➕ Workforce RTA Logs

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Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Workforce RTA Logs Process

Workforce Logs SOP

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Purpose

The Workforce RTA Logs are designed to systematically capture and document all critical operational anomalies across the ECE organization. These logs serve as a communication and documentation tool to ensure management and operations are informed in real-time and can initiate the appropriate response and long-term resolutions.

This SOP outlines the classification, documentation, and escalation process for all types of anomalies including service interruptions, behavioral issues, and performance alerts.

Scope

This SOP applies to all Real-Time Analysts (RTAs) and workforce staff responsible for monitoring intraday operations and maintaining accurate documentation of incidents affecting service level delivery, employee productivity, and operational efficiency.

When to Use the RTA Log

Use the Workforce RTA Log when the following types of anomalies are observed:

- A service level is being compromised (e.g., high ABN, low SLA)
- Employee is violating standard behavior or compliance expectations
- Technical/infrastructure issues affecting one or more employees/sites
- Workflow interruptions due to system or process issues

Types of RTA Logs

Each entry in the RTA Logs must be categorized according to the scale of the impact:

1. **Site-Wide**
   Used when the situation affects the entire site or a large population across multiple accounts.
   Example: Regional power outage or building-level internet disruption.

2. **Account-Wide**
   For issues specific to a program or client account.
   Example: A tool outage affecting only the XYZ client account or SLA drops on ABC program.

3. **Employee (Specific)**
   Used for incidents involving a specific team member.
   Example: Agent caught sleeping or an internet issue at a home-based workstation.

Categories and Sub-Categories

Main Category	Sub-Category	Description
Service Level & Volume Management	SLA Escalation – P1 (85%)	SLA dips below 85% for more than 15 minutes.
	SLA Escalation – P0 (60%)	SLA dips below 60% in any 15-minute interval.
	High Abandonment Rate	ABN rate exceeds threshold per account standards.
	Understaffing Alert	Real-time headcount drops below required levels.

	Overstaffing Alert	Headcount significantly exceeds intraday requirement.
	Queue Surge / Low Queue Alert	Sudden rise or drop in volume that's not forecasted.
Agent Behavior & Compliance	Post Abandonment	Agent logs out or disconnects while on a live contact.
	Sleeping	Agent inactive and unresponsive during live monitoring.
	Unauthorized Use of Cellphone	Agent caught using phone during shift.
	Unscheduled Break / Idle Time	Taking breaks beyond allowed or no active state for prolonged period.
	Extended Non-Productive AUX	Staying in non-productive states too long (e.g., Break, Meeting).
	Accessing Non-Working Related Sites	Visiting websites that are not related to your job or work responsibilities during working hours or while using company equipment or networks.
	Possible Protraction / Work Delay	Delay caused by internal or external blockers.
Technical & Infrastructure Issues	Power Outage	Complete loss of electricity affecting agent(s).

	Internet Outage	Agent unable to connect due to connectivity issues.
	Tools Outage	Specific systems or platforms are down (e.g., Salesforce, Zendesk).
	Latency Issues	Application lagging or slowing down productivity.
	Headset / Device Failure	Hardware problems (broken mouse, headset, keyboard).
Process & Work Disruptions	Possible Protraction / Work Delay	Delay caused by internal or external blockers.
	Workforce System Downtime	Zoho, Genesys, WFM tools become inaccessible or malfunction.
	System Maintenance Impact	Known/planned maintenance that interrupts work hours.

Step-by-Step Logging Process

Step 1: Identify the Situation
Once the anomaly is detected by the RTA or escalated to the team, assess whether it falls under the scope of the Workforce RTA Log.

Step 2: Determine the Log Type
Select the appropriate log type based on the scope of the issue (Site-Wide, Account-Wide, Employee).

Step 3: Select the Appropriate Category/Sub-Category
Based on the nature of the anomaly, assign it to the proper category and sub-category listed above.

Step 4: Fill Out the RTA Log Entry
Use the designated form to document the following:

- Date and Time of the incident
- Site and/or Account affected
- Type of Log and Category/Sub-Category
- Detailed description of the incident
- Action taken by RTA or Operations
- Escalation steps or contacts notified (e.g., TL, OM, IT, WFM)
- Status: Resolved / Ongoing / Escalated

Step 5: Escalate If Necessary
Escalate incidents requiring urgent resolution (e.g., SLA P0 drops, tool outages) to Operations Team.

Step 6: Follow Up
Monitor if the issue persists. Provide updates in the same RTA Log entry until resolved.

Mitigations and Escalation Guidelines

- For **technical issues**, immediately inform the IT Helpdesk or follow internal escalation tree.

- For **agent compliance issues**, escalate to TL or Operations via email or IM after logging.

- For **volume or SLA alerts**, coordinate with Operations to deploy available headcount, pull break queues, or reroute contacts.

- For **site-wide events**, confirm with Facilities and alert all impacted teams for contingency (e.g., reassign to other sites or split volume).

Accountability and Review

- RTA Team Leads must audit the logs weekly to ensure completeness and resolution tracking.

- All logs must be submitted within 15 minutes from discovery of the event.

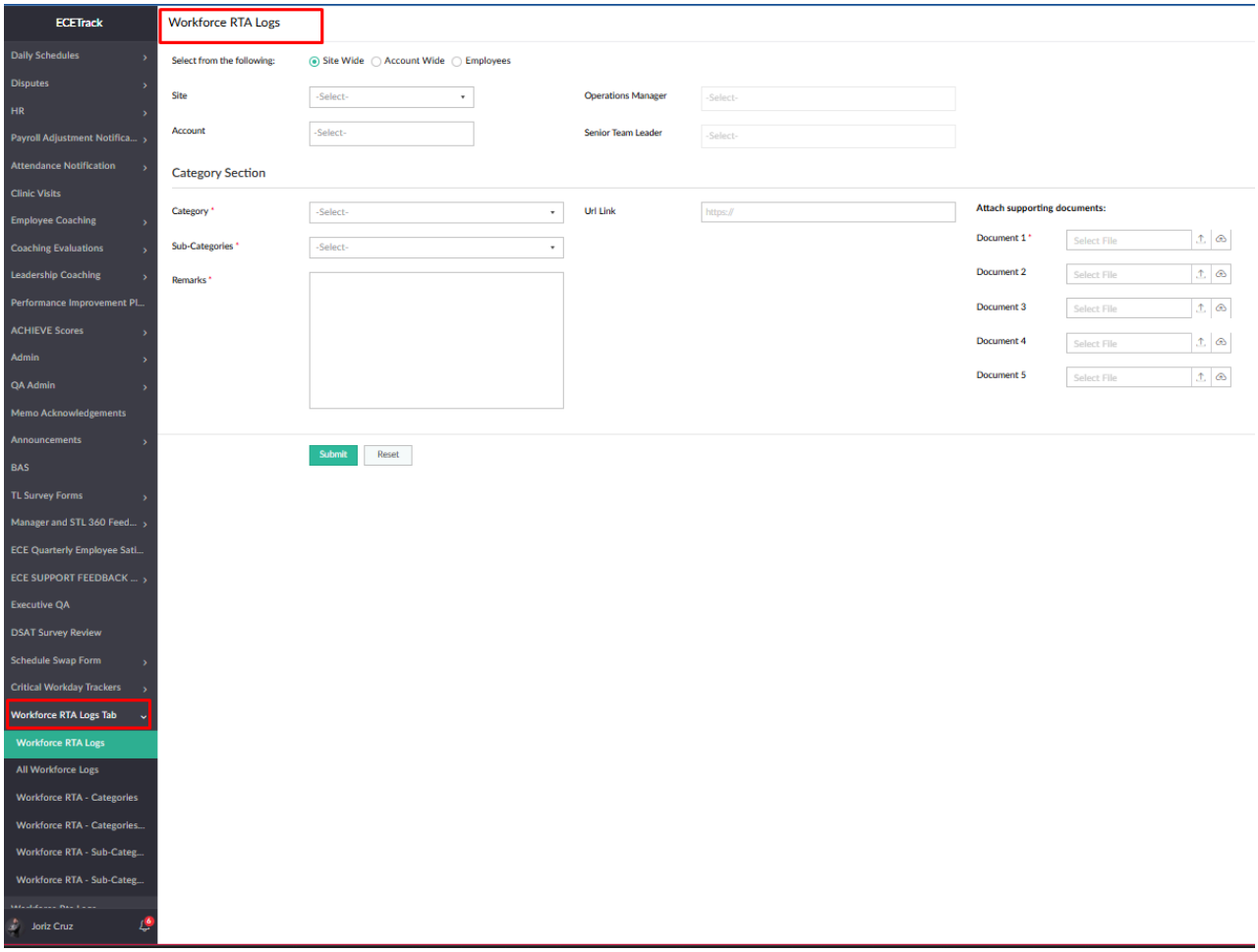
- Incomplete or late RTA logs may be subject to performance feedback or sanctioned accordingly for **negligence.**

How to Log Workforce RTA Logs (Site-Wide / Account-Wide)

Refer to this SOP from Programming Team: Workforce Logs SOP

Step 1: Access the [Workforce RTA Log System]

- Open your preferred web browser.
- Go to the designated **[Workforce RTA Log Form]**.



Step 2: Select the Log Type

- Choose either:
  - **Site-Wide** – if the issue affects an entire site or multiple accounts.
  - **Account-Wide** – if the issue is isolated to a specific account or program.

Step 3: Identify the Affected Entity

- For **Site-Wide**: Select the specific **site name** from the dropdown.
- For **Account-Wide**: Select the **account name** or **program** affected.

Step 4: Choose the Correct Category and Sub-Category

- Use the predefined categories:
    - Service Level & Volume Management
    - Agent Behavior & Compliance
    - Technical & Infrastructure Issues
    - Process & Work Disruptions
- Then select the **appropriate sub-category** that best describes the situation.

Step 5: Provide Incident Details

Fill in the required fields with the following:

- **Date and Time of the Incident** – When the issue occurred.
- **Site and/or Account Affected** – Clearly indicate where the issue happened.
- **Type of Log** – Confirm it is Site-Wide or Account-Wide.
- **Category / Sub-Category** – Based on the nature of the incident.
- **Detailed Description** – Briefly describe the situation, how it was discovered, what was observed, and any relevant context.
- **Action Taken by RTA or Operations** – Note any immediate steps, communication, escalation, or resolution attempts.
- **Status** – Choose one:
    - **Resolved** – if fully addressed
    - **Ongoing** – if still being monitored or partially resolved
    - **Escalated** – if forwarded to IT, Ops, or Management for action

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Step 6: Submit and Monitor

- Click **Submit** or **Save** once all fields are filled out.
- **Continue monitoring** the situation even after logging.
- If the issue persists or changes status, **update the same log entry** with the new developments until fully resolved.

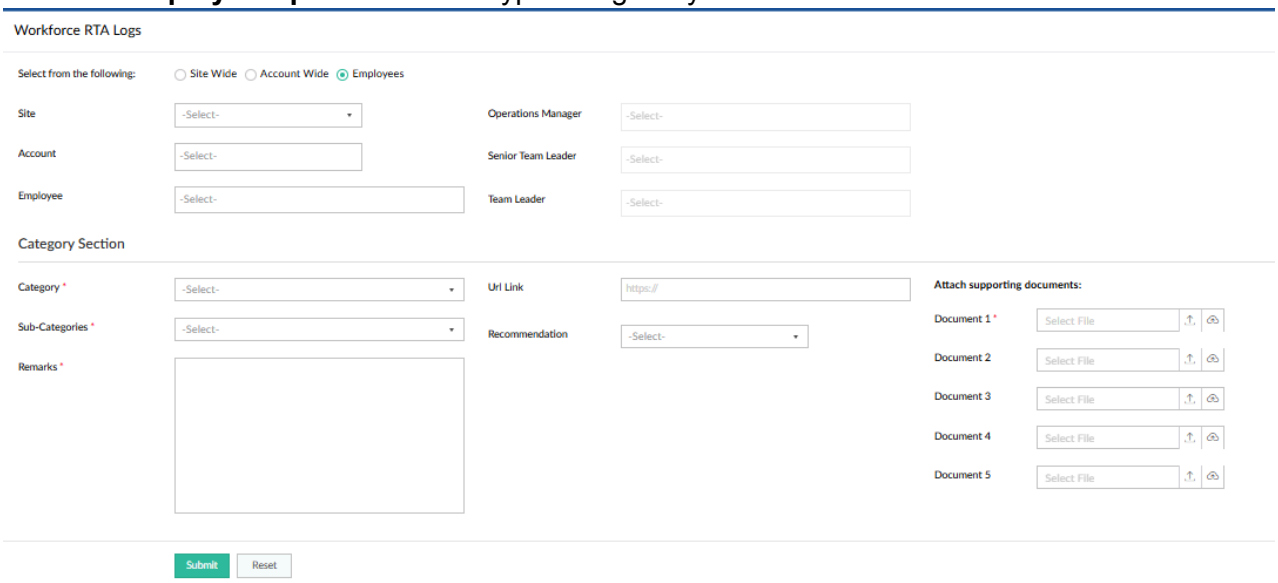
How to Log Workforce RTA Logs (Employee-Specific)

Step 1: Access the [Workforce RTA Log System]

- Open your preferred web browser.
- Go to the designated **[Workforce RTA Log Form]**.

Step 2: Select Type of Log

- Choose **"Employee-Specific"** as the type of log entry.



Step 3: Identify the Employee

- **Select the Employee's Name** from the dropdown or input field.
- **Select the Site and Account** where the employee is assigned.

Step 4: Choose the Appropriate Category and Sub-Category

Under **Agent Behavior & Compliance**, select the relevant sub-category:

- **Post Abandonment** – Agent disconnected/logged out during active contact.
- **Sleeping** – Agent inactive and unresponsive.
- **Unauthorized Use of Cellphone** – Agent caught using a phone while on duty.
- **Unscheduled Break/Idle Time** – Agent took excessive or unscheduled breaks.
- **Extended Non-Productive AUX** – Agent stayed too long in non-productive states, including:
    - Prolonged After Call Work (ACW)
    - Prolonged Average Handle Time (AHT)
    - Unauthorized usage of offline AUX
    - Logging out without approval
    - Any of the above that negatively affected the SLA

Step 5: Fill in the Incident Details

Provide the following information:

- **Date and Time of the Incident** – When it happened.
- **Category/Sub-Category** – Based on the agent's behavior.
- **Detailed Description** – Include what was observed or reported, how it was confirmed (screenshots, chat logs, etc.), and any relevant patterns of behavior.

Step 6: Upload Supporting Documents

- Upload any evidence to support the log:
    - **Screenshots**
    - **Chat or system logs**
    - **AUX reports**
- **Recommendation:** Attach an **NTE/NOD** recommendation or **coaching documentation** if applicable.

Step 7: Submit the Log Entry

- Double-check all fields.
- Click **Submit** or **Save** to log the report.

Step 8: Monitoring and Operations Action

- Once submitted, the **Operations Team (TL, STL, Managers)** will receive an automated **email notification** about the RTA log.

- The **Ops Team must respond** by issuing an:

  - NTE (Notice to Explain) or NOD (Notice of Disciplinary Action)
  - Logging a coaching session

  Once submitted, the Operations Team (TL, STL, Managers) will receive an email alert with the report.

  Within the email/system, they can:

  Click “NTE/NOD” to issue a disciplinary citation.

  Click “Coaching” to log a coaching form.

All Workforce Logs

NTE/NOD	Coaching	Recommendat...	NTE/NOD Sent	Coaching Sent	NTE/NOD S...	Coached	Category	Sub-Categories	Site	Account	Employee
Site Wide											
NTE/NOD	Coaching		NTE/NOD Sent	Coaching Sent	No	No	Technical & Infrastructure Issues	Power Outage	Manila	RTA	
Employees											
NTE/NOD	Coaching	NTE/NOD	NTE/NOD Sent	Coaching Sent	No	No	Agent Behavior & Compliance	Extended Non Productive AUX	Manila	RTA	Salcedo Joriz Cometa Cruz

Accountability:

- ❖ The Immediate Supervisor (e.g., TL) is solely responsible for ensuring the incident is addressed.
- ❖ If the immediate supervisor is unavailable, responsibility follows the hierarchy (STL, then Manager).
- ❖ The Immediate Supervisor is expected to act within 5 calendar days from the date the RTA log was submitted.
- ❖ Failure to act within 5 days will result in the Immediate Supervisor being held accountable and cited for **negligence**.

- ***RTAs will monitor*** *if the action has been completed and document the follow-up on the same entry if needed.*

✅ WFM Escalation Workflow

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📊 Workforce RTA Escalation Workflow

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1. Issue Identification & Log Entry

- RTA identifies SLA failure, AHOD instance, or any real-time operational concern.
- RTA documents the issue in the **Zoho Creator - ECETrack - Workforce RTA Logs** with complete details (timestamp, queue, agent, impact, actions taken).

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2. Initial Notification

- RTA sends the alert to the **Support Operations Team** through the designated channel (Slack, Teams, email, or ticketing system).
- Timestamp is recorded in the Workforce RTA Log.

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3. Wait for Acknowledgement

- Standard waiting period: **5–10 minutes** depending on urgency.
- If **no acknowledgement** is received, proceed to escalation.

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4. First Escalation – Senior Operations Leadership

If **no acknowledgement** is received from the Support Operations Team within the standard response window (5–10 minutes):

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Step 1: Escalate to Senior Operations Leadership

- **Escalation Recipients:**

    1. Senior Team Leader
    2. Workforce RTA Manager
    3. Operations Manager

- **Purpose:**
  Ensure timely visibility and intervention for SLA failures, queue issues, or operational disruptions.

Step 2: Communication Channels

- **Zoho Cliq:**
  Send a direct message immediately outlining:

    - Issue summary
    - Queue impacted
    - Agents affected
    - Actions already taken
    - Requested response time

- **Phone Call:**
  If no response via Cliq within **5 minutes**, call directly using the updated contact numbers of each recipient. Include:

    - Clear description of the issue
    - Urgency level
    - Required action

- Any dependencies affecting resolution

Step 3: Documentation

- Record **all escalation attempts** in the RTA Log including:
  - Date and time of escalation
  - Channel used (Cliq or Phone)
  - Name of person contacted
  - Response received (if any)
  - Actions taken or next steps

Step 4: Follow-up

- Continue monitoring until acknowledgement or resolution is received.
- If the senior leadership team **still does not respond**, escalate immediately to the **Executive Team** following the documented escalation procedure.

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5. Second Escalation – Executive Team

If senior management also does ***not*** acknowledge or action the issue within the escalation window:

➡️ **Escalate to the Executive Leadership Team through email or Cliq:**

1. **Michael Baldwin** – VP for Operations

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2. **Breana Odekirk** – Director of Operations
3. **Chelsea Sidwell** – Director of Implementation
4. **Jennifer Carabeo** – Executive Director
5. **Marta Rub** – VP of Finance
6. **Chris Eisdorfer** – CEO

If **senior management** (Senior Team Leader, Workforce RTA Manager, Operations Manager) **does not acknowledge or take action** within the escalation window:

Escalation Recipients

- Michael Baldwin – VP for Operations
- Breana Odekirk – Director of Operations
- Chelsea Sidwell – Director of Implementation
- Jennifer Carabeo – Executive Director
- Marta Rub – VP of Finance
- Chris Eisdorfer – CEO

Required Escalation Actions

Follow these steps to ensure proper notification:

1. **Send a Zoho Cliq Message**
    - Include issue summary, queue impacted, agents affected, actions taken, and urgency.
2. **Send an Email**
    - Provide the same information as above, attach relevant RTA logs if needed.

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3. **Call via Zoho Cliq**
    - Attempt direct communication if no response via message or email.
4. **Call via Phone**
    - Use updated executive contact numbers to ensure immediate acknowledgement.

Documentation

WFM SLA Failure Escalation Ticket Template - Use this for incident report.

- Include the following in the escalation:
    - **Complete RTA Log**
    - **Summary of escalation attempts** (all channels and timestamps)
    - **Business impact**
    - **Required action** (urgent/critical)

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6. Resolution & Closure

Once the issue is **acknowledged and addressed**:

1. **Update the RTA Log**
    - Action taken
    - Time resolved
    - Team/leader who resolved the issue

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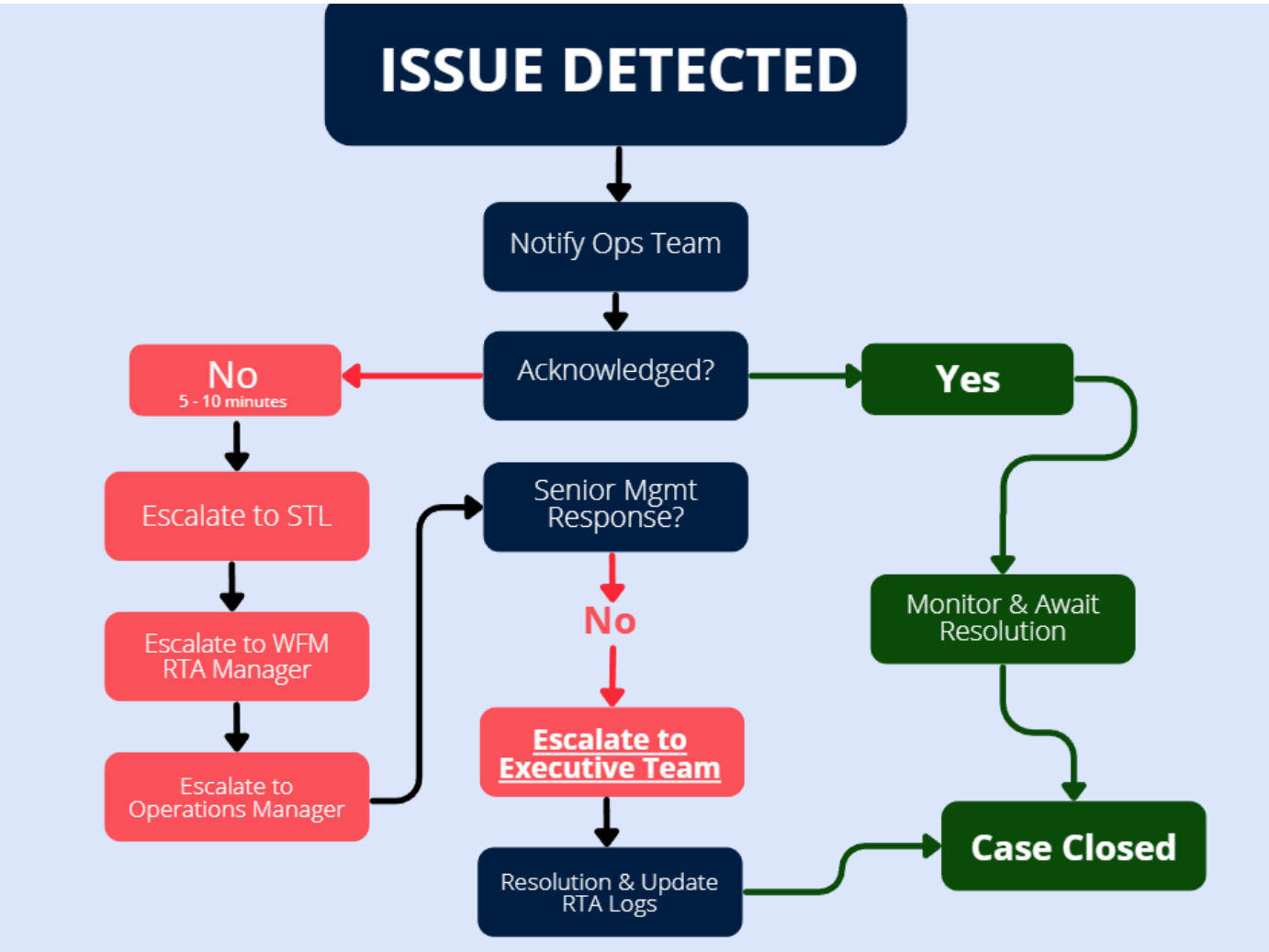
2. **Close the Case**
   - Send a brief summary to the operations channel for awareness and record-keeping.
3. **Optional Follow-up**
   - Review escalation process for lessons learned or improvements.



WFM Escalation - simplified

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Workforce Management (WFM) Escalation Workflow

Step	Action	Details & Timing
1. Identify & Log	RTA detects an issue and documents it.	Identify SLA failure, AHOD instance, or operational concern. Document the issue in the **Zoho Creator - ECETrack - Workforce RTA Logs**. This sends an automated Zoho Cliq to the leaders.
2. Initial Notification	Alert the Team Leader.	Send the alert through the designated channel (Cliq, Slack, Teams, email, or ticketing system).
3. Wait for Acknowledgement	Monitor for immediate response.	Wait for the standard period of **5–10 minutes,** depending on urgency. If **no acknowledgement** is received, proceed to escalation.
4. First Escalation	Escalate to Senior Operations Leadership.	Recipients include the **Senior Team Leader**, **Workforce RTA Manager**, and **Operations Manager**. Send an immediate direct message via **Zoho Cliq**. If no response via Cliq within **5 minutes**, call directly via Cliq or Phone Call.
5. Second Escalation	Escalate to Executive Leadership.	If senior management fails to acknowledge or act, escalate to the **Executive Leadership Team** (e.g., VP for Operations, CEO). This requires notifying them via multiple channels: Zoho Cliq, Email, and Phone Call.
6. Resolution & Closure	Document the solution and close the case.	**Zoho Creator - ECETrack - Workforce RTA Logs** with the action taken, time resolved, and the team/leader who resolved the issue. Send a brief summary to the operations channel and close the case.

Note: The RTA must document all escalation attempts, including the date, time, channel used, person contacted, and any response received, within the RTA Log.

