



Time Off – A Guide for Agents

Requesting Time Off in CommunityWFM 5.0 / 5.1
Version 1.3
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About this document

This document provides a step-by-step guide for requesting time off using the legacy system (Legacy AutoApprove Rules) and the new advanced vacation (PTO Calendar Partition Rules).



Glossary

Accrual: The accumulation or increase of something over time. In All Things Time Off, agents accumulate (accrue) hours to use for time off from work.

Accrual rates: How much and how often time accrues. May be via an external source such as an Excel spreadsheet, via the CommunityWFM accrual engine, or accrual information fed to CommunityWFM via the Community Web restful API.

Accrual schedule: The rate at which agents accumulate hours. Accrual schedules may be weekly, monthly, or annually. The amount accrued may be based on length of service if those with longer service earn more time off, or the same for all agents.

Bid round: A period of time designated for agents to 'bid' with other agents for time off within a PTO calendar. Bid rounds are typically for a set period of time, after which the bids are approved or denied. Calendar rules determine the allowable block sizes, the number of agents who may bid at the same time, and other parameters.

Block: A single time off request made by or on behalf of an agent during a bid round. See Selection.

Calendar partition: The calendar partition establishes time off rules, bidding rules, and manages the time off bidding process. It's the mechanism by which agents can request to use their accrued hours in a bid round or during open selection. If participating in a calendar partition, an agent may not request time off for that time period using the legacy request system.

Classification: A way to organize and report time off. Assign events to a classification, then assign classifications to a policy. You may create multiple classifications, but the same event may **not** be included in more than one classification. Classifications may be included in more than one policy.

Open selection: A period of time when agents may request time off in a calendar without bidding against other agents for the same days. Calendar rules are used to validate then approve or deny the request.

Policy: Policies establish accrual rules for classifications. Employees are assigned to only one policy. Policies might include full-time exempt, part-time non-exempt, etc. You may create as



many policies as needed to cover all employee situations; however, an employee may be assigned to only one policy. Employees must be assigned to a policy in order to apply accrued time and participate in calendar partitions.

PTO: Planned time off.

Published calendar: The published calendar includes all of the time off accruals and the policies governing time off requests for that time. Once published, there's no going back. You cannot "unpublish" the calendar.

Restricted action plan (RAP): A mechanism to prevent automatic time off approval for certain agents. RAPs may also be used to restrict access to the website, mobile application, and to prevent participation in ASAPs and schedule swaps. Default reason codes include corrective action, disciplinary action, or additional training required.

Selection: In a bid round, a selection is the sum of all of the blocks (requests) within a bid round response. See Block.

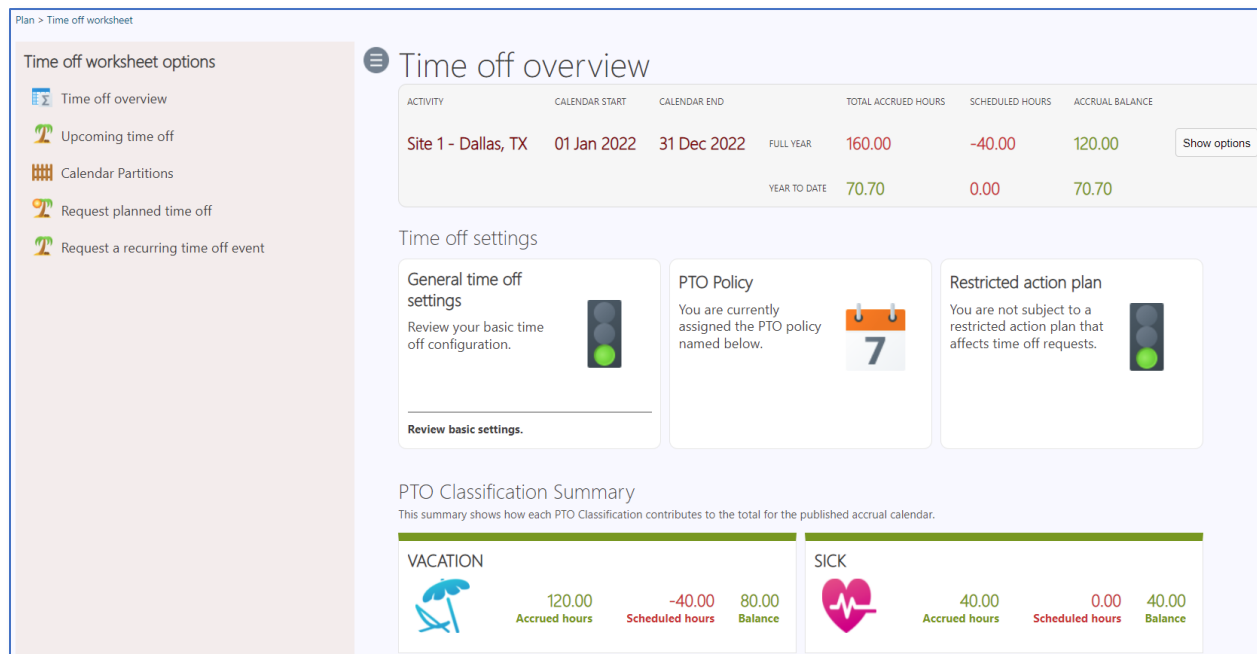
Waitlist: In a calendar partition, the waitlist may be available when a request fails a brownout rule.



Time off requests

A legacy method for requesting time off similar to prior versions will remain in CommunityWFM for now (Plan > Time off requests > *Request planned time off* or *Request a recurring time off event*). However, we recommend that you explore the new features available in the time off worksheet.

The Time Off Worksheet is where you can review your time off accrual balances, time off settings, the PTO policy to which you are assigned, and whether you are on a restricted action plan. A convenient menu on the left will link you to your list of upcoming time off, current and upcoming Calendar Partitions (if participating), and links to request time off or request a recurring time off event, all in one place.



The screenshot shows the 'Time off overview' section of the Time Off Worksheet. It includes a table of accrual data, time off settings, and a PTO Classification Summary.

