

## ADD SHIFT TO BE BOOKED OFF FOR HOLIDAY OR IN-SERVICE

These directions are with the assumption that the employee is not scheduled to work but needs to be booked off to one of the book-off codes.

You can load the current week schedule for your team or for the employee(s) to be added.

**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, and you must never publish a future schedule if your team self-schedules!

### Adding shift to book off for a holiday

1. When the schedule is loaded change the edit mode to Mass Edit – select the wand icon from the function tools, and then select Mass Edit.
2. Select a working shift for the job and shift time that the employee typically works.
3. Select the pencil icon, located from the function tools, and then select Copy.
4. Select the lookup in the Employee field and select and find all employees to be added.
5. Change the date to the date to be booked off, and then select Save.
6. A message displays, "Your date is outside of the selected schedule range," select Ok to acknowledge.

### Next, load the schedule for the holiday to be booked off:

7. Select working shifts to be booked-off, you should still be in Mass edit, the shifts will display shaded green.
8. Select the pencil icon, from the function tools, and then select Book-off.
9. Select the book-off code of HOL-PTO, and then select Submit.

The employee or employees are booked off to HOL-PTO, which will deduct the PTO hours in Kronos for hourly staff.

### Add a shift to book off for In-service on a current, published schedule for one or multiple employees

Please note: You do not need to add in-service time for a class where the employee is registered or will register through the Learning Exchange – Classes in the Learning Exchange will be added to the employee's schedule unless it is a two-day course.

### Steps for adding in-service to a published schedule – current scheduling period – for one employee:

1. In Details Edit mode, select the date on the schedule calendar for the employee and a rectangular box displays.
2. In all capital letters type OFF and select the tab on your keyboard.
3. The edit details section displays, enter the start and end times for the in-service, and then select Save.
4. Select the OFF shift you added, and then select Book-Off.
5. In the Book-Off Wizard select or enter the book-off code (ISV or ISV-WK), change Unfilled to Relief Not Needed, type the name of the in-service in the comments section, and then select Submit.

### Steps for adding in-service to a published schedule — for multiple employees:

1. For steps 1 through 3 follow the steps above, if employees work different jobs, then you must repeat steps 1 through 3 for each job.
4. Change the Edit mode to Mass Edit and select the OFF shift(s) that you added.

5. Select the pencil icon, then select Copy.
6. In the Employee field, select and find the employees to be added for the in-service, then select Save.
7. Select the off shift you added for each employee, select the pencil icon, and then select Book-Off.
8. The Book-Off Wizard displays listing each name, select the book-off code in the top Book-Off Code section, add the name of the in-service in the comments field, and then select Submit.

### **Add a shift to book off for a future In-service, for a date that is included in an unpublished schedule, for one or multiple employees**

Do not load the future schedule. You must assign a published shift to the employees from the **CURRENT SCHEDULE** – Load the current week's schedule or any day in the current schedule period – the key here is that it must be a published schedule and then follow the steps below:

1. Select the date on the schedule calendar for the employee and a rectangular box displays.
2. In all capital letters type OFF and select the tab on your keyboard.
3. The edit details section displays, enter the start and end times for the in-service, and then select Save. If you will be adding in-service time to employees with different jobs, then you must repeat steps 1-3 for each job.
4. Change the Edit mode to Mass Edit and select the OFF shift(s) that you added.
5. Select the pencil icon, then select Copy.
6. In the Employee field, select and find the employee(s) to be booked off to in-service.
7. In the Work Date field change the date to the date of the in-service, and then select Save.
8. Select the shifts you added for each employee, select the pencil icon, and then select Book-off.
9. In the Book-Off Wizard select the book-off code in the top row (ISV or ISV-WK), select Relief Not Needed on the next field, type the name of the in-service in the Comments field, and then select Submit.