



UPSTATE
UNIVERSITY HOSPITAL

**Enhanced Kronos V8
Clinical Trainer
HANDBOOK**

Clinical Trainer Information

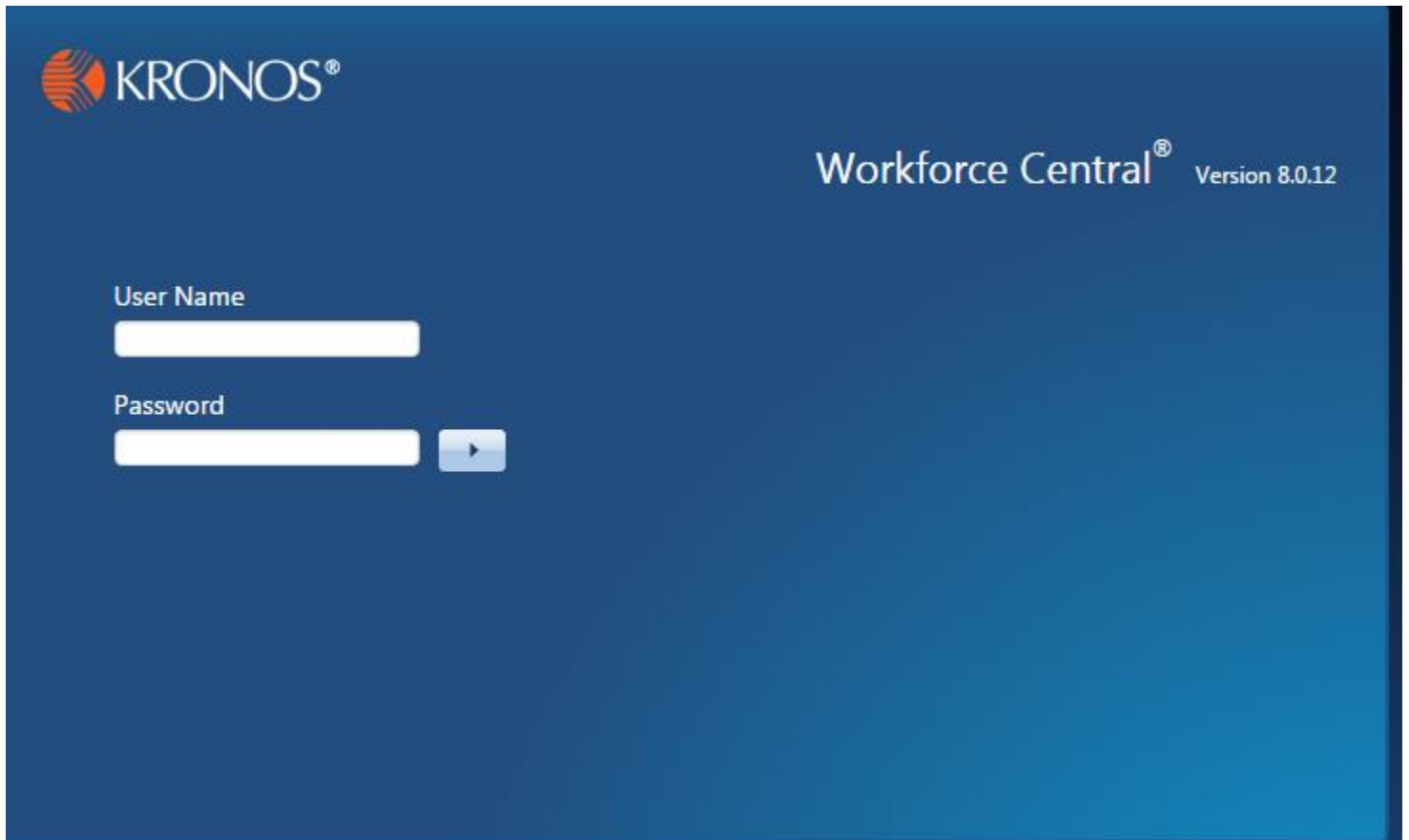
- ✓ The Clinical Trainer has manager access.
- ✓ The first view will be Staffing & Scheduling.
- ✓ Everything that is done by the Clinical Trainer, must be done in the schedule.
- ✓ The Clinical Trainer cannot access another employee's time card and make changes due to union rules.
- ✓ The Clinical Trainer is unable to access their Work & Absence Summary from Kronos. The Trainer needs to sign into self-serve to view their summary.
- ✓ The Trainer must go to the Workspaces carousel in the upper right hand corner of screen and rotate the carousel until they are able to see their own timecard.
- ✓ New employees will be visible in Kronos once Nursing Business Operations (NBO) sets up their job status as an Orienting Registered Nurse (ORN) after notification from Nursing Recruitment.
- ✓ Travel Nurses (TNs) need to be floated into the RN job to count in the workload planner counts.
- ✓ Work rules: Class Traveler Biweekly is the only work rule available for travelers. There is no PPT, SGT, or OT/ET work rule.