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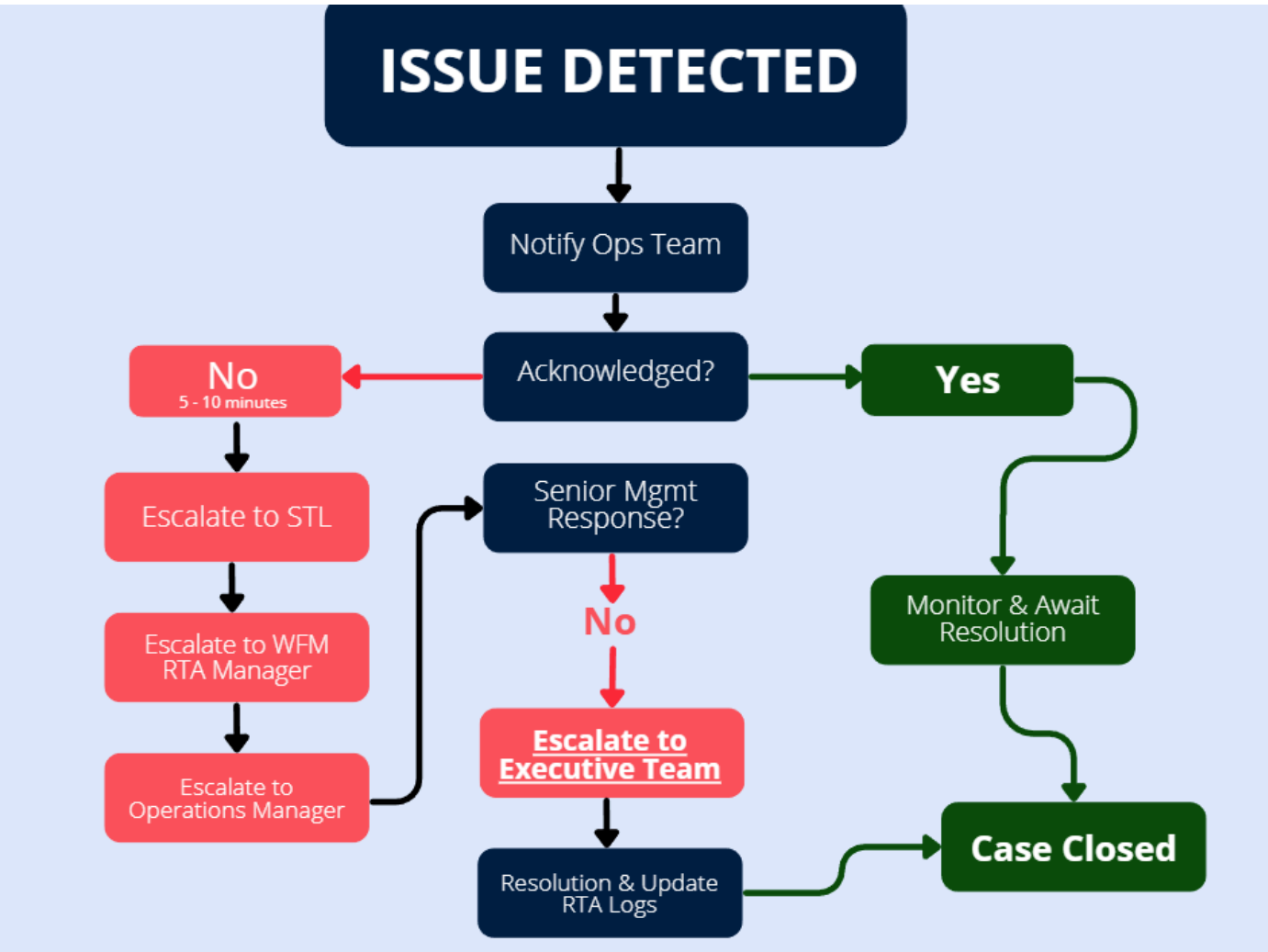
Workforce Management (WFM) Escalation Workflow



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Workforce Management (WFM) Escalation Workflow

Manager and STL Directory

Program	***Position***	***Name***	***Active Contact Number***
Workforce RTA	*Workforce RTA Manager*	***Salcedo Joriz Cruz***	*WhatsApp/Viber/Personal: 09619000047*
Resident Home	*Operations Manager* *STL* *Operations Manager* *STL*	***Dumaguete*** *Van Henry Tianero* *Melrose Baybay* ***Manila*** *Chie Tiu* *Ruby Patayan*	 *WhatsApp: 0906 551 4495* *WhatsApp: 0926 495 7945* *WhatsApp: +63 976 286 3242* *WhatsApp: +63 915 419 0939*
Walmart	*Operations Manager* *Senior Team Leader* *Senior Team Leader* *Assistant Manager* *Senior Team Leader*	***Manila*** *Wendy Tangpuz Pastoral* *Jerico Ilas Triñanes* *Margie Carulla Tuñacao* ***Dumaguete*** *Larry Bird Laranjo Villaverde* *Liberty Gonzales Legaspi*	 *(0906) 207 9474* *(0917) 927 8095* *(0947) 401 3336* *(0961) 931 7616* *(0975) 630 1554*
Ashley	*Operations Manager* *Operations Manager* *Senior Team Leader*	*Marvie Angelo Magsanay Arañas* *Christine Dicen Albina* *Arjay Opeña*	*0962-713-3528* *0962-493-0506* *0936-696-1629*
Earnin	*Operations Managers* *Operations Manager* *Assistant Manager*	***Dunaguete*** *Harvey Mejia* *Glendale De Guzman* ***Manila*** *Janine Herrera* ***Dunaguete*** *Neil Ross Tantio*	 *09982543730* *09062203891* *09175742161* *09278769603*

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Workforce Management (WFM) Escalation Workflow

Program	***Position***	***Name***	***Active Contact Number***
Shef *Prefix* *Hitch* *Daily Harvest* *Sharebite* *Rocco Fridge*	*Senior Team Leader* *Senior Team Leader*	***Dumaguete*** *Dean Paul Villamil* *Romney Levi Gamboa* *Joemar Sarona* *Christopher Robin Sison* ***Manila*** *Robert Valenzuela* *Pocholo Bernardo*	*09270014174* *09352379865* *09750174729 / 09283935786* *09262853236* *09176156145* *09171772909*
Wyze	*Assistant Manager* *Senior Team Leader*	*Ryan Jim Ollina Gajunera* *Patrick James Garces Carabuena*	 *09165286175*
Clearwater	*Assistant Manager*	*Ryan Jim Ollina Gajunera*	
Bubble	*Assistant Manager*	*Ryan Jim Ollina Gajunera*	

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Real-Time & Workforce Management

Real-Time & Workforce Management

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1. Real-Time Monitoring

Task:

- Monitor agent adherence and productivity using workforce tool.
- Ensure service levels (SLA) and key performance metrics are met.
- Track absenteeism, tardiness, and over-breaks.
- Coordinate with Team Leads (TLs) for immediate adherence corrections.
- Identify staffing gaps and communicate to operations.
- Refer to this Workforce Management (WFM) Daily Responsibilities and Best Practices for best practices.

Situational Events & Mitigations:

- *Event:* High agent absenteeism affecting SLA.
  - *Mitigation:* Call out available agents for overtime or extend shifts.
  - *Mitigation:* Prioritize skill-based routing to optimize agent efficiency.
- *Event:* Agents not following break/lunch schedules.
  - *Mitigation:* Send reminders via chat/email; escalate to TLs.
- *Event:* SLA breach due to unexpected call surge.
  - *Mitigation:* Implement volume-based skilling to balance the load.
  - *Mitigation:* Coordinate with operations to reallocate tasks.
- **Event: Identify P0 or P1 events due to a surge in call/chat volumes.**
  - ***P0 (Priority 0)****: Critical impact on service levels (e.g., service is completely down or severely impaired).*
  - ***P1 (Priority 1)****: Major impact but still functioning (e.g., high call volumes causing delays, but service is up).*
    - **Alert counterpart WFM or the client** immediately upon identifying P0/P1 events. Communication should be prompt, clear, and actionable. Use communication channels like email, chat, or call based on urgency.
    - **Set mitigation actions** to alleviate the situation.

- **Mitigation Actions for Surge**:
  - **Overtime Activation**: Offer voluntary overtime to agents to increase coverage.
  - **Shift Swaps**: Reassign agents from non-essential tasks (e.g., training, emails) to handle incoming calls/chats.
  - **Queue Prioritization**: Prioritize high-impact queues (e.g., calls over emails or chats) to reduce the impact on key metrics.
  - **Break Adjustments**: Adjust break times for agents to ensure continuous coverage during peak hours.
  - **Escalate to Upper Management**: Inform management to be on standby for potential escalations or approvals needed for extended mitigation actions.

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2. Scheduling & Shift Optimization

Task:

- Maintain and adjust agent schedules in workforce tool.
- Approve/deny schedule change requests based on business needs.
- Adjust schedules dynamically to align with demand.
- Track compliance of scheduled breaks/lunches.

Situational Events & Mitigations:

- *Event:* More agents requesting schedule swaps than available slots.
  - *Mitigation:* Implement a rotation policy to ensure fairness.
  - *Mitigation:* Limit last-minute changes to avoid service disruptions.
- *Event:* Multiple agents taking breaks at the same time, causing low coverage.
  - *Mitigation:* Stagger break/lunch schedules.
- *Event:* Shortage of staff during peak hours.
  - *Mitigation:* Offer voluntary overtime or early login incentives.

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3. Break Schedule Optimization

Task:

- Align break schedules with forecasted call volume.
- Balance breaks to maintain adequate coverage.
- Ensure that agents do not take breaks outside of assigned slots.

Situational Events & Mitigations:

- *Event:* Agents taking breaks simultaneously, causing queue build-up.
    - *Mitigation:* Split breaks based on call volume trends.
- *Event:* Agents extending breaks, causing schedule imbalances.
    - *Mitigation:* Implement adherence scorecards and escalate repeat offenders.

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4. Shift Bid Recommendations

Task:

- Analyze historical data and call trends.
- Recommend shift bid structures aligning with business needs.
- Suggest rotation policies to balance agent preferences and coverage.
- Implement schedule adjustments for seasonal changes.

Situational Events & Mitigations:

- *Event:* Shift bid results in too many agents in off-peak hours.
    - *Mitigation:* Adjust shift start times before finalizing bids.
- *Event:* Agents unsatisfied with shift assignments.
    - *Mitigation:* Allow limited shift swaps within predefined rules.

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5. Reporting & Analytics

Task:

- Generate real-time and daily reports on adherence, SLA, and productivity.
- Provide insights on workforce trends and operational gaps.
- Share actionable recommendations based on data.

Situational Events & Mitigations:

- *Event:* Reports showing consistent SLA breaches at specific hours.
  - *Mitigation:* Optimize staffing and reassign agents accordingly.
- *Event:* Inaccurate or delayed reports.
  - *Mitigation:* Automate report generation and cross-check data before submission.

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6. Client & Operations Communication

Task:

- Provide real-time updates on SLA and staffing.
- Escalate operational concerns to clients and management.
- Collaborate with operations to implement workforce adjustments.

Situational Events & Mitigations:

- *Event:* Client request for sudden schedule changes.
  - *Mitigation:* Assess feasibility and suggest alternative solutions if needed.
- *Event:* TLs not responding to adherence alerts.
  - *Mitigation:* Escalate to higher management.

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7. Future Schedule Planning

Task:

- Analyze forecast staffing requirements based on call volume trends.
- Prepare seasonal and event-based staffing plans.
- Recommend proactive coverages if gaps are identified.

Situational Events & Mitigations:

- *Event:* Increased attrition affecting future staffing.
  - *Mitigation:* Suggest early coverages to fill forecasted gaps.

- *Event:* Unexpected demand spike outside of forecast.
  - *Mitigation:* Develop contingency staffing strategies.

8. Call Volume Pattern Analysis & SLA Risk Management

Task:

- Analyze call patterns to predict peak and low-demand hours.
- Identify risk periods where SLA breaches may occur.
- Proactively recommend adjustments to schedules.

Situational Events & Mitigations:

- *Event:* SLA breach predicted for upcoming hours.
  - *Mitigation:* Recommend break adjustments and optimize staffing.
- *Event:* Calls unexpectedly dropping due to system issues.
  - *Mitigation:* Notify IT support immediately and reassign calls as needed.

Checklist

1. Real-Time Monitoring

- **Monitor Agent Adherence**
  - ☐ Track agent productivity and compliance using workforce tool.
  - ☐ Send adherence alerts and follow up with Team Leads (TLs).
- **Ensure SLA & KPI Compliance**
  - ☐ Monitor service levels and key performance indicators.
  - ☐ Identify and report deviations immediately.
- **Address Absenteeism & Tardiness**
  - ☐ Track and report attendance issues.
  - ☐ Communicate staffing gaps to operations.

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Real-Time & Workforce Management

---

2. Scheduling & Shift Optimization

- **Maintain & Adjust Schedules**
  - ☐ Approve/deny schedule change requests.
  - ☐ Adjust schedules dynamically to meet business needs.
- **Monitor & Optimize Break Schedules**
  - ☐ Ensure breaks align with call volume forecasts.
  - ☐ Balance breaks to maintain coverage.

---

3. Shift Bid Recommendations

- **Analyze Historical Data**
  - ☐ Review call trends and demand.
  - ☐ Identify optimal shift structures.
- **Recommend Shift Changes**
  - ☐ Propose shift bid schedules aligned with business needs.
  - ☐ Suggest rotation policies for fair scheduling.

---

4. Reporting & Analytics

- **Generate Performance Reports**
  - ☐ Create real-time and daily reports on adherence and SLA.
  - ☐ Identify trends and operational gaps.
- **Provide Insights & Recommendations**
  - ☐ Share actionable workforce insights with operations.
  - ☐ Suggest improvements based on data trends.

---

5. Client & Operations Communication

- **Provide Real-Time Updates**

  - ☐ Communicate SLA and staffing updates to stakeholders.
  - ☐ Escalate operational issues as needed.
- **Collaborate on Workforce Adjustments**
  - ☐ Work with operations to implement schedule changes.
  - ☐ Address client concerns regarding workforce performance.

---

6. Future Schedule Planning

- **Forecast Staffing Needs**
  - ☐ Analyze historical call volume data.
  - ☐ Prepare staffing plans for peak periods.
- **Recommend Hiring Plans**
  - ☐ Identify staffing gaps in advance.
  - ☐ Suggest proactive hiring strategies.

---

7. Call Volume Analysis & SLA Risk Management

- **Analyze Call Patterns**
  - ☐ Predict peak and low-demand hours.
  - ☐ Identify high-risk SLA breach periods.
- **Recommend Schedule Adjustments**
  - ☐ Optimize workforce allocation to prevent SLA breaches.
  - ☐ Implement contingency staffing plans.

Conclusion

This SOP ensures efficient real-time workforce management, proactive problem-solving, and optimal staffing alignment for enhanced service delivery.

✅ Shift Bid/Scheduling

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Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Shift Bid/Scheduling

Shift Bid/Scheduling

Listen to this tab

1. Initial Request & Strategy Planning

Task:

- Upon receiving a shift bid request or required FTE update, the workforce team will conduct a strategic planning meeting.
- The meeting will focus on:
  - Identifying staffing needs.
  - Aligning schedule structures with business requirements.
  - Evaluating workload distribution and peak-hour coverage.
- The strategy plan should include:
  - Proposed shift structures.
  - Special scheduling considerations for students/pregnant employees.
  - Timeline for execution.

Situational Events & Mitigations:

- **Scenario:** Request received with unrealistic FTE allocation.
  - **Mitigation:** Highlight constraints, propose an alternative FTE distribution, and seek client approval.
- **Scenario:** Incomplete data from client or operations.
  - **Mitigation:** Request missing information before finalizing the strategy.

---

2. Schedule Shell Creation & Approval

Task:

- Schedulers will draft initial schedule shells based on business needs and workforce availability.

- The proposed schedule shells will be submitted for approval to the client and operations team.
- Upon approval, a formal email will be sent to all stakeholders (client & operations) for documentation.

Situational Events & Mitigations:

- **Scenario:** Client or operations requests changes after approval.
  - **Mitigation:** Assess feasibility, provide rationale for existing structure, and make adjustments only if necessary.
- **Scenario:** Approval is delayed, causing timeline shifts.
  - **Mitigation:** Follow up proactively and escalate if approval is not received within the agreed timeline.

---

3. Shift Bidding Process

Task:

- RTAs will facilitate the shift bidding process based on the last three months' Achieve Score or performance ranking.
- Special scheduling accommodations will only be granted to:
  - **Students** (must be pre-identified by operations before finalizing schedule shells).
  - **Pregnant employees** (must be pre-identified by operations before finalizing schedule shells).
- Stack ranking will determine priority in selecting schedules.
- Employees failing to submit their shift preference by the deadline will be assigned an available schedule.
- The shift bidding process should take **1-2 weeks** to complete.

Situational Events & Mitigations:

- **Scenario:** Employees fail to submit their preferences on time.
  - **Mitigation:** Send reminders before the deadline; unresponsive employees will be assigned schedules automatically.
- **Scenario:** Employees request exceptions beyond students/pregnant employees.
  - **Mitigation:** Clearly communicate that no other exceptions will be allowed.

- **Scenario:** Employees dispute their shift bid ranking.
  - **Mitigation:** Provide transparency on Achieve Score calculations and ensure ranking data accuracy.

---

4. Transition Week Implementation

Task:

- Once the shift bid process is complete and all schedule shells are selected:
  - RTAs will formally announce the transition week through **Zoho Announcement**.
  - The transition period is considered a **critical work week** due to potential disruptions.
- RTAs will monitor adherence closely to prevent SLA breaches.

Situational Events & Mitigations:

- **Scenario:** High levels of absenteeism during transition week.
  - **Mitigation:** Have backup staffing in place and ensure TLs reinforce attendance expectations.
- **Scenario:** Employees struggle with adapting to new schedules.
  - **Mitigation:** Offer reminders and reinforcement from TLs to ensure compliance.

---

5. Communication & Finalization (EXPANDED)

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Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Shift Bid/Scheduling

Pre-Creation of Schedule Shells

- **Meeting with Operations & Client** to:
    - Discuss upcoming possible movements.
    - Identify any requests for specific shift structures (e.g., AM/PM preference, workload alignment).
    - Align on the **final deadline for requests** before schedule creation begins.

Pre-Transition Week

- **Finalization Meeting** to:
    - Confirm all approved schedule requests and exceptions.
    - **Set clear expectations**: Any additional requests **during or after this point** may cause delays and will be discouraged to maintain scheduling integrity.

Transition Schedule Sign-Off

- **Sign-Off Meeting** with all key stakeholders (Client, Ops Manager, STL, RTA Manager, TL, Scheduler, RTAs) to:
    - Officially approve the **transition schedule** and **stable shift assignments**.
    - Reinforce: Additional change requests at this stage may **disrupt implementation** and will **not be entertained** unless critical and approved by all stakeholders.

Release of Final Schedule Shells

- Once finalized and signed off, the **schedule shells are considered FINAL**.
- Communication will be done via:
    - Zoho Announcement.
    - Cliq Group (for additional reminders).

- Workforce tool or direct schedule file if a tool is not available.

Ops Team Reminders

- Do not pre-release or modify schedules without coordination with Workforce.

- Ensure agents are aware of the finality of the schedule and avoid entertaining late change requests.

Task:

- **Zoho Announcement** will be used for formal communication to frontline employees.
- **Workforce tool** (if available) will be updated to reflect the new schedule.
  - If a workforce tool is not available, frontline employees will receive a **copy of their new schedule**.
- **Operations team** will receive the finalized schedule, but they must not share it with frontline employees.
- **Final Pre-Implementation Meeting:**
  - RTAs will conduct a meeting with the operations team and client to finalize sign-offs before implementing the transition schedule.
    - Included should be the following:
      - Client
      - Operations Manager and Senior Team Leader
      - Workforce RTA Manager
      - RTA Team Leader
      - Workforce Scheduler
      - Workforce RTAs of the program

Situational Events & Mitigations:

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Shift Bid/Scheduling

- **Scenario:** Employees claim they were not informed of schedule changes.
  - **Mitigation:** Ensure multiple communications via Zoho Announcement and Cliq Group messaging.
- **Scenario:** Workforce tool updates are delayed or unavailable.
  - **Mitigation:** Provide an alternative schedule sheet for reference.

Conclusion

This SOP ensures a structured and efficient shift bidding process, minimizing scheduling disruptions while maintaining fairness and operational stability.

✅ Attendance Pointing System

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Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

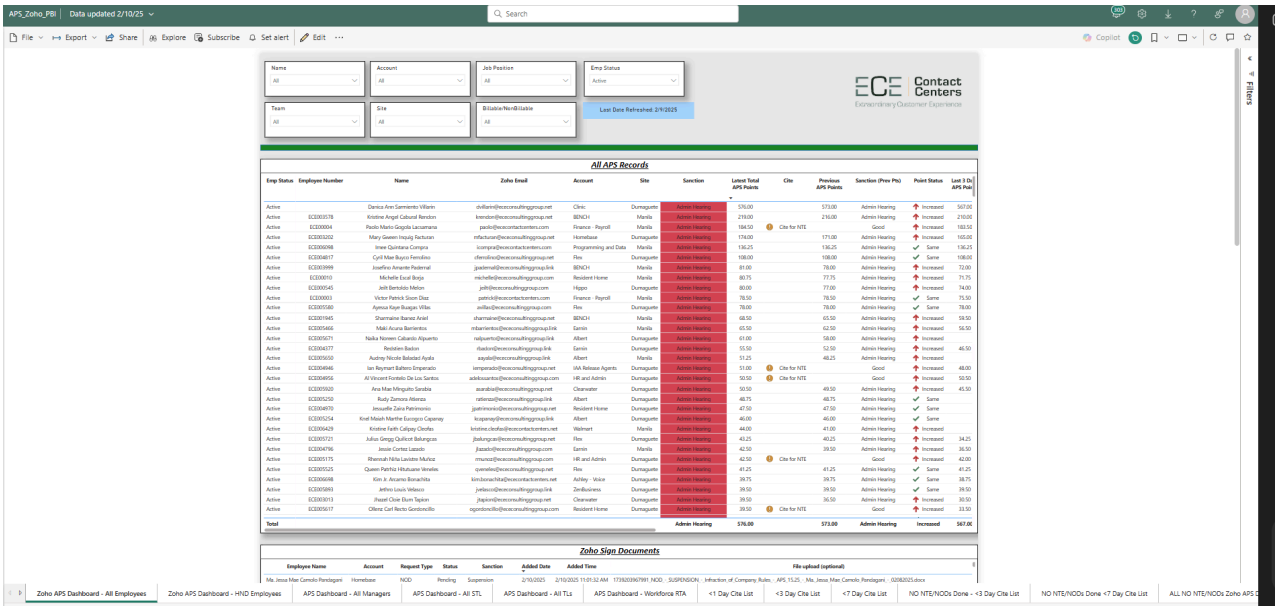
Attendance Pointing System

Attendance Pointing System

Listen to this tab

1. Checking APS

RTAs must check the PowerBI Dashboard (APS_Zoho_PBI) daily to monitor attendance points for employees under their assigned programs. This ensures real-time tracking and immediate resolution of any discrepancies.



2. Updating APS Points: Guidelines

To ensure accurate and efficient attendance validation, a four-level verification process must be followed within seven days from the attendance issue date.

Level 0: Daily Updates by RTA

- RTAs are responsible for daily attendance updates in Zoho.

Level 1: 1 to 3 Days After Absence (Employee's Time Frame)

- Employees must dispute logins and submit supporting documents within three days.
- RTAs and company nurses review and process disputes daily.
- If additional information is needed, the processing period extends to 4-6 days.
- All points should be updated before issuing a Notice to Explain (NTE).

Level 2: 4 to 5 Days After Absence (Leads and Support's Time Frame)

- Employees lose direct access to submit documents in Zoho.
- Leads and support teams must upload necessary documents.
- Employees are encouraged to dispute points before logging out.
- Company nurses and RTAs have 2-3 additional days for final processing.

Level 3: 6 to 7 Days After Absence (Final Processing Period)

- RTAs publish a pending NTE list displaying APS points.
- Final disputes can still be submitted within this period.
- Last-day allowance of 1-2 days before NTE issuance.

Post 7-Day Period

- On the 8th day, APS points are finalized.
- Disputes submitted after this period require NTE inclusion.
- Leads and RTAs failing to validate points correctly may receive an NTE.
- NCNS (No Call, No Show), Critical Working Day (CWD), absences (half/full day), lates, undertime, suspensions, and leaves must be updated within seven days.

3. Leave of Absence (LOA) Handling

- Employees on approved or pending LOA/ML are excluded from APS updates.
- RTAs review and update APS points within seven days of the employee's return.

4. How to Update APS Points

Definition of Terms

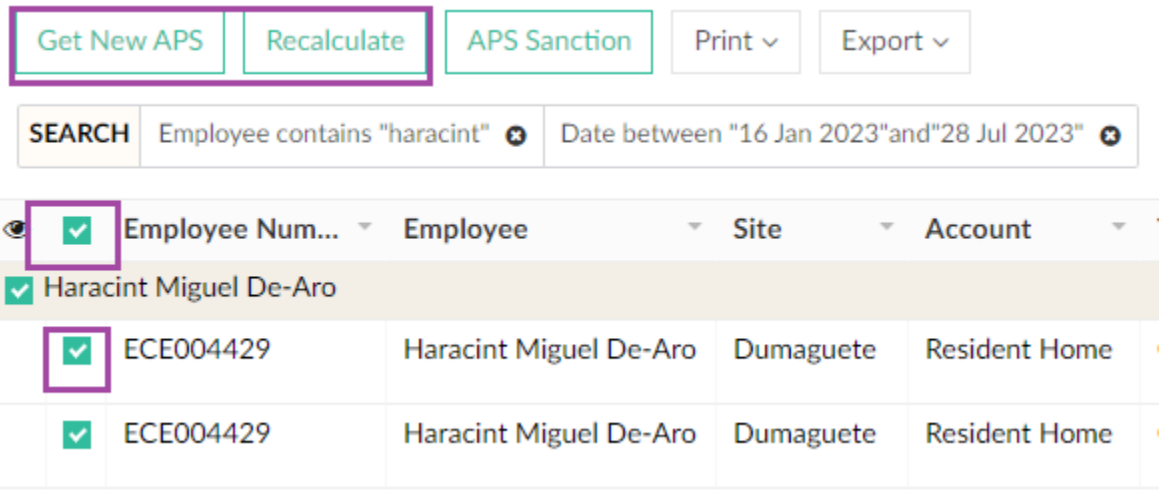
- **New APS:** Displays points per attendance issue.
- **Total APS Points:** Running total of New APS minus rollback points.
- **Rollback Points:** Deducted for every 30 and 60 consecutive days of perfect attendance.

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Attendance Pointing System

APS Updating Steps

1. Verify attendance points and check for errors in Zoho.
2. Ensure Total New APS matches the employee's current APS points.
3. **Bulk Updating:**
   - Select all dates by ticking the box next to the Eye icon.
   - Select specific dates by ticking individual boxes.
   - Click "Get New APS" or "Recalculate."



