

# Time Off Management



## Why Time Off Management is Different with CommunityWFM Enterprise

The CommunityWFM time off platform provides an automated end-to-end solution to streamline your requests to improve agent morale.



### Accrue

You define how agents earn time off by creating customized methods that fit your business.



### Track

Let agents keep track of their time off hours without asking supervisors.



### Bid

Empower agents to easily bid on days off without leaving the WFM software.

## Leverage Time Off Solutions to Improve Efficiency

- Approve or deny all time off requests for a select period in just a few clicks.
- Let agents wait list for popular days so their requests can be approved if another agent cancels their time off.
- Color coded calendars improve the overall agent time off selection process.
- Set thresholds for minimum hours or days worked before enabling time off options.
- Tailor calendar rules by department so each group has their own unique set of time off parameters.
- Unlimited classifications for agent time off including PTO, sick leave, unpaid, and more.

**Areheart, Sam**  
Time off overview

ACTIVITY		TOTAL ACCRUED HOURS	SCHEDULED HOURS	ACCRUAL BALANCE
SITE 1 - DALLAS, TX	FULL YEAR	160.00	40.00	120.00
	YEAR TO DATE	120.00	40.00	80.00

Sam's time off settings

**General time off settings**  
Set up the basic time off configuration for Sam.

**PTO Policy**  
Assign Sam to a PTO policy.  
Current assignment: **Regular Full time**

**Restricted activity plan**  
Set up restricted activity plans for Sam.

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

VACATION	SICK TIME
<p>Accrued hours: 120.00</p> <p>Scheduled hours: 32.00</p> <p>Balance: 88.00</p>	<p>Accrued hours: 40.00</p> <p>Scheduled hours: 8.00</p> <p>Balance: 32.00</p>

## Integrate Our Time Off Management Solution with Your HR System

Time off balances can be shared between an HR system and CommunityWFM Enterprise. Excel information uploads are also supported.

## A Streamlined Time Off Bidding Process

The CommunityWFM Enterprise time off management solution focuses on simplifying the bidding process.

- ✓ Create fully automated bidding rounds with varying rules.
- ✓ Reduced rebidding with accurate time off information blocking off relevant days through a color coded calendar.
- ✓ Allow preferred groups of agents to have priority bidding to improve their likeliness of getting the days off they desire.



## Additional Time Off Options for Agents

Our time-off management system offers maximum agent empowerment and collaboration. Agents can see how likely they are to get time off approved based on their request for both a single day and blocks of days. They can also see detailed tracking of time off used across all categories.