INDEX

	PAGE
How to log into Kronos -----	4
First View-----	5
How to create/delete a Location -----	6
How to create a Hyperfind-----	8
How to view Schedule in 2 week blocks-----	9
How to view Schedule by Schedule Group-----	10
How to assign/remove employee Schedule Group-----	11
How to enter a Shift-----	13
How to Float Staff -----	14
How to Add Work Rule -----	16
How to Edit a Shift -----	17
How to add a Comment or Note-----	18
How to enter a Pay Code-----	19
How to schedule Holiday on the actual Holiday-----	22
When the Clocks Change (Daylight Savings Time)-----	22

How to log into Kronos

Log in by clicking on the KRONOS icon on the Novell server using Google Chrome

The image shows the login interface for Kronos Workforce Central. The background is a solid blue color. In the top left corner, there is the Kronos logo, which consists of an orange circular icon with white lines and the word "KRONOS" in white capital letters. In the top right corner, the text "Workforce Central" is displayed in white, followed by "Version 8.0.12" in a smaller font. Below the logo, there are two white input fields. The first field is labeled "User Name" and the second field is labeled "Password". To the right of the password field is a small blue button with a white right-pointing arrow. The overall layout is clean and professional.

Please note: if your user name or password is not working call IMT at 4-4115

First View

The screenshot shows the 'Schedule Planner' application interface. At the top, there's a header bar with the title 'Schedule Planner' and a settings icon. Below the header, a status bar shows 'Loaded: 11:37', 'Current Schedule Period', and a dropdown menu set to 'None' with an 'Edit' button. A toolbar contains various icons for actions like 'Quick Actions', 'View', 'Column Selection', 'Visibility Filter', 'Select all', 'Gantt View', 'Sorting', 'Tools', 'Engine', 'Refresh', 'View Comments', 'Share', 'Save', and 'Go To'. The main area is titled 'By Employee' and displays a calendar grid for the period '5/18 - 5/24' and '5/25 - 5/31'. The grid columns are labeled with days of the week and dates. A sidebar on the right contains a 'Schedule Planner' section with five numbered buttons: 'Call List' (1), 'Reports' (2), 'Genies' (3), 'Staffing' (4), and 'Workload Planner' (5). An arrow points from the 'Call List' button to a dropdown menu on the left. This menu is titled 'Locations (6)' and lists 'None', 'All Home Locations', '9E', '9F-Location', '9G Location', '9f', and 'Select Locations'. Below this, there is a section titled 'Hyperfinds (91)'.

1. Call List - Future Use
2. Reports - Report Tab
3. Genie - Reconcile Timecard
4. Staffing - Future Use
5. Workload Planner -View Only

How to create/delete a Location

Create a Location:

The screenshot shows a 'Select Locations' dialog box. At the top left, there is an 'As of Date' field with the value '5/08/2017' and a 'Clear All' link at the top right. The dialog is divided into two main sections: 'Available:' on the left and 'Selected:' on the right. The 'Available:' section contains a list of units, each with a plus icon and a text label (e.g., 'CG 8/03/2011 - Forever', 'UH 6/23/2008 - Forever', 'Cardio 6/23/2008 - Forever', '6I MICU 1/07/2015 - Forever', '6K Observation 9/13/2010 - Forever', '8F CPICU 7/22/2009 - Forever', '8G Cardiovascular 7/22/2009 - Forever', 'ED 6/23/2008 - Forever', 'Med 6/23/2008 - Forever', 'Neuro 6/23/2008 - Forever', 'NSG ON CALL 10/08/2014 - Forever', 'NSS-UH 8/12/2011 - Forever', 'Peds. 6/23/2008 - Forever', 'Peri-Op 6/23/2008 - Forever', 'Procedural 9/04/2008 - Forever'). The '8F CPICU 7/22/2009 - Forever' unit is highlighted. A right-pointing arrow is located between the 'Available:' and 'Selected:' sections. The 'Selected:' section contains the text 'Organization/SUNY/UH/Cardio/8F CPICU'. At the bottom left, there is a 'Saved Location Name:' label and a text input field containing '8F location'. At the bottom right, there are 'Cancel' and 'Save' buttons. Five numbered arrows point to specific elements: 1. '8F location' input field, 2. right-pointing arrow, 3. '8F CPICU 7/22/2009 - Forever' unit in the 'Available:' list, 4. 'Save' button, and 5. 'Organization/SUNY/UH/Cardio/8F CPICU' in the 'Selected:' section.