4. **Verifying APS Points:**
   - Filter employee records by name or employee number.
   - Date range: January 16, 2023, up to seven days ago.
   - Validate points using Attendance Tracker or consult leads.

Get New APS	To update APS points after dispute approval
Edit New APS Points	To manually edit the points. *Edited points are not affected by the Get New APS button*
Recalculate	To recalculate Total APS Points including Rollback Points

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Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Attendance Pointing System

Attendance Issues & Handling Procedures

- **Late & Undertime:** Must be disputed upon logout. Employees have seven days to process disputes.
- **Absences:** Initially marked in Zoho. Employees must submit required documents to reduce APS points.
- **Sick Leave Without Pay:** Medical certificates uploaded in Zoho.
- **Leave Without Pay:** Management discretion applies; additional documentation may be required.
- **Suspensions:** Points removal must be filed under Leave Request in Zoho.
- **LOA:** No APS points incurred. Must be recorded in Zoho | LOA Notification Report.
- **Medical Documents:** Validated by company nurses, uploaded within three days of absence.
- **Additional Documents:** Validated by RTAs, uploaded within three days.
- **NCNS:** Updated in Zoho immediately or the next day.
- **CWD:** Auto-updated in Zoho; manual checks required.

Common Error	Solution
Incorrect Total New APS	Manually adjust APS points.
Missing Rollback Points	Click "Recalculate."
Mismatch Between New APS Points and Notes	Adjust manually.
Incorrect Carryover Points from Old APS	Report to Imee for correction.
Lates, Undertimes, and Half-day Absences Compounding Incorrectly	Adjust manually or escalate for automation.
Blank New APS with Reset Rollback Points	Click "Get New APS."
LOA Approved but APS Points Not Adjusted	Filter LOA cases, select incorrect data, and click "Get New APS."
Day Off Status with APS Points	Filter and manually correct.

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Attendance Pointing System

Final Step:

If unresolved, report incorrect APS points to Imee via the #Zoho APS - All Accounts Cliq Channel.

✅ Issuance of NTE and NOD

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Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Issuance of Notice to Explain (NTE) and Notice of Decision (NOD)

Listen to this tab

Issuance of Notice to Explain (NTE) and Notice of Decision (NOD)

Effective Date: March 1, 2025

Department: Workforce RTA Team
Subject: Issuance of Notice to Explain (NTE) and Notice of Decision (NOD) for Attendance and Workforce-Related Violations

---

Scope and Responsibilities

The Workforce RTA team is responsible for issuing NTE/NOD for attendance-related and workforce-related violations only. Any other violations must be handled by the Operations Team. The following list outlines the specific violations under the RTA's jurisdiction:

1. **Attendance Pointing System (APS) Violations**
2. **Failure to Observe Critical Workday**
3. **Gross and Habitual Neglect of Duties (Absenteeism)**
4. **Unauthorized Extension of Break**
5. **No Call No Show**
6. **Excessive Tardiness and/or Undertime**
7. **Significant Delay in Rendering Service to Clients/Customers (Work Avoidance)**
8. **Protraction of Work (Work Avoidance)**

Procedure for Issuing an NTE

1. **Violation Confirmation**
    - The RTA will monitor attendance and workforce-related adherence reports.

- If a potential violation is detected, the RTA will validate the issue using attendance records, system logs, and shift adherence reports.
- For APS violations, the RTA must ensure that all accumulated points align with the Attendance Pointing System rules.
- If a violation is confirmed, the RTA will refer to the **Revised Company Handbook (Effective March 1, 2025)** to determine the appropriate disciplinary action.

2. **Documentation**
   - The RTA must document the violation with the following details:
     - **Date of offense**
     - **Screenshots as evidence** (including timestamps and system-generated logs)
     - **Complete details of the offense**
   - If multiple violations occur within a short period, the RTA must specify each infraction separately with corresponding evidence.
3. **Filing the NTE**
   - Once all necessary details are gathered, the RTA will complete the **NTE Form** in **Zoho Sign**.
   - The document must be sent to the employee with the Operations Team CC'd for acknowledgment.
   - The employee is required to respond within **5 days** from the time the NTE was sent.
4. **Follow-up and Escalation**
   - If the employee does not respond within the given timeframe, the RTA must escalate the issue to HR for further action.
   - For repeated violations, the RTA must document patterns and provide a recommendation for further disciplinary action.

Procedure for Issuing an NOD

1. **Review of Employee's Explanation**
   - Once the employee submits their response to the NTE, HR will evaluate the justification.
   - If the explanation is insufficient or unacceptable, HR will provide a final decision.
2. **Issuing the NOD**

- The RTA will issue the **Notice of Decision (NOD)** via Zoho Sign, indicating the following:
  - The disciplinary action taken (e.g., written warning, suspension, termination)
  - The final decision from HR
  - Any corrective actions required
- The NOD must be acknowledged by the employee within **24 hours** after issuance.

3. **Record Keeping**
   - All issued NTEs and NODs must be documented and stored in the employee's HR record.
   - The RTA must ensure that all workforce violations are tracked to monitor recurrence.

Situational Cases and Mitigation Strategies

1. Employee Denies Violation:

- The RTA must provide documented evidence, including screenshots and system logs.
- If the dispute remains unresolved, escalate the case to HR for review.

2. Employee Refuses to Sign the NTE/NOD:

- If the employee does not acknowledge the document within the given timeframe, the RTA must escalate it to HR.
- HR will then proceed with the necessary disciplinary actions as per company policy.

3. System-Related Errors (e.g., Incorrect APS Points):

- If the violation is linked to a system-generated error, the RTA must validate and adjust APS points accordingly before issuing an NTE.
- If the issue persists, report to HR for further resolution.

4. Employee Requests an Appeal:

- Employees may submit an appeal through HR within **3 working days** from NOD issuance.
- The RTA must provide all relevant documentation to support the case review.

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

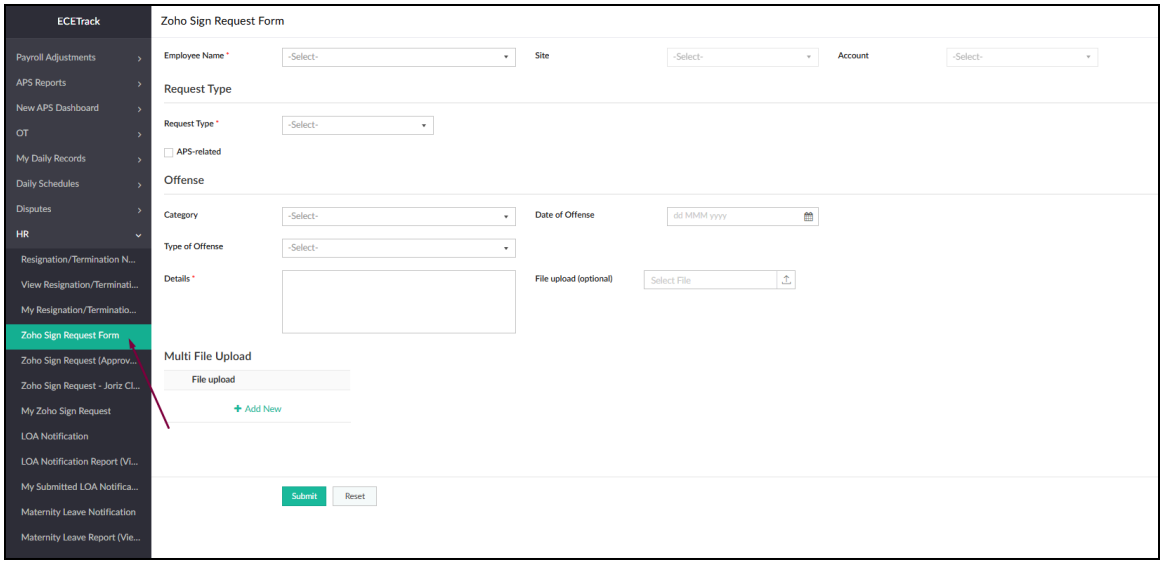
Issuance of Notice to Explain (NTE) and Notice of Decision (NOD)

Conclusion

This SOP ensures a structured approach to managing attendance and workforce-related violations. The RTA team must adhere to these guidelines to maintain consistency, fairness, and compliance with company policies. Any deviation from this SOP must be escalated to HR for review and approval.

Uploading an NTE:

1. From Zoho homepage, you can access the Zoho Sign Request Form by clicking on HR, and then clicking on Zoho Sign Request Form.



2. Provide all the needed information:

- **Employee Name**
- **Choose NTE**: If the NTE also has an admin hearing schedule, tick Admin Hearing. (see below)

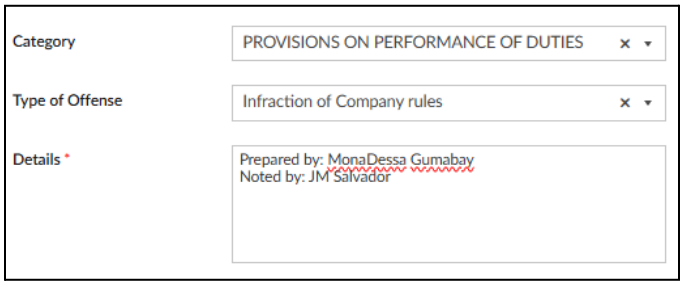
Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

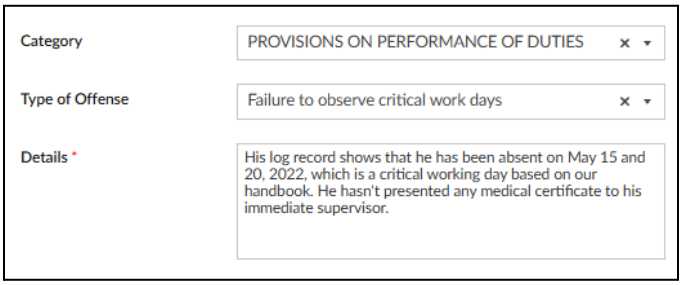
Issuance of Notice to Explain (NTE) and Notice of Decision (NOD)

- **Category:** All NTEs sent out by the Workforce RTA team fall under **Provisions on Performance of Duties.**

- **Type of Offense:** Choose which best fits the violation.
  - Attendance Pointing System (APS) Violations
  - Failure to Observe Critical Workday
  - Gross and Habitual Neglect of Duties (Absenteeism)
  - Unauthorized Extension of Break
  - No Call No Show
  - Excessive Tardiness and/or Undertime
  - Significant Delay in Rendering Service to Clients/Customers (Work Avoidance)
  - Protraction of Work (Work Avoidance)

- **Details:** This part usually contains who prepared the document, or a brief summary of the offense



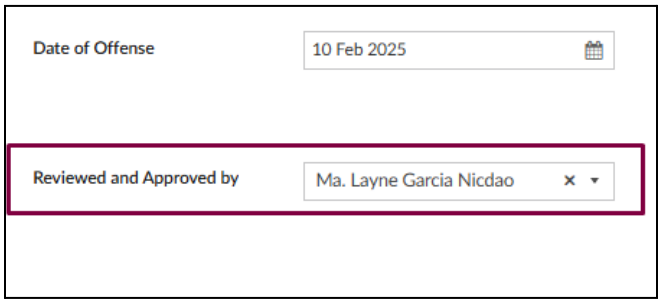


- **Date of Offense:** This is the date when the employee committed the violation, or the latest occurrence on a series of violations (i.e. **Unauthorized Extension of Break**)

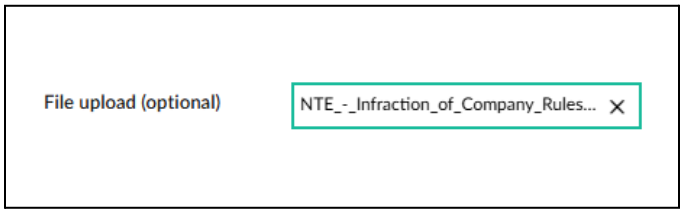
3. Provide the Approver for the NTE. This person is usually the operations manager or the program manager.

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Issuance of Notice to Explain (NTE) and Notice of Decision (NOD)



4. Upload the NTE Document.

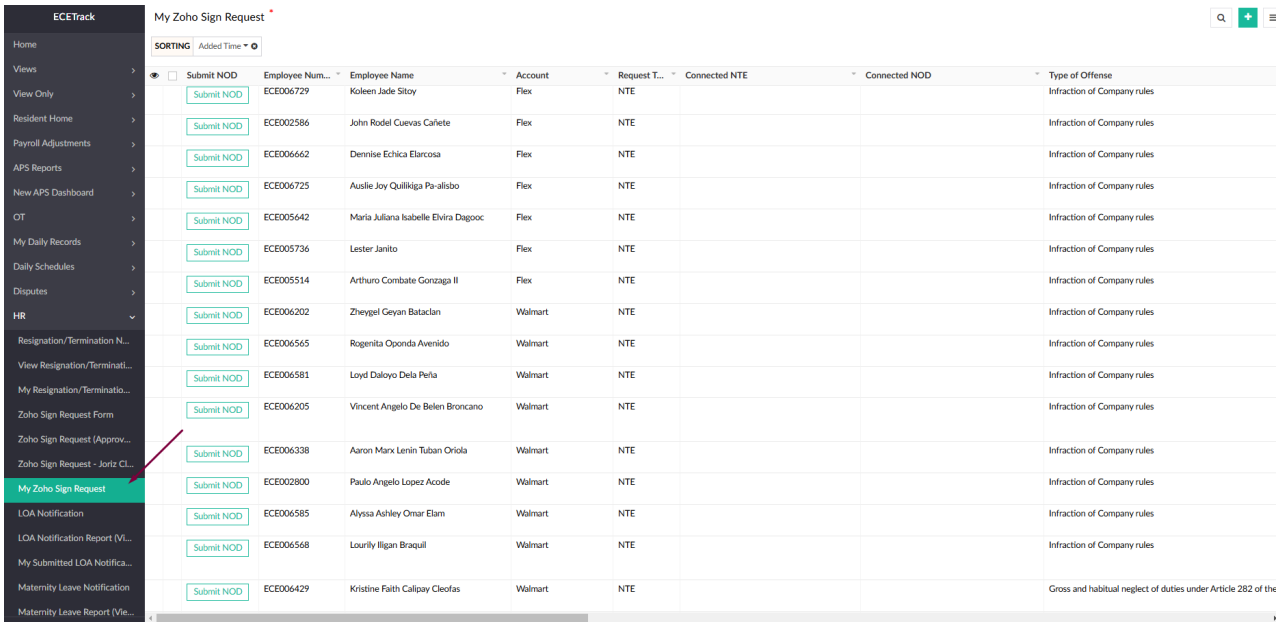


Uploading an NOD:

1. From Zoho, click HR, and then click on **My Zoho Sign Request.** From this page, you should see all the NTEs and NODs you have submitted.

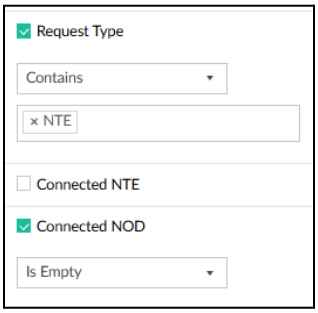
Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Issuance of Notice to Explain (NTE) and Notice of Decision (NOD)



2. To display the **NTEs without connected NODs**, you can apply the following filters:

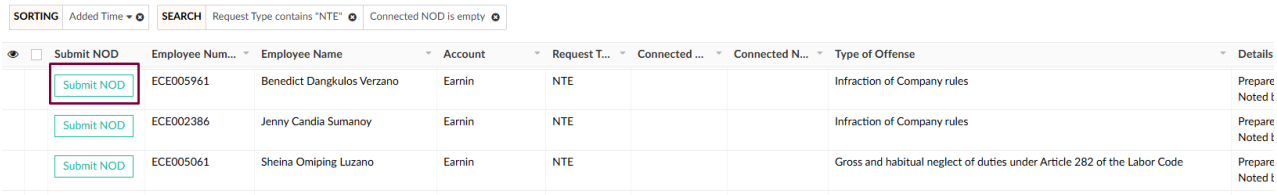
Request Type - Contains NTE
Connected NOD - is Empty

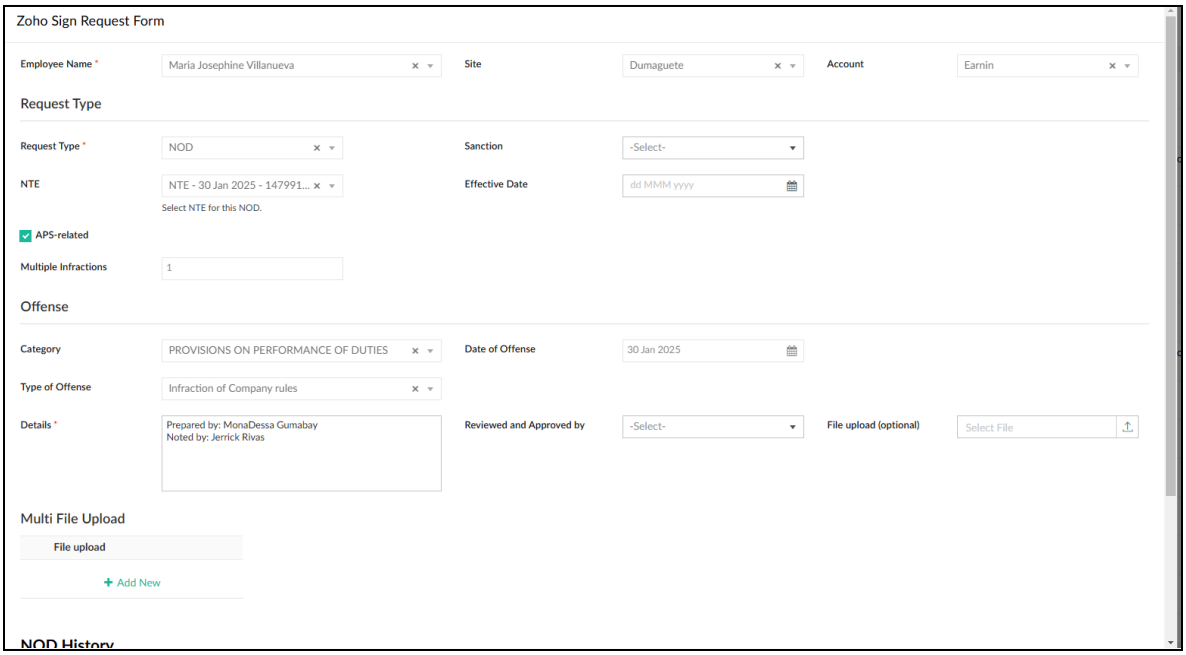


3. Select the correct NTE, then click on **Submit NOD.**

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Issuance of Notice to Explain (NTE) and Notice of Decision (NOD)

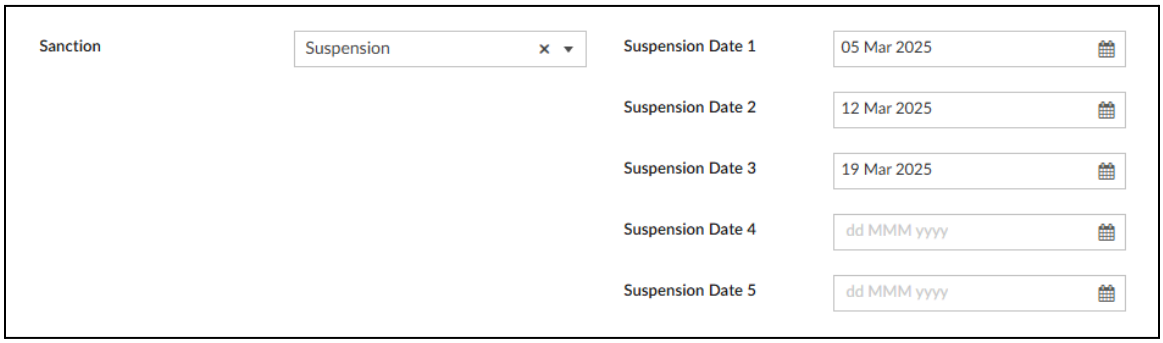




4. Just like sending an NTE, you'll have to provide the needed information:
   - **Sanction:** The assigned disciplinary action based on the progression of the violation. If the sanction is **suspension**, provide the suspension dates.

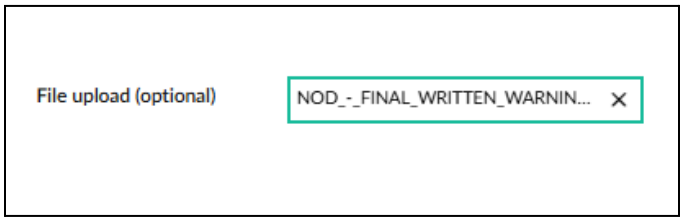
Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Issuance of Notice to Explain (NTE) and Notice of Decision (NOD)



- **Effective Date:** Usually set to the local time when the NOD was sent. This option disappears if you choose **Void** as the sanction.
- **Reviewed and Approved by:** Provide the same approver as the NTE.

5. Upload the NOD Document.



❗ Billable Hours

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Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Billable Hours Report Process – Workforce RTA Team

Billable Hours Report Process

Listen to this tab

1. Purpose This SOP outlines the process for reviewing, validating, and transferring billable hours (BH) to ensure accuracy before submitting the final BH template file to Norma. Proper adherence to this process helps maintain payroll accuracy, minimize billing discrepancies, and ensure alignment between different reporting systems.

2. Scope This procedure applies to all Workforce Real-Time Analysts (RTA) responsible for managing and verifying billable hours before final submission.

3. Responsibilities

- Ensure accuracy in the billable hours data.
- Follow the BH checklist to validate all required fields.
- Conduct a final review before transferring data to the final BH template file.
- Cross-check CRM vs Billable Hours vs Payroll hours to ensure alignment.

4. Procedure

Step 1: Obtain the Required Documents

- Download the **Billable Hours file template** from the designated repository.
- Ensure access to the **BH Checklist** for reference and validation.
- Gather all necessary logs from Zoho and other reporting tools.

Step 2: Review Time Log and Break Log Entries in Zoho

- Use the BH Checklist to verify all required checks.
- Identify any discrepancies or missing data and make necessary corrections.
- Clear out all Zoho adjustments, including disputes, overtime, and leave entries.
- Review attendance records to ensure tardiness and undertime are accounted for.
- Identify time log records with missing logout times and update accordingly.
- Confirm that approved OT entries match the PA w BH records.
- Verify overbreaks of **0.25 hours or more** and correct invalid entries.
- Ensure break and clinic logs have complete start and end times.

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Billable Hours Report Process – Workforce RTA Team

- Validate transfer dates to ensure billing accuracy.
- Ensure hours before promotions or reassignments are billed under the correct category.
- Properly classify employees as **billable or non-billable** as per program guidelines.
- Validate training hours for new hires and transfer them to the **Operations Tab** once they enter the nesting phase.
- Check leave records and half-day absences for accurate deductions.
- Confirm correct lunch break deductions for employees on half or full shifts.
- Ensure that employees on whole-day absences reflect **zero billable hours**.

Step 3: Use the BH Review Template

- Before transferring the hours to the final BH template, use a designated **review template** to validate the data.
- Ensure all entries comply with **billing guidelines** and match operational data.

Step 4: Validate Incentives and Reimbursements

- Check with **Operations** if there are client incentives or reimbursable expenses.
- Attach **proof of expenses** and confirm the correct currency exchange rates when applicable.

Step 5: Validate US Holiday Hours

- Ensure all holiday hours are recorded in the **Holiday Tab**.
- Tag holidays correctly in the **Operation Tab**.
- Even if an entire account is on **Holiday Leave**, names must still be listed with **zero hours** in the Holiday Tab.
- Holiday **OT hours** should be categorized in the correct **Holiday OT tab**.

Step 6: Cross-Check CRM vs Billable Hours vs Payroll Hours

- Ensure that **CRM hours**, **Billable Hours**, and **Payroll Hours** are aligned.
- Investigate any discrepancies, resolve or notate them before final submission.
- Coordinate with Payroll and RTAs if there are inconsistencies.

Step 7: Final Review and Submission

- Download the billable hours from **PA w BH** and conduct a **final review**.
- Complete the **QC Checklist** to verify all details before submission.

- Submit the file for **quality checking** to the assigned verifier.
- Once approved, send the **final BH file** to Norma.

5. Compliance and Updates

- Regularly review this SOP to ensure alignment with current **BH policies and processes**.
- Implement necessary updates to enhance **efficiency and accuracy**.
- Conduct periodic audits to prevent **billing errors and disputes**.

6. Situational Events and Mitigations

Scenario 1: Missing Log-Out Times

- **Issue:** An employee's time log is missing a logout entry.
- **Mitigation:** Cross-check CRM records for activity logs and confirm the correct logout time with the operations team.

Scenario 2: Incorrect Classification of Non-Billable vs. Billable Employees

- **Issue:** An employee marked as billable should be non-billable or vice versa.
- **Mitigation:** Review program assignment records and update the BH template accordingly. Confirm with **Ops** before finalizing the update.

Scenario 3: Unapproved Overtime Included in Billable Hours

- **Issue:** Overtime hours are reflected in billable hours but were not approved.
- **Mitigation:** Verify approval status in **Zoho Overtime Requests** and adjust accordingly. Coordinate with Payroll for any necessary corrections.

Scenario 4: Discrepancy Between CRM, Billable Hours, and Payroll Hours

- **Issue:** An employee's hours do not match across the three systems.
- **Mitigation:** Perform a **side-by-side comparison** and identify the root cause. Escalate unresolved discrepancies to **Payroll and HR**.

Scenario 5: Incorrect Holiday Hours Reflected

- **Issue:** Employees have incorrect holiday hours logged.
- **Mitigation:** Cross-check **Holiday Tab** entries and update accordingly. Ensure holiday OT is in the correct **Holiday OT tab**.

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Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Billable Hours Report Process – Workforce RTA Team

By following this SOP, the Workforce RTA team ensures an efficient and error-free process in handling billable hours, preventing disputes, and maintaining payroll integrity.

