workable

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 settings
- Create work schedules for employees
- Create holiday calendars

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1. Create work schedules

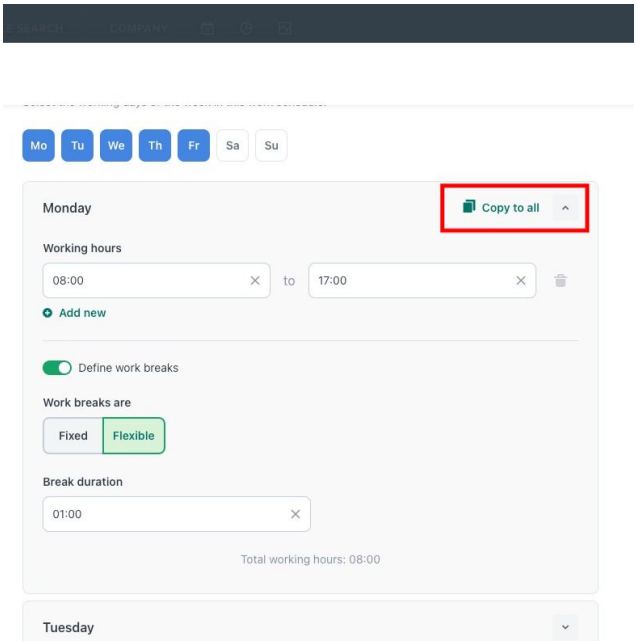
Work schedules facilitate your employees' time off management.

Creating work schedules

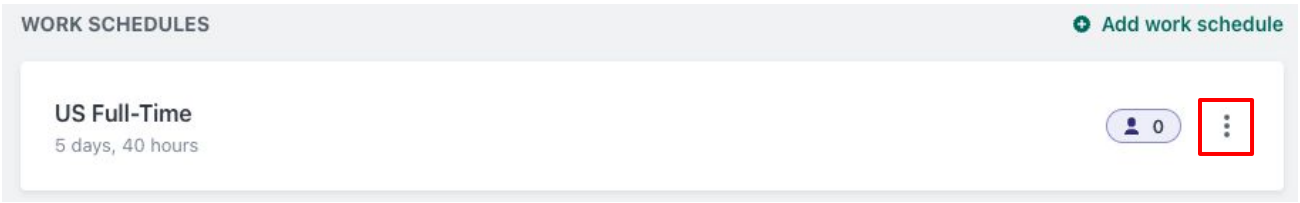
1. Click **Add work schedule** from your work schedules settings. You can create specific work schedules for employees of different departments, entities or locations.

2. 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.

3. Click click **copy to all** for the same settings to be applied to the rest of the enabled days.



Managing work schedules



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.

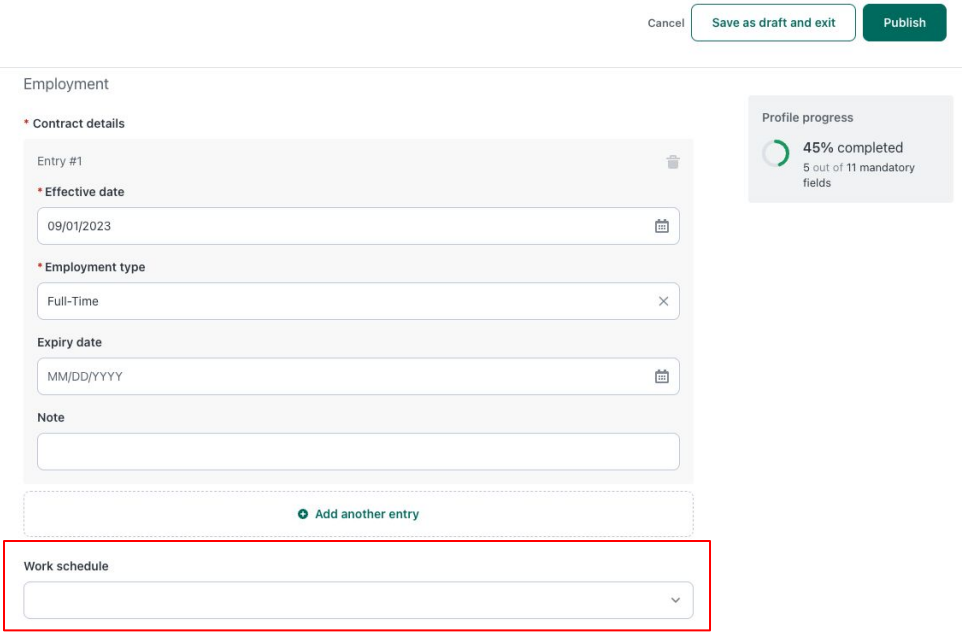
- **Delete** - Deleting a work schedule that is not assigned to any employees will completely remove it from the account. Any past assignments to employees won't be affected.