As of Date: 5/08/2017 [Clear All](#)

Available:

- + CG 8/03/2011 - Forever
- UH 6/23/2008 - Forever
 - Cardio 6/23/2008 - Forever
 - + 6I MICU 1/07/2015 - Forever
 - + 6K Observation 9/13/2010 - Forever
 - + 8F CPICU 7/22/2009 - Forever
 - + 8G Cardiovascular 7/22/2009 - Forever
 - + ED 6/23/2008 - Forever
 - + Med 6/23/2008 - Forever
 - + Neuro 6/23/2008 - Forever
 - + NSG ON CALL 10/08/2014 - Forever
 - + NSS-UH 8/12/2011 - Forever
 - + Peds. 6/23/2008 - Forever
 - + Peri-Op 6/23/2008 - Forever
 - + Procedural 9/04/2008 - Forever

Selected:

Organization/SUNY/UH/Cardio/8F CPICU

Saved Location Name: 8F location

[Cancel](#) [Save](#)

1. Highlight the unit
2. Select arrow
3. Unit is selected
4. Save as: name the unit
5. Select save

Delete a Location:

The screenshot shows the 'Staffing and Scheduling' application. At the top, there's a header with the title and a search bar. Below the header, there's a status bar with 'Loaded: 14:05', a 'Current Schedule Period' dropdown, a '11E Peds Surg' dropdown, and an 'Edit' button. An arrow points from the text 'Select Edit' to the 'Edit' button. Below the status bar, there's a section titled 'Select Locations 11E Peds Surg'. This section has a date picker set to '5/08/2017' and a 'Clear All' link. It is divided into two panes: 'Available:' and 'Selected:'. The 'Available:' pane contains a list of locations, including 'Organization Beginning Of Time - Forever', 'SUNY 6/23/2008 - Forever', 'CG 8/03/2011 - Forever', 'UH 6/23/2008 - Forever', 'Cardio 6/23/2008 - Forever', 'ED 6/23/2008 - Forever', 'Med 6/23/2008 - Forever', 'Neuro 6/23/2008 - Forever', 'NSG ON CALL 10/08/2014 - Forever', 'NSS-UH 8/12/2011 - Forever', 'Peds. 6/23/2008 - Forever', '11E Peds Surg 7/22/2009 - Forever', '11G Peds Hem-Onc 7/22/2009 - Forever', and '12E Peds Gen 7/22/2009 - Forever'. An arrow points from the text 'Highlight unit to be deleted' to the '11E Peds Surg 7/22/2009 - Forever' entry. The 'Selected:' pane contains the entry 'Organization/SUNY/UH/Peds./11E Peds Surg'. Below the 'Available:' pane is a 'Save As' button. Between the panes are two arrows: a right-pointing arrow and a left-pointing arrow. An arrow points from the text 'Move the selected unit back to available by clicking on arrow' to the left-pointing arrow. Below the 'Selected:' pane are three buttons: 'Delete', 'Cancel', and 'OK'. An arrow points from the text 'Select delete' to the 'Delete' button.

Move the selected unit back to available by clicking on arrow & Select delete

This screenshot shows the same interface as the previous one, but with a 'Note' dialog box open in the center. The dialog box has a title bar with a close button (X) and contains the text 'Are you sure you want to delete ?'. At the bottom of the dialog box are two buttons: 'OK' and 'Cancel'. An arrow points from the text 'If you are sure you want to delete the location - select OK' to the 'OK' button. The background interface is dimmed, showing the 'Available:' and 'Selected:' panes.

If you are sure you want to delete the location - select OK

How to create a Hyperfind

Schedule Planner

Loaded: 10:52 Current Schedule Period 9f Edit

Quick Actions View Column Selection Visibility Filter Select all Gantt View Sorting Tools Engines

By Employee 5/04 - 5/10

Name	J...	Sched... Group	Seniorit... Date	Std P... Perio...	Sch H...	L...	W... Ty...	T 04	F 05	S 06	S 07	M 08	T 09	W 10
Open Shifts[343]								27	21	21	29	27	27	27
Abend, Faith A	RN	RN-N	7/30/20...	72.00	80.0	...	U 0...		19:00 -	19:00 -	19:00 -		23:00 -	
Amos, Gabrielle...	RN		11/03/2...	80.00	80.0	...	U 1...	7:00 - 1	7:00 - 1			7:00 - 1	7:00 - 1	7:00 - 1
Antoshuk, Svetl...	RN	RN-N	8/14/20...	72.00	80.0	...	U 0...				19:00 -	19:00 -		

Locations (7)
Hyperfinds (91)
Ad Hoc
9e
9f
9F Payroll
9G
9G PPclose
9G Spinelli
9 NICU
New...
Edit Ad Hoc...

Select new in drop down box

HYPERFIND QUERIES Last Refreshed: 11:12

1 Visibility Personal 2 Name * 6E Description

Select Conditions Test

Filter

- General Information
 - Name or ID
 - Primary Job**
 - Expired Primary Job
 - Primary Account
 - Additional Information
 - Person's Dates
- Timekeeper
- Time Management
- Scheduling
- Workforce Scheduler
- Accruals
- User Information
- Role - Timekeeper
- Process Manager

PRIMARY JOB

☒ Include ☐ Exclude people who meet this condition

As Of Date * 5/16/2017 Go To Show Clear All

- Neuro 6/23/2008 - Forever
- Rehab 6/23/2008 - Forever
- Surg 6/23/2008 - Forever
- 5A Surg 7/22/2009 - Forever
- 5B Surg 7/22/2009 - Forever
- 6E Burn 7/22/2009 - Forever**