Billable Hours Mapping (Step by Step Process)

Albert	Ashley	Bubble	Citcon
Clearwater	Coalition	D&L Transport	Daily Harvest
Earnin	Flex	Hippo	Hitch
Homebase	Illuminz	KMicro	Lytx
Minoan	Newport	PLS T&T	Papaya
Prefix	Resident Home	Rocco Fridge	Sharebite
Shef	Spireon	Tremendous	Walmart
Wyze	ZenBusiness	Perfect Serve	ILS

Zoho Related Tasks

➕ Zoho Discrepancy Process

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Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Zoho Discrepancy Process – Workforce RTA Team

Zoho Discrepancy Process

Listen to this tab

I. Purpose

The purpose of this SOP is to establish a clear and standardized process for reviewing, verifying, and approving payroll discrepancies to ensure accurate employee compensation while maintaining compliance with company policies and labor regulations.

II. Scope

This procedure applies to all employees involved in payroll processing.

III. Responsibilities

- **Employee**: Reports payroll discrepancies promptly.
- **Approvers**:
  - Reviews and validates the claim.
  - Investigates the discrepancy, gathers the necessary documentation, and coordinates with the Real-Time Analyst of the account.
  - Approves the payroll discrepancy.
- **Payroll Administrator:**
  - Reviews and verifies the accuracy of absence and leave hours filed against the downloaded attendance before processing salary credits.
  - Makes the necessary adjustments to the upcoming salary.

IV. Payroll Discrepancy Filing Procedure

Step 1: Submission of Payroll Discrepancy Requests

- Employees must submit discrepancies within the next payroll period (once the payslip becomes available) to be credited to the next regular salary.
- Discrepancies may include incorrect wages, overtime, deductions, or missing payments.
- Employees report issues via *Payroll Discrepancy* form.

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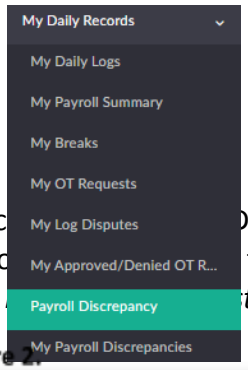
Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Zoho Discrepancy Process – Workforce RTA Team

How to file a Payroll Discrepancy:

- Go to *Payroll Discrepancy* view (My Daily Records > Payroll Discrepancy)



2. Ac Discrepancy Form and fill o fields. (*Required fields are terisk (*).*)

Figure 1.

Figure 2.

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Zoho Discrepancy Process – Workforce RTA Team

- **Payroll Month** – The month in which the salary is credited.
- **Payroll Period** – The timeframe corresponding to the reported discrepancy.
  - **First Half** – The payroll period covering the 26th to the 10th.
  - **Second Half** – The payroll period covering the 11th to the 25th.
- **Discrepancy Type** – refers to the specific category of payroll errors or inconsistencies that need to be reviewed and corrected. Common payroll discrepancy types include, but are not limited to:
  - *Unfiled/Pending/Denied Leave* – Refers to leave requests that were filed late, are still awaiting approval, or have been denied.

NOTE: Unfiled Vacation Leave (VL) hours should not be filed as a payroll discrepancy, as this would negate the requirement to file the leave at least seven days before the actual leave date.

❖ However, if VL hours were filed on time but approved late, resulting in salary deductions, the employee may file a payroll discrepancy, as the delay was due to the approver's fault.
- Submit a payroll ticket for VL retraction and advise the employee to file for SL instead if they still have available SL hours.
- If no SL hours are available, you must still submit a payroll ticket for VL retraction to credit back the leave hours, as they were not paid, but the deduction will remain.

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Zoho Discrepancy Process – Workforce RTA Team

- *Unfiled/Pending OT* - Refers to overtime requests that were submitted late or are still pending approval.
- *Unfiled/Pending Late/UT/OB/Absent* – Refers to Late, Undertime (UT), Overbreak (OB), or Absences that were recorded incorrectly but were not disputed for correction.

- **Hours** – Enter the number of hours only for absences or unpaid hours; otherwise, input 0.
- **Amount** – Enter the amount only if referring to Late, Undertime, or Overbreak; otherwise, leave blank.
- **Notes** – Provide a clear and concise note to help the approver understand the discrepancy you are reporting.
- **Payslip Screenshot** – A required document for accurate review and validation of the discrepancy. Without this, the payroll discrepancy request will be disapproved.

3. Once all required fields are completed, click the Submit button to send your request for review.

Step 2: Initial Review & Verification of Payroll Discrepancy

- The approver reviews the claim for accuracy and supporting proofs.
- Check the attached payslip to determine the pay period for which the employee is filing.

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Pay Period	:	January 26 to February 10, 2025
Name	:	JUMUAD, ELENA ROSE B.
Employee ID	:	ECE005340
Position	:	

- Look for the deduction in the payslip and ensure that the discrepancy hours/amount match the hours/amount stated in the payslip.

Items	Hours
Basic Income	80.00
REGU NDIF	67.00
SPCL BP	8.00
SPCL NDIF	5.00
Adjustments	0.00

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Zoho Discrepancy Process – Workforce RTA Team

- Review the employee's time log records to identify the specific date(s) being filed for. Employees may not always specify the affected dates, so you will need to verify them yourself.

Date	Sch...	Sched...	Wo...	Late	Unde...	Absent	Lunch	Log In	Log Out	Login ...	Status	Note	Modified Time	Modified User
10 Feb 2025	11:00	20:00	8	0.00	0.00	0.00						[VL in Hours][8]	27 Feb 2025 15:11:09	jdeguia1
09 Feb 2025	0:00	0:00	0	0.00	0.00	0.00						DAY OFF	10 Feb 2025 04:38:05	ronemilcgarcia3
08 Feb 2025	0:00	0:00	0	0.00	0.00	0.00						DAY OFF	09 Feb 2025 09:20:13	zoho_ece11
07 Feb 2025	11:00	20:00	8	0.00	0.00	0.00	0.96	07 Feb 2025 10:50:07	07 Feb 2025 20:12:23	9.37	Whole Day		07 Feb 2025 20:12:33	ejumuad_ececonsultinggro
06 Feb 2025	11:00	20:00	8	0.00	0.00	0.00	0.98	06 Feb 2025 10:51:42	06 Feb 2025 20:01:01	9.16	Whole Day		07 Feb 2025 09:26:07	markxeniel.mercado_ecec
05 Feb 2025	11:00	20:00	8	0.00	0.00	0.00	1.18	05 Feb 2025 10:52:24	05 Feb 2025 20:03:04	9.18	Whole Day		05 Feb 2025 20:03:12	ejumuad_ececonsultinggro
04 Feb 2025	11:00	20:00	8	0.00	0.00	0.00	0.97	04 Feb 2025 10:51:59	04 Feb 2025 20:00:58	9.15	Whole Day		04 Feb 2025 20:01:07	ejumuad_ececonsultinggro
03 Feb 2025	11:00	20:00	8	0.00	0.00	0.00	0.97	03 Feb 2025 10:46:52	03 Feb 2025 20:02:01	9.25	Whole Day		03 Feb 2025 20:02:10	ejumuad_ececonsultinggro
02 Feb 2025	0:00	0:00	0	0.00	0.00	0.00						DAY OFF	03 Feb 2025 06:37:45	ronemilcgarcia3
01 Feb 2025	0:00	0:00	0	0.00	0.00	0.00						DAY OFF	02 Feb 2025 09:35:17	zoho_ece11
31 Jan 2025	11:00	20:00	8	0.00	0.00	0.00	0.98	31 Jan 2025 10:47:22	31 Jan 2025 20:01:01	9.23	Whole Day		31 Jan 2025 20:01:08	ejumuad_ececonsultinggro
30 Jan 2025	11:00	20:00	8	0.00	0.00	0.00						[VL in Hours][8]	29 Jan 2025 00:02:06	zoho_ece11
29 Jan 2025	11:00	20:00	8	0.00	0.00	0.00	0.00	29 Jan 2025 10:40:17	29 Jan 2025 20:02:58	9.38	Whole Day		29 Jan 2025 20:03:05	ejumuad_ececonsultinggro
28 Jan 2025	11:00	20:00	8	0.00	0.00	0.00	0.98	28 Jan 2025 10:45:40	28 Jan 2025 20:00:36	9.25	Whole Day		28 Jan 2025 20:00:46	ejumuad_ececonsultinggro
27 Jan 2025	11:00	20:00	8	0.00	0.00	0.00	0.97	27 Jan 2025 10:38:19	27 Jan 2025 20:02:00	9.39	Whole Day		27 Jan 2025 20:02:08	ejumuad_ececonsultinggro
26 Jan 2025	0:00	0:00	0	0.00	0.00	0.00						DAY OFF	27 Jan 2025 10:59:02	ronemilcgarcia3

- If valid, ensure that all information in the discrepancy form is accurately completed to prevent errors during the validation process (via Validate Payroll Discrepancy form).

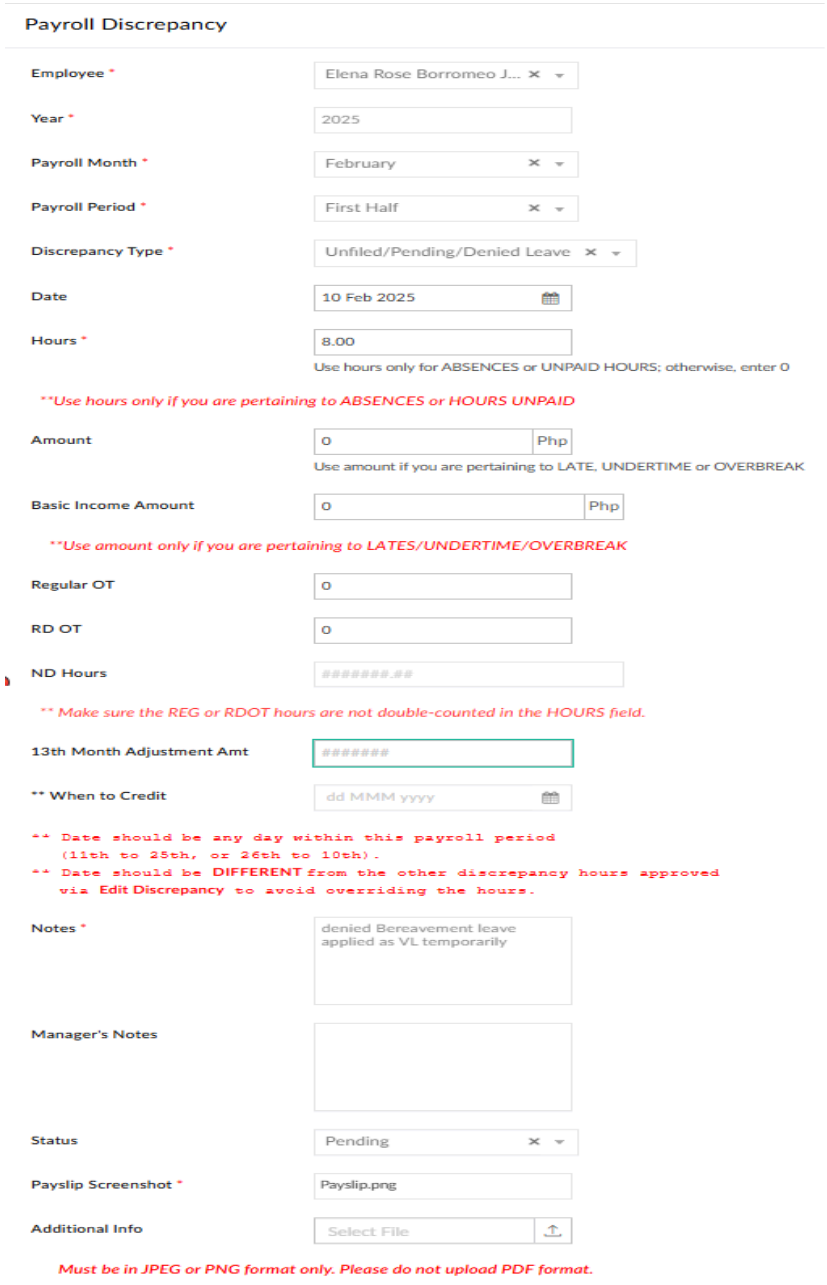
  To check, hover your mouse pointer over the row of the employee's discrepancy and click the three dots next to the checkbox.

Update Status	Employee	Discrepancy Type	Notes	Manager's No...	Status	Modified User	Date Added	Date	Payslip Scr
Ashley - Voice									
Update Status	Elena Rose Borromeo Jumuad	Unfiled/Pending/Denied Leave	denied Bereavement leave applied as VL temporarily		Pending	ejumuad_ececonsultinggroup	27 Feb 2025 17:16:20	10 Feb 2025	

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Zoho Discrepancy Process – Workforce RTA Team

The Payroll Discrepancy form will be displayed.



Payroll Discrepancy

Employee * Elena Rose Borromeo J...
Year * 2025
Payroll Month * February
Payroll Period * First Half
Discrepancy Type * Unfiled/Pending/Denied Leave
Date 10 Feb 2025
Hours * 8.00
Use hours only for ABSENCES or UNPAID HOURS; otherwise, enter 0
**Use hours only if you are pertaining to ABSENCES or HOURS UNPAID
Amount 0 Php
Use amount if you are pertaining to LATE, UNDERTIME or OVERBREAK
Basic Income Amount 0 Php
**Use amount only if you are pertaining to LATES/UNDERTIME/OVERBREAK
Regular OT 0
RD OT 0
ND Hours #######.##
** Make sure the REG or RDOT hours are not double-counted in the HOURS field.
13th Month Adjustment Amt #######
** When to Credit dd MMM yyyy
** Date should be any day within this payroll period (11th to 25th, or 26th to 10th).
** Date should be DIFFERENT from the other discrepancy hours approved via Edit Discrepancy to avoid overriding the hours.
Notes * denied Bereavement leave applied as VL temporarily
Manager's Notes
Status Pending
Payslip Screenshot * Payslip.png
Additional Info Select File
Must be in JPEG or PNG format only. Please do not upload PDF format.

Approvers View of the submitted Payroll Discrepancy Form

- The **HOURS** field is only for ABSENCES and/or UNPAID HOURS.
- The **AMOUNT** field is only for LATE, UNDERTIME, OVERBREAK, and/or CLINIC.

Amount Calculator

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

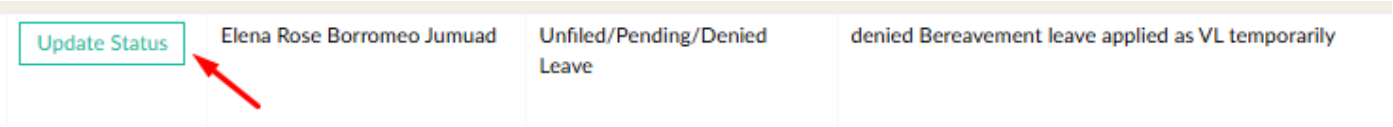
Zoho Discrepancy Process – Workforce RTA Team

Basic Income:	8049.60	
Hourly Rate:	100.62	
Late from payslip (hrs):	1.81	182.12
# of hrs to credit:	1.77	178.10

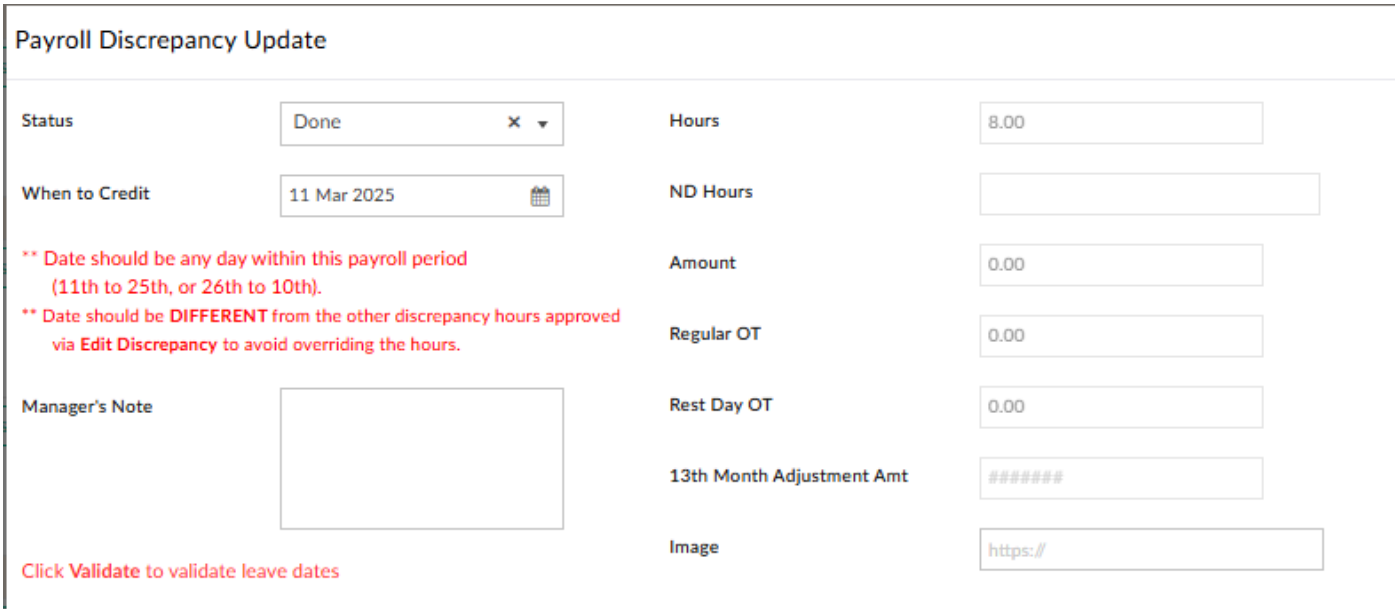
- If everything is in order, the approver forwards the discrepancy hours to the payroll team for validation if the discrepancy falls under any of the following categories:
  - Late filing or approval of leave;
  - Late filing or approval of overtime (OT)
- Once done, you can proceed with approving the payroll discrepancy.

Step 3: Approval Process

1. Click the **Update Status** button.



- The **Payroll Discrepancy Update** form will show.



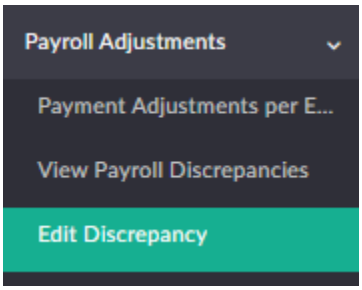
Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Zoho Discrepancy Process – Workforce RTA Team

- Update the status to "**Done**," enter the "**When to Credit**" date, and add a note in the "Manager's Note" field if necessary. The data in the right column is automatically populated.

- To know if the date selected is not yet previously selected for other discrepancy hours.

  - Go to **Payroll Adjustments > Edit Discrepancy**

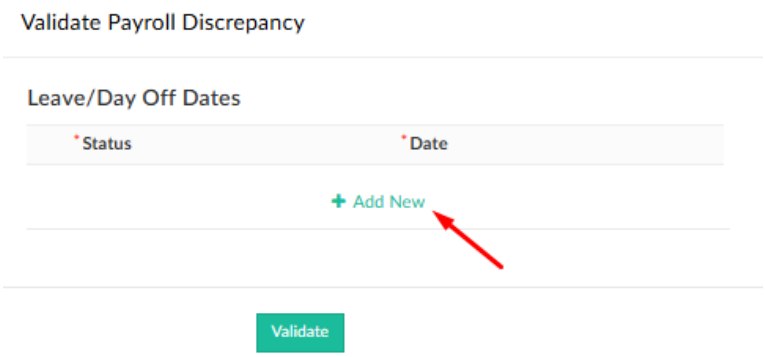


  - Make sure that the columns from **Discrepancy Hours** to **Netpay Adjustments** are set to **0**.

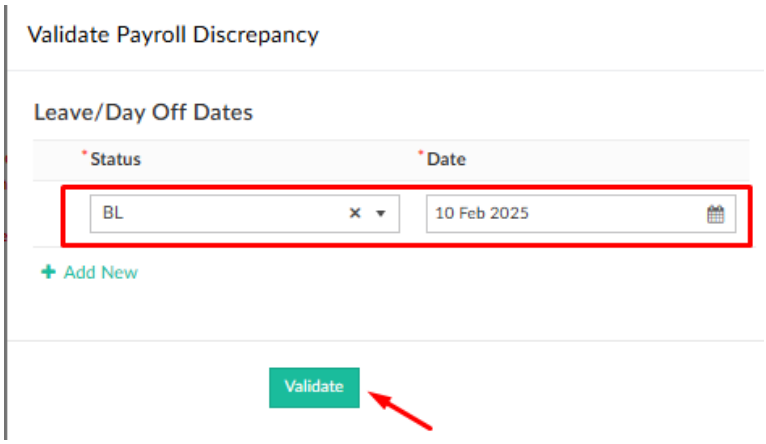
Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Zoho Discrepancy Process – Workforce RTA Team

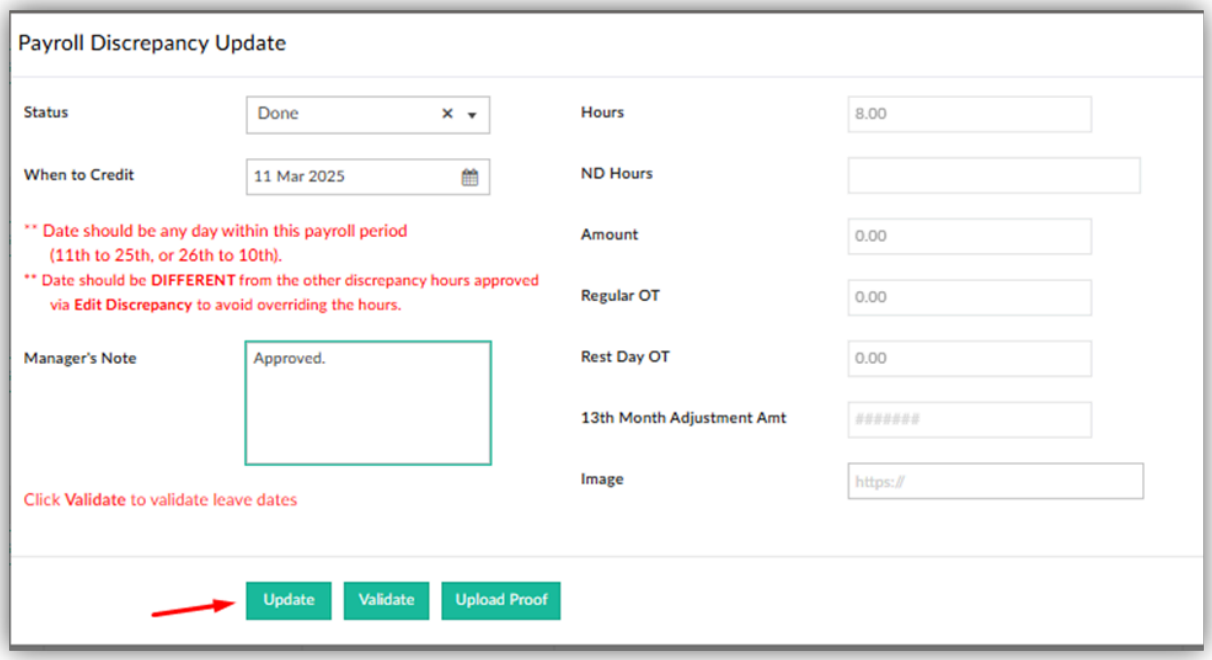
2. Click the **Validate** button. The **Validate Payroll Discrepancy** form will show.



- Click **"+ Add New**," select the correct status from the dropdown list, and choose the affected date.



3. Once the validation is successful, click the **Update** button. The request will then be removed from the pending list.

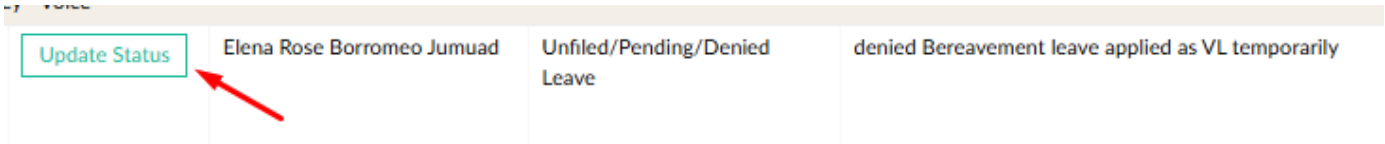


Step 4: Process for Denying a Payroll Discrepancy Request

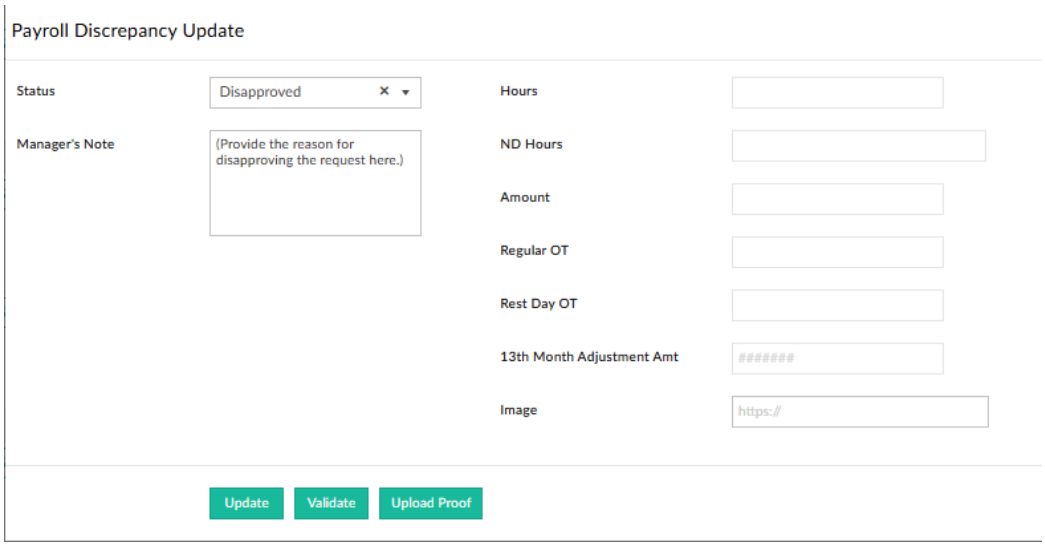
1. **Review** the request
   - Verify the details of the discrepancy claim.
   - Check supporting documents.
2. Determine the **validity** of the request
   - If the request does not meet the required criteria (e.g., incorrect filing or lack of documentation), proceed with denial.
3. Click the **Update Status** button.

