Workforce Management Web for Supervisors Help

Time-Off Rules

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Time-Off Rules

Time-off rules control how the agent's time-off hours are accrued/awarded and define the options for time-off requests. For example, you might set different accrual rates for paid time off depending on how long an agent has been employed.

Use the Time-Off Rules panes to:

- Create and edit time-off rules includes setting Properties and Rules for Requests
- Delete time-off rules
- Copy time-off rules
- Associate agents and time-off types with a time-off rule

You can configure:

- Multiple time-off rules for each time-off type
- A single time-off rule for multiple time-off types
- A single time-off rule for one time-off type

How Time-Off Rules Work

The following points explain how time-off rules work:

- Time off can be either accrued or awarded.
- If you change a time-off rule, the agent's carry-over time-off hours for that time-off type are calculated immediately, and the new rule applies from the time of the change. Time-off rules can change during configuration of the site, the agent, or the time-off rule.
- If agents with time-off rules for one or more time-off types are transferred to a different site during synchronization, the time-off rules associated with the agents remain, but they are no longer active. To enable agents to continue to accumulate time off, you must manually assign agents time-off rules for the new site. When WFM calculates carry-over for these agent, it calculates the time off at the old rate until the End Date and at the new rate from the End Date until the Carry-Over date.

> **Tip**
> Time-Off carry-over occurs automatically by default. You can turned it off in the WFM Server Application Options.

- If an agent becomes unassigned (is no longer associated with a site) he or she keeps the assigned time-off rules. However, WFM sets the date, on which the agent was removed from the site as the End Date, and time off is accrued, based on the rules from the former site only up to that date. The agent can continue to accrue time off, only if you assign the him/her to a site and assign another time-off rule.

- If an agent is unassigned from a time-off rule for any time-off type (by setting the End Date for this time-off rule) and is not assigned this time-off type by any other time-off rule (no other record exists with a Start Date for this time-off type) then the agent can request time off for this time-off type but the balance is no longer accrued.

Tip

To understand how time-off rules or constraints affect agent preferences, see Preference Statuses.