

Time-off management

Learn how to manage time off with Workable

Getting started

Before you can manage time-off types and policies you must:

- Enable onboard & manage features in your <u>settings</u>
- Create work schedules for employees
- Create holiday calendars

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1. Create work schedules

Work schedules facilitate your employees' time off management.

Creating work schedules

- Click Add work schedule from your work schedules settings. You can create specific work schedules for employees of different departments, entities or locations.
- Add work breaks, by toggling the setting to on. Fixed work breaks need a specified start and end time whereas flexible breaks are specified by the total break duration.
- Click click copy to all for the same settings to be applied to the rest of the enabled days.

Managing work schedules

WORK SCHEDULES	• Add work schedule
US Full-Time 5 days, 40 hours	

Mo Tu We

Monday

08:00

• Add new

Define work breaks

Fixed Flexible

Work breaks are

Break duration

01:00

Tuesday

Working hour

Sa Su

× to 17:00

×

Total working hours: 08:00

Copy to all

×

Click the three dots next to the work schedule you want to edit. You may see different options depending on if the schedule is currently assigned to employees.

- Edit Editing a work schedule immediately updates the work schedule for all assigned employees, reflecting the changes in their profiles.
- **Disable** Disabling a work schedule that is already assigned to an employee prevents new assignments for other employees. Any employees that already have been assigned to this work schedule will keep it.
- Enable Enabling a disabled work schedule will make it available for assignments to employees.
- **Delete** Deleting a work schedule that is not assigned to any employees will completely remove it from the account. Any past assignments to employees won't be affected.

2. Assign work schedules

After creating work schedules, assign them to employees via the employee profile fields

	Employment		
	* Contract details		Profile progress
For new employees	Entry #1	÷	5 out of 11 mandat
i of new employees	* Effective date		fields
There is a dedicated profile field	09/01/2023		
n the default <u>profile template</u> for	• Employment type		
vork schedules under Job >	Full-Time	×	
mployment. When you create a	Expiry date		
new employee simply select the	MM/DD/YYYY	Ē	
he correct work schedule from	Note		
he dropdown.			
	• Add anoth	er entry	
	Work schedule		
		v]	

Workable AU Sydney NSW, Australia		Update
t, +199999999999		
Information Files Time off		
ERSONAL JOB COMPENSATION & BENEFITS LEGAL DOCUMENTS EXP	PERIENCE EMERGENCY	
Basic		
Job title Customer Support Specialist	Hire date -	Start date 05 March 2024
Entity 🕲 Workable AU Sydney NSW, Australia	Department G&A	Division -
Manager -	Direct reports	
Employment		
Contract details		
Effective date 11 April 2023 Note	Employment type Full-Time	Expiry date
Work schedule Standard (1993) - 18:00. 5 days, 42.5 hours		

Adams, Michael (Mike) Customer Support Specialist (Full-Time) in G&A

For existing employees

Save as draft and exit

Cance

If you already have existing employees, edit their employee profile via the Actions button and add their work schedule under **Job > Employment.** Similarly, to edit an employee's work schedule, edit from their employee profile.

Tip: The work schedules that are displayed for selection are only those that relate to the employee's department, location, or entity. If you don't see the correct work schedule, ensure your work schedule settings are correct

Publish

3. Create holiday calendars

When employees request time off, the designated holidays won't be deducted from their balance, depending on the time-off type settings

Navigate to your <u>holiday calendars settings</u> and click **Add holiday calendar.** Fill out the calendar name and the location or entity, if applicable.

		Add holiday calenda
		Entities and locations
		Workable US ×
	11/70	Employees in the selected entitles or locations will be assigned this holiday calendar automatically.
		Import public holidays
Enter a locati holidays are c	on to import public holida	olidays by location ys from that country to this calendar. Public foce and will automatically update each year.
	holidays are c	Enter a location to import public holida holidays are calculated 5 years in advar

Import holidays via API

Automatically create holiday calendars for the next five years. First, select the country. Then, select a states or region, if applicable. Finally click **Import public holidays** to complete the process.

Manually add holidays

Click **Add holiday manually**, add a name for the holiday, and at least one date. Click Add additional date to add dates for additional years if this is an annual holiday. Finally, click **Add holiday** to the complete the process.

