

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

The screenshot displays the WFM Advanced Schedule View (ASV) interface. At the top, there's a header with 'Employee' and a dropdown menu showing 'RN'. Below this, a calendar view shows 'Wed 1' and 'Thu 2'. A green circle '1' is placed over an empty cell on 'Wed 1'. A green circle '2' is placed over the 'OFF' shift being added. A green circle '3' is placed over the 'Save' button in the details panel. The details panel shows the following information:

Details	Day	Start Time	End Time	Unit	Position	Activity
		07:00	19:00	WORKBRAIN ...	RN	OFF

Below the details panel, there are buttons for 'Add Work', 'Add On-call', 'Breaks and Meals', and 'Skills'. At the bottom left, there are 'Save' and 'Cancel' buttons. A green arrow points from the 'Save' button to the 'OFF' shift in the calendar.

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OFF
VUH 9S

SwapDeleteFloatBook-OffUnassignAdd ShiftShift HistorySplit ShiftShift

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

Book-Off Wizard

	Employee	Shift Label	Work Date	Start Time	End Time	5Book-Off Code	6Send 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

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

SubmitCancel

7CommentsComments are optional

Approved PTO

Wed 1

HOL-PTO
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