HOL-PTO: ADDING a SHIFT to BOOK OFF for a HOLIDAY

Log in to WFM, go to Schedule Admin, Scheduling>Advanced Schedule View (ASV)

These directions are with the assumption that the employee is not scheduled to work but needs to be booked off for a holiday, using PTO with the book-off code of HOL-PTO
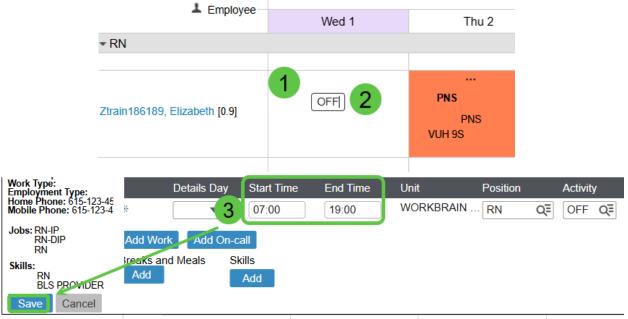
From the ASV load the schedule for the date of the in-service for the employee to be added or for the team

VERY IMPORTANT - If the holiday or in-service is to be added to a future schedule, be sure and load the schedule for the current week, not the future schedule. This is because the shift must be published to have the book off function. You must NEVER publish a future schedule if your team self-schedules until all self-scheduling windows have closed for that schedule period.

Adding HOL-PTO time for one employee to a current schedule:

1. Select an empty cell for the date on the schedule calendar for the employee that is to be booked off to HOL-PTO and a rectangular box displays
2. Type OFF (is case sensitive, must be all caps) and then press the tab key on the computer keyboard
3. The details panel displays for the selected employee - modify the start and end times to reflect the time to be booked-off and then select the blue Save button – the OFF-shift displays shaded blue on the schedule calendar
4. Select the OFF shift you created and then select Book-Off from the function tabs
5. The book-off wizard displays - select HOL-PTO from the list of book-off codes
6. ***Select RNN (Relief Not Needed) code in the 'Send To Relief Queue' column
7. Add comments (optional) and then select Submit

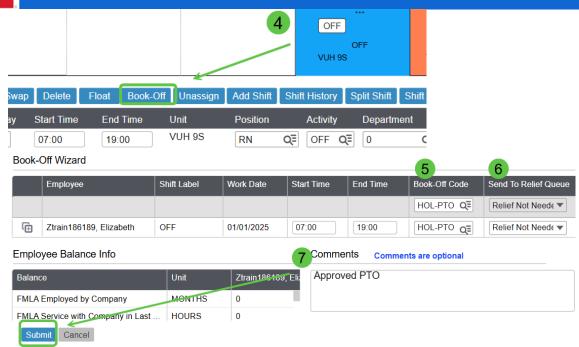*If you do not enter RNN in the send to relief queue column, then an Off shift will display in the unassigned shifts.*

Screenshots with steps

Email us at wfm@vumc.org   Help/User Site: www.vumc.org/WFM

④

| OFF |
OFF
VUH 9S

| Swap | Delete | Float | **Book-Off** | Unassign | Add Shift | Shift History | Split Shift | Shift |

| | Start Time | End Time | Unit | Position | Activity | Department |
| ay | 07:00 | 19:00 | VUH 9S | RN | OFF | 0 |

Book-Off Wizard

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	Employee	Shift Label	Work Date	Start Time	End Time	Book-Off Code	Send To Relief Queue
						HOL-PTO	Relief Not Neede ▼
⬚	Ztrain186189, Elizabeth	OFF	01/01/2025	07:00	19:00	HOL-PTO	Relief Not Neede ▼

Employee Balance Info

⑦ Comments   **Comments are optional**

Balance	Unit	Ztrain186189, Eli
FMLA Employed by Company	MONTHS	0
FMLA Service with Company in Last ...	HOURS	0

Approved PTO

Submit   Cancel

| Wed 1 |
| HOL-PTO |
| HOL-PTO |
| VUH 9S |