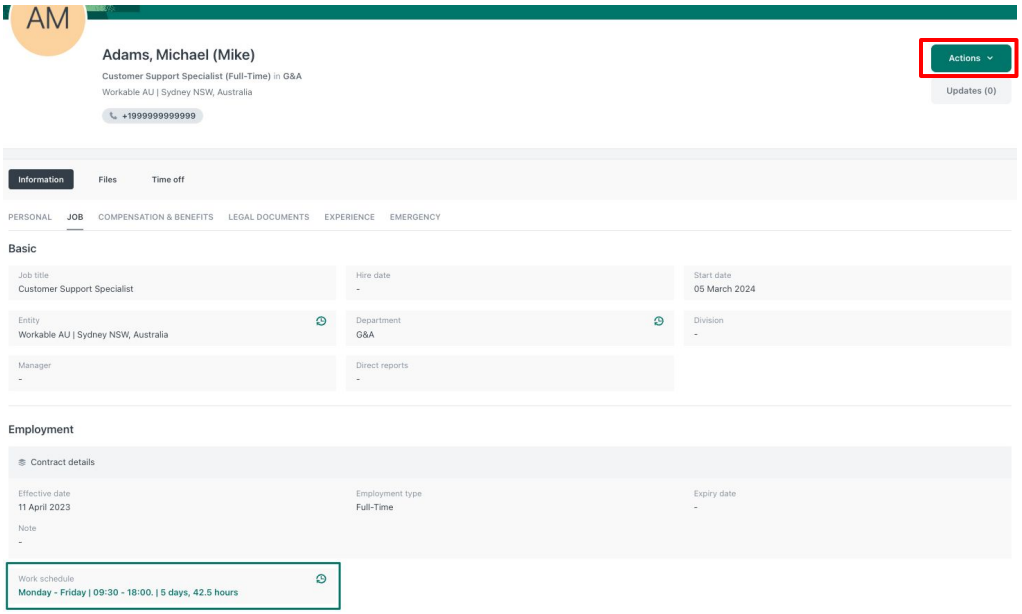
2. Assign work schedules

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

For new employees

There is a dedicated profile field in the default profile template for work schedules under **Job > Employment.** When you create a new employee simply select the the correct work schedule from the dropdown.





For existing employees

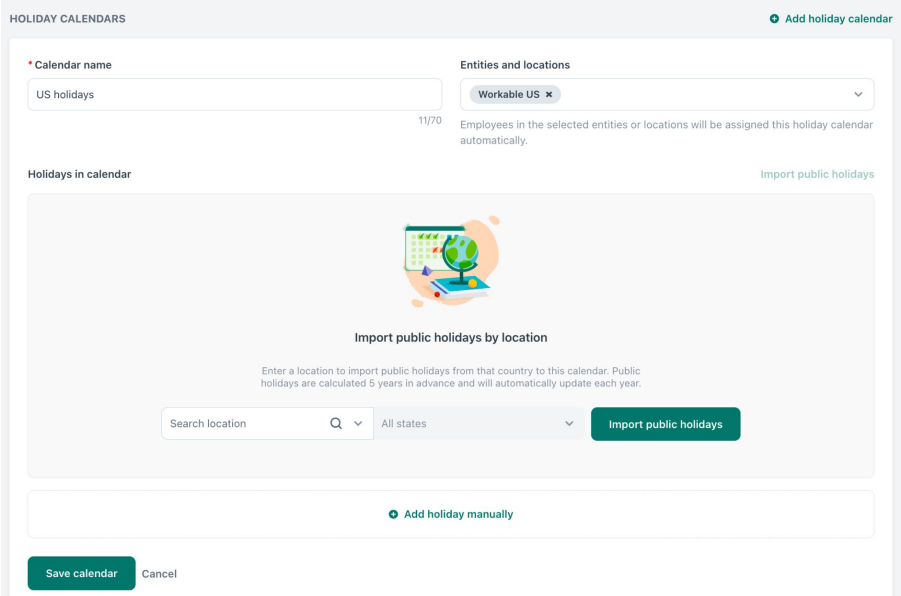
If you already have existing employees, edit their employee profile via the Actions button and add their work schedule under **Job > Employment.** Similarly, to edit an employee's work schedule, edit from their employee profile.