ACTIVITY	CALENDAR START	CALENDAR END		TOTAL ACCRUED HOURS	SCHEDULED HOURS	ACCRUAL BALANCE	
Site 1 - Dallas, TX	01 Jan 2022	31 Dec 2022	FULL YEAR	160.00	-40.00	120.00	Show options
			YEAR TO DATE	70.70	0.00	70.70	

Time off settings

- General time off settings:** Review your basic time off configuration. (Status: On)
- PTO Policy:** You are currently assigned the PTO policy named below. (Policy: 7)
- Restricted action plan:** You are not subject to a restricted action plan that affects time off requests. (Status: Off)

PTO Classification Summary
This summary shows how each PTO Classification contributes to the total for the published accrual calendar.

Classification	Accrued hours	Scheduled hours	Balance
VACATION	120.00	-40.00	80.00
SICK	40.00	0.00	40.00

Note: If you are a participant in a calendar partition (advanced vacation), **you cannot request time off unless there is as calendar partition in place.** You will receive the following message:

Request date	Validation results	Comments
Tuesday, 24 August 2021	Failed	You cannot request time off outside the bounds of a defined Calendar Partition.

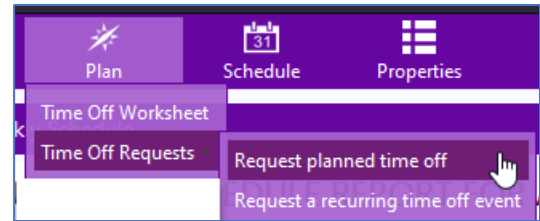


Traditional time off requests

Plan > Time Off Requests > Request planned time off or Request a recurring time off event or use the same forms from the time off worksheet

Select **planned time off** for a one-time partial day event, a single full day, or multi-consecutive day events.

Select **recurring event** for partial day events that occur on more than one day (consecutive or non-consecutive), or for full day events that occur on more than one non-consecutive day.



Request planned time off

Complete the *Request time off* worksheet.

Are you requesting off a portion of a day or a whole day(s)? Select *All day* or *partial day*. Partial days can only be for a single date. If you have multiple partial day events (e.g., off every Tuesday and Thursday morning), request a recurring time off event.

Request type: Select from the available event types.

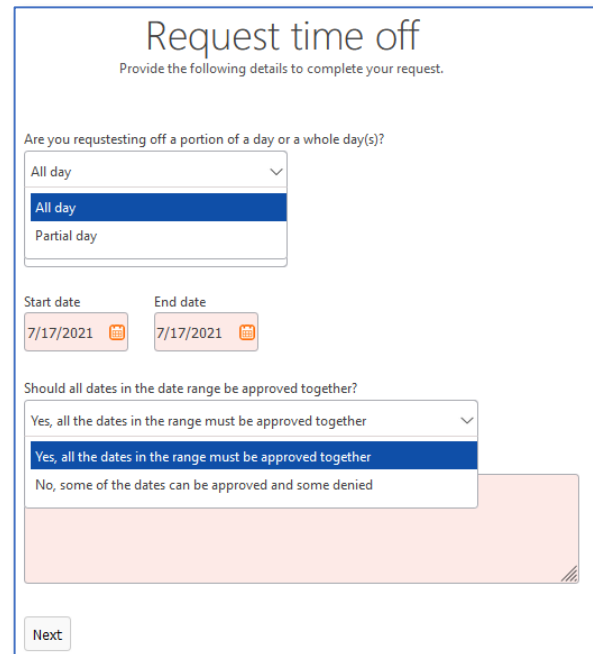
Start date / End date: Dates must be consecutive. For non-consecutive days, request a recurring time off event.

Should all dates in the date range be approved

together? Is the request all or nothing? If you can't have all of the days off, do you want to have at least some? The default option is *No*. If planning to use the waitlist in a calendar partition, select *Yes*, even for a single day request.

Comments: Required.

Click *Next*.





The validation engine will run and let you know whether your request will likely be approved or denied and why. If there are rules not met, you can go back and make changes to your request.

Request validation results

Review the results of the runtime validation of your request and then decide if you wish to continue.

Good to go! The request will likely be approved. [110]

Click the Save Request/Finish button to complete your time off request.

The following table shows the dates of your request and the time off rule validation results for each date.

Request date	Validation results	Comments
Monday, 27 November 2023	Passed	Agent Blackout Date Rule - No rule of this type was in place. Brownout rule - Your request does not violate the brownout rule parameters. Minimum request interval rule - Your request does not violate the minimum request interval parameters. Accrued hours rule - You have sufficient accrued hours for the request. Agent RAP rule - You are not restricted from making time off requests for this time period. Agent hire date rule - You are not under a hire date restriction for this time period. Calendar partition enforcement rule - Your request is inside a valid and open calendar partition.

Back
Save request

Or you can proceed and *Save request*.

Saving the request sends it to your supervisor team. After saving, you will see a summary of your request.

Schedule events list

Review the results of the runtime validation of your request and then decide if you wish to continue.

Good to go! The request will likely be approved. [110]

Click the Save Request/Finish button to complete your time off request.

The following table shows the resulting scheduled events that will now be reviewed by your supervisor team.

Event start	Event end	Duration (in hours)	Event type
Monday, 27 Nov 2023 12:00 am	Monday, 27 Nov 2023 08:00 am	8.00	PTO

Finish



Click *Finish*.

Note: The green check does not mean that your request has been approved. It only means that it is likely to be approved.

Your requests will appear in the *Pending and Upcoming requested time off* module. Refresh the page if needed to view them.

Request a recurring time off event

Complete the recurring time off event worksheet.

Request type: Select from the available event types.

Start date / End date: Select start and end dates.

Start time / End time: Select start and end times. Must be the same for each day.

What recurrence pattern should apply to this request? Select from *This event occurs every day in the specified date range* and *This event occurs only on selected days of the week*. If only certain days, check the boxes for the selected days.

Comments: Required.

Click *Save* to send your request to your supervisor. **Note:** The validation step that occurs when requesting a non-recurring event does not run for this type of event.

Recurring time off event

Provide the following details to complete your request.

Request type

Start date: 8/20/2021 End date: 9/30/2021

Start time: 8:00 AM End time: 12:00 PM

What recurrence pattern should apply to this request?

Monday
 Tuesday
 Wednesday
 Thursday
 Friday
 Saturday
 Sunday

Comments



On the final page, review the table of requests then click *Finish*.

Recurring time off event

Provide the following details to complete your request.