3

4 ☒ Include jobs from all locations below

Effective Date As of today

5 Selected Condition Add Update Delete

Primary job matches Organization/SUNY/UH/Surg./6E Burn as of today (include jobs from all locations below)

6

Cancel Refresh Save As Save

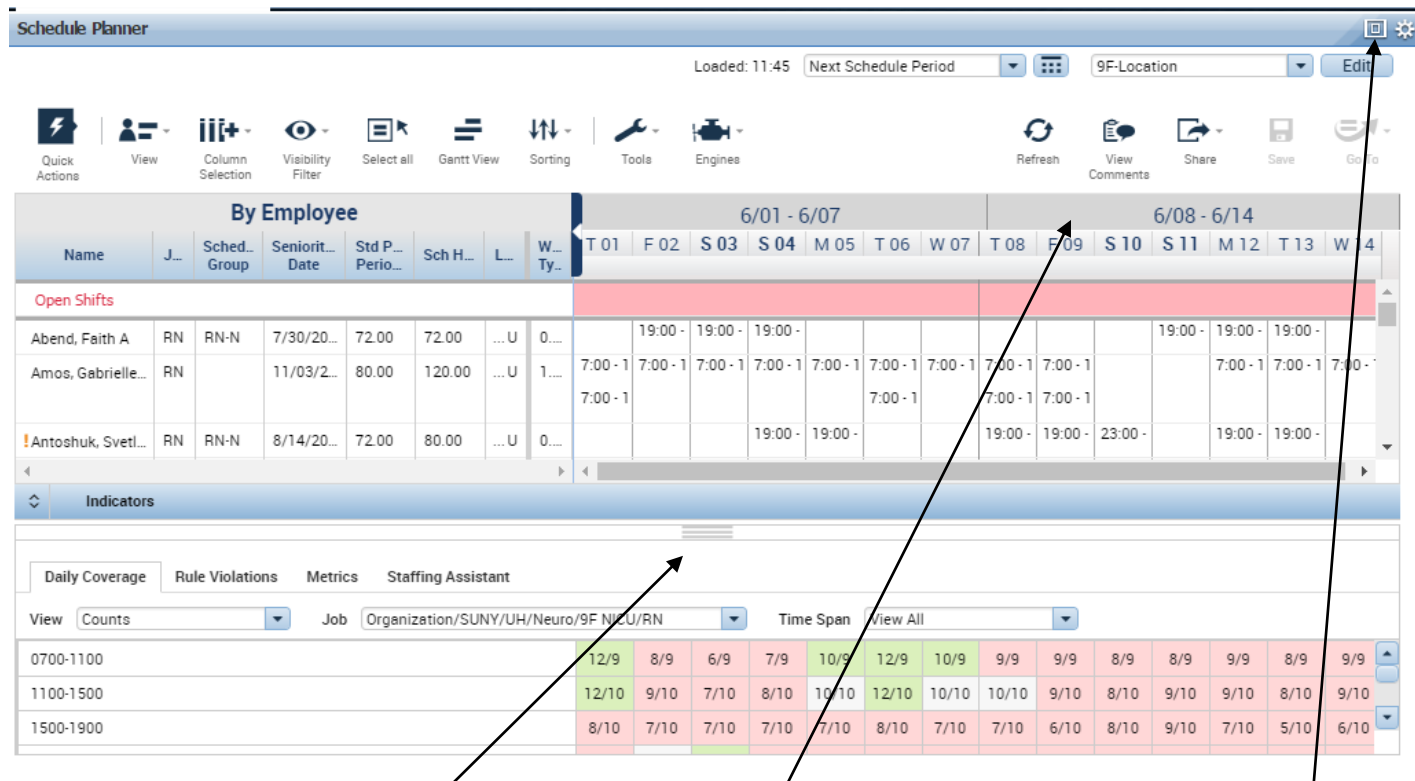
1. Select: Personal
2. Enter Query Name
3. Select: Unit
4. Select: Include Jobs
5. Select: Add
6. Select: Save

Please note: Hyperfinds cannot be deleted

How to view Schedule in two week blocks

Please note: the current schedule shows the entire two week block

When changing to a different pay period or range of dates:

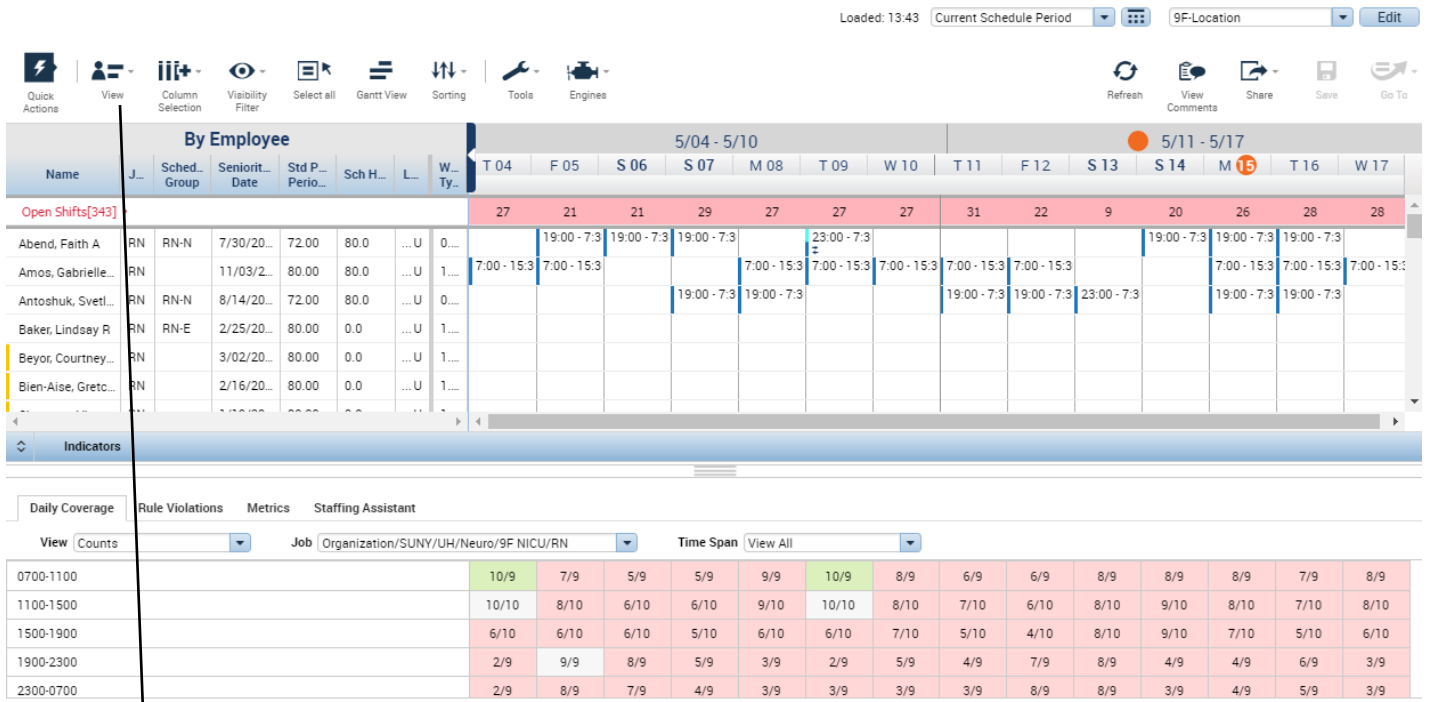


Double click on the second week of the schedule twice to view the two week schedule

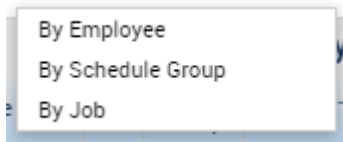
You can use the maximize button for larger view and minimize when needed

If unable to view all the zones in the workload planner, decrease the number of staff to be viewed by moving the slide bar up

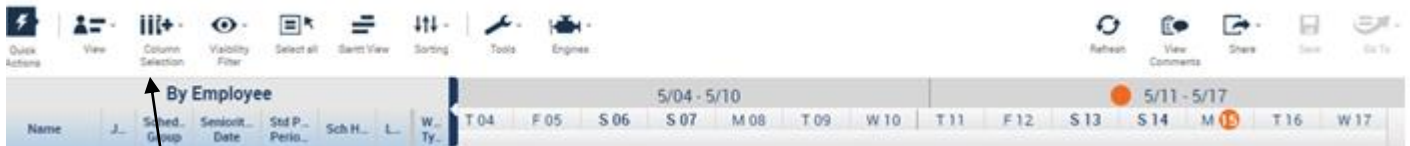
How to view Schedule by Schedule Group



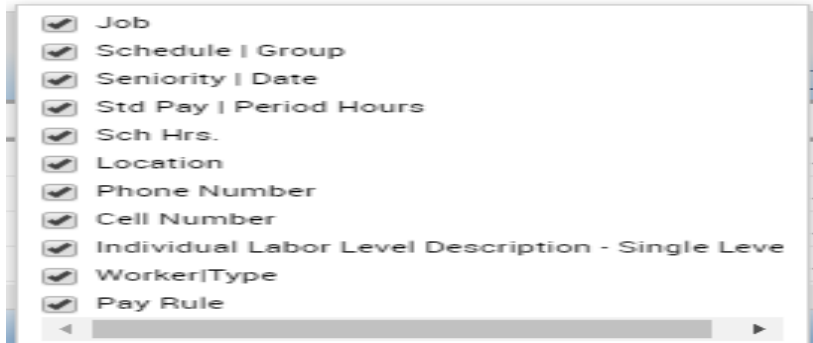
Click on View icon in task bar



How to change view by employee:



Using Column Selection, columns can be deleted by un-checking to give more landscape to view (this does not save)