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

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 holiday calendars settings and click **Add holiday calendar.** Fill out the calendar name and the location or entity, if applicable.



Import holidays via API

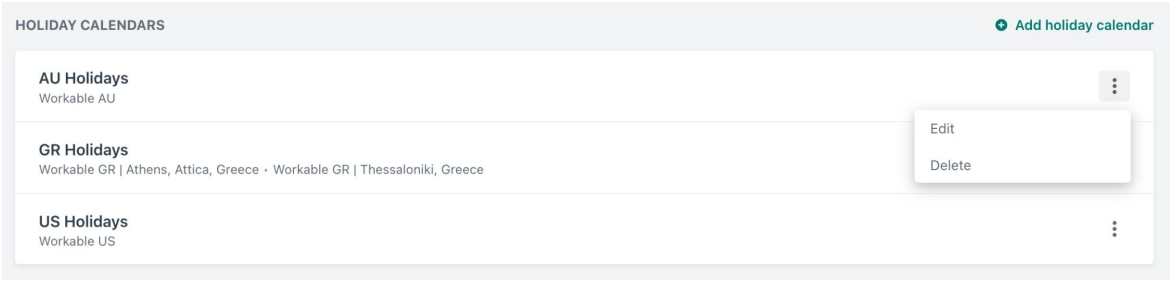
Automatically create holiday calendars for the next five years. First, select the country. Then, select a states or region, if applicable. Finally click **Import public holidays** to complete the process.

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.