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Zoho Discrepancy Process – Workforce RTA Team



4. Update the status to "**Disapproved**" and clearly state the reason for denial in the "Manager's Note" field.



- The common disapproval reasons include but are not limited to:
  - ❖ Incorrect Payroll Month
  - ❖ Incorrect Payroll Period
  - ❖ No screenshot of payslip is attached
  - ❖ Duplicate Request

5. Click the "**Update**" button and the discrepancy filed will be removed from the pending list.

V. Final Payroll Validation

- The payroll team validates approved discrepancies and makes necessary adjustments.

VI. Compliance & Confidentiality

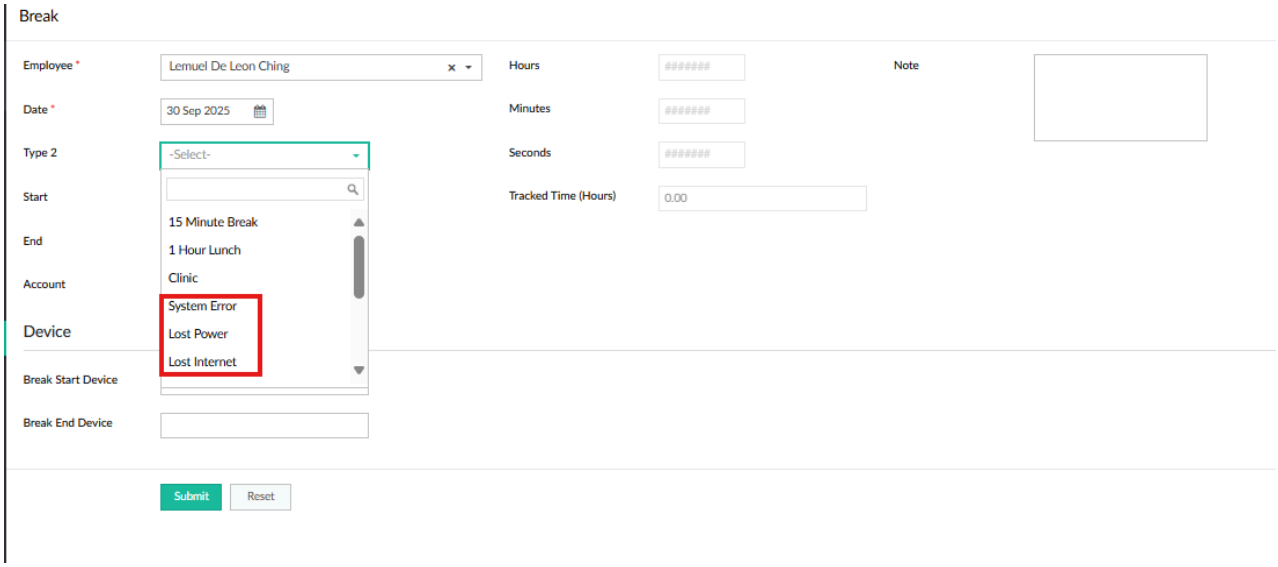
- All payroll discrepancies must comply with company policies and labor laws.
- Employee information must be handled with confidentiality and in accordance with data protection regulations.

➕ Zoho Break Logs for Outages

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Zoho Break Logs for Power/Internet Outages

Zoho has 3 available break auxes for situations where there are Power outages, internet outage or system issue.



System Error : Tool issue within the PC unit (client or ECE regardless). Non deductible.
Lost Power : Power / Electricity outage causing non-productive hours.
Lost Internet : Internet connectivity outage causing non-productive hours.

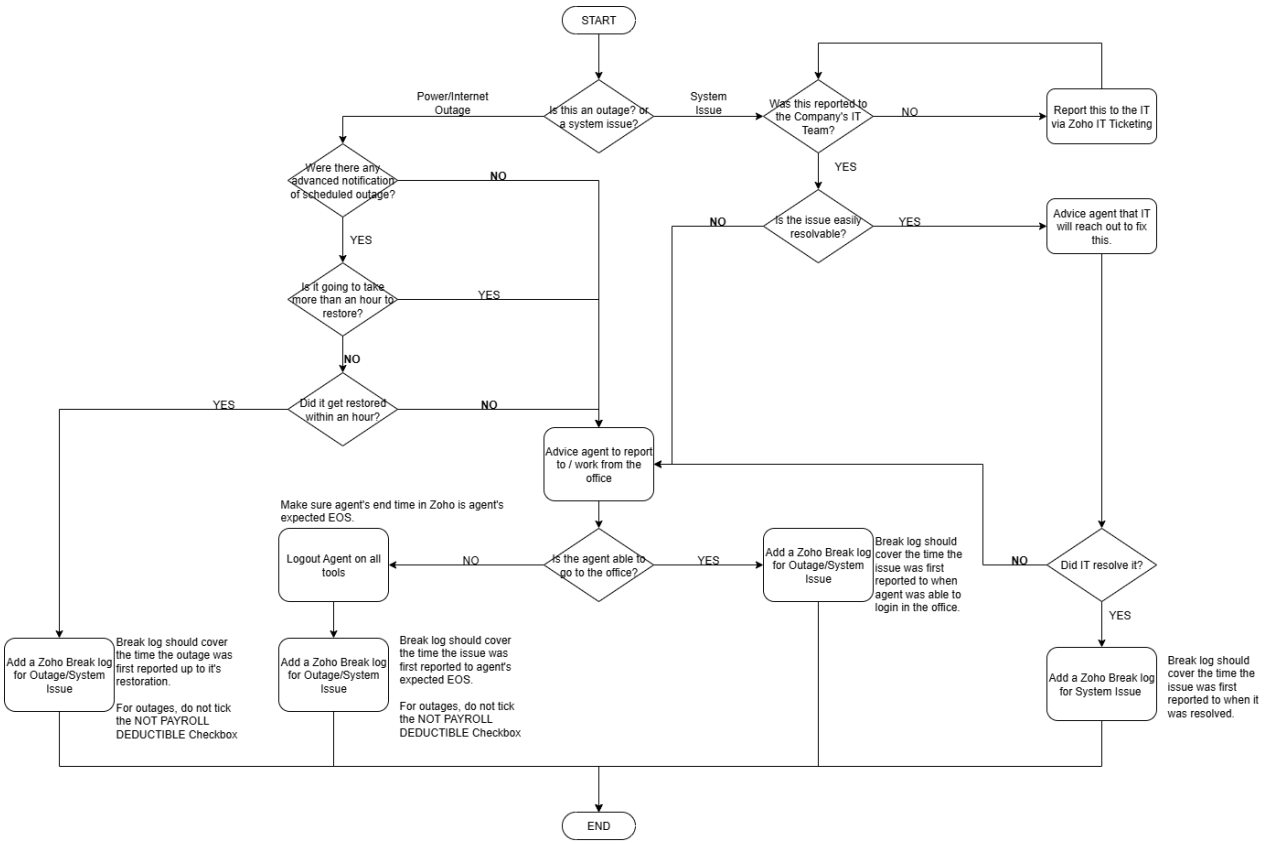
Office Based Employees

For all office based employees with any issues with regards to power outage or internet outage, we'll automatically add a break log for the respective outage. Take note that none of these logs will be deductible from the employees payroll so **MAKE SURE TO TICK** the **Not Payroll Deductible Checkbox**.

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Work From Home Based Employees

For all work from home employees with any issues with regards to power outage or internet outage, we'll follow the flowchart outlined below:



Outages TL;DR:

- If the outage cannot be resolved within an hour, have the agent report to the office.
- If an agent can report, then add outage logs from the time the issue started to the time the agent got to the office. Make sure to not tick the NOT PAYROLL DEDUCTIBLE box as this should be docked from their pay.
- If the agent cannot report to the office, then logout agent and add outage logs from start of issue to end of shift. Make sure to not tick the NOT PAYROLL DEDUCTIBLE box as this should be docked from their pay.
- If outage is resolved within an hour, add outage logs from start of issue to end of issue.

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Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Issue TL;DR:

- If issue is resolvable by the IT, then add issue logs from start of issue to end of issue
- If the issue is not resolvable, have the agent report to the office.
- If an agent can report, then add system issue logs from the time the issue started to the time agent got to the office.
- If the agent cannot report to the office, then logout agent and add system issue logs from start of issue to end of shift.

FAQs:

1. **Why am I being docked if my PC failed to work properly? This is a company issued device.**

- Upon being deployed to the Work from Home environment, agents have been set with an expectation that should there be any work disruptions brought about system issues or outages, they are to report to work in the office. To continue being paid for their hours, they have to continue working in the office.

2. **Can I use lunch instead of having break aux for outages and issues?**

- Yes, agents can request to use their lunch instead for the 1 hour of outage/issue so that they are not docked any additional from their pay. RTAs will adjust their break schedule to meet this request and agents are no longer expected to take any extra Lunch breaks within their shift afterwards.

✅ HR Movement

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Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

HR Movement Process – Workforce RTA Team

HR Movement Process

Listen to this tab

Effective Date: February 24, 2025

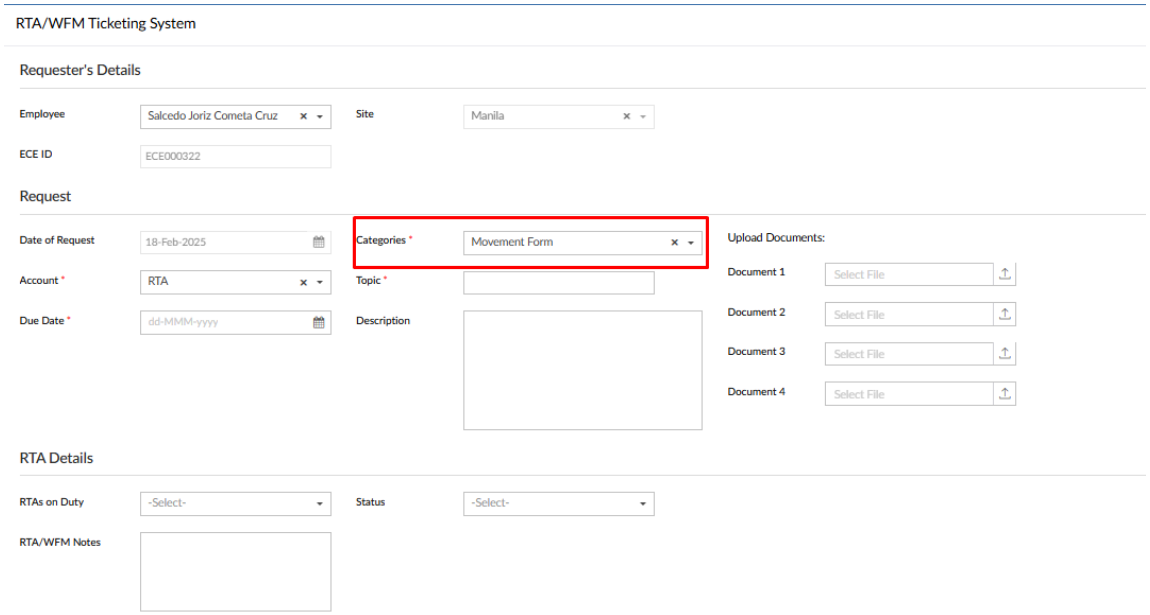
Purpose:
To ensure a standardized and organized approach in processing HR movements, the Workforce RTA team will be responsible for submitting HR Movement Forms to Zoho. This includes handling all employee transitions such as promotions, demotions, team leader and senior team leader movements, floating statuses, and other personnel changes within the operations team.

Please refer to this Standard Operating Procedure (SOP) for HR Movement Notification For…

Process Flow:

1. **Operations Team Submission**

   - Any employee movement request must be formally submitted by the Operations Team via a Workforce Management (WFM) ticket.
   - The WFM ticket must contain all necessary details, including employee name, ID, type of movement, effective date, and any required supporting documents.
   - The ticket serves as an official record of the request, ensuring accountability and tracking.



2. **Verification by Workforce RTA**

   - The assigned RTA will review the submitted WFM ticket to verify completeness and accuracy.
   - If any details are missing or unclear, the RTA will coordinate with the requestor to clarify and update the ticket before proceeding.
   - If the movement request is invalid or does not align with company policies, the RTA will escalate to Workforce Manager for further validation.

3. **Submission to HR Movement Form**

   - Once validated, the RTA will input the details into the HR Movement Form in Zoho following standard processes.
   - After submission, the RTA must record the transaction and confirm with the Operations Team that the request has been processed.
     - ***i. Specific Cases:***
       1. ***Change of Account:*** *The* ***receiving program's RTA*** *will process the movement. The Operations team must clearly indicate the new program and the effective date.*
          a. ***Wrong Account Assignment:*** *If an employee is moved to the incorrect program, the RTA must correct the entry immediately and inform both the previous and receiving account teams.*
       2. ***Change of Account (BENCH or Floating):*** *The* ***previous program's RTA*** *will process the movement, indicating the start of floating status and its expected duration.*
          a. ***Floating Status Extended Beyond Expected Duration****: If an employee remains on floating status longer than the indicated period, RTA should follow up with the Operations team for resolution.*

4. **Follow-Up & Confirmation**
    - Management team will process the movement request based on the submitted form.
    - RTAs are responsible for monitoring the status of each request and following up if processing delays occur.
    - Once management team finalizes the movement, RTAs will update the WFM ticket and close it for record-keeping purposes.

Situational Events & Mitigations

1. **Incomplete or Incorrect Ticket Submission**
    - If details in the WFM ticket are incomplete or inaccurate, the RTA will notify the Operations Team immediately.
    - The movement request will not proceed until all required information is provided.
2. **Urgent or Immediate Movements**
    - For time-sensitive changes (e.g., same-day promotions, demotions, or floating statuses), RTAs must escalate to Workforce Management for priority processing.
    - The Operations Team must indicate urgency in the WFM ticket for faster turnaround.
3. **Delayed Processing**
    - If management team does not update the movement within the expected timeframe, the RTA must follow up within 48 hours.
    - Persistent delays will be escalated to leadership for resolution.
4. **Discrepancies in Movement Execution**
    - If an employee's movement does not reflect correctly in payroll or records, RTAs will coordinate with the management team for corrections.
    - RTAs or operation team must report discrepancies within 7 days of implementation for timely adjustments.

---

5. **Employee Disputes on Movement**
    - If an employee contests their movement status, RTAs will refer them to the Operations Team for clarification.
    - No adjustments will be made unless a new WFM ticket is submitted with approved corrections.
6. **Mass or Multiple Employee Movements**
    - For batch movements (e.g., restructuring or large promotions), RTAs must prepare in advance and coordinate closely with management team.
    - A consolidated WFM ticket with all employees listed must be submitted to streamline processing.

Compliance & Accountability

- RTAs are responsible for ensuring all movements are properly documented and processed according to company policy.
- Operations Teams must adhere to the requirement of submitting a WFM ticket before any movement is processed.
- Any failure to comply with this process will be subject to review and corrective actions as necessary.

By following this SOP, the Workforce RTA team ensures efficiency, accuracy, and transparency in processing HR movements, reducing errors and improving coordination between Workforce, HR, and Operations.

➕ TL/STL Database Update Process

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Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

TL/STL Database Update Process – Workforce RTA Team

Senior TL/TL Database Update

Listen to this tab

Overview

This SOP outlines the process for updating the Senior Team Leader (STL) and Team Leader (TL) assignments in the ECE system. The **Workforce Real-Time Analysts (RTAs)** are responsible for ensuring that any leadership changes are accurately documented and reflected in the database. These updates help maintain proper reporting lines, coaching assignments, and leadership accountability.

Please refer to this for complete process of HR Movement
Standard Operating Procedure (SOP) for HR Movement Notification Form_9/19/2023

Rationale

Keeping the STL/TL database up to date ensures:

- Clear accountability in agent supervision
- Accurate routing of reports, coaching, and escalation
- Alignment of leadership with performance data
- Consistency in HR and payroll coordination

I. Updating TL Changes via Movement Notification Form

For Single Employee Update

1. Go to:
   Movement Notification Form – Single Update
2. **Select the Employee Name**
   Use the drop-down to choose the affected employee.

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

TL/STL Database Update Process – Workforce RTA Team

---

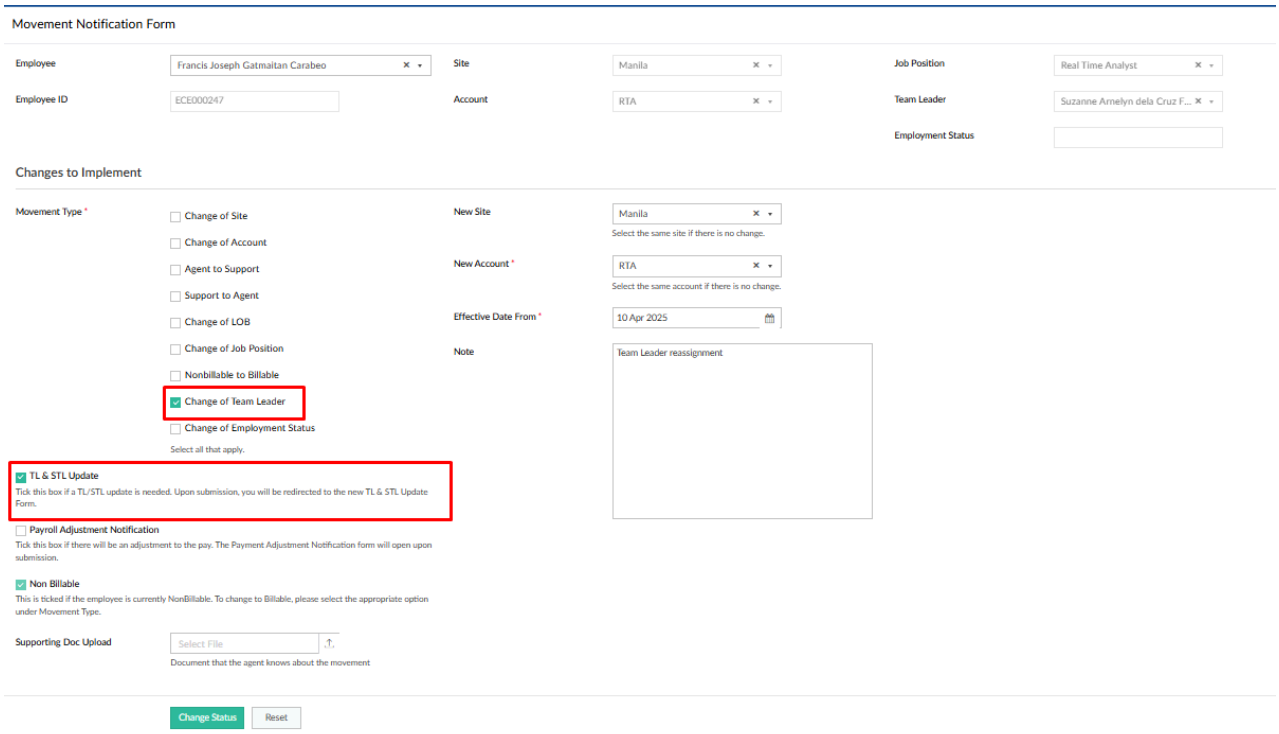
3. **Select Movement Type:**
   - Choose **Change of Team Leader**
   - If the employee is also moving to a new account, select **Change of Account** as well.

4. **Set the Effective Date**
   Enter the official start date of the new TL assignment.

5. **Update the Account Field**
   Ensure the correct account is selected based on the movement.

6. **Tick the "TL & STL Update" checkbox**
   This instructs the system to update the leadership information.

7. **Add Detailed Notes and Supporting Documents**
   Provide context or justification for the change. Upload any related memos, approvals, or leadership changes.



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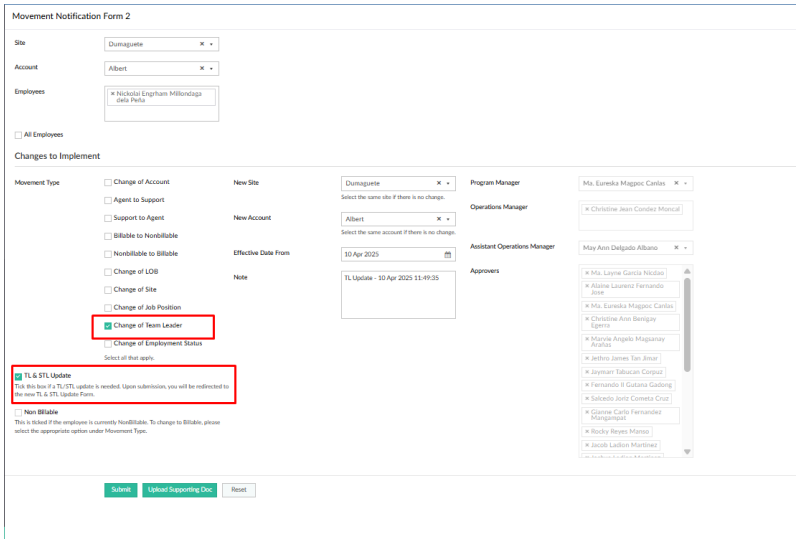
TL/STL Database Update Process – Workforce RTA Team

Note: Upon submission, you will be redirected to the new TL & STL Update Form.

For Bulk Employee Update

1. Go to:
   [Movement Notification Form – Bulk Update]
2. **Select the Site and Account**
3. **Select Employee Name(s)**
   Choose multiple employees or use the "All Employees" option.
4. **Select Movement Type: Change of Team Leader**
   Include **Change of Account** if needed.
5. **Set the Effective Date**
6. **Update the Account Field**
7. **Tick the "TL & STL Update" checkbox**
8. **Add Notes and Supporting Documents**



Note: Upon submission, you will be redirected to the new TL & STL Update Form.

II. Updating STL Assignments via Pending Management Updates

For Senior Team Leader (STL) Update

1. Go to:
   Pending Management Updates

2. Click **"Add Record"**

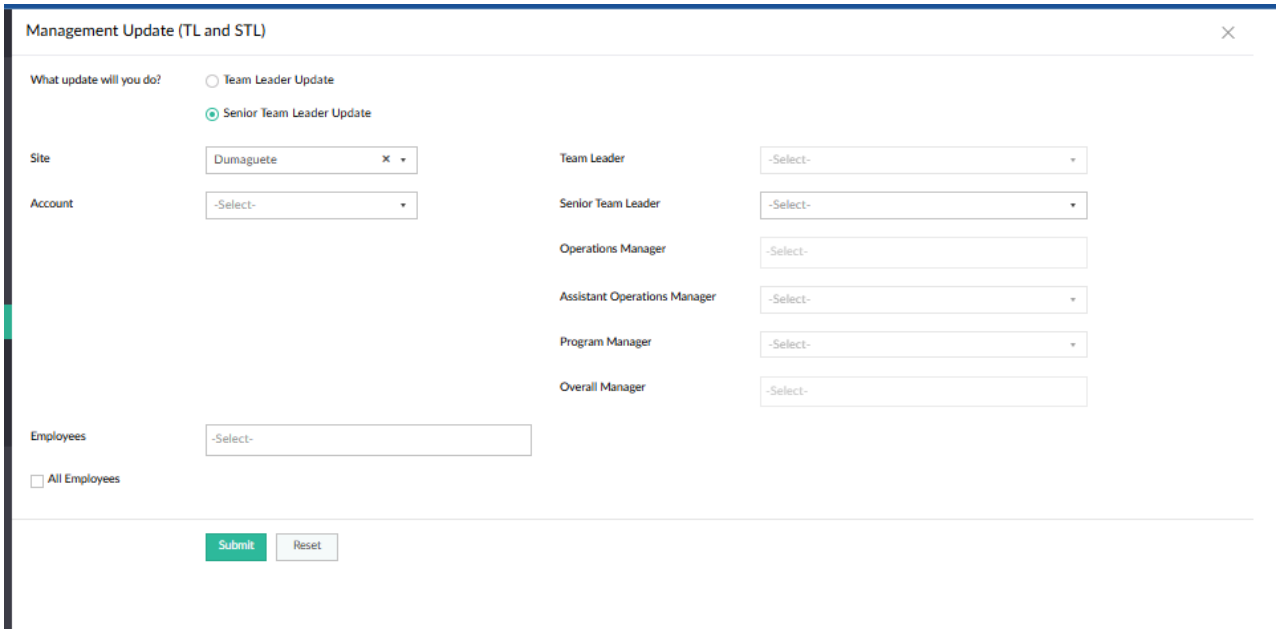
3. **Select Update Type:**
   Choose **Senior Team Leader Update**

4. **Select Site and Account**
   Make sure the site and account are aligned with the STL assignment.

5. **Select Employee Name(s)**
   Use the multiple selection feature or select "All Employees" if applicable.

6. **Update the "Senior Team Leader" Field**
   Input the full name of the new STL who will be assigned to the selected employees.

7. **Review and Submit**
   Ensure all fields are correct and submit the update for processing.



III. Notification and Approval Process

- All STL/TL updates trigger a **Zoho Cliq notification** to the designated channel:
  `#Zoho STL and TL Update Approval`
- Notifications will include an **"Open" button** which redirects to:
  Pending Management Updates
- **Approvers:**
  - All **Workforce RTA Leaders** and **Workforce RTAs (SMEs)** are responsible for approving these requests.

How to Approve:

1. Click the **"Open"** button from the Zoho Cliq alert.
2. On the page:
   - Click **"Approve"** for individual records, or
   - Use **"Select All"** and click **"Bulk Update"** for multiple approvals.
3. This action will update the database accordingly.

Reminders

- Always confirm leadership changes with operations or HR before filing.
- Avoid duplicate entries by checking if a change has already been logged.
- Supporting documents must be clear and valid.
- All updates should reflect in internal reporting, dashboards, and performance tools.