The following table shows the resulting scheduled events that will now be reviewed by your supervisor team.

Event start	Event end	Duration (in hours)	Event type
Tuesday, 31 Aug 2021 08:00 am	Tuesday, 31 Aug 2021 12:00 pm	4.00	LOA
Thursday, 02 Sep 2021 08:00 am	Thursday, 02 Sep 2021 12:00 pm	4.00	LOA
Tuesday, 07 Sep 2021 08:00 am	Tuesday, 07 Sep 2021 12:00 pm	4.00	LOA
Thursday, 09 Sep 2021 08:00 am	Thursday, 09 Sep 2021 12:00 pm	4.00	LOA
Tuesday, 14 Sep 2021 08:00 am	Tuesday, 14 Sep 2021 12:00 pm	4.00	LOA
Thursday, 16 Sep 2021 08:00 am	Thursday, 16 Sep 2021 12:00 pm	4.00	LOA
Tuesday, 21 Sep 2021 08:00 am	Tuesday, 21 Sep 2021 12:00 pm	4.00	LOA
Thursday, 23 Sep 2021 08:00 am	Thursday, 23 Sep 2021 12:00 pm	4.00	LOA
Tuesday, 28 Sep 2021 08:00 am	Tuesday, 28 Sep 2021 12:00 pm	4.00	LOA
Thursday, 30 Sep 2021 08:00 am	Thursday, 30 Sep 2021 12:00 pm	4.00	LOA

Finish

View pending and upcoming time off requests

You can view, delete, and edit (disabled for some), or add to the waitlist (for some requests) current requests.

Go to Plan > Time off worksheet then select *Time off overview* from the Time off worksheet options.

Pending & Upcoming requested time off
This list shows you the pending and upcoming scheduled time off hours.

Start time	End time	Request date from	Request date through	Request type	PTO classification	Total hours of time off	Review status	Waitlist status	Comments
08:00 am	12:00 pm	24 Aug 2021	24 Aug 2021	PTO	PTO - vacation	4.00	Denied	Not waitlisted	I need to be off every Tues and Thurs AM Edit Delete
08:00 am	12:00 pm	26 Aug 2021	26 Aug 2021	PTO	PTO - vacation	4.00	Approved	Not waitlisted	I need to be off every Tues and Thurs AM Edit Delete
08:00 am	12:00 pm	31 Aug 2021	31 Aug 2021	PTO	PTO - vacation	4.00	Approved	Not waitlisted	I need to be off every Tues and Thurs AM Edit Delete
08:00 am	12:00 pm	02 Sep 2021	02 Sep 2021	PTO	PTO - vacation	4.00	Approved	Not waitlisted	I need to be off every Tues and Thurs AM Edit Delete

Refresh



Supervisor view

Supervisors will be able to review, approve, deny, and revalidate requests in their Pending requests module.

Pending requests					
Request type	Person	Event date(s)	Description	Total duration	Requested on
	Badgett, Gregory	Mon, 02 Aug 2021 - Wed, 04 Aug 2021	PTO comments (Paid Time Off Request, 8 hours)	24.00	Fri, 16 Jul 2021 09:44 am   
	Badgett, Gregory	Mon, 02 Aug 2021 - Wed, 04 Aug 2021	I need a break! (Paid Time Off Request, 8 hours)	24.00	Fri, 16 Jul 2021 09:50 am   
	Granda, Luis	Mon, 16 Aug 2021 - Tue, 17 Aug 2021	PTO comments (Paid Time Off Request, 8 hours)	16.00	Thu, 15 Jul 2021 04:16 pm   



Calendar partitions / advanced vacation

There are several advantages to using the time off worksheet/calendar partitions including—

- Ability to view a calendar showing blackout and brownout dates and other rules.
- During a bid round, the ability to view other agent’s requests (with or without identification – depending on the settings).
- Adding denied requests to a waiting list (for some request types).
- Receiving an immediate estimate of whether your request is likely to be approved.

There are two parts to a calendar partition: Bid rounds and open selection.

Bid rounds

In bid rounds, a designated number of agents “bid” in rank order for time off. As one person validates and commits their request, the next agent in line is able to validate and commit their request. Even before their turn, agents can view the calendar with others’ requests and validate their own, but still must wait their turn to commit. Once all of the agents complete their bids, the system validates and completes all of the requests, placing the time off onto the agent’s schedules.

Open selection

In an open selection, individual requests are approved or denied without waiting for other agents to complete their time off requests.

Time off worksheet

Plan > Time Off Worksheet

Time off overview

Time off overview						
ACTIVITY	CALENDAR START	CALENDAR END		TOTAL ACCRUED HOURS	SCHEDULED HOURS	ACCRUAL BALANCE
Site 1 - Dallas, TX	01 Jan 2021	31 Dec 2021	FULL YEAR	96.00	0.00	96.00
			YEAR TO DATE	0.00	0.00	0.00

Show options



The Time off overview provides all of the information regarding your time off including your total accrued hours, upcoming scheduled time off hours, and remaining hours. Click *Show options* to view past or future accrual calendars. You may also launch the *Request time off* or *Request a recurring event* worksheet from the options window.

Published calendar options

[Hide options](#)

Report filters and options

Filter participants by this Activity

What accrual period do you want to use?

01 January 2021

What basis do you want to use?

Use transactions for all accrual calendars in the period range.

Additional options

Request planned time off

Create a new PTO request.




Request a recurring time off event

Create a new request for a recurring time off event that occurs on certain week days during the request period.

Time off settings

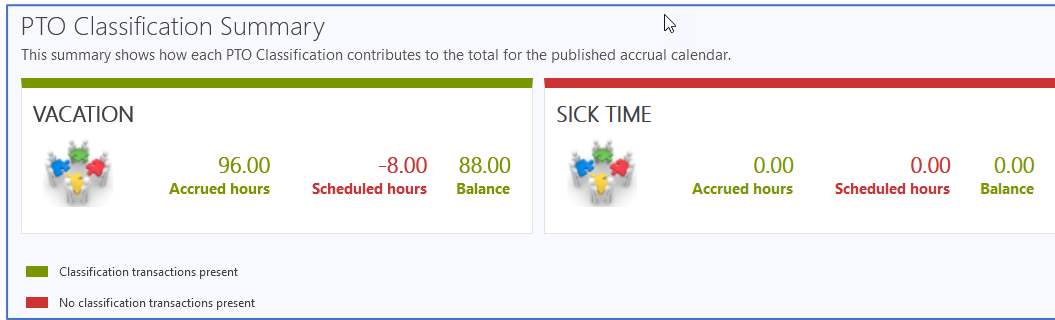
Time off settings includes a review of *General time off settings* (the source of your time off rules [legacy or calendar partition] and whether you have a hire date delay in effect), a panel showing the name of your assigned PTO policy, and whether you are part of a restricted activity plan that would prevent time off requests or other activities.