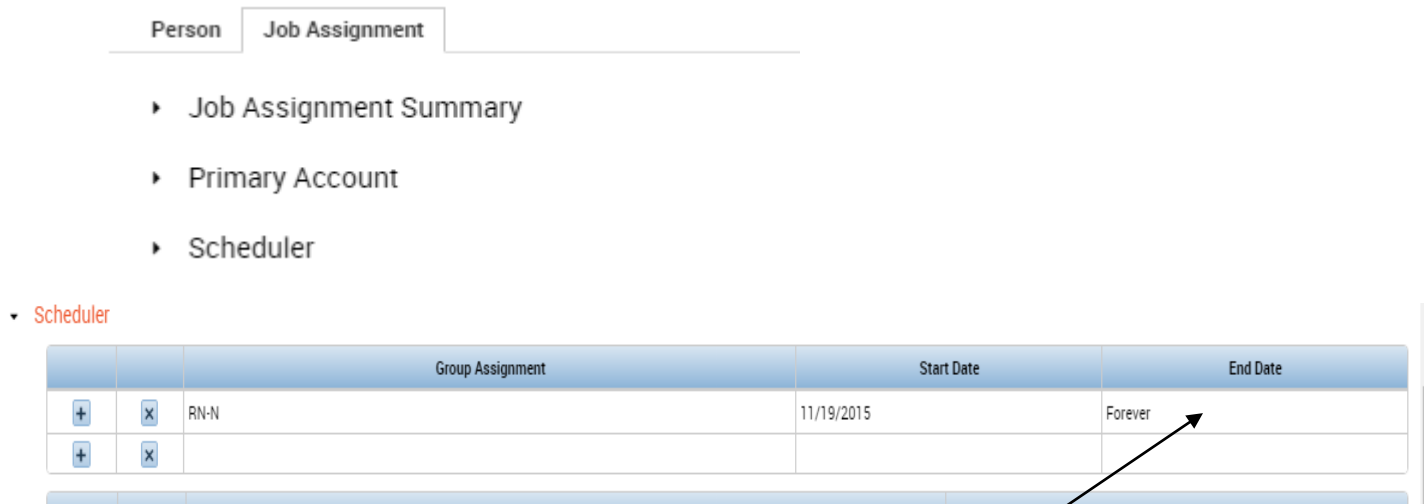


How to assign and remove employee Schedule Group

Highlight person in scheduling by using Go To



Click on Job Assignment Tab and select Scheduler




End date the old pattern (always on the last day of a pay period)

Assign New Group that the person should be assigned to in the Group Assignment drop down

How to assign multiple staff to a group:

Select multiple staff by holding down the CTRL key highlighting each person to be assigned to the group and using the GO TO – select People Editor



The screenshot shows the 'People Editor' window for 'Baker, Lindsey R'. The 'Job Assignment' tab is active. The 'Scheduler' section is expanded, showing a table with columns: Group Assignment, Start Date, and End Date. The first row shows 'RN-E' with a start date of '6/16/2016' and an end date of 'Forever'. There are two empty rows below it. The interface includes a 'History' button, 'Refresh', 'Save', and 'Go To' buttons, and a 'Loaded: 11:55' status indicator. A black arrow points from the 'GO TO' button to the 'People Editor' title bar.

		Group Assignment	Start Date	End Date
+	x	RN-E	6/16/2016	Forever
+	x			
+	x			

Use the arrow to scroll thru each employee selected to change or add a schedule group

How to enter a Shift

RN		2/16/20...	80.00	0.00	... U	1...								
RN		1/19/20...	80.00	0.00	... U	1...								
RN	RN-N	10/09/2...	80.00	0.00	... U	1...								
RN	RN-D	1/06/20...	80.00	80.00	... U	1...								
RN	RN-D	4/24/20...	80.00	80.00	... U	1...	7:00 - 19:30						7:00 - 19:30	7:00 - 19:30
RN		10/20/2...	80.00	0.00	... U	1...								

Add Shift

Assigned to Bien-Aise, Gretchen

Shift Details 12:00-13:00(1.00h)

Primary Job Organization/SUNY/UH/Neuro/9F NICU/RN

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
<input type="button" value="+"/>	<input type="button" value="x"/>	5/20/2017	Regular	12:00	13:00	5/20/2017	1.00			

Comments (0) [Add Comment](#)

Select Apply

13

Edit Shift

Assigned to: Mantor, Harmony M Shift Details: 7:30-15:30(8.00h) Primary Job: ...ion/SUNY/UH/Access Services/PAS Cent Reg/HPSC

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
	5/21/2018	Regular	7:30	15:30	5/21/2018	8.00			

Search...