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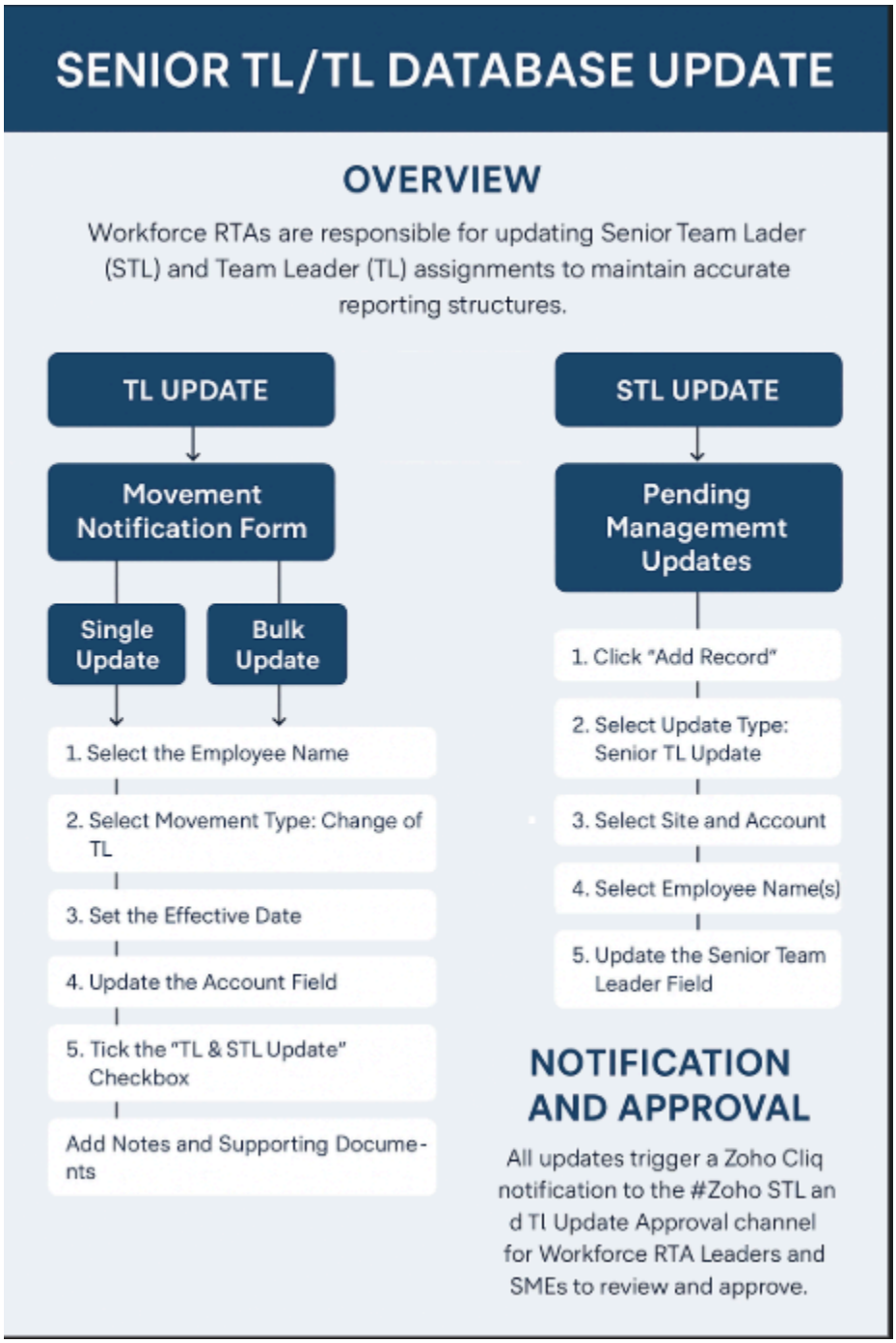
TL/STL Database Update Process – Workforce RTA Team



✅ Resignation Form

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Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Resignation/Termination Form Process – Workforce RTA Team

Resignation/Termination Form Process

Listen to this tab

Effective Date: February 24, 2025

Department: Workforce RTA

Scope: This SOP outlines the step-by-step process for handling employee resignations within the Workforce RTA team, ensuring accuracy, compliance, and seamless coordination between Operations, HR, and Workforce RTA.

---

1. Notification of Resignation

All resignations must be formally communicated to the Workforce RTA team. Employees must submit a resignation letter, and Workforce RTA, along with HR, must be included in the email thread as CC'd recipients. The resignation letter should be addressed to the Operations Team, who will acknowledge receipt and confirm the resignation details.

Email to CC:

workforcerta@ececontactcenters.com

hr@ececontactcenters.com

If an employee verbally resigns or expresses intent to resign without submitting a formal letter, the Operations Team should instruct the employee to send a written resignation email. If the employee refuses, Operations must escalate the case to HR for documentation.

---

2. Filing the Resignation in Zoho

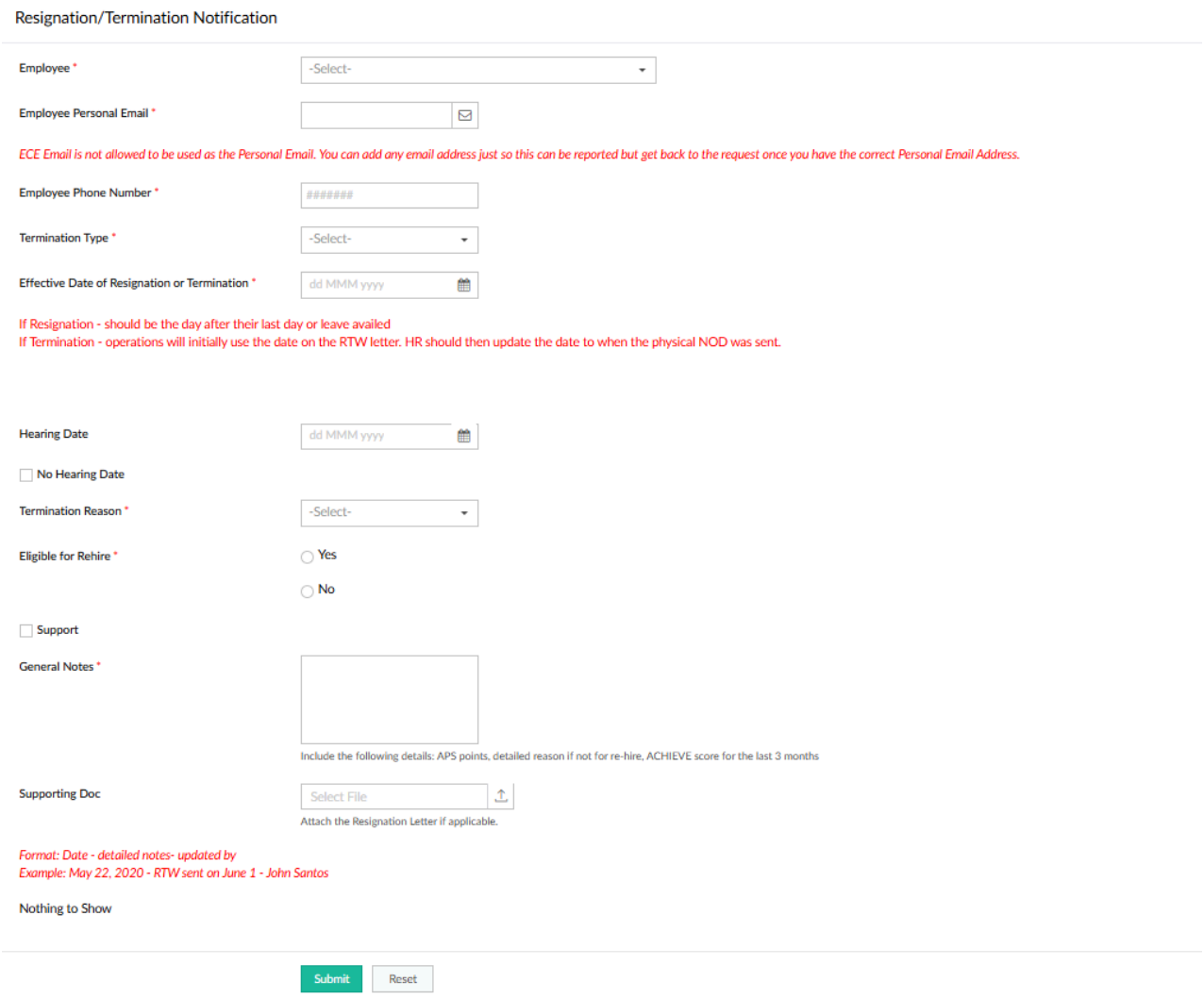
Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Resignation/Termination Form Process – Workforce RTA Team

Once the resignation is acknowledged by the Operations Team, Workforce RTA will be responsible for filing the resignation in Zoho under the Resignation Form, following the standard process.

Workforce RTA must ensure all required details are collected before submission:

- **Employee's personal email address and contact number** (for HR exit interview and clearance processing).
- **Reason for resignation or termination.**
    - If **Resignation**, the resignation date should be recorded as the day after their last working day or any approved leave availed before their official exit.
- If **Termination**, Operations will initially use the return-to-work (RTW) letter date. However, HR will later update the official termination date to reflect when the physical Notice of Decision (NOD) was sent to the employee.


Resignation/Termination Notification

Employee * -Select-

Employee Personal Email *

ECE Email is not allowed to be used as the Personal Email. You can add any email address just so this can be reported but get back to the request once you have the correct Personal Email Address.

Employee Phone Number * #######

Termination Type * -Select-

Effective Date of Resignation or Termination * dd MMM yyyy

If Resignation - should be the day after their last day or leave availed
If Termination - operations will initially use the date on the RTW letter. HR should then update the date to when the physical NOD was sent.

Hearing Date dd MMM yyyy

No Hearing Date

Termination Reason * -Select-

Eligible for Rehire * Yes No

Support

General Notes *

Include the following details: APS points, detailed reason if not for re-hire, ACHIEVE score for the last 3 months

Supporting Doc Select File

Attach the Resignation Letter if applicable.

Format: Date - detailed notes- updated by
Example: May 22, 2020 - RTW sent on June 1 - John Santos

Nothing to Show

Submit Reset

In situations where resignation dates are unclear (e.g., if an employee extends their leave or disputes the resignation date), **Workforce RTA must verify details with Operations and HR before finalizing in Zoho.**

---

3. Additional Employee Information for Processing

When submitting the resignation form, Workforce RTA must include the following additional details for record-keeping and future reference:

- **APS Points (Attendance Pointing System record):** Include the employee's latest APS points to document their attendance standing before resignation.
- **Eligibility for Rehire:** Clearly indicate whether the employee is eligible for rehire based on company policy and HR assessment.
- **Detailed Reason if Not Eligible for Rehire:** If the employee is not eligible for rehire, provide a detailed explanation (e.g., policy violations, poor performance, attendance issues).
- **ACHIEVE Score for the Last Three Months:** Include the employee's last three months of ACHIEVE scores to provide an overview of their performance before resignation.

If there are missing details, Workforce RTA must coordinate with HR or Operations before submitting the form to avoid processing delays.

4. Situational Events & Mitigation Strategies

Scenario 1: Employee Submits a Late Resignation Letter

- If an employee fails to submit a resignation letter within the standard notice period, Operations must escalate the issue to HR. Workforce RTA should proceed with documentation based on Operations' acknowledgment.

Scenario 2: Employee Resigns and Stops Reporting to Work Without Notice

- If an employee stops reporting to work and does not provide a formal resignation, Operations should attempt to contact them. If unresponsive, Workforce RTA should document the case as an unauthorized absence and coordinate with HR to process the termination accordingly.

Scenario 3: Employee Requests a Change in Last Working Day After Submission

- Any request for a change in the last working day must be reviewed by HR. Workforce RTA should not update the resignation details unless HR approves the modification.

Scenario 4: Resignation Submitted but Employee is on Floating Status

- If an employee on floating status submits a resignation, Workforce RTA must verify if their floating status affects their notice period. HR will determine if adjustments are needed.

Scenario 5: Discrepancy in Termination Date Between RTW Letter and NOD

- If the termination date differs between the RTW letter and the physical NOD, HR must confirm the official date before Workforce RTA finalizes the entry in Zoho.

---

5. Final Submission & Record Keeping

After completing the form, Workforce RTA must double-check all details for accuracy before submitting the resignation entry in Zoho. A confirmation email must be sent to HR and Operations to notify them of the completed submission by sending the screenshot of filed resignation form.

If HR or Operations request any corrections post-submission, Workforce RTA must coordinate the necessary changes promptly.

---

6. Compliance & Accountability

Failure to follow the resignation submission process correctly may lead to misfiling, processing delays, or compliance issues. If Workforce RTA submits incomplete or incorrect data, an internal review will be conducted, and corrective actions may be taken.

To avoid errors, Workforce RTA must:

- Ensure all resignation-related communications are properly documented.
- Verify resignation dates, termination dates, and additional details before filing.
- Follow up with HR and Operations if discrepancies arise.

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Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Resignation/Termination Form Process – Workforce RTA Team

Step-by-Step Process for Accessing the Zoho Resignation/Termination Form

The **Zoho Resignation/Termination Form** allows RTAs and authorized personnel to submit and review resignation or termination requests. Follow the detailed steps below to ensure proper documentation and compliance with company policies.

Step 1: Log In to ECETrack

1. Open your preferred web browser (**Google Chrome, Mozilla Firefox, or Microsoft Edge**).
2. Navigate to the **ECETrack website** by entering the designated URL provided by your company.
3. Enter your **username and password** in the respective login fields.
4. Click the **“Sign In”** button to access your dashboard.

Step 2: Navigate to the Resignation/Termination Form

1. Once logged in, locate the **left-side menu bar** on the ECETrack home page.
2. Click on the **"HR" tab** at the Left panel of the page.
3. A drop-down menu will appear—select **"Resignation/Termination Form"**.
4. This will redirect you to the form submission page.

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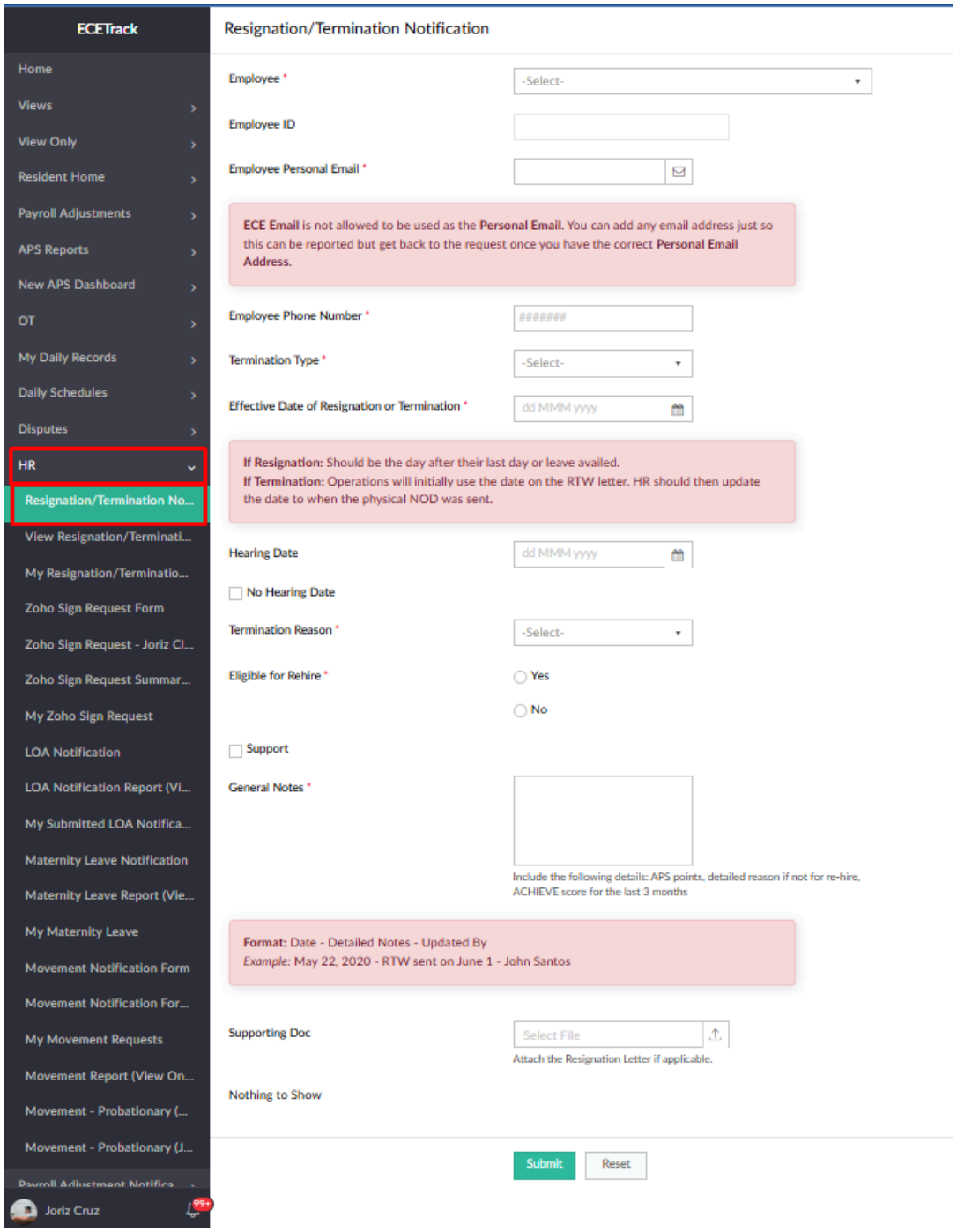
Resignation/Termination Form Process – Workforce RTA Team



Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Resignation/Termination Form Process – Workforce RTA Team

Step 3: Fill Out the Required Details

Once on the **Resignation/Termination Form** page, you must complete the necessary details.

After filling out the required fields, review the details carefully before submitting the form.

Step 4: Submitting the Resignation/Termination Form

1. Once all fields are completed, click the **"Submit"** button.
2. A confirmation message will appear, verifying that the form has been successfully submitted.
3. The request will then be forwarded to the **HR** for further processing.

Step 5: Accessing Submitted Resignation/Termination Requests

RTAs can monitor submitted forms using the following options:

1. **My Resignation/Termination Notifications**
   - This section allows RTAs to track their own submitted forms.
   - You can check the status (Pending, Approved, or Rejected) and review submission details.
2. **View Resignation/Termination Notifications**
   - This section provides access to all submitted resignation/termination forms.
   - RTAs can filter requests based on approval status, employee name, or submission date.

Step 6: Follow-Up and Documentation

1. **Ensure all supporting documents are properly uploaded** to avoid processing delays.
2. **Coordinate with HR and Operations** for clearance, final pay, and exit processes.

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3. **Monitor the approval status** and follow up with the concerned teams if necessary.

❗ Resignation: No Show/Withdrawn

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Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Resignation/Termination Form Process
For NO-SHOW and WITHDRAWN Employees

✅ Daily Schedules

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Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Daily Schedule Change Request Process – Workforce RTA Team

Daily Schedules

Listen to this tab

RTA Schedule Change Request Approval Process

Objective:
To ensure schedule change requests in Zoho are validated and approved correctly, ensuring that the schedule is accurate and aligns with operational needs.

Key Takeaways for Approving Schedule Change Requests:

1. **Verify the Schedule in Zoho:**
   - Check the request in Zoho to ensure it reflects the correct, updated schedule. If the schedule shows discrepancies, determine whether it was mistakenly recorded or if an update is required.
2. **Validate the Request:**
   - Ensure the schedule change request aligns with an approved schedule or is a legitimate update. If the request does not match the approved schedule, verify with the employee or their supervisor for clarification.
   - Ensure that any request submitted outside the approved time frame is justified and valid.
3. **Evaluate Operational Impact:**
   - Assess the impact of the schedule change on team coverage. Confirm that the new schedule will not create gaps in staffing or disrupt service levels.
4. **Check the Timing of the Request:**
   - Ensure that the schedule change request in Zoho is submitted within the allowed time frame (e.g., advance notice required). Any changes outside this time frame should be validated with the employee for justification.
5. **Review Supporting Documentation (if applicable):**
   - If the request requires supporting documentation (e.g., medical leave, personal reasons), verify that it is included in Zoho or attached to the request.
6. **Document the Approval or Denial:**

- Once the request is validated, approve or deny the change directly in Zoho. If the request is denied, communicate the reason to the employee in a timely manner and update Zoho accordingly.

7. **Monitor for Patterns:**
   - Regularly monitor schedule change requests for recurring issues, especially those involving frequent or last-minute changes. Address any patterns with employees to ensure their schedules are properly managed.

Key Reminders:

- Always verify the Zoho request to ensure it's correctly recorded and matches the employee's approved schedule.
- Consider the operational impact of any change and maintain adequate staffing levels.
- Keep communication clear and document all decisions in Zoho for transparency.

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Daily Schedule Change Request Process – Workforce RTA Team

Step-by-Step Guide: Accessing the Daily Schedule – Schedule Change Requests (Approver's View)

Managing **Schedule Change Requests** accurately is essential to maintaining workforce efficiency. Below is a **detailed step-by-step guide** for RTAs to access, review, approve, disapprove, and manually adjust schedules in the **Approver's View** of the **Daily Schedule Change Requests**.

Step 1: Log in to ECETrack

1. Open your preferred web browser (**Google Chrome, Mozilla Firefox, or Microsoft Edge**).
2. Navigate to the **ECETrack website** by entering the designated URL provided by your company.
3. In the login fields, enter your **username and password**.
4. Click the **"Sign In"** button to access the **ECETrack dashboard**.

Step 2: Navigate to the Daily Schedule Tab

1. Once logged in, locate the **left-side menu bar** on the ECETrack home page.
2. Click on the **"Daily Schedule"** tab at the top of the page.
3. A drop-down menu will appear—click **"Schedule Change Requests (Approver's View)"**.
4. You will be redirected to the **Schedule Change Requests Page**, where all pending and approved schedule change requests are listed.

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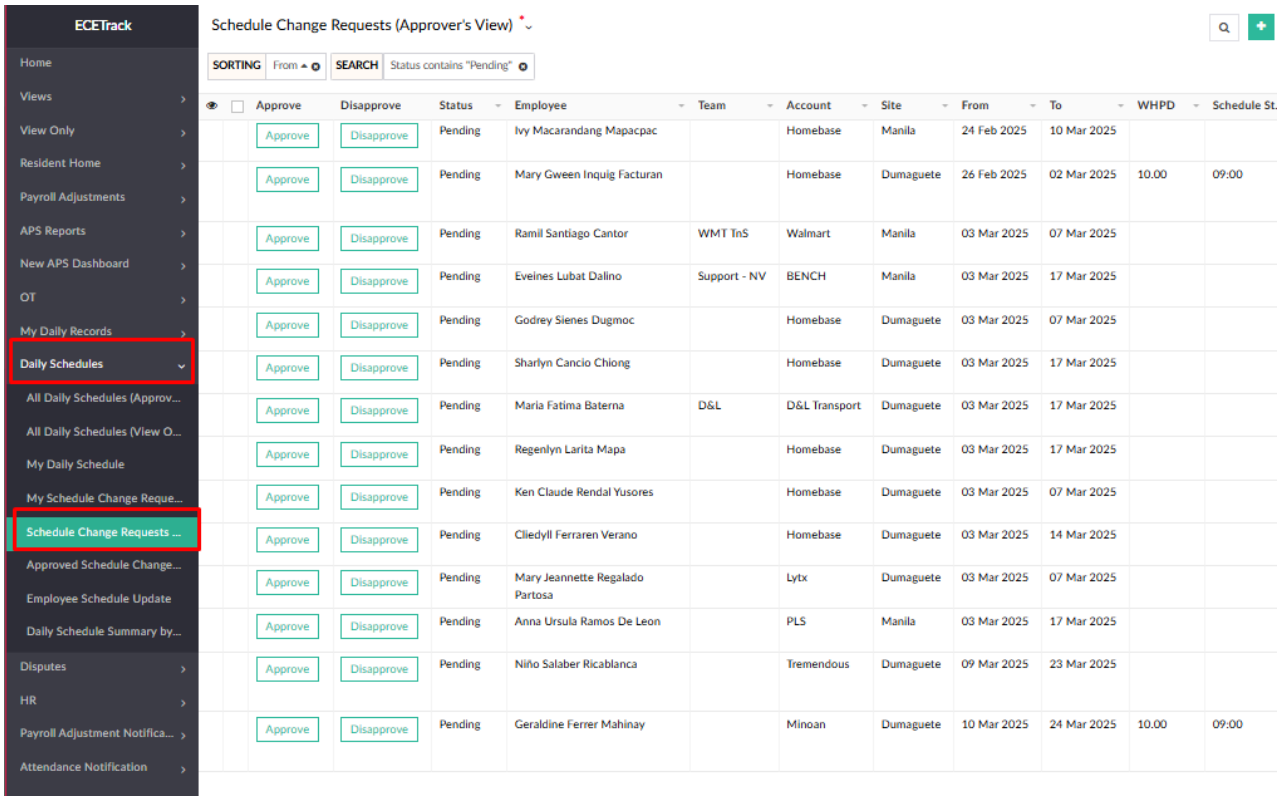
Daily Schedule Change Request Process – Workforce RTA Team



Approve	Disapprove	Status	Employee	Team	Account	Site	From	To	WHPD	Schedule St.
Approve	Disapprove	Pending	Ivy Macarandang Mapacpac		Homebase	Manila	24 Feb 2025	10 Mar 2025		
Approve	Disapprove	Pending	Mary Gween Inquig Facturan		Homebase	Dumaguete	26 Feb 2025	02 Mar 2025	10.00	09:00
Approve	Disapprove	Pending	Ramil Santiago Cantor	WMT TnS	Walmart	Manila	03 Mar 2025	07 Mar 2025		
Approve	Disapprove	Pending	Eveines Lubat Dalino	Support - NV	BENCH	Manila	03 Mar 2025	17 Mar 2025		
Approve	Disapprove	Pending	Godrey Sienes Dugmoc		Homebase	Dumaguete	03 Mar 2025	07 Mar 2025		
Approve	Disapprove	Pending	Sharlyn Cancio Chiong		Homebase	Dumaguete	03 Mar 2025	17 Mar 2025		
Approve	Disapprove	Pending	Maria Fatima Baterna	D&L	D&L Transport	Dumaguete	03 Mar 2025	17 Mar 2025		
Approve	Disapprove	Pending	Regenlyn Larita Mapa		Homebase	Dumaguete	03 Mar 2025	17 Mar 2025		
Approve	Disapprove	Pending	Ken Claude Rendal Yusores		Homebase	Dumaguete	03 Mar 2025	07 Mar 2025		
Approve	Disapprove	Pending	Cliedyll Ferraren Verano		Homebase	Dumaguete	03 Mar 2025	14 Mar 2025		
Approve	Disapprove	Pending	Mary Jeannette Regalado Partosa		Lytx	Dumaguete	03 Mar 2025	07 Mar 2025		
Approve	Disapprove	Pending	Anna Ursula Ramos De Leon		PLS	Manila	03 Mar 2025	17 Mar 2025		
Approve	Disapprove	Pending	Niño Salaber Ricablanca		Tremendous	Dumaguete	09 Mar 2025	23 Mar 2025		
Approve	Disapprove	Pending	Geraldine Ferrer Mahinay		Minoan	Dumaguete	10 Mar 2025	24 Mar 2025	10.00	09:00

Step 3: Reviewing and Processing Schedule Change Requests

Comparing Requests with the Master Schedule

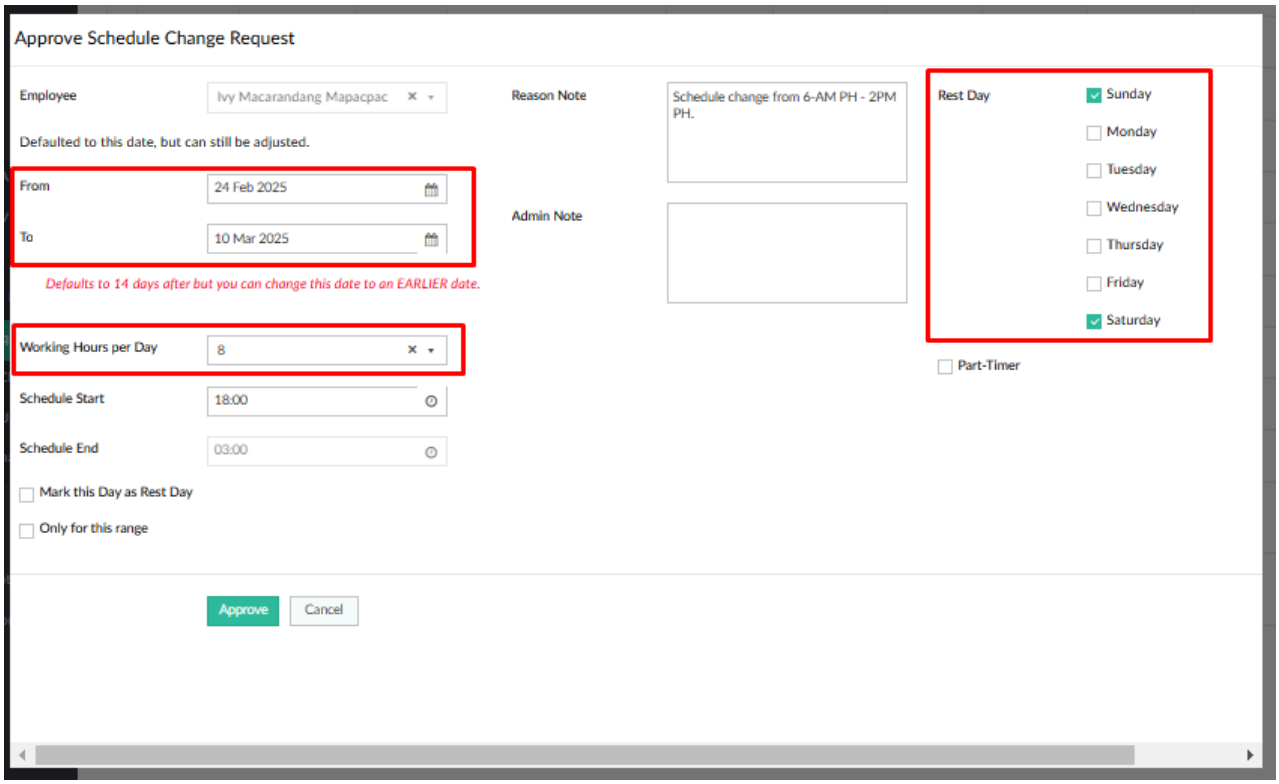
1. RTAs must compare the **requested schedule change** with the account's **Master List of Schedules** or **Workforce Tool**.
2. Ensure the requested schedule adheres to business requirements and workforce staffing policies.
3. If the request does not comply with guidelines, it must be disapproved with a valid reason.