Time off settings

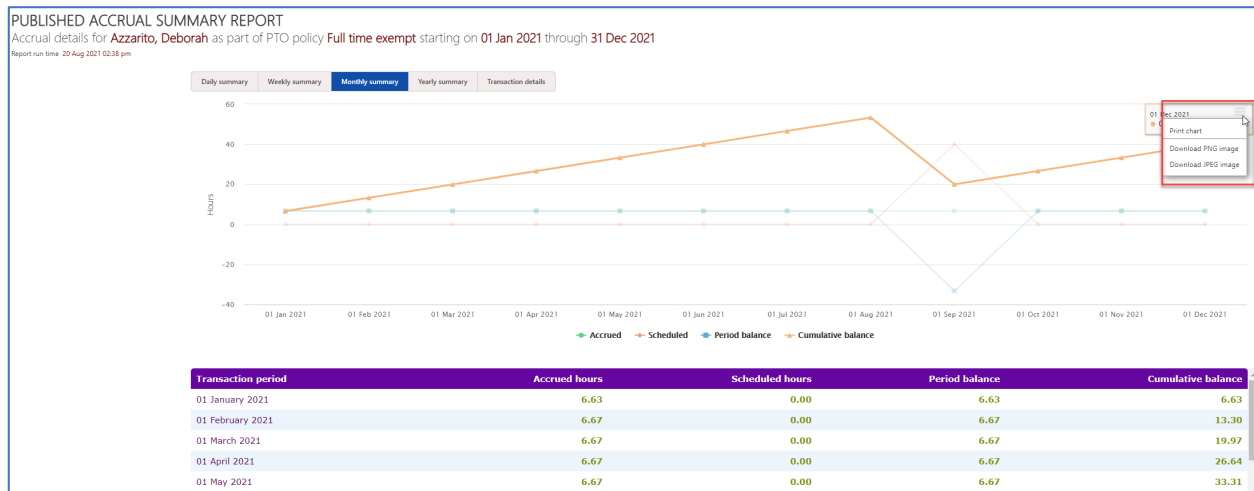
<p>General time off settings</p> <p>Review your basic time off configuration.</p> <div style="text-align: right;"></div> <hr style="border: 0; border-top: 1px solid #ccc; margin-top: 10px;"/> <p>Review basic settings.</p>	<p>PTO Policy</p> <p>You are currently assigned the PTO policy named below.</p> <p>Full time exempt</p> <div style="text-align: right;"></div>	<p>Restricted action plan</p> <p>You are not subject to a restricted action plan that affects time off requests.</p> <div style="text-align: right;"></div>
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PTO Classification Summary

The Classification Summary shows which classification(s) contribute to your accrued hours. For example, if you have separate vacation and sick hours, you may have one classification for each with different totals of accrued hours.



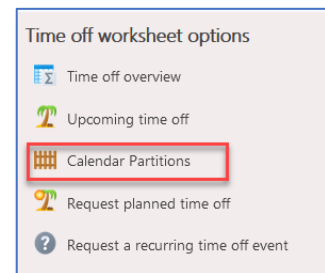
Clicking on a classification block will display the published accrual summary report where you can see daily, weekly, monthly, or annual accruals in graph and list form. Transaction details will display your time off accruals, requests, and accrual balances. Printing and downloading an image are available for this report.



Time off rules

Prior to making time off requests, it may be helpful to view the calendar time off rules. When you receive the notification that you have been added to a calendar partition—

1. Go to Plan > Time off worksheet
2. In the worksheet options menu select *Calendar Partitions*.





3. Select the calendar partition name in *Current and Upcoming Calendar partitions*.

Current & Upcoming calendar partitions
This list shows you the calendar partitions that you are part of.

TEST

01 Jan 2021 31 Dec 2021 1

Calendar start Calendar end Default rank

4. In the PTO Calendar overview options, select *Time off rules*.

PTO Calendar overview options

- Overview
- Time off rules
- Time off bid rounds
- Available time off

PTO Calendar Reports

- PTO Calendar Transactions Report

Rules include blackout dates, brownout dates, and minimum interval request rules.

You can change the view from calendar to list view, if desired.

Time Off Rules - Calendar View

Show the list of applied time off rules in a calendar view.

Show time off rules in a calendar.

Time Off Rules - List View

Show the list of applied time off rules in a list view.

Show time off rules in a plain list.

In a bid round, there may be additional rules for the minimum and/or maximum number of hours you can request in a block, whether contiguous selection of days is allowed, and whether you are required to use a minimum or maximum percentage of your time. The bid round rules are visible when you select *Show this bid round status*.

2

Vacation

Open

The open date of this round is **23 Jun 2021**, and the close date is **31 Dec 2021**.

Show this bid round status.

MINIMUM BID ROUND BLOCK SIZE	MAXIMUM BID ROUND BLOCK SIZE	MINIMUM % OF ACCRUED BALANCE	MAXIMUM % OF ACCRUED BALANCE	CONTIGUOUS SELECTIONS ALLOWED?
8 hours	40 hours	N/A	N/A	Yes



Making time off requests

If you are part of a calendar partition that is in an active bid round, you cannot make a separate request for time off within the calendar dates. Any requests must be made through the bidding process. After all bidding is complete, the calendar may move to open selection with different rules (for example, some may have bidding for weeks of time, then move to open selection where people may request single days).

Validation results	Comments
Failed	You cannot request time off outside the bounds of a defined Calendar Partition.