Comments (0) [Add Comment](#)

[Cancel](#) [Apply](#)

Click on Search under Job Transfer

Transfer

Name: Masten, Constance J
Job: Access Services/PAS Cent Reg/HPSC
Labor Account:
Work Rule:

Job Transfer | **Labor Account** | Work Rule

- PAS 6/23/2008 - Forever
 - HPSC 6/23/2008 - Forever
 - STAFF ASST 1 6/23/2008 - Forever
 - HPSC 2 6/23/2008 - Forever
- PAS Administration 6/23/2008 - Forever
- PAS Admitting 6/23/2008 - Forever
- PAS Ambassador 6/23/2008 - Forever
- PAS Cent Reg 6/23/2008 - Forever
 - HPSC 6/23/2008 - Forever**
 - STAFF ASST 1 6/23/2008 - Forever
 - HPSC 2 6/23/2008 - Forever
 - HPSC-ROC 6/23/2008 - Forever

[Cancel](#) [Apply](#)

View the Organization Map

Transfer

Name: Masten, Constance J
 Job: Access Services/PAS Cent Reg/HPSC-BC
 Labor Account:
 Work Rule:

Job Transfer | Labor Account | Work Rule

PAS Ambassador 6/23/2008 - Forever
☒ PAS Cent Reg 6/23/2008 - Forever
☐ HPSC 6/23/2008 - Forever
☐ STAFF ASST 1 6/23/2008 - Forever
☐ HPSC 2 6/23/2008 - Forever
☐ HPSC-ROC 6/23/2008 - Forever
☒ HPSC-BC 6/23/2008 - Forever
☐ HPSC-UHCC 6/23/2008 - Forever
☐ HPSC-550 Lab 6/23/2008 - Forever
☐ HPSC-550 Pat 6/23/2008 - Forever
☐ HPSC-2W 6/23/2008 - Forever
☐ HPSC-5E 6/23/2008 - Forever

Cancel Apply

Select department job

Select Apply

Edit Shift

Assigned to: Masten, Constance J
 Shift Details: 8:00-16:00(8.00h)
 Primary Job: ...ion/SUNY/UH/Access Services/PAS Cent Reg/HPSC

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
<input type="checkbox"/>	6/04/2018	Transfer	8:00	16:00	6/04/2018	8.00	...Cent Reg/HPSC-BC		

Comments (0) [Add Comment](#)

Cancel Apply

Employee has sucessfully been floated into a different job

Employees can also be floated by selecting from Job Transfer Column drop down be assigned a work rule from Work Rule Transfer Column Drop Down

Edit Shift

Assigned to: Masten, Constance J

Shift Details: 8:00-16:00(8.00h)

Primary Job: ...ion/SUNY/UH/Access Services/PAS Cent Reg/HPSC

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
+ x	6/04/2018	Transfer	8:00	16:00	6/04/2018	8.00	...AS Cent Reg/HPSC		Class-CSEA-75-30-D

Comments (1) [Add Comment](#)

Class name and location

Class for new system

[Add another note](#)

[Cancel](#) [Apply](#)

Search the list of work rules

Select the correct work rule

Add a comment

Please note:

Work Rules are to assign a staff member to a person task

Work Rules are selected by type of assignment and the correct pay rule for the employee

Work Rules that will remove a staff member from your work load planner (direct care) are CLASS, OT-ET CLASS, PPT (Professional Practice time, OT-ET PPR), SGT (Shared Governance, OT-ET SGT)

OT-ET +Pay rule will count in direct care working overtime/extra time

ONC work rule is the staff member is oncall, this converts to ONCALL Pay Code in time card

To edit shift: click on the + and extend the bar

Add Shift

Assigned to

Bien-Aise, Gretchen

Shift Details 12:00-13:00(1.00h)

Primary Job Organization/SUNY/UH/Neuro/9F NICU/RN

Insert Template

Shift Label

Repeat this shift for 1 days

		Start Date	Type	Start Time	End Time	End Date	Duration	Job Transfer	Labor Level Transfer	Work Rule Transfer
+	x	5/20/2017	Regular	12:00	13:00	5/20/2017	1.00			

Comments (0) [Add Comment](#)

Cancel

Apply

Add Shift

Assigned to

Baker, Lindsay R

Shift Details 7:00-19:30(12.50h)

Primary Job Organization/SUNY/UH/Neuro/9F NICU/RN

Insert Template

Shift Label

Repeat this shift for 1 days

		Start Date	Type	Start Time	End Time	End Date	Duration	Job Transfer	Labor Level Transfer	Work Rule Transfer
+	x	6/02/2017	Regular	7:00	15:00	6/02/2017	8.00			
+	x	6/02/2017	Transfer	15:00	19:30	6/02/2017	4.50	...URO Stepdown/RN		OT-ET

Comments (0) [Add Comment](#)

Cancel

Apply

When complete always click on Apply

Hover over each shift to view employee job

Schedule view of Job transfers and work rules now show as an arrow with in the cell

7:00 - 19:30	7:00 - 19:30	23:00 - 11:30			
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Hover over arrow to view transfers - no "x" next to the shift identifying transfer

How to add Comment or Note

Add Shift

Assigned to

Bien-Aise, Gretchen

Shift Details 12:00-13:00(1.00h)

