

Time-off & Shift Trades

Genesys WFM Time-Off & Shift Trades Documentation

Study Notes

Topic	Description
Time-Off Management	Automated request evaluation, approvals
Auto-Approval	Qualifying requests approved automatically
Time-Off Plans	Define activity codes linked to limits
Daily Limits	Max hours per day per management unit
Shift Trades	Agent-to-agent schedule swaps
Trade Rules	Configuration of swap eligibility
Approval Workflow	Auto-approve or manual review
Self-Service Portal	Agents request via desktop/mobile

Navigation

Menu → Workforce Management → Time Off OR Agent Portal → Schedule → Time Off / Shift Trades

Time-Off Management Overview

Time-Off Management enables agents to request absences while maintaining workforce balance and service levels. Supervisors can define automated approval rules, allowing qualifying requests to be approved instantly while flagging exceptions for manual review.

Time-Off functions:

- Automate approval of routine requests
- Maintain visibility across absences
- Track time-off limits and balances
- Enforce policy rules
- Support work-life balance
- Reduce administrative burden

Key Components

Time-Off System:

1. Time-Off Types

- ├─ Vacation
- ├─ Sick Leave
- ├─ Personal Time
- ├─ Unpaid Time Off
- ├─ Bereavement
- ├─ Jury Duty
- └─ Other (customizable)

2. Request Submission (Agent)

- ├─ Select dates
- ├─ Choose type
- ├─ Submit request
- └─ Receive approval/notification

3. Approval Rules (Supervisor)

- ├─ Auto-approve if meets criteria
- ├─ Flag exceptions for review
- ├─ Document decision
- └─ Notify agent

4. Scheduling Impact

- ├─ Reduce available staffing
- ├─ Trigger schedule adjustments

- └─ Maintain service levels
- └─ Update master schedule

5. Reporting

- └─ Track utilization
- └─ Monitor patterns
- └─ Identify trends
- └─ Manage balances

Time-Off Plans

Time-Off Plans link activity codes to time-off limits, defining how much of each type agents can use.

Time-Off Plan Example: Standard Benefits

Plan Name: Standard Employee

Vacation:

- └─ Activity Code: VAC
- └─ Annual Limit: 20 days
- └─ Monthly Accrual: 1.67 days
- └─ Carryover: 5 days max to next year
- └─ Blackout Dates: Dec 24-25 (no vacation)
- └─ Min. Notice: 2 weeks advance

Sick Leave:

- └─ Activity Code: SICK
- └─ Annual Limit: 10 days
- └─ Monthly Accrual: 0.83 days
- └─ Carryover: None (use it or lose it)
- └─ Blackout Dates: None
- └─ Min. Notice: None (emergency allowed)
- └─ Requires: Medical note if >3 consecutive

Personal Time:

- └─ Activity Code: PERSONAL
- └─ Annual Limit: 5 days

- └ Monthly Accrual: 0.42 days
- └ Carryover: 1 day to next year
- └ Blackout Dates: Dec 24-25
- └ Min. Notice: 3 days advance
- └ Approval: Supervisor discretion

Unpaid Time:

- └ Activity Code: UNPAID
- └ Annual Limit: Unlimited
- └ Accrual: N/A
- └ Carryover: N/A
- └ Blackout Dates: None
- └ Min. Notice: 1 week advance
- └ Approval: Requires supervisory approval

Automated Approval Rules

Supervisors configure rules for automatic approval of time-off requests.