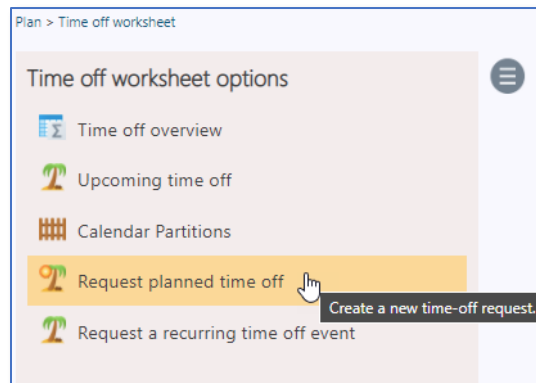
Making a request in open selection

After you receive the notifications that you are included in a calendar partition and that the calendar is available, you can submit time off requests.

Go to Plan > Time Off Worksheet

There are two ways to launch the request time off window. To view available time and the likelihood of having your request approved, use the second method (calendar partitions).

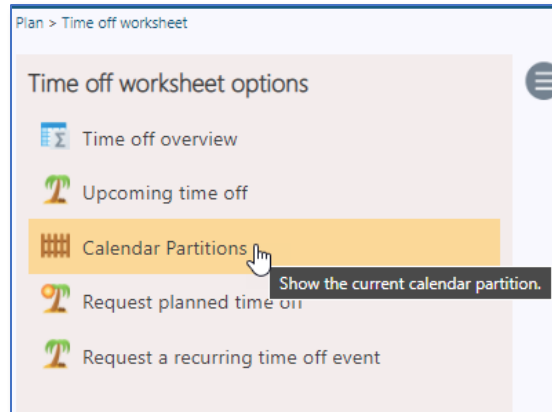
1. In the left side menu select *Request planned time off*.



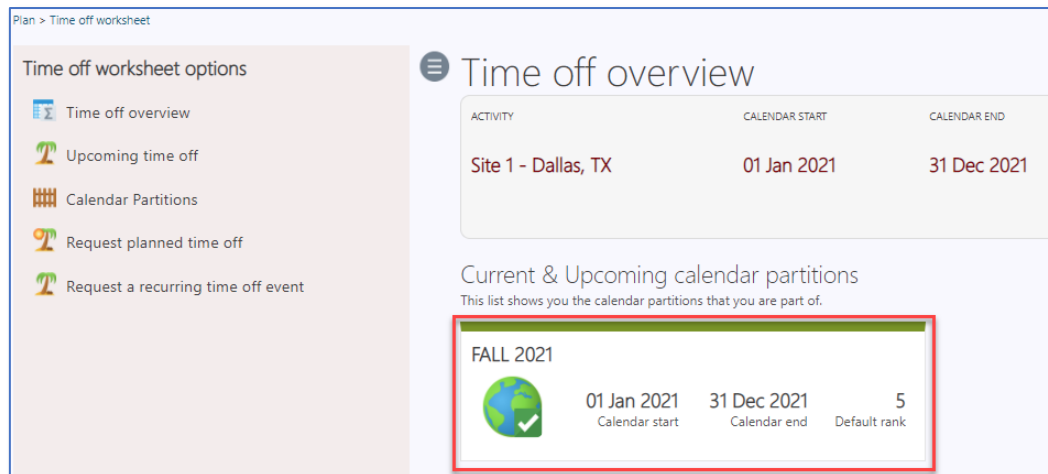
OR



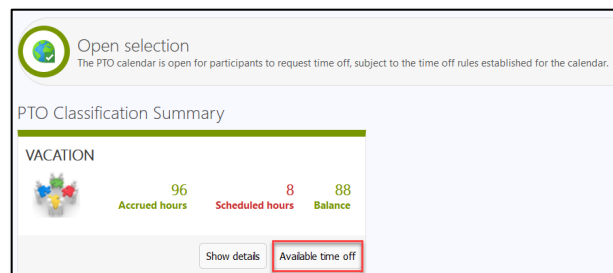
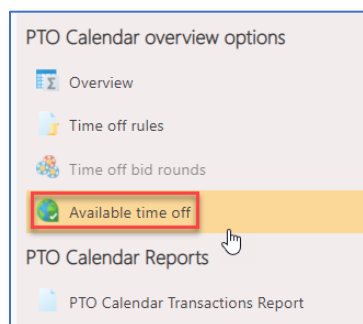
1. Select *Calendar Partitions*.



2. In the *Current and upcoming calendar partitions* click on your partition.

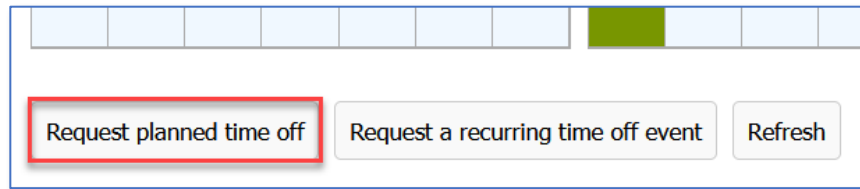


3. Go to the *Classification Summary* and click *Available time off* or in the left side navigation click *Available time off*.





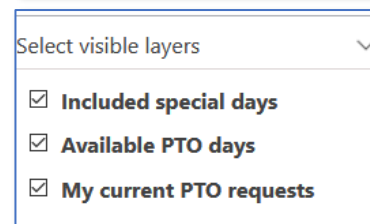
4. After the calendar loads, scroll to the bottom and select *Request time off*.



With the calendar partition view, you can see with a glance the likelihood of having your request approved and view your current requests. Green days will likely be approved. Yellow is less likely to be approved. Red is unlikely to be approved.

August 2021						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
01	02	03	04	05	06	07
08	09	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

You can change the calendar display to include or exclude designated special days, available days, and your current requests.



Clicking on a day in the calendar will show details of current requests and whether you are likely or unlikely to receive approval for your time off request for that day.

Available PTO daily detail

The following details apply to the schedule date **Friday, 02 July 2021**

MAXIMUM AVAILABLE PTO HOURS:	40.00
TOTAL SCHEDULED HOURS:	8.00
LIKELY REMAINING HOURS OF PTO:	32.00
REMAINING FTES OF PTO TIME:	4.00
PERCENTAGE OF ALLOCATED HOURS REMAINING:	80.00%

BASED ON THIS DATA, YOU ARE **LIKELY** TO HAVE TIME OFF APPROVED ON THIS DATE.

[Dismiss](#)

The time off request worksheet is the same regardless of the path you take to launch it.