Primary Job Organization/SUNY/UH/Neuro/9F NICU/RN

Insert Template

Shift Label

Repeat this shift for 1 days

		Start Date	Type	Start Time	End Time	End Date	Duration	Job Transfer	Labor Level Transfer	Work Rule Transfer
+	x	5/20/2017	Regular	12:00	13:00	5/20/2017	1.00			

Comments (0) [Add Comment](#)

Cancel

Apply

Click on Add Comment

		Start Date	Type	Start Time	End Time	End Date	Duration	Job Transfer	Labor Level Transfer	Work Rule Transfer
+	x	6/01/2017	Regular	7:00	15:30	6/01/2017	8.50			

Comments (0)

Select Comment

x

Type a note (optional)

[Add another note](#)

Add

Cancel

Apply

Select comment from drop down

Add note if needed

Select Apply

Hover over employee shift will show comment

Please note: only Class Comment and Comments for Shift show on the assignment sheet

How to a Add Pay Code

Add Pay Code

Assigned to
Baker, Lindsay R

Effective Date:* 6/03/2017

Pay Code:* Sick-Reg-Unsched-D

Amount (HH.hh):* 0.00

☒ Create Open Shift

☒ Override Shift

☒ Whole Shift ☐ Partial Shift

Start Time:* 0:00

Repeat for: 1 days

Comments (0) [Add Comment](#)

Unavailable Start Time: 7:00

Unavailable Amount (HH.hh): 24.0

Transfer Job:

Transfer Labor Level:

[Cancel](#) [Apply](#)

Always unclick Create Open Shift

If replacing an entire shift leave Override and Whole Shift selected

Add Comment if needed

Select Apply

Always remember to Save



How to enter a partial shift pay code:

Clark, Frankie L	RN	RN-D	1/06/20...	80.00	80.00	...U	1...	7:00-1	7:00-1	7:00-1	7:00-1	7:00-1	7:00-1
------------------	----	------	------------	-------	-------	------	------	--------	--------	--------	--------	--------	--------

Check the number of scheduled hours

Edit the shift that person is changing

Edit Shift

Assigned to: Clark, Frankie L

Shift Details: 7:00-19:30(12.50h) Primary Job: Organization/SUNY/UH/Neuro/9F NICU/RN

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
+ x	6/03/2017	Regular	7:00	14:30	6/03/2017	7.50			

Clark, Frankie L	RN	RN-D	1/06/20...	80.00	75.00	... U	1...	7:00 - 1	7:00 - 1	7:00 - 1	7:00 - 1	7:00 - 1	7:00 - 1
------------------	----	------	------------	-------	-------	-------	------	----------	----------	----------	----------	----------	----------

Check the total scheduled hours to identify exactly how many hours of accruals that need to be used without having to be concerned about lunch and breaks.

Add Pay Code

Assigned to: Clark, Frankie L

Effective Date: 6/03/2017

Pay Code: Pers-D

Amount (HH.hh): 5.00

☐ Create Open Shift

☐ Override Shift

☐ Whole Shift ☒ Partial Shift

Start Time: 14:30

Repeat for: 1 days

Transfer Job:

Transfer Labor Level:

Comments (0) [Add Comment](#)

Cancel Apply

Enter Pay Code

Enter Amount

Enter Start time and Unavailable Start time

Click Partial Shift

Unclick Create Open Shift, Override Shift and Whole Shift

Select Apply

Clark, Frankie L	RN	RN-D	1/06/20...	80.00	80.00	... U	1...	7:00 - 1	7:00 - 1	7:00 - 1	Pers-D
------------------	----	------	------------	-------	-------	-------	------	----------	----------	----------	--------

How to Schedule Holidays on the Actual Holiday

If the person is taking the holiday on the actual holiday enter HOB-D or .HOB E/N based on their pay rule. Holidays are only given for 8 hours. If the person is taking 12 hours on the holiday, enter HOB 8 and add an additional HolcompU D or HolCompU EN 4

If the person is working on the holiday, nothing has to be done by the scheduler: payroll will handle the Holiday worked credit

If the person's normal pass day falls on the holiday and there is no need to use an accrual to meet their total obligation, enter H-Pass 0

When the Clocks Change (Daylight Savings Time)

Spring

- In the spring, clocks are move forward so the Kronos system calculates that the employee only worked 7 or 11 hours of obligation when working the night shift
- Manager will add to the employee's schedule, one hour of obligation
- PEF Employees-Add Pay code WE-Eve-Night-PEF 1.0 hours
- CSEA Employees- Add Pay code Reg-EN 1.0 hours

Fall

- In the fall, clocks are move backward so the Kronos system calculates that the employee worked 9 or 13 hours of obligation when working the night shift.
- Manager will need to make a time card edit to correct the obligation
- Manager will select Daily view at the left hand corner of the time card and then highlight the shift worked on the Saturday of the time change
- Manager will do a right click, select move hours
- PEF Employees- Move Pay code WE-Eve-Night-PEF to Overtime 1 hour
- CSEA Employees-Move Pay code-Reg EN to Overtime 1 hour