Auto-Approval Rule Example:

Rule: Vacation Request Auto-Approval

Conditions (ALL must be true):

- └ Time-Off Type: Vacation
- └ Balance Available: > 8 hours (full day)
- └ Notice Period: \geq 2 weeks advance
- └ Minimum Staffing: \geq 3 agents remaining
- └ Blackout Dates: Not during Dec 24-25
- └ Previous Pending: None pending for agent
- └ Manager Approval: Not required if rules met

Result:

- └ Request arrives Sunday
- └ System checks all conditions
- └ If all met: ✓ APPROVED instantly
- └ If any fail: ⚠ PENDING for supervisor review

└ Agent notification: Immediate

Example Scenarios:

Request 1: 2 weeks advance, 4 agents remain

└ Conditions: All met ✓

└ Result: AUTO-APPROVED ✓

└ Agent: Sees approval immediately

Request 2: 1 week advance (less than 2 weeks)

└ Condition: Notice period failed ✗

└ Result: PENDING manual review

└ Agent: Waits for supervisor decision

Request 3: 2 weeks advance, only 2 agents remain (below 3)

└ Condition: Minimum staffing failed ✗

└ Result: PENDING manual review

└ Agent: Can be denied or rescheduled

Daily Time-Off Limits

Supervisors can set maximum hours per day per management unit to prevent over-staffing on any day.

Daily Limits Configuration:

Management Unit: Support - Dallas

Monday:

└ Total Agents: 50

└ Max Allowed Off: 8 agents (16%)

└ Configuration: 8 hours max (full day)

Tuesday:

└ Total Agents: 50

└ Max Allowed Off: 8 agents (16%)

└ Configuration: 8 hours max

... (same for all days)

Holiday Period (Dec 20-26):

- └ Total Agents: 50
- └ Max Allowed Off: 5 agents (10%) ← More restrictive
- └ Configuration: 5 agents max

Application:

Request 1: Vacation Dec 22 (within holiday period)

- └ Currently Approved: 4 agents off
- └ Requesting Agent: 1 more
- └ Total if Approved: 5 agents (at limit)
- └ Result: ✓ APPROVED (meets limit)

Request 2: Vacation Dec 22 (within holiday period)

- └ Currently Approved: 5 agents off
- └ Requesting Agent: 1 more
- └ Total if Approved: 6 agents (exceeds limit of 5)
- └ Result: ✗ DENIED (over limit)

Shift Trades

Shift Trades allow agents to swap work schedules with other agents, subject to supervisor-configured rules.

Trade Configuration

Shift Trade Rules Setup:

Rule 1: Basic Trade Eligibility

- └ Agents in same team: Must trade with same team
- └ Agents in different teams: Can trade (if enabled)
- └ Same skill requirements: Both must be qualified
- └ Hours equivalence: Trades must be similar duration
- └ Master schedule: Can't trade published master schedule

Rule 2: Trade Window

- └ Minimum notice: 2 weeks before shift
- └ Maximum advance: Up to 26 weeks forward
- └ Trade-back window: Must reverse within X days
- └ Freeze period: No trades during blackout dates

Rule 3: Agent Eligibility

- └ Minimum tenure: 3 months to trade
- └ Performance: No active disciplinary actions
- └ Adherence: >85% adherence to qualify
- └ Pending trades: Only 1 trade pending at a time
- └ Trade history: Limit to X trades per period

Rule 4: Approval Workflow

- └ Agent 1: Initiates trade
- └ Agent 2: Reviews and accepts/declines
- └ Supervisor: Auto-approves if eligible
- └ Supervisor: Denies if rule violations
- └ Notification: Both agents notified of decision

Rule 5: Service Level Protection

- └ Staffing impact: Must not drop below minimum
- └ Skill requirements: Both agents must be skilled
- └ Activity match: Can trade between activities? (config)
- └ Override: Supervisor can force approve

Trade Process

Shift Trade Workflow:

Agent A Initiates Trade:

- └ 1. Select shift to trade (Mine: Tuesday 09:00-17:00)
- └ 2. Search for potential trades
 - └ Can filter by: Agent, Team, Date, Activity
- └ 3. Identify Agent B with matching shift
 - └ Wednesday 09:00-17:00
- └ 4. Send trade request

| └ Propose: My Tuesday for Your Wednesday

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Agent B Reviews:

└ 1. Receives trade notification

└ 2. Reviews details:

| └ My shift: Wednesday 09:00-17:00

| └ Agent A's shift: Tuesday 09:00-17:00

| └ Hours: Both 8 hours ✓

| └ Skills: Both trained ✓

| └ Duration: Both same activity ✓

└ 3. Accept or decline

| └ Accept: Proceeds to supervisor

| └ Decline: Agent A notified

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Supervisor Auto-Approval:

└ 1. System checks approval rules:

| └ Both agents eligible ✓

| └ Skill match ✓

| └ Staffing impact acceptable ✓

| └ No rule violations ✓

| └ Service level maintained ✓

└ 2. Result: ✓ AUTO-APPROVED

└ 3. Schedules updated:

| └ Agent A: Now Tuesday off, Wednesday working

| └ Agent B: Now Tuesday working, Wednesday off

| └ Master Schedule: Updated

└ 4. Both agents notified

| └ Approved, effective immediately

|

Result:

└ Trade completed

└ Master schedule updated

└ Both agents working new dates

└ Can be reversed if both agree

Trade Exceptions

Scenario 1: Skills Don't Match

Agent A: Support Tier 2 (advanced skills)

Agent B: Support Tier 1 (basic skills)

Trade Request: A's Tuesday for B's Wednesday

├ A has: Advanced skills for Tier 2 work

├ B has: Only basic skills

├ Tuesday activity: Tier 2 required

├ B not qualified for Tuesday

├ Result: ✗ DENIED (skill mismatch)

Solution:

├ Agent B must complete training first

├ OR Agent A finds Tier 2 agent to trade with

└ OR Supervisor overrides (if business allows)

Scenario 2: Staffing Impact

Team: Support (5 agents)

Tuesday staffing: All 5 present

Trade Request: Agent A & B both want to trade out

Impact:

├ Both agents trading simultaneously

├ Tuesday minimum: 3 agents required

├ Remaining: 3 agents (meets minimum)

├ Service Level: Might be at risk

├ Result: ⚠ PENDING supervisor review

Supervisor Options:

├ Approve (accept slight service risk)

├ Deny one trade, approve other

├ Offer alternative dates

└ Request one agent to post-poner

Self-Service Portal

Agents manage time-off and trades through desktop or mobile portal.

Agent Self-Service Features:

Time-Off Request:

- └ 1. Select "Time Off" module
- └ 2. Click "Request Time Off"
- └ 3. Choose:
 - | └ Type (Vacation, Sick, etc.)
 - | └ Dates (calendar picker)
 - | └ Notes (optional)
 - | └ Submit
- └ 4. See:
 - | └ Time-off balance
 - | └ Blackout dates highlighted
 - | └ Minimum notice requirements
 - | └ Approval status
- └ 5. Receive notification
 - └ Auto-approved or pending review

Shift Trade Request:

- └ 1. Select "Schedule" module
- └ 2. Click "Find Trades"
- └ 3. View:
 - | └ Own scheduled shifts
 - | └ Available agents to trade with
 - | └ Their shift availability
 - | └ Compatibility check (skills, hours)
- └ 4. Select trade
 - | └ Propose: "My Tuesday for Your Wednesday"
- └ 5. Request sent
 - | └ Other agent notified
- └ 6. Await response
 - | └ Accepted: Goes to supervisor
 - | └ Denied: Request closed
 - └ Auto-approved: Notification of approval

View Schedules:

- └ Calendar view of all shifts
- └ Color-coded by activity
- └ Mobile-friendly display
- └ Search and filter options

└ Print or export option

Mobile Features:

└ Responsive design

└ Touch-friendly interface

└ Push notifications for approvals

└ Photo ID verification (optional)

└ Works offline (syncs when online)

Real-World Examples

Example 1: Vacation Request (Auto-Approved)

Agent: AGENT_045

Vacation Request:

└ Type: Vacation

└ Dates: June 15-22, 2026 (8 days)

└ Submitted: May 1, 2026

└ Notice: 45 days advance ✓

└ Date: Monday request for Monday-Monday week

System Checks:

└ Vacation balance: 18 days available ✓

└ Notice period: 45 days (requirement: 14 days) ✓

└ Minimum staffing check:

| └ Support team: 8 agents total

| └ Currently approved off: 2 agents

| └ Daily limit: 4 agents max

| └ If approved: 3 agents off (within limit) ✓

| └ Minimum on hand: 5 agents ✓

└ Blackout dates: No (June 15-22 not blackout) ✓

└ All conditions: MET ✓

Result: ✓ AUTO-APPROVED

Notification:

- └ Agent receives email: "Vacation approved"
- └ Schedule updated: June 15-22 marked as VAC
- └ Balance: 18 - 8 = 10 days remaining
- └ Can cancel up to 2 weeks before with notice

Example 2: Trade (Manual Approval Due to Staffing)

Agents: AGENT_033, AGENT_128

Trade Request:

- └ Agent 033 offers: Friday 09:00-17:00
- └ Agent 128 offers: Wednesday 09:00-17:00
- └ Submitted: Thursday (2 days notice)
- └ Proposed dates: Next week

Rule Checks:

- └ Notice period: 2 days (requirement: 2 weeks) ✗
- └ Result: DOES NOT MEET AUTO-APPROVAL
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Supervisor Review:

- └ 1. Check request details:
 - | └ Both agents qualified ✓
 - | └ Same activity (Support) ✓
 - | └ Same hours (8 hours each) ✓
 - | └ No pending trades ✓
 - |
- └ 2. Staffing impact:
 - | └ Support team: 6 agents
 - | └ Friday staffing: Currently 5 agents
 - | └ If trade: Still 5 agents (no change) ✓
 - | └ Service level: Not impacted ✓
 - |
- └ 3. Business decision:
 - | └ Short notice: Usually denied
 - | └ But: Staffing impact minimal
 - | └ Decision: APPROVE with exception

| ↳ Note: "Last-minute trade due to emergency"

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Result: ✓ MANUALLY APPROVED

Outcome:

└ Both agents notified

└ Schedule updated

└ Trade effective next week

↳ Documented for future reference

Best Practices

Time-Off

- **Clear Rules** - Simple, documented policies
- **Fair Application** - Consistent across team
- **Balance** - Support work-life balance while maintaining service
- **Planning** - Encourage advance notice
- **Limits** - Realistic balance between coverage and flexibility
- **Communication** - Transparent approval/denial reasons

Shift Trades

- **Flexibility** - Enable trades to improve agent satisfaction
- **Safeguards** - Protect service level and skill requirements
- **Training** - Ensure agents know how to trade
- **Monitoring** - Watch for abuse of trade system
- **Documentation** - Keep record of all trades
- **Supervisor Review** - Spot-check for compliance

Interview Cheat Sheet

Question	Answer
What's time-off management?	Automated approval of absence requests

Question	Answer
Auto-approval criteria?	Balance, notice, staffing, blackout dates
Daily limits function?	Prevent over-staffing by limiting absences per day
Time-off types?	Vacation, sick, personal, unpaid, bereavement, jury duty
What's shift trade?	Agent-to-agent schedule swap
Trade requirements?	Skill match, hours match, staffing maintained
Trade approval?	Auto-approve if eligible, else supervisor review
Notice requirement?	Varies by type (vacation 2 weeks, sick immediate)
Can trades be reversed?	Yes, if both agents agree within timeframe
Mobile access?	Agents can request via mobile app
Approval notification?	Email/in-system notification immediately
What blocks approval?	Insufficient balance, short notice, staffing risk

Key Takeaways

- **Automation** - Approve routine requests automatically
 - **Self-Service** - Agents manage own time-off/trades
 - **Balance** - Support flexibility while protecting service
 - **Rules** - Clear criteria for approval/denial
 - **Visibility** - Supervisors see impact before approval
 - **Fairness** - Consistent application of policies
 - **Convenience** - Mobile and desktop access
 - **Work-Life** - Enable better work-life balance
 - **Efficiency** - Reduce administrative burden
 - **Service Level** - Never compromise customer service
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Additional Resources

- Time-Off Management: help.genesys.cloud/articles/time-off-management/
 - Shift Trades: help.genesys.cloud/articles/shift-trades-overview/
 - Support: <https://support.genesys.com>
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