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Workforce Management Web for Supervisors Help

Insert Exception with Payback

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Use the **Insert Payback Exception Wizard** in the **Schedule > Intra-Day** view to add unpaid, part-day exceptions to agents' schedules to make up for or pay back time lost due to lateness or a personal appointment.

To enter an exception with payback:

1. In the Intra-Day grid, right-click a shift in an agent's row.
2. From the shortcut menu that opens, select **Insert > Exception with payback...**. The Insert Payback Exception Wizard opens.
3. **Select Exception:**
 - a. Select an exception in the list.
 - b. Set a new **Start time** and **End time** to cover the time missed, checking **Next Day**, if applicable. The **Enter payback** check box is checked by default.
 - c. In the **Memo** field, add comments or additional information about this exception.
 - d. Click **Next**.
4. **Select Marked Time:**
 - a. Select a Marked Time of type Payback from the list.
 - b. Click the **Calendar** to select the date for this payback.
 - c. Click **Next**.
5. **Select Payback Parameters:**
 - a. Add work to the shift or meal, by changing one or more of the following parameters. If you change more than one, the total time must equal the payback period for this exception:
 - The **New start** time for the shift
 - The **New end** time for the shift
 - The **New start** time for the meal
 - The **New end** time for the meal
6. Click **Finish**.

What You Should Know About Payback Exceptions

Keep these things in mind when inserting payback exceptions:

- You can insert payback intervals into schedules for:
 - For the current date, to the end of a shift and/or over meals by decreasing meal duration.
 - For future dates, to the beginning of a shift, end of a shift, and/or over meals by decreasing meal

duration.

To decrease the meal duration, edit start/end time by setting start time later and/or the end time earlier.

- You can specify multiple intervals of payback for a single day, but all intervals must be within the same shift. If the payback starts before the shift start time, you must specify a new start time for the shift. The payback interval is the time between the new and previous shift start time.
- If you add an exception over unpaid time, you must estimate the amount of time for payback, because it might not be the entire duration of the exception.
- When reviewing schedule validation warnings related to payback exceptions, you can save or cancel the changes.

After Inserting Exceptions with Payback

WFM reschedules shift items as follows:

- WFM leaves unpaid shift items as they are (same duration, same place in the schedule).
- If a shift change occurs and additional shift items are required, WFM schedules them. For example, if the shift duration increases, then additional breaks could be added to the schedule.

If an existing shift does not have a shift item sequence that matches the modified schedule, WFM selects other shifts with shift item sequences that "fit better". If WFM cannot find a shift item sequence that "fits", it leaves the existing or current schedule as is.