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Daily Schedule Change Request Process – Workforce RTA Team

RTA's Checklist When Approving Requests

- **Check the Date Range (From and To):**
  - Ensure that the **new schedule always starts on a Monday** of the week.
- **Verify Rest Days:**
  - Ensure that the selected rest days align with the account's shift rotation and business needs.
- **Confirm Working Hours per Day:**
  - Check that the requested **shift start time and end time** meet the required shift length.



Step 4: Approving or Disapproving Schedule Change Requests

To Approve a Schedule Change Request:

1. Locate the request from the **Schedule Change Requests (Approver's View)**.
2. Click the **"Approve"** button.
3. The system will update the employee's schedule accordingly.
4. Notify the employee and their immediate supervisor that the schedule request has been approved.

To Disapprove a Schedule Change Request:

1. Click the **"Disapprove"** button next to the request.
2. A **pop-up window** will appear, requiring you to enter the **reason for disapproval**.
3. Provide a **clear explanation** (e.g., does not meet shift requirements, overlaps with an existing request, or violates business rules).
4. Click **"Submit"**, and the system will update the request status as **Disapproved**.
5. Notify the employee and their immediate supervisor of the decision.

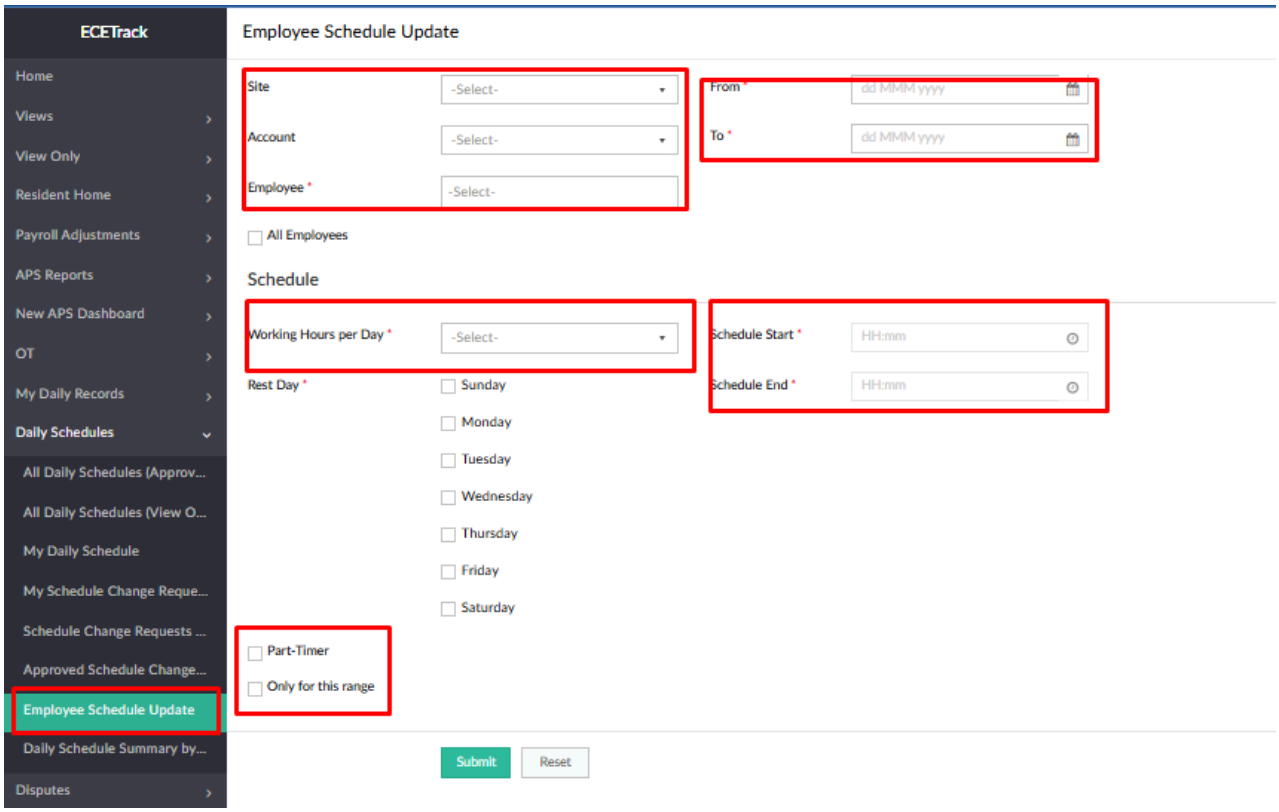
Step 5: Manually Changing Employee Schedules

RTAs also have the ability to **manually change schedules** for individual employees or bulk employees if necessary.

Manual Schedule Adjustment Process:

1. Navigate to the **Employee Schedule Update** page.
2. Select the **site, account, and name(s) of the employee(s)** requiring a schedule change.
3. Set the **effective date range** for the new schedule.
4. Adjust the following details as needed:
    - **Working hours per day**
    - **Shift start and end times**
    - **Rest day selection**

5. If applicable, click the **"Part-time"** box to categorize the employee's schedule accordingly.
6. **Click "Only for this range"** if the schedule change is temporary and only applies within the specified date range.
   - **If left unchecked, the system will copy the last two weeks of the employee's schedule for the next week's schedule.**
7. Click **"Submit"** to apply the changes.



Step 6: Ensuring Accuracy and Compliance

1. **Validate all schedule changes before finalizing approvals.**
2. **Ensure adherence to company policies** regarding shift lengths, rest day rotations, and workforce requirements.

---

3. **Regularly update workforce tracking tools** to reflect approved schedule changes in real time.
4. **Notify employees and supervisors** immediately after changes are approved or denied.

By following this step-by-step process, RTAs can effectively manage **schedule change requests**, ensuring compliance, operational efficiency, and proper workforce planning.

✅ Zoho Dispute Process

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Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Zoho Dispute Process – Workforce RTA Team

Zoho Dispute Process

Listen to this tab

Objective:

To ensure accurate and timely review of disputes related to workforce scheduling and payroll, minimizing errors and ensuring proper validation before payroll and billables cutoffs.

Review Schedule:

- **ALL** disputes must be reviewed before the payroll cutoff (10th and 25th of every month).
- **ALL** disputes must be reviewed before the billables cutoff (15th and last day of the month).
- RTAs should check for any pending disputes ***daily*** to avoid backlog and ensure timely resolution.

Dispute Review Guidelines:

1. **Validation of Fields:**

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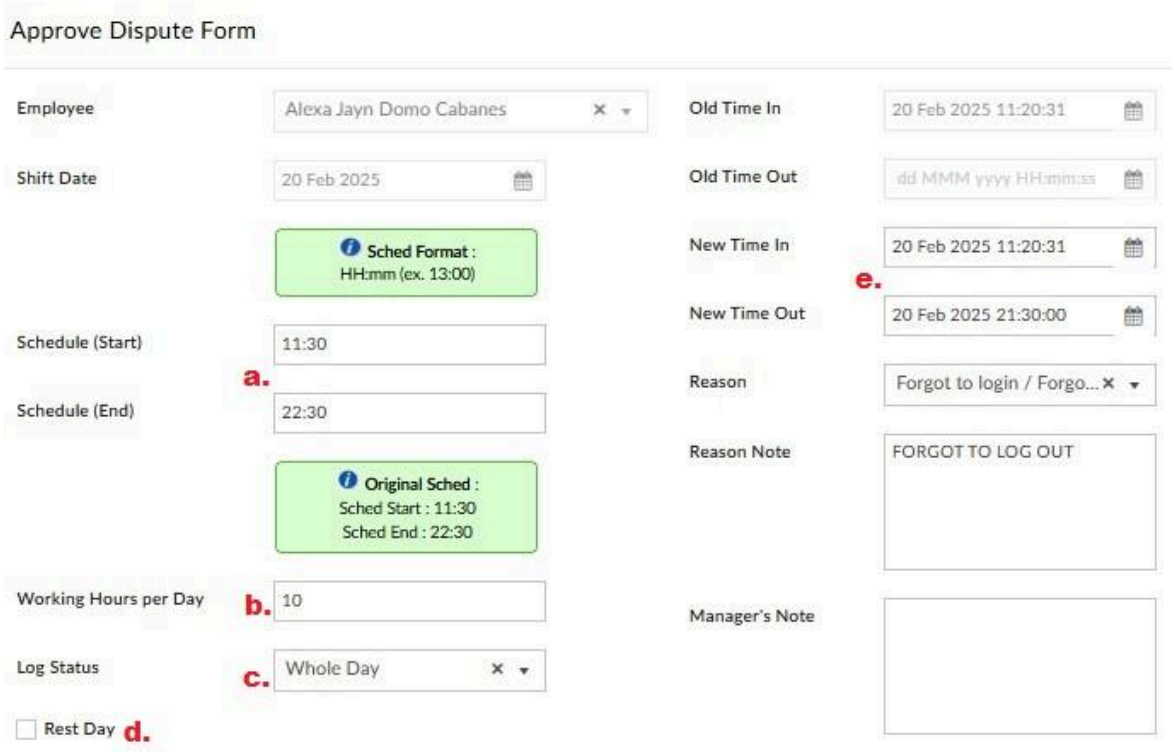
Zoho Dispute Process – Workforce RTA Team



a. Schedule start and end times.
b. Working hours per day.
c. Log status (Whole Day, Pre-shift OT, Rest Day OT, etc).
d. Rest day tickbox (if applicable).
e. Start and end times.

2. Verification Process:

- Cross-check start and end times using the **CRM Tool**, if available.
- If CRM Tool is not available, validate using the screenshot provided in the dispute.

3. Resolution Actions:

- If the dispute is valid, update necessary fields to ensure accuracy and prevent the need for resubmission, and then ***approve*** the request.
- If the dispute is invalid, ***deny*** the request with a brief explanation.
- If the dispute requires further clarification or validation, ***skip the dispute*** and escalate it to the immediate supervisor of the disputee for further review.

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Zoho Dispute Process – Workforce RTA Team

Responsibilities of RTAs:

- Conduct daily checks on pending disputes.
- Ensure all disputes are reviewed and addressed before payroll and billables cutoffs.
- Maintain accuracy and consistency in reviewing disputes.
- Communicate unresolved disputes to the appropriate supervisor for timely resolution.

Sample Disputes:
Scenario 1

Approve Dispute Form

Employee	Fatima Mary Vicente Acab	Old Time In	20 Feb 2025 20:01:01
Shift Date	20 Feb 2025	Old Time Out	21 Feb 2025 07:09:06
	Sched Format : HH:mm (ex. 13:00)	New Time In	20 Feb 2025 20:00:00
Schedule (Start)	20:00	New Time Out	21 Feb 2025 07:09:06
Schedule (End)	7:00	Reason	PC/Net issue
	Original Sched : Sched Start : 20:00 Sched End : 07:00	Reason Note	not late, zoho loads
Working Hours per Day	10	Manager's Note	
Log Status	Whole Day		
Rest Day			

Resolution: Check the CRM tool for the actual login time. If the agent logged in on time in the CRM tool, approve the dispute; otherwise, disapprove it. If the CRM tool is unavailable, check the attached screenshot. If the screenshot provides sufficient proof that the agent was indeed on time, approve the dispute. If there is insufficient proof, deny the dispute. All employees are required to arrive early to work to allow enough time to prepare.

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Zoho Dispute Process – Workforce RTA Team

Scenario 2

Approve Dispute Form

Employee	Charish Capanay Quinamot	Old Time In	18 Feb 2025 00:02:26
Shift Date	18 Feb 2025	Old Time Out	18 Feb 2025 08:31:28
	Sched Format : HH:mm (ex. 13:00)	New Time In	17 Feb 2025 21:30:00
		New Time Out	18 Feb 2025 08:30:00
Schedule (Start)	00:00	Reason	Schedule changed
Schedule (End)	11:00	Reason Note	Slide shift
	Original Sched : Sched Start : 00:00 Sched End : 11:00		
Working Hours per Day	10	Manager's Note	
Log Status	Whole Day		
☐ Rest Day			

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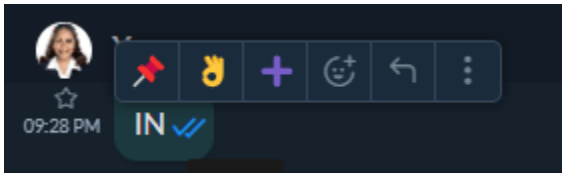
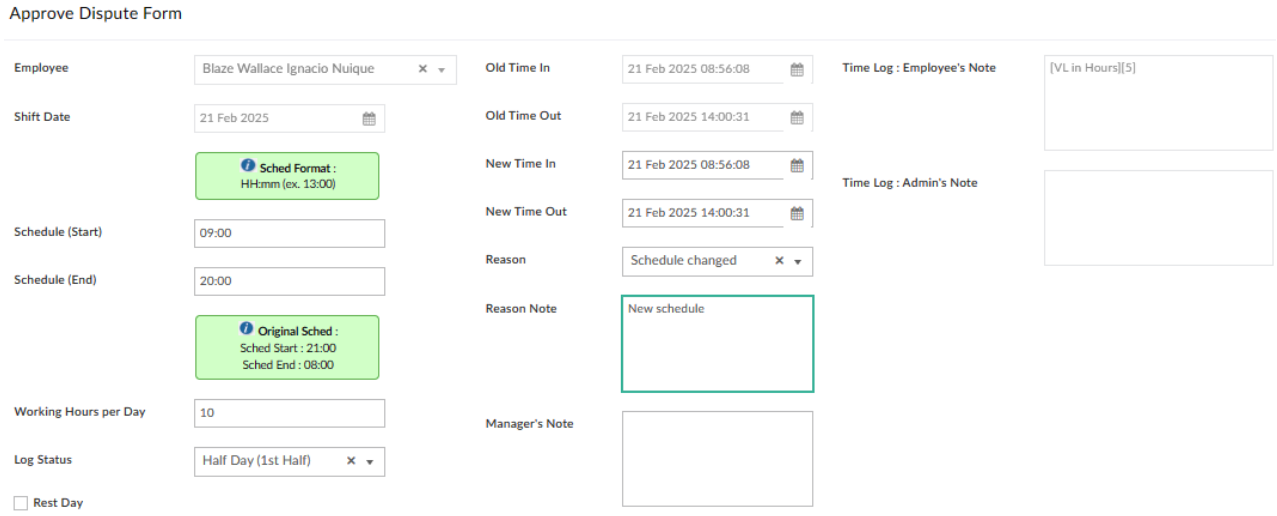
Zoho Dispute Process – Workforce RTA Team

Attached Screenshot:



Resolution: The actual login time in the screenshot and dispute form does not match the stated schedule (Start) of 00:00. Approving this dispute would result in the agent incurring 2.5 hours of tardiness. Verify the validity of the slide shift and whether it was approved. If the slide shift is valid, confirm the correct adjusted schedule start time.

Scenario 3.



Resolution: This highlights the importance of meticulously reviewing every detail of the dispute. A closer inspection reveals that the agent took VL during the second half of their shift. However, the dispute form indicates a status of Half Day (1st Half). Approving the dispute without correcting this detail would result in the agent incurring 5 hours of tardiness. Instead, update the Log Status to Half Day (2nd Half) before approving.

✅ Overtime Approval

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Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Overtime Approval Process – Workforce RTA Team

Overtime Approval Process Listen to this tab

Objective:
As RTAs, it is our responsibility to correctly review all OT Requests on time. Reviewing all OT Requests on time ensures that all approved OT will be credited on the next payday. Correctly approving or denying OTs also ensures first-time resolution, preventing resubmission of OT Requests, and preventing company losses through incorrect approval of OT hours.

OT Review Deadlines:
All OT Requests should be reviewed before the following cutoffs:

- **Payroll Cutoff:** 10th and 25th of every month
- **Billable Hours Cutoff:** 15th and last day of the month

Criteria for Approving OT Requests:

1. **Maximum OT Limits:**
   - Regular OT, including pre-shift, post-shift, and OT lunch, should not exceed **4 hours per day**.
2. **Rest Day OT Consideration:**
   - There must be a **12-hour gap** between:
     - Logout time of the previous regular shift and login time of the Rest Day OT shift.
     - Logout time of the Rest Day OT shift and login time of the next regular shift.
   - If the 12-hour gap is not met, the OT will only be considered **Regular OT**, not Rest Day OT.

Client-Mandated OT Consideration:

- If the OT was performed to cover for an employee on PTO, it **is NOT client-mandated**.
- A program's client must explicitly **give the signal** to solicit for OT before it can be considered **client-mandated**.

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Overtime Approval Process – Workforce RTA Team

Approval Process:

1. Verify if the request meets the OT limits and the Rest Day OT criteria.
2. Confirm if the OT is client-mandated based on the guidelines.
3. Check the time start and time end of OTs through the actual CRM logs. If it's not available, consider the productivity of the employee. The employee should have agreeable productivity during his/her OT time.
4. Approve or deny the OT request accordingly.
5. Ensure all approved OT requests are reviewed before the designated cutoffs.
6. Communicate any denials with the appropriate justification to prevent resubmission.

Compliance and Accountability:

- RTAs must ensure adherence to this SOP to avoid payroll discrepancies.
- Any incorrect approvals leading to company losses may result in corrective action.
- Consistent failure to review OT requests on time will be subject to performance evaluation.

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Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Overtime Approval Process – Workforce RTA Team

Step-by-Step Process for Accessing the OT Approval Form

The **Overtime (OT) Approval Form** in ECETrack allows RTAs to review, approve, or disapprove OT requests based on company policies. Follow the detailed steps below to access and process OT requests efficiently.

Step 1: Log In to ECETrack

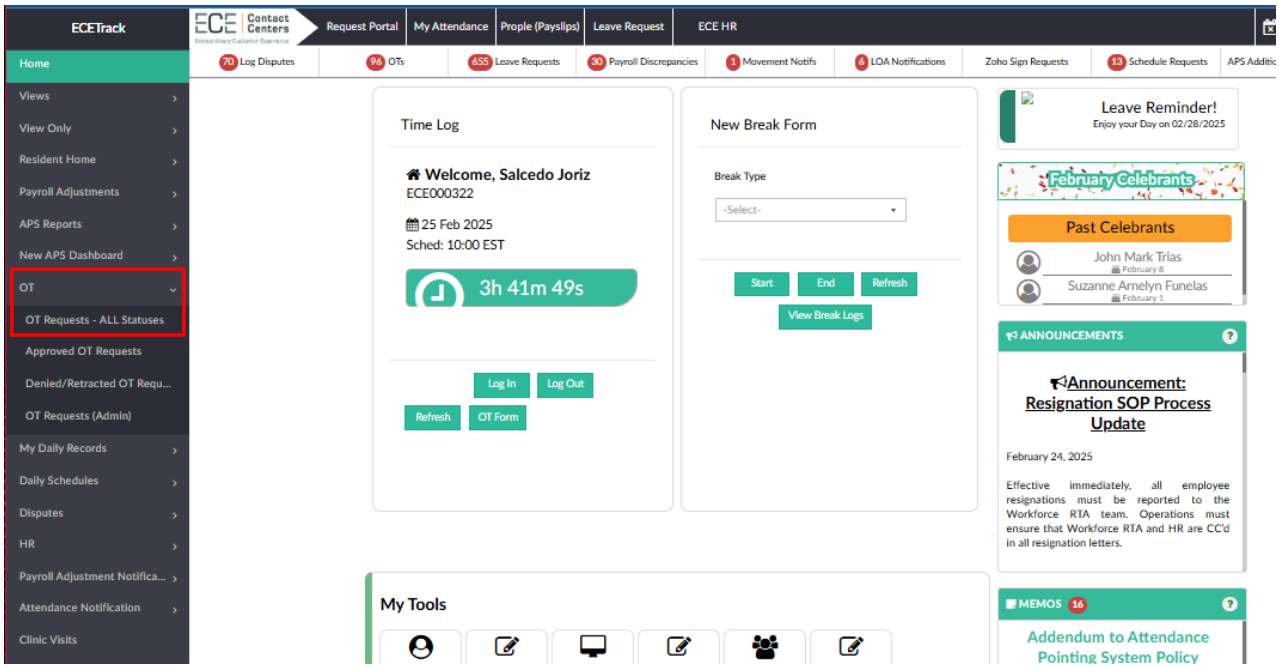
1. Open your preferred web browser (**Google Chrome, Mozilla Firefox, or Microsoft Edge**).
2. Navigate to the **ECETrack website** by entering the designated URL provided by your company.
3. In the login fields, enter your **username and password**.
4. Click the **“Sign In”** button to access the dashboard.

Step 2: Navigate to the OT Request Page

1. Once logged in, locate the **left-side menu bar** on the ECETrack home page.
2. Click on the **"OT"** tab at the top of the page.
3. A drop-down menu will appear—select **"OT REQUESTS - ALL STATUSES"**.
4. This page displays all submitted OT requests, regardless of status (Pending, Approved, or Disapproved).

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Overtime Approval Process – Workforce RTA Team



Step 3: Filter OT Requests to Pending Status

1. In the **OT Requests page**, locate the **filter option** at the top.
2. Click on the filter and **select "Pending"** to display only the OT requests awaiting approval.
3. Review each request carefully before proceeding to approval or disapproval.

Step 4: Review and Validate OT Requests

RTAs should review OT requests based on the following guidelines:

- **Check if the employee meets OT eligibility** (e.g., shift coverage, business need, and prior approval).

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Overtime Approval Process – Workforce RTA Team

- **Verify time logs in Zoho** to ensure the requested OT hours match the recorded work time.
- **Confirm if the OT is pre-approved by the supervisor** or required for urgent operational needs.
- **Cross-check for any overlapping OT requests** that may lead to duplicate entries.

Step 5: Approve or Disapprove OT Requests

Approving OT Requests

1. If the OT request meets all requirements, click the **"Approve"** button.
2. The system will confirm approval, and the request status will update automatically.
3. Notify the employee that their OT has been approved.

Disapproving OT Requests

1. If the OT request **does not meet company guidelines**, click the **"Deny"** button.
2. A **pop-up window** will appear, requiring you to enter the **reason for disapproval**.
3. Provide a **clear explanation** (e.g., exceeding allowed OT limit, incorrect request details, or missing approval from the supervisor).
4. Click **"Submit"** to finalize the disapproval, and the system will update the request status.
5. Notify the employee of the decision and provide guidance if they need to correct and resubmit their request.

