



Preparing for Advanced Vacation

Webinar handout

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About this document

This document accompanies the CommunityWFM College webinar *Preparing for Advanced Vacation*. It includes additional details and step-by-step instructions for completing the tasks discussed during the webinar.

****This webinar is not training for how to use the vacation features****

The information presented and the form in this handout will help you prepare for and guide you in collecting the information you need and decisions you need to make prior to using the advanced vacation features in CommunityWFM 5.x.



Advanced Vacation Pre-discovery Questionnaire

Prior to setting up the time off request features in Community, 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.

Community provides many options to accommodate a wide range of possibilities. Will Community be the source of record for time off accruals? Do agents at different seniority 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? Community 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 Community 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 Community?

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

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.**

This is similar to the current options available in Community 4.4. Blackout day, brownout day, and minimum request interval rules automatically approve or deny requests based on established rules. 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 Community will deduct time when an agent requests time off using designated events. Accruals may be generated by the Community accrual engine, uploaded via Excel, or manually entered. For this option classifications, including event types, must be configured and included in PTO policies. Agents are then assigned to a policy. Classifications may be included in more than one policy, but agents can belong to only one policy.

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 for days with brownout rules, 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 (eg, 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 Community 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 Community 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 lates, 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 part-time employees?

- No
- Yes
- We have no part-time employees/part-time 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 trainer.

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 agents be able to use the waitlist if a requested date is not available due to 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.



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

- No
- Yes

Vacation bidding

Will Community 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