT

Shift Breaks

Date: Friday 09/13/2019

Create a shift from 8:00a to 5:00p

Position: Customer Support

Employee: Eric James Spengler

Transfer

Location: Manhattan Main Office

Schedule: Legal - Schedule from 09/11

Position: Research and Development

Other Shifts this employee is already working:

DATE	START TIME	END TIME	POSITION
Tue, 09/10/2019	9:00a	1:00p	Research and Development Team Lead

(Scheduled on Legal - Schedule from 09/10/2019 to 09/13/2019)

Total hours scheduled: -
Total cost scheduled: -

Transfer **Cancel**

💡 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

Monthly View | **Weekly View** | Daily View

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
☐ Collapse Groups ☐ Show Special Shifts (Hidden shifts are not shown) ☐ Group Summaries

09/11/2019

Update

September 10 - September 13

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)?