Managing holiday calendars and individual holidays

Simply click the three dots to the holiday calendar or individual holiday. Editing or deleting a holiday calendar or holiday will not affect any already created time-off requests.

HOLIDAY CALENDARS	Add holiday calendar
AU Holidays Workable AU	:
GR Holidays Workable GR Athens, Attica, Greece - Workable GR Thessaloniki, Greece	Edit Delete
US Holidays Workable US	:

4. Create time-off types

Time-off types need to be created in order to create specific time-off policies. By default, you will see Paid Time Off, Sick leave, and Unpaid leave

Add time-off types

Navigate to your time off settings and click Add time-off type. Fill out the appropriate information.

- Set approval flows. By default, any specific policies within this time-off type will have the same approval flow but each individual policy can have its unique approval flow
- Toggle the option to count the holidays from your holiday calendars as work days. By keeping this disabled, time-off balances will not be deducted on company holidays
- If show time-off type to all employees is enabled, the employees' absence will be shown in the employee profile header and the who is out calendar



Add time-off type

Enter a name for this time-off type	
<u></u>	0/50
Description	
Enter a description for this time-off type	
	0/140
This type of time off is	
Paid Unpaid	
Approvals 🚱	
Require approval	
Require approval	
Calendar settings Count company holidays as work days	ff.
Calendar settings Count company holidays as work days Choose if holidays from holiday calendars count as work days for time o Count weekends as work days	
Calendar settings Count company holidays as work days Choose if holidays from holiday calendars count as work days for time o Count weekends as work days	
Calendar settings Count company holidays as work days Choose if holidays from holiday calendars count as work days for time of Count weekends as work days Choose if days off from work schedules count as work days for time off. Show time-off type to all employees	
Calendar settings Count company holidays as work days Choose if holidays from holiday calendars count as work days for time of Count weekends as work days Choose if days off from work schedules count as work days for time off. Show time-off type to all employees Time-off type will be visible to other employees during time-off.	
Calendar settings Count company holidays as work days Choose if holidays from holiday calendars count as work days for time of Count weekends as work days Choose if days off from work schedules count as work days for time off. Show time-off type to all employees	

Manage time-off types

Click the three dots to the right of the time-off type to manage the time-off type.

Add time-off typ

- Edit Existing time-off requests or approvals will remain unaffected by any calendar settings or approval-related changes made by HR Adminis. Any requests created after these changes will follow the latest rules.
- **Change order** - Use the arrows to change the order of the time-off types. The order here reflects the order seen on the employee profile. Once changes are made, they immediately show in the time-off section of the employee profile .
- **Delete** Delete a time-off type that does not include any assigned policies to employees. Time off types with policies assigned to employees can't be deleted.

5a. Create time-off policies

Time-off policies allow for different rules & balances available to employees

Add time-off policies

Navigate to your <u>time off settings</u> and click **Add policy** to the applicable time-off type and fill out the applicable information.

- Policies can be tracked in: full days, half days, or hours
- Policy cycles can be yearly, quarterly, monthly, or you can choose the policy to only occur once
- Policies can renew on employment start date, or on a specific date (e.g., January 1 each year)

Policy basics

GR PTO		
Track time off in		
I rack time off in		
Full days	~	
Policy cycle		
Year	~	
Select how often the policy cycle renews.		
Policy renews on		
 Employment start date 		
On a specific date		
January, 1		
Entities and locations		
Workable GR ×		

Define accrual levels

Each time-off policy can have multiple accrual levels, which might have different amounts of days/hours allocated to employees based on their years of service or cycles completed during employment. You will be prompted to define:

- If the time off at this level is limited or unlimited
- Total days/hours off in the policy cycle
- Accrual cycle; Accrued per: Year, Quarter, Month
- Accrual limit; the maximum number of days that the balance can reach during every renewal
- The number of days or months after the start date that the employee will be able to request time off

Create multiple levels of time-off policies by clicking Add new level and defining when an employee moves to the next level based on their years of service in the company (i.e "1 year after start date") or the Number of cycles elapsed in the policy (i.e "After 2 cycles")

Accrual levels

Define the total allowance and accrual cycles for employees under this policy, with tiered allowance levels based on years of service or cycles.