Are you requesting off a portion of a day or a whole day(s)? Select *All day* or *partial day*. With *partial days* you have the option to enter the specific hours for your request. With *All day*, you can indicate whether the request may be approved if only some days are available or if it must be all approved or nothing. If planning to use the waitlist in a calendar partition, select *Yes*, even for a single day request.

Request type: select the type of time off event to apply to this request.

Start date and End date: Enter the date(s) of your request. End date only appears if the request is *All day*.

Start time and End time: Only appears for partial day requests.

The screenshot shows a form with the following fields:

- Start date:** A date picker showing 8/20/2021.
- Start time:** Three dropdown menus for hour (12), minute (00), and period (AM).
- End time:** Three dropdown menus for hour (12), minute (00), and period (AM).

Should all dates in the date range be approved together? Only appears for *All day* requests.

The screenshot shows a dropdown menu with the following options:

- Should all dates in the date range be approved together?
- Yes, all the dates in the range must be approved together (selected)
- No, some of the dates can be approved and some denied


Comments: Enter a reason for your request. This field is required.



When you click *Next*, the system will run validation rules against your request and let you know whether the request is likely to be approved and the reason(s) why it is approved (“passed”) or failed. If there’s a green check at the top, your request will likely be approved.

Request validation results

Review the results of the runtime validation of your request and then decide if you wish to continue.



Good to go! The request will likely be approved. [110]

Click the Save Request/Finish button to complete your time off request.

The following table shows the dates of your request and the time off rule validation results for each date.


Request date	Validation results	Comments
Monday, 27 November 2023	Passed	Agent Blackout Date Rule - No rule of this type was in place. Brownout rule - Your request does not violate the brownout rule parameters. Minimum request interval rule - Your request does not violate the minimum request interval parameters. Accrued hours rule - You have sufficient accrued hours for the request. Agent RAP rule - You are not restricted from making time off requests for this time period. Agent hire date rule - You are not under a hire date restriction for this time period. Calendar partition enforcement rule - Your request is inside a valid and open calendar partition.

You can *Save request* even if it fails, or select *Back* to revise your request. Saved requests will be reviewed by the Auto-Approve service and your supervisor team. If you don’t have sufficient accrued time, the Auto-Approve service will deny your request and send you a notification.

On the next screen, click *Finish* to finalize your request.

Schedule events list

Review the results of the runtime validation of your request and then decide if you wish to continue.



Good to go! The request will likely be approved. [110]

Click the Save Request/Finish button to complete your time off request.

The following table shows the resulting scheduled events that will now be reviewed by your supervisor team.

Event start	Event end	Duration (in hours)	Event type
Monday, 27 Nov 2023 12:00 am	Monday, 27 Nov 2023 08:00 am	8.00	PTO



Waitlist

If you request time off on a day with brownout rules, and there are already requests for the maximum amount of time for that day, you have the option of adding yourself to a waitlist. If the time becomes available, you have the option to accept the time off and if necessary, forfeit existing time off requests.


Notes

- Waitlist is not available during bid rounds.
- Waitlist is not available for all types of requests.
- There is no ranking in the waitlist – it's first requested > first granted.
- When selecting to join a waitlist, you will see how many others are in line in front of you.
- If there is one day in a multi-day request that is not available for the waitlist (e.g., a blackout day), the waitlist option is not available. This is true even if each day is an individual request (you selected *No, some of the dates can be approved and some denied* when making the request).
- Requests on the waitlist have a status of *Denied*.
- When waitlist hours become available, you will receive a memo that waitlist hours are available and will need to go to your time off worksheet to accept or decline the hours.
 - You need to have available accrued hours or be willing to give up future requests to accept the waitlist offer.

Adding a request to the waitlist

When the request fails the validation rules, eligible requests will have an option to *Continue to waitlist*.

Request validation results
Review the results of the runtime validation of your request and then decide if you wish to continue.



Looks like the request will be denied. See the list below for more details. [15423]


The following table shows the dates of your request and the time off rule validation results for each date.

Request date	Validation results	Comments
Tuesday, 07 September 2021	Failed	The Date of this event conflicts with a previous Brownout Date established by your organization.



Review the rule type and your request. You can see here if others are ahead of you in the waitlist queue. To proceed click *Setup waitlist item*.

Select whether you wish to go ahead and designate time to forfeit should the waitlist time become available (and can automatically accept the time), or you can defer and make the decision when the time becomes available.



The results of the waitlist queue report are shown below. [15423]

Current available time off

Rule type	Rule application	Event date	Total allowed PTO	Total scheduled PTO	Total PTO balance
Agent Brownout Date Rule	Enterprise Model	Tuesday, 07 Sep 2021	8.00	16.00	-8.00

Current waitlist queue

No other people have waitlist queue items that overlap your time off request.

Waitlist queue

Review the current available time off and waitlist queue, and decide how you wish to continue.
Please note that if you elect to waitlist this request, it will have a review status of denied while it remains in the waitlist queue.

Choose how you want to set up your request in the waitlist queue

-- Choose how you want to set up your waitlist request --

What does this mean?

- If you **pre-select your hours of approved time off to forfeit**, you will choose what upcoming time off you want to surrender and then you will have the option to automatically accept the waitlist hours when you are notified that those hours are available.
- If you **select your hours of approved time off to forfeit after the hours are available**, you have nothing more to do now. But, you **may** have to select hours to forfeit before you can accept the waitlisted hours.

Please select how you want to set up your waitlist queue

Choose how you want to set up your request in the waitlist queue

-- Choose how you want to set up your waitlist request --

-- Choose how you want to set up your waitlist request --

I want to pre-select approved hours of time off to forfeit if these hours become available.
 I will wait until the hours become available to select my approved hours to forfeit.



If you choose to wait, you can proceed to *Save to queue*.

Waitlist queue

Review the current available time off and waitlist queue, and decide how you wish to continue.
Please note that if you elect to waitlist this request, it will have a review status of denied while it remains in the waitlist queue.

Choose how you want to set up your request in the waitlist queue

I will wait until the hours become available to select my approved hours to forfeit.

What does this mean?

- If you **pre-select your hours of approved time off to forfeit**, you will choose what upcoming time off you want to surrender and then you will have the option to automatically accept the waitlist hours when you are notified that those hours are available.
- If you **select your hours of approved time off to forfeit after the hours are available**, you have nothing more to do now. But, you **may** have to select hours to forfeit before you can accept the waitlisted hours.