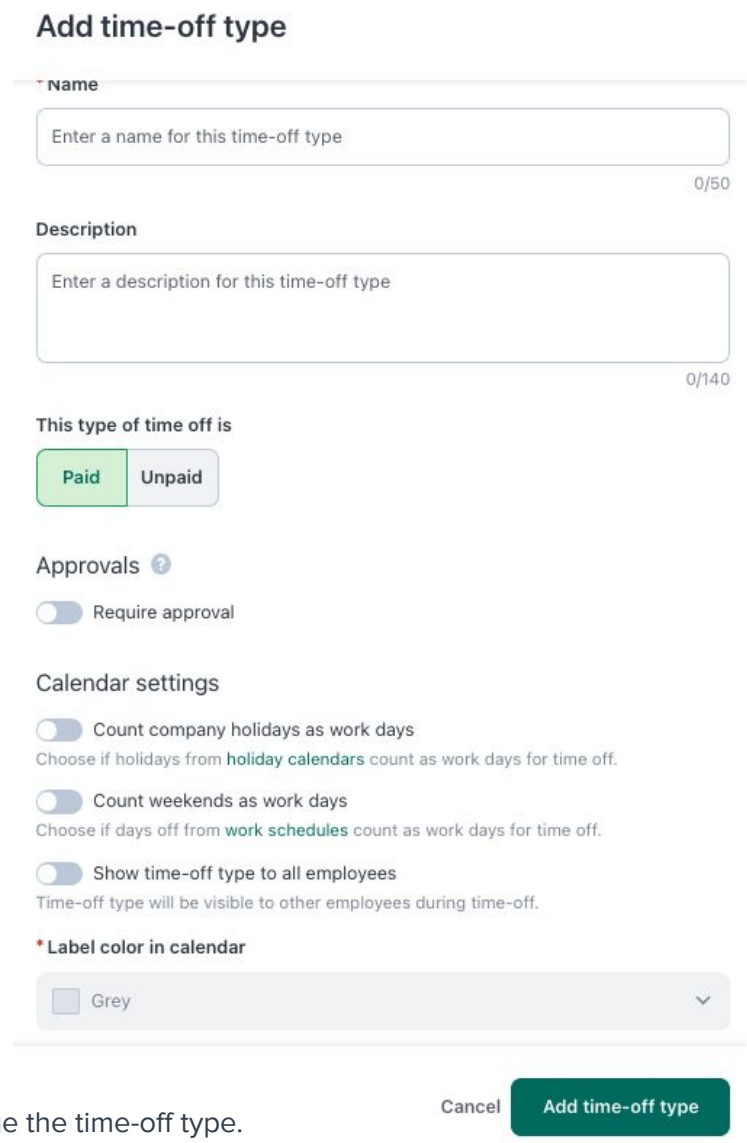
4. Create time-off types

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



Manage time-off types

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

- **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.

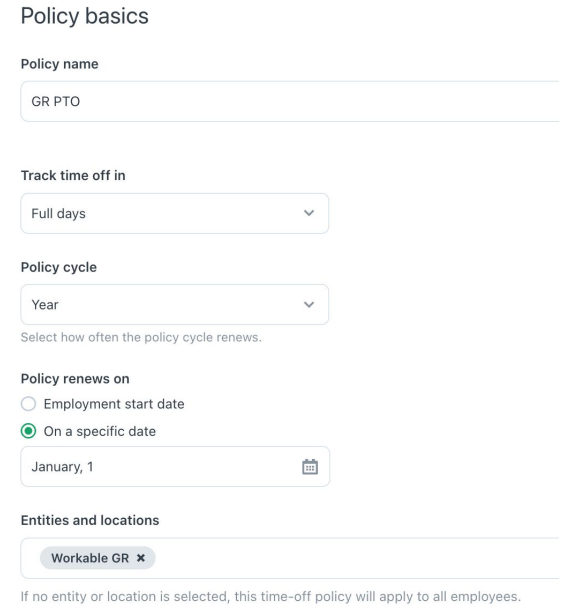
5a. Create time-off policies

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

Add time-off policies

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

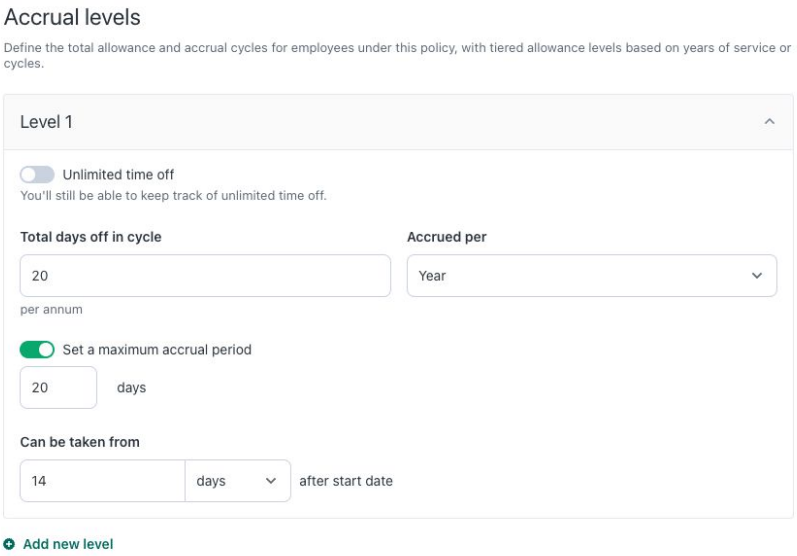
- Policies can be tracked in: full days, half days, or hours
- Policy cycles can be yearly, quarterly, monthly, or you can choose the policy to only occur once
- Policies can renew on employment start date, or on a specific date (e.g., January 1 each year)