Level 1				^
Unlimited ti	me off b keep track of unlimited t	ime off		
Total days off in c		and on.	Accrued per	
20			Year	~
per annum				
	num accrual period			
20 da	ys			
Can be taken from	n			
14	days 🗸	after start date		

• Add new level

5b. Create time-off policies

Set additional settings

Carryover - define in each policy if the employees are allowed to carry over any unused days/hours in the next cycle and when these days/hours should expire

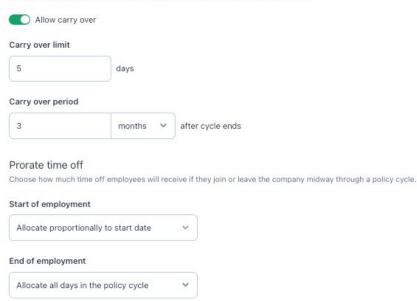
Proration - Start of employment

- Allocate proportionally to start date: When an employee joins the company, their allocated time off is proportional to the number of days between their start date and the end of the cycle.
- Allocate all days in the policy cycle: When an employee joins the company, the entire accrual cycle's amount will be allocated and made available for utilization.

Additional settings

Carry over

Choose if employees can carry over unused days from the current cycle to the next.



Proration - End of employment

- Allocate proportionally to end date: The employee can take time off based on their active accrual days, and the balance will be recalculated when offboarding is scheduled.
- Allocate all days in the policy cycle: All allocated days will be available to an employee with a scheduled offboarding, without any proration on the employment end date.

Approvals - By default, a time-off policy follows the approval flow assigned to the time-off type it belongs to. However your can define custom approval flows for each policy

Manage time-off policies

Click the three dots to the right of the time-off type to manage the time-off policy.

- Editing a policy is limited for some settings if the policy has already been assigned to at least one employee. Any changes will be applied on the next accrual or cycle renewal. Existing time-off balances and requests created before the policy was edited will not be affected.
- **Disable** a time-off policy that is already assigned to one or more employees to prevent it from being available for any new assignments. A disabled marker will appear next to disabled policies. The already assigned employees won't be affected.
- **Enable** a disabled time-off policy to make it available for new assignments to employees. Employees assigned to the policy before it was initially disabled won't be affected.
- **Delete** a time-off policy that is not currently assigned to employees. Deleted policies cannot be restored.

6. Assign time-off policies

Add time-off policies to an employee

Long, John (John) Associate Product Manager (Full-Time) akatia.papaef@yahoo.gr & +1219384759374	Actions A Invite to account I Edit profile
Information Files Time off	Manage time-off policies Request e-Signature

Find the employee profile you wish to assign the time-off policy to. Click **Actions > Manage time-off policies**. Then, select the time-off types you wish to assign to the employee.

If multiple policies exist within a time-off type, only the ones applicable to the employee's entities and departments will be visible. Select the appropriate option for the employee. Click **Save** to complete the process

When time-off types are assigned to an employee, Workable will allocate the accrual balance for the current cycle based on the employee's start date. The balance will become available shortly after under **Time off tab** > **Balances** within the employee profile

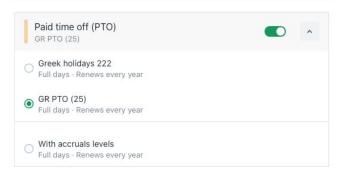
Update time-off policies and balances

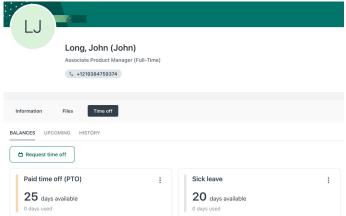
Within the employee profile, click **Actions > Manage time-off policies** and toggle on/off the policies you wish to change.

For more information on understanding how an employee's time-off balances are affected by updating time-off policies, click <u>here</u>.

Manage time-off policies

Choose which time-off policies this employee is eligible for.



