HOW TO PROCESS AN EMPLOYEE'S REQUEST

How do PTO & SICK Balances Work in WFM?

WFM is the System for Requesting Time Off - WFM maintains employees' current and projected flexPTO balances:

- Employees submit time off using the leave request form, indicating how they want to be paid for
- their time away.
- Approved flexPTO hours are deducted from employee's flexPTO or SICK balance in WFM to cover the approved date(s).
- Overnight, the approved hours will be sent to Workday. Workday will send this information to Kronos for non-exempt (hourly) employees.
- Areas that are closed on VUMC designated holidays are flagged in WFM as closed and the hours scheduled will be deducted from the flex PTO balance for that date. These hours are sent to Workday, which will send to Kronos.
- Future deductions can be viewed in WFM through the Balance Report by employees and admin and admin can also view balances form the Balance and Accrual Report.
- In addition to approved time off in WFM, unplanned book-offs for absences or voluntary cancellation are included in the time off integration. Which means the hours booked off to ABS, FML_ABS, PERS, or CXV are immediately deducted from their flexPTO balance in WFM and sent to Workday overnight, which then sends the information to Kronos. See WFM Time Codes lists for all timecodes, includes descriptions and if sent to Workday and then Kronos for hourly, non-exempt employees.
- Updates made in Kronos are sent to WFM weekly, in a Tuesday import.
- Workday is the System of Record for the Hours Currently Available.
- All book-offs must be in WFM by the end of the pay period to ensure they are sent to Workday and Kronos.

Why do the balances match sometimes and other times they do not?

- Any balance discrepancies between WFM, Workday, and Kronos will be updated with the weekly
- reconciliation to WFM on Tuesday.
- How do the discrepancies happen? Example: Employee has 12 hours approved flexPTO for Monday, but
- on Wednesday they signed up for an overtime shift. They no longer need to use 12 hours of flexPTO. The 12 hours PTO is removed from Kronos. If you run the balance report in WFM it will show the 12 hours still deducted. The following Tuesday when the change made in Kronos is sent to WFM, the 12 hours not used will be added back to the employee's flexPTO balance. Please note, the date for the adjustment will always show Tuesday as the adjusted date.
- The same applies if an employee used additional hours of PTO or SICK time in Kronos that were not entered in WFM, the hours entered in Kronos will be sent to WFM in the Tuesday import listing the adjustment date as Tuesday – not the date used.

Messages – WFM Inbox

- Your Home page in the Schedule Admin, under the heading of TO DOS displays a yellow highlighted message listing the number of these items in your WFM Inbox stating to "Click Messages above to review."

- Select the envelope icon from the blue navigation bar, a red circle with the number of unread messages displays top-right corner of the envelope.

Messages > Inbox – Types of mail:

- Interactions – Requests from staff that need processing – leave requests, shift trades, post a shift, and take a shift all needing response
- Interaction - Posted billboard shift claimed – if you posted shifts to the billboard and an employee claimed one of the posted shifts, you will receive a message displaying the employee that claimed the shift, the shift date & times – this is for your information – no processing or response needed

Processing Options at the top of the Leave Request form

- **Process** is selected by default for processing the request. With Process you can approve or reject various rows within a single form. Any dates rejected will display as a First Off Requests*
- **Reroute** is selected if you need to reroute the form to the second approver. (Reroute is not available if the form has already rerouted.) Your name will display in the From column, not the employee's name
- **Reject All–No First Off** is selected if you want to reject the entire request and do not want the employee to be added to the First Off List. Typical reasons for rejecting all:
    - Employee entered times for a full shift – only partial shifts should have start & end times
    - Request was submitted outside of your designated timeline for submissions
    - A balance type for unpaid time was used without meeting FTE
- **Comments** – suggest entering comment when dates are rejected with brief explanation why
- **Submit** – select to process the request
- **Cancel** – select to remove anything you have entered and returns you to your messages
- **Show History** – select to display date and time submitted, routing actions
- **Print** – select to print a copy of the form displayed

How to Process a Leave Request – go to Messages

Remember, if you want to process based on first submitted requests, select the word Date from the gray header row – this will list requests in chronological order

1. Select the name of the employee and the leave form displays
2. Select Choose to view how the employee plans on being paid for their time away
3. Select *Schd* to view how many employees have approved time for the dates requested, the schedule for the employee's team and default shift displays the week of the request, plus one week prior and one week after the requested dates
4. Select the box in the Aprv column to approve the request or select the box in the Reject column to reject the request – each row is treated as a separate request when approving/rejecting
5. Enter a brief comment as to why, for any dates rejected
6. Select Submit to process the request

You will see a message stating, 'Your form has been Submitted,' select OK to return to your messages

NOTE:

- When Schd is selected, the schedule displays all staff scheduled -if your team self-schedules you will only see employees on master rotations or approved time off for the employee's day part.
- Requests are approved/rejected per row within a form.
- If you want to reject all requests on the form, select Reject by each row and change the response from Process to Reject All – No First Off before selecting Submit.