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

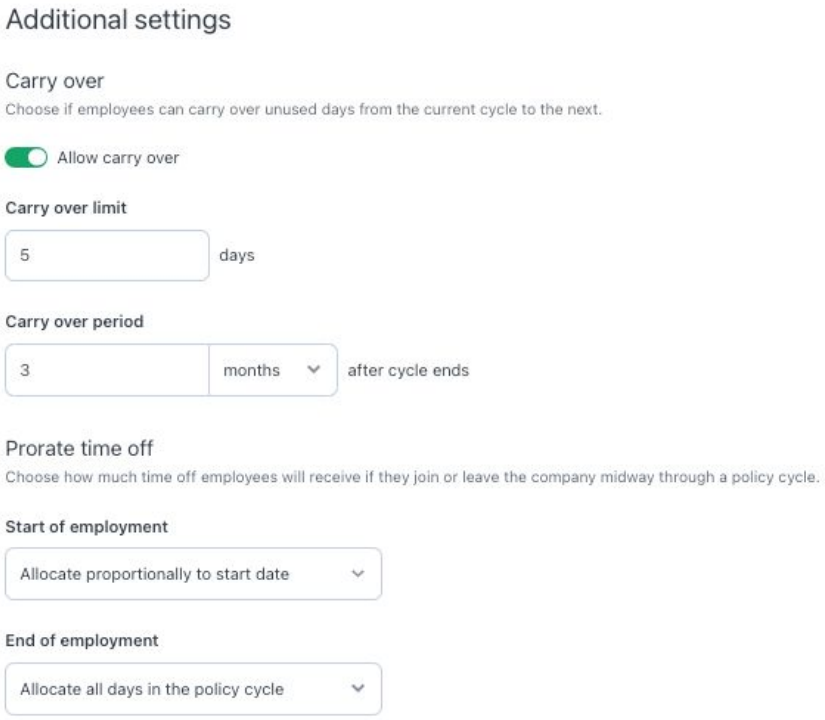


Create multiple levels of time-off policies by clicking Add new level and defining when an employee moves to the next level based on their years of service in the company (i.e “1 year after start date”) or the Number of cycles elapsed in the policy (i.e “After 2 cycles”)

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.

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

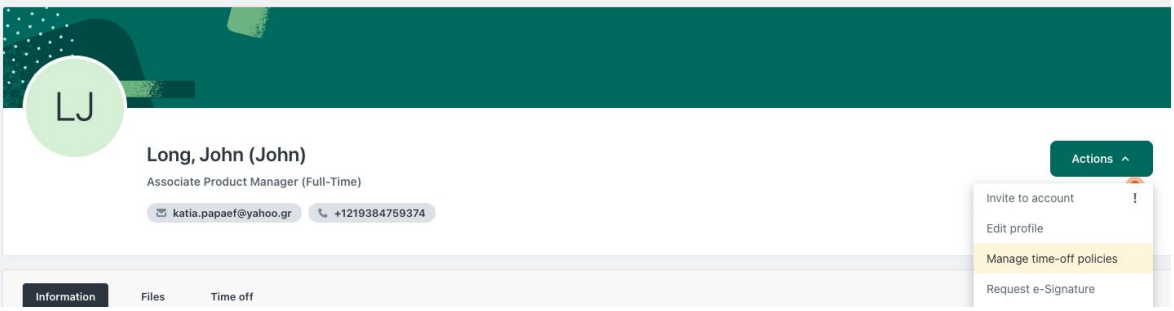
Manage time-off policies

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.

