How do I change a time model/weekly schedule?

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Note: If the person will continue to be present on the same days as before, but at a lower percentage per day ("half-time part-time"), please see Changing a person's weekly working time/part-time factor[8] for information on this topic.

General

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Important: Every working time change in Personalwolke must be entered before the effective date of the change!
If it turns out that entering it before the effective date is not possible, please be sure to contact our support team before making any entries if in doubt!

A change to an employee's time model can be necessary for several reasons: a reduction of weekly working time combined with fewer working days, a general change to a company's working time agreement, part-time parental leave, a change of work location combined with different opening hours, a change in shift operations, and so on.

For such a working time change or change of the time model, the change must be made by assigning a new weekly schedule, which is explained below:

Step 1 - Is there already a daily schedule or weekly schedule with the right daily or weekly working time?

Using the right weekly schedule with equally suitable daily schedules is the prerequisite for correct time tracking for a person.

This is because the daily or weekly schedule affects correct time tracking with regard to the daily actual time, extra hours and overtime, and a person's other time accounts. It should therefore be an exact representation of this person's daily and weekly target time.

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Using an unsuitable weekly schedule can lead to incorrect payroll processing, incorrect target times and, consequently, incorrect overtime calculations.

How to get to the overview of the existing weekly schedules is explained HERE[9]. You can find information on daily schedules HERE[10].

It is therefore best to use one of the daily schedules that were created for your company as a template!

If no suitable daily schedule exists, be sure to follow the overtime requirements of the collective agreement that applies to the person or your works agreement when creating a new one. If these do not provide a guideline either, please contact support.

What should the daily/weekly schedule represent?

The weekly schedule should reflect the person's time evaluation (target working time, overtime evaluation, etc.).

This means that for each weekday, the daily schedule that matches the person's target working time must be assigned. This applies to both full-time and part-time employees. It also means that the weekly schedule contains suitable daily schedules for holidays that fall on a working day, as well as for Saturday/Sunday/holidays.

Have you found an exactly matching weekly schedule? Then please continue with Step 4[11]!

Have you found a weekly schedule whose parameters largely fit, but, for example, the weekly working time is too long because the daily target on one or more working days is longer than you need? Then please go to Step 2[12].

Have you found a weekly schedule that fits except for the schedule of individual days or with regard to the weekends or similar (e.g. three days off are needed instead of two)? Then please go to Step 3.[13]

Example
Mr. Berger will work 24 hours per week in the future so that he can take care of his childcare duties. Because his employer, a service company, is open Monday through Saturday, a corresponding weekly schedule must be created as a time model for Mr. Berger. In the future, he will work 8 hours each on Monday, Tuesday and Saturday.

When setting up the right time model for Mr. Berger, it is found that a suitable weekly schedule already exists: Ms. Huber, who is pursuing further education alongside her job, has had a weekly target of 24 hours for a year already, but she works on Wednesday, Thursday and Friday.

So Ms. Huber's weekly schedule is used as a template to create Mr. Berger's weekly schedule. When entering it, only the daily schedules from Ms. Huber's weekly schedule are moved to Mr. Berger's future working days.

This approach ensures that Mr. Berger's working time accounts are maintained correctly.

NOTIZ

Important: Please do not change an existing weekly schedule because of a single person, since doing so affects the time accounts of every person whose working time is based on that weekly schedule!

Step 2 - Creating a daily schedule

NOTIZ

The basic rule is: never change an existing weekly schedule!

If, in an existing weekly schedule, the daily working time for one or more days does not meet your needs, a daily schedule must be created for this day or these days before creating the new weekly schedule.
Here too: be sure to use an existing daily schedule as a template!

You can read how to create a new daily schedule HERE[14].

Step 3 - Creating a weekly schedule

> WARNUNG
> The basic rule is: never change an existing weekly schedule!

To create a new weekly schedule, you need:

- an existing weekly schedule as a template
- valid daily schedules for the days that do not match the template
- a meaningful name for the new weekly schedule that makes it easy to find again in a selection list

How to proceed technically is explained HERE[15]

Replace the daily schedule only on those days on which a working time different from the template is required. In principle, a different daily schedule can be used for every weekday, as well as for holidays. It is therefore theoretically possible to use more than seven different daily schedules in a person's weekly schedule.

