

Advanced Vacation Pre-discovery Questionnaire

Client name: _____

Person completing form: _____

Prior to setting up the time off request features in CommunityWFM, we need to determine how you will use the application. This may include having discussions with supervisors, HR, WFM analysts, and management. Planning now will prevent having to make tedious corrections later.

CommunityWFM provides many options to accommodate a wide range of possibilities. Will CommunityWFM be the source of record for time off accruals? Do agents at different levels accrue planned time off (PTO) hours/days at different rates? Are there different buckets for sick time and vacation time? Do different departments share the same policies, but have different calendars? CommunityWFM can handle it, with a bit of planning.

We designed this questionnaire as a conversation starter and to help you gather the information required to successfully implement advanced vacation in CommunityWFM 5.x. Your responses enable the Onboarding Specialist to customize the training when you are ready to implement these features.

How will you use the vacation planning features in CommunityWFM?

- ☐ **No tracking of PTO accruals and no auto-approval of time off requests. Manual tracking of accruals outside of CommunityWFM and manual approval of time off requests within CommunityWFM.**

This option does not require additional set-up or planning. Agents make time off requests using the Request time off form, rules are configured to ignore accruals, and all requests set to auto-pending to be later approved or denied by a supervisor.

- ☐ **No tracking of PTO accruals but will use system auto-approve rules to approve/deny time off requests.**

CommunityWFM will automatically approve or deny requests based on established rules for blackout day, brownout day, and minimum request intervals. Agents make time off

requests using the Request time off form, rules are configured to ignore PTO accruals, but rules for blackout days, brownout days, and minimum request interval are in place and run at the time of the agent's request. Agents can view the rules and see why a request is approved or denied.

- ☐ **Will track PTO accruals in the system; may or may not use auto approve rules to approve/deny time off requests.**

Agents can view their PTO accrual balance in the Time off worksheet and CommunityWFM will deduct time when an agent requests time off using designated events. Accruals may be generated by the CommunityWFM accrual engine or uploaded via Excel. For this option, classifications, including event types, must be configured and included in PTO policies. Agents are then assigned to policies.

The following options require that agents time off rules are set to 'calendar partition.'

- ☐ **Will track use of PTO accruals and create open selection calendars with rules for approving time off requests.**

Calendars allow agents to view available time off prior to making a request. Calendars also allow the option of having a waiting list so if an agent removes a previously requested day off, the next agent on the waiting list will receive an offer to accept that day.

- ☐ **Will track use of PTO accruals and create bidding calendars with rules.**

This option requires agent ranking profiles, which are used to determine the order of bidding. You can have rules limiting the minimum and/or maximum duration of requests (e.g., everyone must request at least one week and no more than two weeks during the first round of bidding), along with several other parameters.

Will CommunityWFM track employees' use of PTO hours?

- ☐ No
- ☐ Yes > agents will be able to view their available and scheduled PTO hours in their time off worksheet.

Will CommunityWFM calculate PTO accrual hours?

☐ No, an external source will provide accrual hours.

☐ Excel upload

☐ Other: _____

☐ Yes

Are there different categories of PTO (eg, vacation, sick, discretionary days)?

☐ No, all PTO is in one bucket.

☐ Yes: **How many buckets of time?** _____

What are the categories? _____

Will “late” events be charged to an agent’s PTO?

E.g., if an agent is more than 15 minutes late, should they have time deducted from their PTO bucket? Or 5 minutes? Or 1 hour?

☐ No

☐ Yes > What is the trigger for using PTO – how many minutes? _____

How often do employees accrue time off?

☐ Weekly

☐ Monthly

☐ Annually

☐ Other: _____

Do all employees accrue the same amount of PTO?

☐ No, accrual is based on:

☐ Years of service

☐ Hours worked – What is the formula? _____

☐ Other: _____

☐ Yes

Is accrued time off prorated for parttime employees?

- ☐ No
- ☐ Yes
- ☐ We have no parttime employees/parttime employees do not earn PTO

Are there other categories of employees that accrue time off?

- ☐ No
- ☐ Yes – what are the categories? _____

Do you have a copy of the company accrual schedule?

- ☐ No **Homework:** Obtain a copy of the accrual schedule.
- ☐ Yes – have a copy available for the CommunityWFM consultant.

Is there a maximum accrual of hours?

- ☐ No
- ☐ Yes, what is the maximum? _____

Is there rollover of PTO from one year to the next?

Will need answer for each classification of PTO.

- ☐ No (use it or lose it)
- ☐ Yes: **Percentage or number of hours allowed:** _____

Does the rollover amount expire?

- ☐ No
- ☐ Yes: **When does it expire?**
- Specific date** (eg, March 30): _____
- Amount of time** (eg, after 90 days): _____

Is there a grace period for new employees before accrued time may be used (eg, 90 days)?

- ☐ No
- ☐ Yes: **Does PTO accrue during the grace period?**
- ☐ No
- ☐ Yes

Using accrued time

Will the time off settings be set to auto-approve/auto-deny PTO requests?

- ☐ No. All requests will go to pending and require manual approval/denial.
- ☐ Yes

Vacation bidding

Will CommunityWFM be used for vacation bidding?

- ☐ No
- ☐ Yes

Will there be a requirement to request a specific amount of time during a bid?

(eg, all agents must request a full week of time during the first round of bidding)

- ☐ No
- ☐ Yes

Will agents be allowed to view the name/image of other agents and their requested time off in a calendar partition bid round?

Agents will be able to view dates requested, but there is an option to obscure the name/image.

- ☐ No
- ☐ Yes

Will agents be able to use the waitlist if a requested date is not available due to a brownout rule?

- ☐ No
- ☐ Yes. Meeting a brownout rule threshold (x number or percentage of agents allowed off per day) in a calendar partition triggers the option for a waitlist. There is no ranking or seniority in the waitlist – it's first come/first served.