- *First Off Requests – Is a list of employees whose leave requests dates were rejected using process and includes employees that enter a request to be first off for their scheduled shift. A report is available to view a list of employees in First Off.

When a Request is Processed:

- ***Processed Request Message:*** Employees will receive a message in their VUMC Outlook email with the subject "*Your Leave Request has been processed. When viewing the form, a check mark in the Aprv box next to the dates requesting indicates approval. PTO approval is conditional based on employee's available Hours*." They must log into WFM, select Employee Self Service, and open the request from their messages to view the form and what leader processed the requests.
- ***Dates that are Approved:*** These dates are immediately booked off the schedule and will display on employee's home page calendar. Approved dates are shaded green on the Printed Schedule Reports and display on the Assignment Sheet, Approved Leave Report, and on the ASV.
- **When an employee no longer has benefited hours to cover dates requested – Admin:** You will immediately receive a message stating, "The Leave Request submitted by said employee has been rejected due to balance." Select the message to review the information. The message displays the employee, dated submitted, dates requested and approver. Since the date the request was submitted, the balances have changed which have resulted in an insufficient number of hours to approve this request, therefore it has been rejected by the system and is not approved in WFM. In bold: The leave request form was not processed therefore all dates requested on this form have been rejected. The status of this request will display as Exception.
- **When an employee no longer has benefited hours to cover dates requested - Employee:** The employee receives an email in Outlook with the subject stating, "The Leave Requests submitted by their VUNet ID has been rejected due to balance."
    - When the employee views the requests from their messages, they see the same message the manager sees on their side, see above message.
    - If they view their requests from the Quick Links, they will see Exception instead of Accepted and they will see Process Terminated instead of Flow Completed.
    - If they select View, the requests will have initially approved dates checked in the APRV column, however the dates are not approved due to insufficient balance.

When Request Reroute to the second approver:

- If a request is not processed within 5 days from the date it was submitted, the form will automatically reroute to the second approver and will remain in their inbox until it is processed.
- When you open a request form that was rerouted: A message displays to let you know the form was rerouted from the first approver and list the date submitted. Note: The date on rerouted requests in your messages will be the reroute date, not the date submitted!
- You open a request form and receive a system error: This can happen if the form was processed by another approver, or you are opening a form that was rerouted. Only the rerouted form can be processed.

Request for VUMC Designated Holiday

- When you approve a request that contains a VUMC designated holiday, you must book this day off to the HOL-PTO time code from the ASV. If the employee is not scheduled to work the holiday, refer to the document "Add Shift to be Booked Off to Holiday or In-Service" available from the WFM Help page Schedule Admin Toolbox>Advanced Schedule View (ASV).
- When you open a request that contains holiday: A message displays to let you know the request contains a holiday.

Request for time off using the POFF (Preferred Off) code

- **POFF(Preferred Off) is the time code that is chosen when an employee is requesting a preferred day off that does not need to be covered by benefited time.** This is typically used by employees who work in areas that self-schedule when the employee is planning to work their FTE but is requesting a day off that they do not want to get moved to when the schedule is being finalized.
- **Many VUAH & VCH inpatient units limit the number of POFF days that are approved during a 6-week schedule period.** If an employee submits a request that is above or will put them above the limit that is set for their unit, they see a message to let them know let them know the request will cause them to exceed the POFF limit for the schedule period. You will also see the same message when you open the request form for processing.

Differences with the Shift Trade, Post a Shift, & Bid on a Shift Requests and How to Process

Shift Trades are requests entered by employees requesting to trade their shift with a co-worker:

- Shift trades will route to Approver 1 if it is a one-way shift trade where an employee is giving their working or on call shift, or part of the shift, to a co-worker.
- Two-way shift trades where employees are swapping shifts or part of their shifts, if either employee is in overtime for the week, they are trading
- You will not see shift trades if employees are swapping shifts or part of their shifts and there is no overtime associated
- Employees can enter shift trades at any time, up to two hours before the start of the shift, the shift trade will route to the co-worker for agreement
- The co-worker must agree to the trade before the shifts are changed on the schedule
- Shift Trades will **reroute** to Approver 2 **on day 7**

Shift Trade forms

- Have three radio buttons: Yes, No, & Reroute
- There are Submit, Cancel, Show History & Print buttons, the same as on the leave request form
- A comment field is also available for you to add comments for the employee
- Shift trades will display a substitute (the co-worker) in the top right of form
- If you agree with the request, you will leave it on Yes and select submit
- If you do not agree with the request, you will select No, type a comment, and then select submit
- The shift trade, if approved, will route to the co-worker (substitute) for processing, they must agree by submitting the requests with Yes selected
- The shifts will be traded in the system one the co-worker submits agreement