If a weekly schedule exists whose weekly target fits, but the distribution of working time across the individual weekdays differs, please use this weekly schedule as a template anyway. When creating the weekly schedule based on it, change only the daily schedules of those days whose daily target differs from the one you need.

As replacements, however, be sure to use only existing daily schedules or the new daily schedule you previously created based on an existing daily schedule from the selection list!

Step 4 - Adjusting this person's time tracking entries

Is the change of the time model associated with a working time reduction from full-time to part-time?

- Answer NO # please continue with Step 5 [16]
- Answer YES # please note that a reduction in working time may also require a change to the vacation entitlement (aliquoting) and measures for dealing with actual working time that exceeds the target working time (extra work).

These fields, which may need to be edited, can be found in the person's master record under Settings/Time tracking and concern

- **Care entitlement**: aliquoting of the hours allowance in line with the working time reduction - manual entry required!
- **Extra hours and extra hours evaluation**: explanations of the entry can be found under Extra hours[17] in the manual
- **Balance settlement**: explanations of the entry can be found under Balance settlement[18] in the manual
- Part-time: explanations of the entry can be found under Part-time[19] in the manual
- **Vacation settlement**; explanations of the entry can be found under Vacation settlement[20] in the manual

Step 5 - Assigning the weekly schedule to the person

1. Open the person's master record
2. Go to the "Settings" tab
3. Open Time tracking
4. Click Plus

5. Enter the date from which the person will have the new weekly target
6. Select the weekly schedule you previously chose or created from the selection list.
7. Then click "Save".
8. With these steps, you have successfully changed a person's working time!

Changing the working time model or the weekly working time/weekly schedule retroactively

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Caution: a retroactive change of working time should be the absolute exception, since it involves an irreversible correction of the working time accounts!

In rare cases, it can of course happen that a change in weekly working time has to be entered retroactively, e.g. if it was decided at short notice. Steps 1 to 3 must also be carried out for this.
In step 4, item 5, however, a date in the past must now be entered.
So that the working time accounts can be corrected properly, the time accounts must now be recalculated from the date on which the person already started working according to the new working time.

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Caution! A recalculation is irreversible and has far-reaching consequences! Not only are the time accounts for the actual times changed, but the vacation entitlement, time credits and other parameters are also adjusted.

1. You may therefore want to take a screenshot beforehand of the view of the person's time accounts in the Correction-Client/Day view[21].
2. For the recalculation, please click the "Recalculate" button.
3. In the window that now appears, enter the date from which the new working time has been valid.
4. Select the appropriate setting from the mode list. An explanation is provided a little further down.
5. Then click "Recalculate" again.
6. The time accounts have now been adjusted to the new working times as of the reference date
7. If desired, check again in the Correction-Client/Day view[22] that the changes are correct

In the window that now opens, please enter the from-date in the past.

The following options are available under Mode:

- Reapply time models and adjustments from master record: all previous data on time models or permissions, e.g. concerning time capping, is overwritten from the entered date. This also overwrites the data of requests and the like.
  This mode is suitable, for example, when an incorrect time model was initially used for a newly created person.
- Recalculate with historical time model references: the past time model is kept, and only the permissions (for time capping, etc.) are overwritten
- Time model from historically set weekly schedule: here only the time model is overwritten, but the permissions are kept.

Keywords: time model, working time, weekly schedule, daily schedule, part-time

1. /daisy/personalwolke-admin/6487-dsy.html?language=4
2. /daisy/personalwolke-admin/9884-dsy.html?language=4

3. /daisy/personalwolke-admin/8978-dsy.html?language=4
4. /daisy/personalwolke-admin/9876-dsy.html?language=4
5. /daisy/personalwolke-admin/8996-dsy.html?language=4
6. /daisy/personalwolke-admin/8607-dsy.html?language=4
7. /daisy/personalwolke-admin/8614-dsy.html?language=4
8. /daisy/personalwolke-admin/8615-dsy.html?language=4
9. /daisy/personalwolke-admin/8616-dsy.html?language=4
10. /daisy/personalwolke-admin/6190-dsy.html?language=4
11. /daisy/personalwolke-admin/6190-dsy.html?language=4