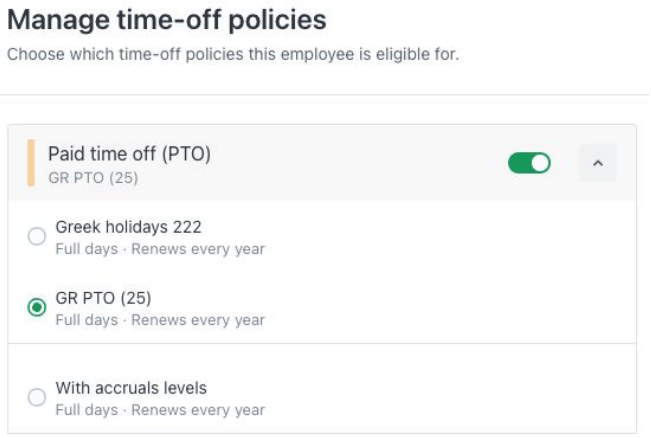
6. Assign time-off policies

Add time-off policies to an employee

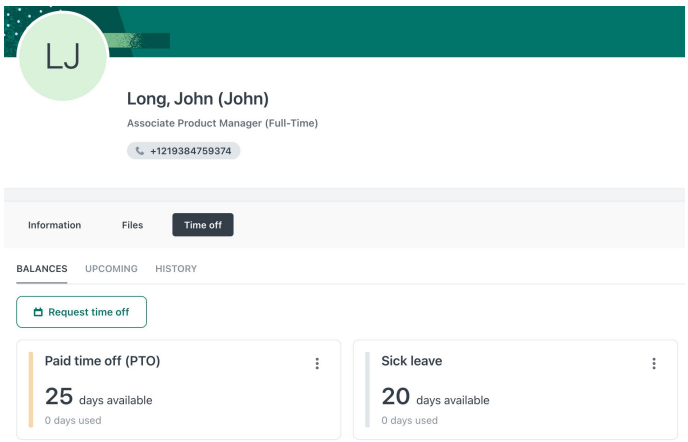


Find the employee profile you wish to assign the time-off policy to. Click **Actions > Manage time-off policies**. Then, select the time-off types you wish to assign to the employee.

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.

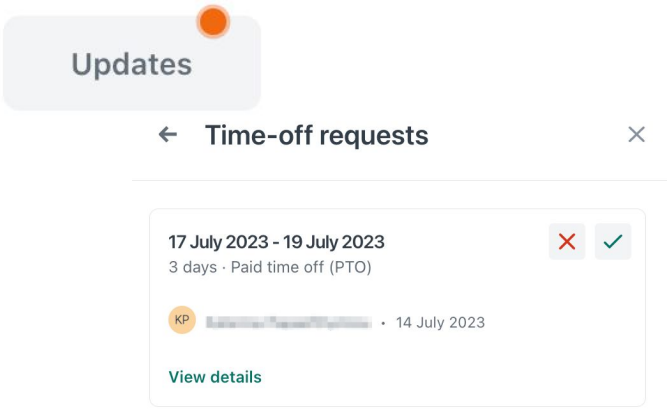
For more information on understanding how an employee's time-off balances are affected by updating time-off policies, click here.

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.

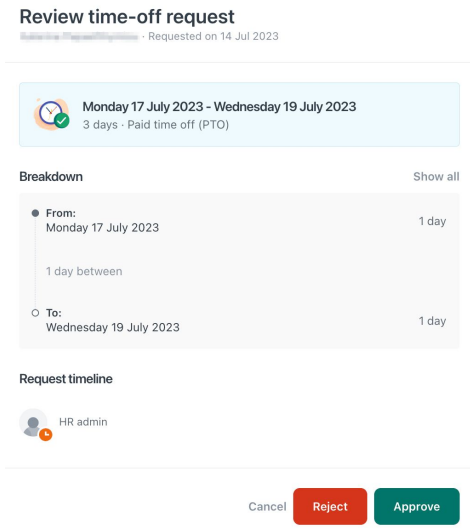
Via employee profile

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



Via details modal

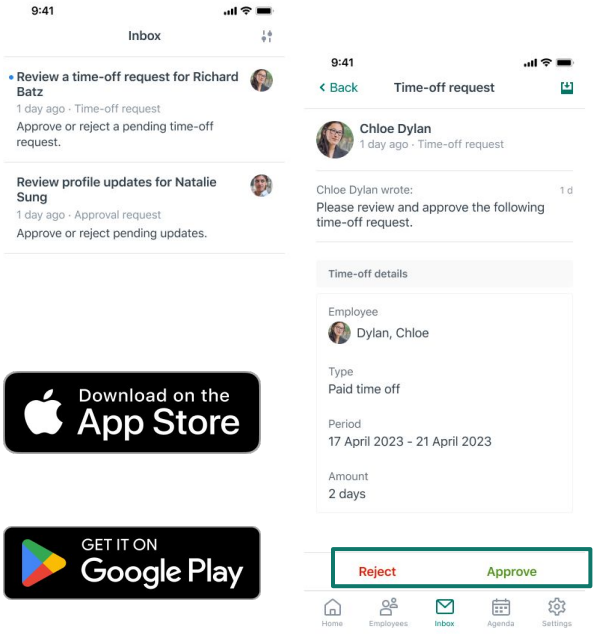
When you click **View details** from the time-off request via the Updates icon in the employee profile, you can take action at the bottom of the modal.



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.



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 here 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 cancel 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 request time off, cancel an upcoming request, and see upcoming time off requests in their dashboard. Admins and line managers have the additional functionality to approve/reject requests 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

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