Select forfeit hours after the hours become available

Good news!
 You don't need to do anything more. If you want to save this request to the waitlist queue, then click the "Save to queue" button below.

Back
Save to queue

If you decide to preselect hours, the list of available hours will show and you can make your selection. Doing this will allow you to automatically accept the waitlist time if it becomes available.

Waitlist queue

Review the current available time off and waitlist queue, and decide how you wish to continue.
Please note that if you elect to waitlist this request, it will have a review status of denied while it remains in the waitlist queue.

Choose how you want to set up your request in the waitlist queue

I want to pre-select approved hours of time off to forfeit if these hours become available.

What does this mean?

- If you **pre-select your hours of approved time off to forfeit**, you will choose what upcoming time off you want to surrender and then you will have the option to automatically accept the waitlist hours when you are notified that those hours are available.
- If you **select your hours of approved time off to forfeit after the hours are available**, you have nothing more to do now. But, you **may** have to select hours to forfeit before you can accept the waitlisted hours.

ESTIMATED DURATION OF REQUEST
32.00

DURATION OF FORFEIT SELECTIONS
32.00

	Request date from	Request date through	Request type	Total hours	Review status
<input type="checkbox"/>	10 Sep 2021	10 Sep 2021	PTO	8.00	Approved
<input type="checkbox"/>	08 Sep 2021	08 Sep 2021	PTO	4.00	Approved
<input checked="" type="checkbox"/>	07 Sep 2021	07 Sep 2021	PTO	8.00	Approved
<input checked="" type="checkbox"/>	13 Sep 2021	15 Sep 2021	PTO	24.00	Approved

Back
Save to queue



After saving to the queue, review the list and click *Finish*.

Waitlisted time off request results

You have successfully saved a time off request to the waitlist queue.

The following table shows the resulting scheduled events that will now be reviewed by your supervisor team.

Event start	Event end	Duration (in hours)	Event type
Tuesday, 07 Sep 2021 12:00 am	Wednesday, 08 Sep 2021 12:00 am	8.00	PTO

Finish

The waitlist request will have a status of Denied and Not *eligible* on the *Pending and Upcoming requested time off* module, because it is already on the waitlist.

Start time	End time	Request date from	Request date through	Request type	PTO classification	Total hours of time off	Review status	Waitlist status	Comments
N/A	N/A	02 Sep 2021	03 Sep 2021	PTO	Vacation	16.00	Denied	Not eligible	<div style="display: flex; align-items: center;"> Long weekend Edit Delete </div>

Clicking the waitlist icon will launch the details of the request, allowing you to remove it from the waitlist queue or change the selected hours you wish to forfeit (if selected).



Making a request in a bid round

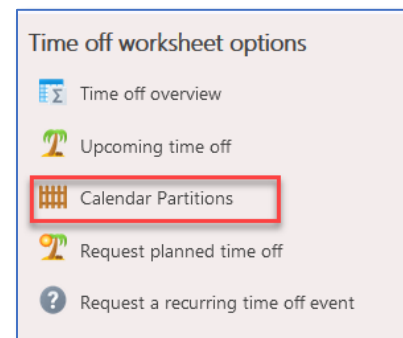
When participating in a bid round, you are bidding against other agents for the same blocks of time. Depending on the settings created by your WFM team, there may be multiple people bidding at the same time, or only a few, or even one. You will be able to see your place in line (your rank) and assess how likely approval is of your time off request before you make the request.

You will receive a notification when a bid round is open. At that point you can review your options for time off and validate your request, however, you can't commit your request until it is your turn.

There are several ways to get to the area where you can make your request. The recommended way is to go to **Show available PTO**. This will display a calendar view showing blackout, brownout, and special calendar days, any current requests from you, requests already committed by other agents, and is a quick way to determine the likelihood that your request will be approved. Green days are very likely to be approved, yellow is less likely to be approved, and red is unlikely to be approved.

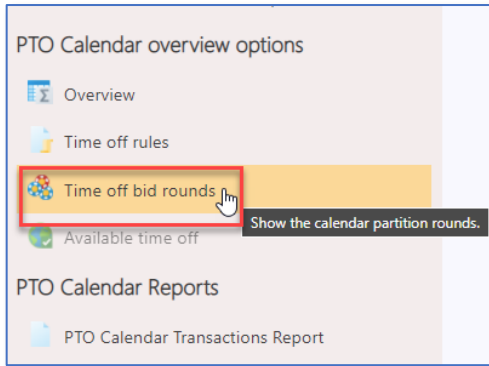
To get to *Show available PTO*:

1. Go to Plan > Time off worksheet
2. Select *Calendar Partitions* from the *Time off worksheet options* menu on the left.
3. Click on the partition name. If you are in more than one partition they will all be shown here.

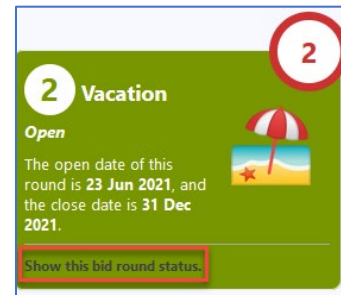




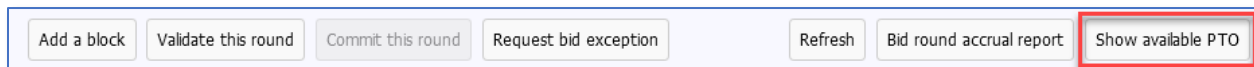
4. Select *Time off bid rounds* from the *PTO Calendar overview options* on the left.



5. Open bid rounds will be green, and your place in line to bid in the upper right corner. Select *Show this bid round status*.



6. On the bottom right select *Show available PTO*.



7. From the calendar view, click *Add a block* at the bottom left of the calendar.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		01	02	03	04	05
06	07	08	09	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Your current requests have poker chips (the icon of the bid round).