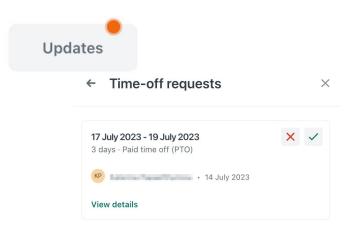


7. Approve/reject time-off requests

You will receive a notification via email and within your Workable inbox when a new time off request is sent. Take action on desktop or our mobile app.

Via employee profile

Click the Updates icon in the employee profile to review the time-off request and take action



Via details modal

•

When you click **View details** from the time-off request via the Updates icon in the employee profile, you can take action at the bottom of the modal.

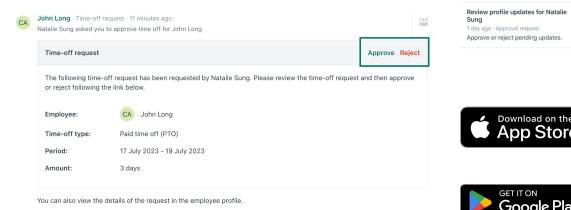
Review time-off request

Monday 17 July 2023 - W 3 days - Paid time off (PTO	
Breakdown	Show all
 From: Monday 17 July 2023 1 day between 	1 day
O To: Wednesday 19 July 2023	1 day
Request timeline	
< <u>0</u>	
	Cancel Reject Approve
-41 🗘 🖛	
Inbox 👘	
iew a time-off request for Richard v ago · Time-off request	
iew a time-off request for Richard 👔	
iew a time-off request for Richard 👔 z y ago - Time-off request rove or reject a pending time-off	< Back Time-off request
iew a time-off request for Richard 2 / ago - Time-off request rove or reject a pending time-off iest. iew profile updates for Natalie 9 / ago - Approval request	Chloe Dylan 1day ago - Time-off request Chloe Dylan vrote: Chloe Dylan wrote: Please review and approve the following
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iew a time-off request for Richard and a second sec	Chice Dylan 1day ago - Time-off request Chice Dylan 1day ago - Time-off request Chice Dylan wrote: Please review and approve the following the dynamic off request Time-off details Employee with Dylan, Chice Type Paid time off
iew a time-off request for Richard ago - Time-off request rove or reject a pending time-off test. iew profile updates for Natalie g ago - Approval request rove or reject pending updates.	Chloe Dylan 1 Chloe Dylan 1 1 day ago - Time-off request 1 Chloe Dylan wrote: 1 Please review and approve the following 1 Time-off details 1 Employee: 1 Oplan, Chloe 1 Type Paid time off Period 17 April 2023 - 21 April 2023
iew a time-off request for Richard and a second sec	< Back
iew a time-off request for Richard and a second sec	< Back

Via Workable inbox

Review the request and take action directly in your Workable inbox on desktop or mobile.

Note: you will also receive an email about the new request, but cannot take action on the request within your email client.



View profile

8. FAQs

Can I upload employee time-off balances in bulk?

Yes. Please refer to our instructions on how to perform bulk adjustments.

Can time-off balances be adjusted?

Yes. You can edit each balance under the Time off tab in the employee profile. Click <u>here</u> for more information.

I approved a time off request but I don't see the employee's balance change.

Request amounts are deducted from the available balance when a request is approved by all approvers. If you are not the final approver, you will not see the balance change until the final approver approves the request.

Can I cancel a time-off request?

Yes. You can <u>cancel</u> by going to the employee's profile, click the Time off tab, and choose between History or Upcoming subtabs. Employees themselves can only cancel upcoming time-off requests, but require an HR Admin to cancel requests that are in progress or from the past.

What time off features are available in the mobile app?

At this time, our mobile app allows all employees to <u>request time off</u>, <u>cancel an upcoming request</u>, and see upcoming time off requests in their dashboard. Admins and line managers have the additional functionality to <u>approve/reject requests</u> via the mobile app.

Can I request time off for another employee?

A time off request can be created within the employee profile from line managers and managers above on behalf of their direct reports. HR Admins can request time off for all employees. In mobile apps, you can request time off only for yourself and not for another employee.

Support when you need it

help.workable.com

support@workable.com

+1 (844) 657 7637 +44 (0) 800 086 8870 (3:00am - 5:00pm ET)

Live chat and access support resources by clicking your user icon and then "Help"