**An alternative way to reach *Add a block***

1. In the left side menu, click *Time off bid rounds*. You will see your bid rounds, current and past. For past bid round you can view but not edit the details.
 2. To make a bid in a new round, click *Show this bid round status*.
 3. Review the details, including your bid rank, open and close date, minimum and maximum block sizes allowed, your accrued hours, hours already scheduled, etc.
 4. To request a new block of time, click *Add a block*.
-
8. **Are you requesting off a portion of a day or a whole day(s)?** In the pop-up window, select whether your request is for a full or partial day. The rules of the calendar may not allow partial days, and requests for partial days may only include a single date. Whole days may include a date range.
 9. **Event type:** Select the event type to use for your time off. You may only select from event types including in the PTO classification.
 10. Select the **Start date** and **End date** for your request. The calendar rules may require a minimum or maximum number of days for your request.
 11. **Comments:** add a comment (required)
 12. Click *Next*.

The validation for your block (the single request) will run and display the results. This includes checking blackout and brownout days, minimum interval request rules, minimum/maximum block size, etc. If any rules fail, you have the option to go back and adjust your request. Even if a rule fails, you still have the option of saving the block (see [Requesting an exception](#)).

A note about the timing of requests: When validating a request, the system looks at how much time you have accrued as of the date of making the request, how much time you will have accrued by the date of the request, **minus** any already approved time. Because of this, you may want to validate your requests in the order of your preference, i.e., if you really want that time in November, more so than the time in May, validate the November time first.



Validation results

Review the validation of your block and then decide if you wish to continue.

All of the events in this block passed time off rule validation. [17280]

Time off rule validation
The following table shows the block bid and the time off rule validation results for each date.

Request date	Validation results	Comments
Monday, 05 July 2021	Passed	No time off rules failed.
Tuesday, 06 July 2021	Passed	No time off rules failed.
Wednesday, 07 July 2021	Passed	No time off rules failed.
Thursday, 08 July 2021	Passed	No time off rules failed.
Friday, 09 July 2021	Passed	No time off rules failed.

Block rule validation
The following table shows the results of applying the block rules.

Block rule	Validation results	Comments
Minimum block size enforcement rule.	Passed	This block meets the minimum size criteria for this bid round.
Maximum block size enforcement rule.	Passed	This block meets the maximum size criteria for this bid round.
Conjoined blocks enforcement rule.	Passed	This block does not violate the adjacent block rule for this bid round.

Your request will be added to your calendar partition worksheet.

13. Add any additional blocks to request other time off.

14. After you have added all of your time off requests (blocks), click *Validate this round*. The validation for your entire block (all of your requests) will run and display the results.

This bid passed all validation rules. [17296]

Bid round requirements validation
The following table shows the rules applied to your responses for this bid round.

Validation rule	Validation results	Comments
Minimum percent of accrual balance rule.	Passed	This bid round meets the minimum accrual balance requirements.
Maximum percent of accrual balance rule.	Passed	This bid round conforms to the maximum accrual balance requirements.

15. Click *Close*.



If your block passes validation and it's your turn to complete your bid, the *Commit this round* button will be available. At that time, you will be at the same ranking as all other people who are eligible to commit bids. It's first committed – first served.

This screen will automatically refresh and the button available when it's your turn to commit.



16. Click *Commit this round* to confirm your selections.

17. *Are you sure you want to commit this bid?* You will need to check a box confirming your understanding that the selections are final. You will receive a notification that you have committed your bid.

Are you sure you want to commit this bid?

By committing the bid, you are making your final selections for this round. Future changes require supervisor approval to modify your published schedule.

I understand that committing the bid means I can make no further changes to my PTO selections.

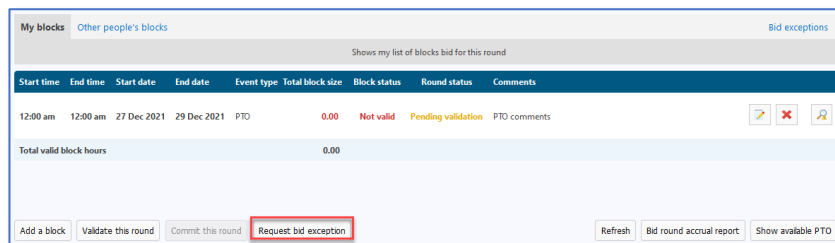
After all bidding is complete, and your administrator has executed the bid, the system will approve or deny all requests and place the approved requests on the schedules.

Requesting an bid exception

If your request fails one or more rules, you can request a bid exception. For example, if the bid rules require a minimum request of 40 hours and you have only 32 hours accrued, you can request an exception to the minimum block size enforcement rule.

When the validation fails, note the text that describes why your request failed. You'll need to select the matching text in your exception request.

1. After making and saving your block, select *Request bid exception*





- Select the reason for the exception request and add a comment (required). If you don't have enough accrued hours, select *Insufficient available accrued hours to meet bid rules*. If you don't have enough hours to meet the minimum/maximum hours required in the bid round, select *Insufficient available PTO to meet time off rules*.

Please select the reason for the exception request

Insufficient available PTO to meet time off rules. ▼

Insufficient available accrued hours to meet bid rules.

Insufficient available PTO to meet time off rules.

- Review the tabs and find the reason why your request failed and select the appropriate one to request a bid exception. After making your selections, click *Save exception request*.

Bid round rules **Bid block rules** Activity time off rules Supervisor time off rules

Shows the list of rules used to validate each time off block

Request exception?	Rule description	Start date	End date
<input type="checkbox"/>	Maximum block size enforcement rule.		
<input checked="" type="checkbox"/>	Minimum block size enforcement rule.		

Note: Consider sending a memo to your supervisor/scheduler letting them know you have sent an exception request as there currently isn't an automatic notification.

You will receive a notification when there is an update to the review status. To view the status, go to the calendar partition > Bid exceptions tab. From here you can edit or delete your request until it is approved or denied.

Once approved or denied, you can no longer edit or delete the exception request.

My blocks Other people's blocks Bid exceptions

Shows my list of exceptions for this round

Create date	Reason code	Comments	Review status	Participants	Activity rules	Supervisor rules	Block rules	Round rules
03 Jun 2021	Insufficient available accrued hours to meet bid rules.	I don't have enough hours.	Pending	1	0	0	1	0

My blocks Other people's blocks Bid exceptions

Shows my list of exceptions for this round

Create date	Reason code	Comments	Review status	Participants	Activity rules	Supervisor rules	Block rules	Round rules
03 Jun 2021	Insufficient available accrued hours to meet bid rules.	I don't have enough hours.	Approved	1	0	0	1	0