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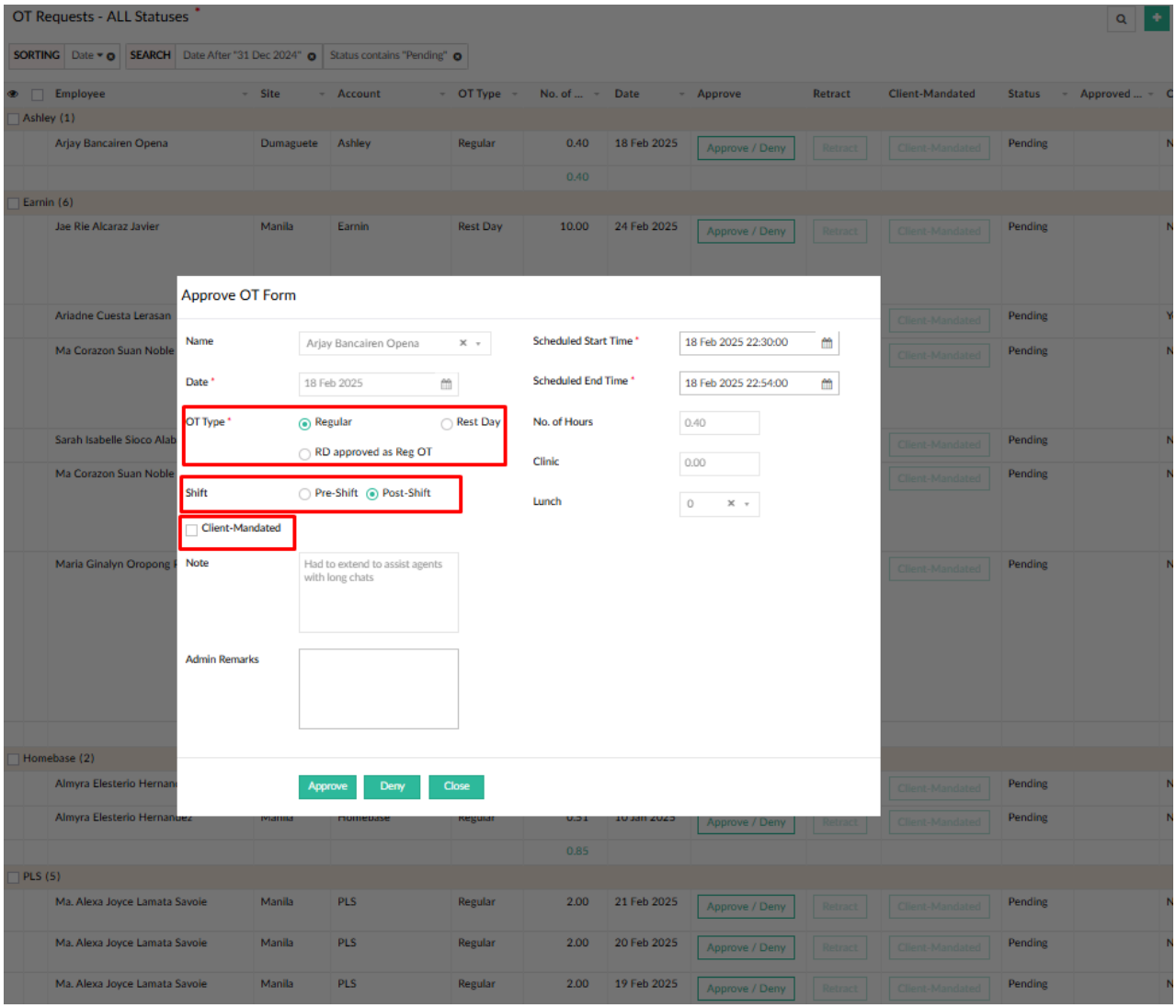
Overtime Approval Process – Workforce RTA Team



Step 6: Final Review and Documentation

1. After approving/disapproving OT requests, ensure the **records are updated** in ECETrack.
2. **Coordinate with Payroll** to ensure approved OT hours are reflected correctly.

---

3. **Monitor upcoming OT requests** to ensure compliance with workforce planning and business needs.

➕ OT Commitment Form

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Overtime Commitment Form – Workforce RTA Team

OT Commitment

All Employee Access:
Form:OT_Commitment_Form
My_OT_Commitments

RTA Access:
Pending_OT_Commitments
All_OT_Commitments1
Listen to this tab

1. Purpose

The purpose of this SOP is to establish a **clear, detailed, and standardized process** for filing, reviewing, and approving Overtime (OT) Commitment Requests using the OT Commitment Form in Zoho Creator.

This ensures:

- **Transparency** – Employees know the exact process and criteria for OT requests.
- **Accountability** – RTAs and employees follow proper documentation and approvals.
- **Accurate Scheduling** – Approved OT is reflected in the scheduling system to avoid conflicts and overstaffing.

---

2. Scope

This SOP applies to:

- **All employees** required to file OT commitments.
- **All designated RTAs** responsible for approving or disapproving OT requests.

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Overtime Commitment Form – Workforce RTA Team

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3. Context

There are cases where operations require employees to render overtime on rest days to meet business demands. To manage this fairly and efficiently, all OT commitments must be logged, reviewed, and tracked in Zoho Creator.

This ensures:

- Proper **workforce allocation** based on business needs.
- Prevention of **unauthorized overtime**.
- Accurate reflection in **employee time logs and payroll processing**.

---

4. Process Flow

Step 1: Filing of OT Commitment by Employee

1. Employee opens the **OT Commitment Form** in Zoho Creator.
2. Employee details (Name, ID, Site, Account) are **auto-populated** by the system.
3. Employee completes the required fields:
    - **Date of Committed OT** → Must fall on the employee's *rest day*.
    - **Time Limit** → Allowed range is *4 to 10 hours only* (to balance operational needs and labor compliance).
    - **Start Time** → The time OT is scheduled to begin.
    - **End Time** → *Auto-calculated* based on Start Time + Time Limit; not editable to prevent errors.
    - **Notes/Remarks** → Employee must provide context if required (e.g., urgent deliverable, system downtime recovery, etc.).

- **Agreement Checkbox** → Employee must tick this to acknowledge that OT is voluntary and subject to RTA approval.

4. Employee submits the request.
5. System automatically sets the request **Status = Pending**.
6. System notifies designated RTAs via **Zoho Cliq channel message**.
7. The filed request is **automatically reflected in the employee's daily schedule** for visibility.

Step 2: RTA Review and Approval

1. RTA receives notification in the designated **Zoho Cliq channel**.
2. RTA opens the **Pending OT Commitments Report** (filtered by "Pending").
3. RTA reviews the request by clicking **Approve/Disapprove**.
   - Employee details, requested date, and hours are displayed.
4. RTA updates the **Status** field:
   - **Approved** → Employee's OT is confirmed and locked into the schedule.
   - **Disapproved** → Request is declined (with optional remarks for documentation).
   - **Pending (default)** → If unchanged, the request remains pending until action is taken.
5. Status update is saved and recorded in reports.
6. The employee's time log is updated automatically once approved.

---

5. Form Rules and Validations

To ensure accuracy and consistency, the form enforces the following rules:

- Employee details are **auto-filled** on load to avoid manual errors.
- **Date of OT** must fall only on an employee's *rest day*.
- **Time Limit** restricted strictly between *4–10 hours*.
- **End Time** is auto-calculated and not editable.
- **Agreement Checkbox** must be ticked before submission.
- **Default Status = Pending** upon submission.

---

6. Notifications

- Upon submission, **RTAs are instantly notified** via Zoho Cliq.
- Employees can view the status in their request record.
- Approval/Disapproval actions remain visible in reports for monitoring, audit, and payroll alignment.

Step-by-Step Process: Filing OT Commitment Form in Zoho - Agent Point of View

Step 1: Access the OT Commitment Form

1. Log in to **Zoho Creator / ECETrack**.
2. On the navigation menu, go to the **OT tab**.
3. Select **OT Commitment Form**.

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Overtime Commitment Form – Workforce RTA Team

Step 2: Fill Out the OT Commitment Form

1. **Date of Committed OT** → Select the date (must be on your rest day).
2. **Time Limit** → Choose the number of hours (between **4–10 hours only**).
3. **Start Time** → Indicate the time when your OT is set to begin.
4. **End Time** → This will **auto-calculate** based on the Start Time and Time Limit.
5. **Notes/Remarks** → Add any important details related to your OT.
6. **Agreement / Acknowledgement Checkbox** → Tick the box to confirm your understanding and agreement.
7. Once complete, click **Submit**.

Step 3: View Your Filed OT Requests

1. After submission, go to the **My OT Commitments** tab.
2. Here, you can track the status of your request:
    - **Pending** → Awaiting RTA review.
    - **Approved** → OT is confirmed.
    - **Disapproved** → OT request has been declined.

Step 4: Notifications

- Employees will receive updates through:

- **Zoho Cliq ChatBot** notification, or
- **Zoho announcement in ECETrack**.

Step-by-Step Process: OT Commitment Form — RTA Approval Process

Purpose & Context

This process ensures every OT Commitment filed by employees is **reviewed, approved, or disapproved** by RTAs in a timely, consistent way that protects staffing levels, SLA, and policy compliance. RTAs use the **Pending OT Commitments for Approval** tab to act on requests and the **All OT Commitments** tab to monitor, audit, and report across all statuses.

System Paths (RTA)

- **Pending OT Commitments for Approval** – where you review and act on *new/pending* requests.
- **All OT Commitments** – full registry of requests across **Approved/Disapproved/Pending/Retracted** for analytics and reporting.

Step-by-Step

Step 1 — Open the Pending Queue

1. Log in to ECETrack/Zoho Creator.
2. Go to **OT** → **Pending OT Commitments for Approval**.
3. Apply filters as needed (Date range, Site, Account, Status = Pending).

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Overtime Commitment Form – Workforce RTA Team

Step 2 — Pre-Review Checks (at a glance)

Before opening a record, scan columns for:

- **Date** (should be the employee's rest day per policy).
- **Time Limit** (must be **4–10 hours**).
- **Start/End Time** (no conflicts/overlaps).
- **Notes/Remarks** (context for business need).
- **Duplicate** entries (same user, same date).

Step 3 — Open the Request (Record View)

Click the request (or the **Approve/Disapprove** action) to open details. Validate:

A. Identity & Assignment

- Employee name/ID, **Site/Account**, role/team.
- Ensure the request belongs to your assigned program/site.

B. Policy & Form Validations

- Date is a **rest day** (not a scheduled workday).
- **Time Limit** is **4–10 hours**; **End Time** is system-calculated.
- **Agreement/Acknowledgement** checkbox is ticked.
- No **overlapping OT commitments** or entries already approved.

C. Operational Fit

- **Staffing plan**: Is OT required for the stated interval?
- **SLA/Volume**: Will this OT meaningfully support SLA risk periods?

- **Conflicts**: No approved **leave**, training, suspension, LOA/ML, or preventive suspension on the same date.
- **Compliance flags** (if applicable): critical NTE/NODs that bar OT (follow your local policy).

D. Financial/Payroll Alignment (sanity check)

- Within **OT cap or policy limits** (daily/weekly/monthly).
- Will flow cleanly to **Billable Hours** and **Payroll** (avoid split ranges that violate rules).

Step 4 — Decide & Action

Use the action buttons at the top/right of the record or in the grid:

- **Approve**
  - Use when all **policy**, **operational need**, and **no-conflict** checks pass.
  - Add an **Approval Note** (e.g., “Rest-day OT for coverage 14:00–22:00; interval understaffed”).
- **Disapprove**
  - Use when request fails a check (no need, conflicts, not a rest day, exceeds cap, etc.).
  - Enter a **clear reason** (e.g., “Not a rest day”; “Allocation full”; “Conflict with approved VL”; “Over OT cap”).
- **Retract**
  - Use when the employee asked to cancel or you detect a **clerical error** (wrong date/time/account).
  - Add the **reason** (“Employee requested cancellation via Cliq”; “Duplicated entry”; “Filed under wrong account”).
- **Bulk Approval / Bulk Disapproval**

- Multi-select **only** when requests share the same **account/site**, **date**, and **operational rationale**.
- Always confirm uniform **rest-day** status and **time-limit compliance** before bulk action.
- Add a concise **bulk note** (e.g., “Weekend recovery coverage for surge 10:00–18:00; 8 hrs per agent”).

Save the status change to commit the decision.

Step 5 — Post-Decision Updates (System & Comms)

- **Schedule reflection**: Approved OT auto-lands in the employee’s daily schedule.
- **Notifications**: Employees receive updates via **Cliq ChatBot** and/or **Zoho Announcement in ECETrack**.
- **Intraday plan**: Adjust interval staffing grids and break optimization to incorporate the newly approved OT.
- **Escalations** (if disapproving critical requests): Inform Ops/TL with reason and alternatives (e.g., different time window, different agents).

Step 6 — Monitor, Audit, and Report

1. Go to **OT** → **All OT Commitments** to view **everything** (Approved, Disapproved, Pending, Retracted).
2. Build filters/views for:
    - **Status breakdown** by site/account/date.
    - **Fill rate** (approved vs. filed).
    - **Denial reasons** (capacity full, policy conflict, non-rest day, etc.).
    - **Coverage vs. need** (compare approved OT hours to understaff deltas).

---

3. Export or snapshot for weekly **Ops/WFM governance** and **BH/Payroll reconciliation**.

RTA Responsibility & Decision Standard

- **Every OT Commitment must be closed** (approved or disapproved) before the OT date to avoid on-shift ambiguity.
- RTAs ensure approvals **align with staffing needs** by interval and do not create **overstaffing** or **policy violations**.
- RTAs maintain a documented **reason** for every decision to support audit, client queries, and payroll reconciliation.

Common Situations & Mitigations

- **Not a Rest Day** → Disapprove; advise employee to follow standard OT process for working days (if any) or refile on an actual rest day.
- **Slot/Capacity Full** → Disapprove with reason; suggest **alternate time window** or **alternate rest-day** if need persists.
- **Conflict with Approved Leave/Training/Suspension/LOA** → Disapprove; instruct correction (retract leave or pick another date once status changes).
- **Exceeded OT Cap** → Disapprove; escalate to Ops if business-critical and policy allows exception routing.
- **Late Filing (inside freeze window)** → Disapprove per policy; if SLA-critical, escalate for exception approval and document fully.
- **Bulk Needs Change (business demand dropped)** → Use **Bulk Disapprove/Retract** with a clear note; notify impacted employees and Ops.
- **Clerical Errors** → Use **Retract**, then advise refiling with correct details.

Quality & Compliance Checklist (Quick)

- Date is a **rest day**
- Time limit **4–10 hours**; **End Time** auto-calculated
- No **overlaps/duplicates/conflicts** (leave/training/suspension/LOA)
- **Operational need** confirmed (interval coverage/SLA)
- Within **OT caps** and policy limits
- Clear **decision note** entered
- Intraday staffing plan updated (on approval)
- Reflected in **All OT Commitments** views for reporting

✅ Leaves Approval

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Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Leave Process – Workforce RTA Team

Process Guide: Vacation Leave (VL) Approvals Listen to this tab

Objective:
This guide outlines the process for filing, reviewing, and approving Vacation Leave (VL) requests to ensure proper scheduling and adequate staffing coverage.

---

1. Filing a Vacation Leave Request

- Agents must submit their VL requests in **Zoho** at least **7 days in advance** to allow for proper review and approval.
- The request should include the **date(s) of leave** and any other relevant details required in the system.

---

2. Review and Approval by RTA

- **RTAs check VL allocations for specific LOBs** to determine if the requested leave can be accommodated based on staffing needs.c
- VL requests will be **approved or disapproved** based on the following criteria:
  - **Approval**: If VL allocations allow for the requested leave without negatively impacting operations.
  - **Disapproval**: If VL allocations have been exhausted, approving the leave would result in insufficient staffing, affecting SLAs and overall team performance.
- Once a decision is made, RTAs will:
  - **Approve the request in Zoho**, if eligible.
  - **Disapprove the request in Zoho**, if staffing constraints prevent approval.

---

3. VL Plotting in Assembled

- After approving the VL request in Zoho, RTAs must **plot the leave in Assembled** to ensure schedules reflect the approved leave.

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Leave Process – Workforce RTA Team

---

4. Important Reminders

- **Advance Filing**: Requests must be submitted at least **7 days in advance** for consideration. Late requests may not be accommodated.
- **Staffing Considerations**: VL approvals are subject to **staffing levels** and **business needs** to prevent operational disruptions.
- **Communication**: Agents will be notified via Zoho regarding the status of their VL request. If disapproved, they may reach out for further clarification or alternative scheduling options.

Process Guide: Sick Leave (SL) Approval

Objective:
This guide outlines the proper procedure for filing, reviewing, and approving Sick Leave (SL) requests to ensure compliance with company policies while maintaining smooth operations.

---

1. Filing a Sick Leave Request

- Agents must **file their SL request in Zoho immediately after returning** from an absence.
- If the SL request covers **less than 2 days**, no additional documents are required.

---

2. Documentation Requirements for Extended Absences

- If the absence is **2 days or more**, agents are required to submit:
  - A **medical certificate** from a licensed doctor.
  - A **fit-to-work validation** confirming their ability to resume duties.

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Leave Process – Workforce RTA Team

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3. Review and Approval by RTA

- RTAs will **review and approve SL requests in Zoho** based on the provided information.
- For **SL of 2 days or more**, additional validation from the **Clinic** is required before approval. The Clinic will verify the medical certificate and fit-to-work status before RTAs proceed with approval.
- **SL used for recreation or vacation purposes shall not be allowed. RTAs who approved this requests will be reprimanded.**

---

4. Schedule Update in Workforce tool (if applicable)

- Once the SL request is approved in Zoho, RTAs must **update the agent's schedule in Workforce Tool** (if available) to reflect the approved leave.

---

5. Important Reminders

- **Timely Filing:** SL must be filed **immediately upon return** from absence.
- **Medical Certification:** A valid **medical certificate with a fit-to-work clearance** is required for consecutive absences of **2 days or more**.
- **Clinic Validation:** SL requests for **2+ days** require verification from the **Clinic** before approval.
- **Schedule Accuracy:** RTAs must ensure that schedules in **Workforce Tool** (if available) accurately reflect approved SLs.

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Step-by-Step Process for Approving Sick Leave (SL) for Consecutive Absences Exceeding 2 Days

Proper validation of **Sick Leave (SL) requests** is essential to maintain compliance and workforce efficiency. RTAs must follow the steps below before approving any SL request for consecutive absences of **2 or more days**.

Step 1: Review the SL Request and Check Zoho Time Logs

1. Log in to the **Zoho Leave Request Portal** via ECETrack.
2. Navigate to **"Leaves for Approval"** in the left-side menu.
3. Locate the **pending SL request** submitted by the employee.
4. Open the **Zoho Time Logs** to review the employee's attendance history.
5. Verify if there are **any previously approved SLs or absences** that require additional documentation before further approval.

Step 2: Determine If a Medical Certificate (MedCert) is Required

Case 1: If There Is Already ONE Approved SL and Additional Absences Are Filed

- *If the employee already has **one approved SL** and has **further absences pending approval**, then:*
    1. *The employee **must submit a Medical Certificate** (MedCert).*
    2. *The MedCert must be **approved by the clinic** before RTAs can approve the additional SL requests.*

Case 2: If No SL Is Approved Yet, but the Employee Is Absent for 2 or more Consecutive Days

- *If the employee has been absent **for 2 or more consecutive days** and has not yet had any SL approved, then:*
    1. *The employee **must file a Medical Certificate** to the clinic for validation.*

---

2. *The **clinic team must review and approve the MedCert** before any SL request can be processed.*

Step 3: Verify the Medical Certificate Approval Status

1. Go to the **APS Tab** in Zoho.
2. Open either of the following reports to check the employee's MedCert submission:
   - **Upload Medical Certificate Report**
   - **Additional Docs Report**
3. Locate the employee's submitted **Medical Certificate**.
4. Check if the clinic has **approved or denied** the MedCert.

Step 4: Take Action Based on MedCert Approval Status

If the Medical Certificate Is Approved by the Clinic

✅ RTAs can **approve the pending SL requests** for the consecutive absences.
✅ Update the system to reflect the SL approval and ensure the employee is notified.

If the Medical Certificate Is Denied by the Clinic

❌ RTAs **must retract all approved/pending SL requests** associated with the consecutive absences.
❌ Inform the employee that their **SL request cannot be approved** due to non-compliance with medical certification requirements.
❌ Advise the employee to **comply with any additional requirements** as directed by the clinic team.

Step 5: Notify the Employee of the SL Decision

1. If the SL request is approved, send a notification to the employee confirming the approval.
2. If the SL request is denied, inform the employee with **clear instructions** on what actions they need to take (e.g., re-filing MedCert or providing additional documentation).

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Leave Process – Workforce RTA Team

Final Notes

- **Always check for any previously approved SLs** before processing new SL requests.
- **Do not approve additional SLs without a valid MedCert** if the employee has been absent for 2 or more consecutive days.
- **Ensure clinic validation of MedCerts** before finalizing SL approvals.
- **Maintain accurate documentation** in Zoho for transparency and tracking purposes.

NOTE: If half-day absent on CWD, no medical certificate is needed.

✅ SPL Approval

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Solo Parent Leave Process – Workforce RTA Team

Process Guide: Solo Parent Leave (SPL) Listen to this tab

Objective:
This guide outlines the steps for filing, validating, and approving Solo Parent Leave (SPL) requests to ensure compliance with company policies and legal requirements.

Process Flow:

1. Filing an SPL Request

- Employees must submit a leave application via Zoho and attach a copy of their SP ID at least seven (7) days before the intended leave date.
- In cases of emergency, the leave may be availed of without prior notice, subject to approval and proper justification.

  Emergency Cases:
  Emergency Solo Parent Leave may be granted for the following reasons:

  - Hospitalization of the child due to a severe illness or injury.
  - Medical emergencies require immediate parental attention.
  - Natural disasters or calamities affecting the child's welfare.
  - Other urgent circumstances where the physical presence of the solo parent is crucial.

  In such cases, the employee must notify their immediate supervisor and HR as soon as possible and provide supporting documents upon return to work.

- The request should include the following:
  - **Valid Solo Parent ID** issued by the agent's respective city/municipal **DSWD office**.
  - Ensure the ID is uploaded as an attachment to the Zoho request.

2. Verification by RTA

- **Ownership**: RTAs will take responsibility for reviewing and approving SPL requests.
- **ID Verification Steps**:
  1. Confirm that the uploaded Solo Parent ID is valid and clearly legible.

---

2. Check the **expiration or validity date** of the ID to ensure it is current.
3. Verify that the ID matches the agent's personal details in Zoho.

3. Approval of SPL Request

- Once the verification is complete and all requirements are met:
  - The RTA will approve the SPL request in Zoho.
  - If there are discrepancies (e.g., expired ID, missing information), the RTA will notify the agent and request corrections.

Important Reminders:

- **Validity of Solo Parent ID**: The ID must be valid at the time of the SPL request. Expired IDs will not be accepted.
- **Timely Filing**: Agents are encouraged to submit their requests and required documentation well in advance to allow sufficient time for review and approval.
- **Communication**: Any issues or delays in the SPL approval process must be promptly communicated to the agent.

By following this process, we can ensure consistency and compliance with company policies while supporting agents eligible for Solo Parent Leave.

For further questions or clarification, please feel free to reach out.

Step-by-Step Process for Approving/Disapproving SPL (Solo Parent Leave) Requests

Approving or disapproving Solo Parent Leave (SPL) requests requires careful verification of supporting documents and compliance with SPL policies. Follow the steps below to ensure an accurate and efficient approval process.

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Solo Parent Leave Process – Workforce RTA Team

Step 1: Access the SPL Approval Page

1. Open your preferred web browser (Google Chrome, Mozilla Firefox, or Microsoft Edge).
2. Copy and paste the following URL into the address bar:
   Zoho SPL Approval Page
3. Press Enter to open the SPL Leaves for Approval report.

Step 2: Verify Uploaded Supporting Documents

1. Locate the employee's SPL request in the approval queue.
2. Click on the request to review the supporting documents.
3. Ensure the documents meet company guidelines and are valid for SPL approval.
4. If documents are missing, unclear, or invalid, disapprove the request and notify the employee to resubmit the correct documents.

Step 3: Check the Employee's SPL Usage

1. Open a new browser tab and go to the View Attendance Page:
   Zoho View Attendance
2. Use the search/filter function to find the employee's name.
3. Review the total number of SPLs already approved.

---

4. Important Rule:
    - Employees are allowed only 7 SPLs in total.
    - If the employee has already been approved for 7 SPLs, disapprove any additional requests.
    - If the total SPL usage is within the limit, proceed to Step 4.

Step 4: Approve or Disapprove the SPL Request

To Approve:

1. Ensure the employee has not exceeded the 7 SPL limit.
2. Confirm that the supporting documents are valid.
3. Click the “Approve” button.
4. Notify the employee and their immediate supervisor about the approval.

To Disapprove:

1. If the supporting documents are missing or invalid, disapprove the request.
2. If the employee has exceeded the 7 SPL limit, disapprove the request.
3. Click the “Disapprove” button.
4. Provide a clear reason in the pop-up box (e.g., exceeded SPL limit, incomplete documentation).
5. Notify the employee and their immediate supervisor about the disapproval.

Step 5: Ensure Compliance & Record Keeping

1. Double-check the approval/disapproval entries to prevent errors.
2. Maintain an accurate record of SPL requests and their statuses in the system.
3. Regularly update the Workforce Tracking System to reflect approved SPLs.

✅ Bereavement Filing

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Bereavement Leave – Workforce RTA Team

Process Guide: Bereavement Filing Process Listen to this tab

Objective:
This guide outlines the steps for the process of Bereavement Leave requests to ensure compliance with company policies and legal requirements.

Process Flow:

1. Upon the passing of an employee's immediate family member, the employee must immediately inform their direct supervisor or the account's operations manager through direct/private messages or formally by email that they will be availing their 3 days of bereavement leave. Emails must be addressed to the following:

To: Team Lead / Senior Team Lead / Operations Manager / Site HR
Cc: workforcerta@ececontactcenters.com

For easy identification, the email body must contain the following information:

Name of Employee:
Account:
Site:
Dates of Bereavement to be availed:
Relationship to the deceased:

2. Once the email has been received and acknowledged by the Operations team and/or HR team, Agent will file for the bereavement leave in Zoho Attendance (leave request form) with the family member's death certificate attached.

- The Local Civil Registry office may not issue a death certificate immediately and as such, filing of bereavement leave may be done after the dates to be availed has lapsed.
- In the meantime, it is important to note that the agent will be marked ABSENT and will incur APS points on their attendance during the period prior to submission of the BL request.
- Communicate to the agent and the ops team as needed that these will be removed automatically once the BL is requested and approved.

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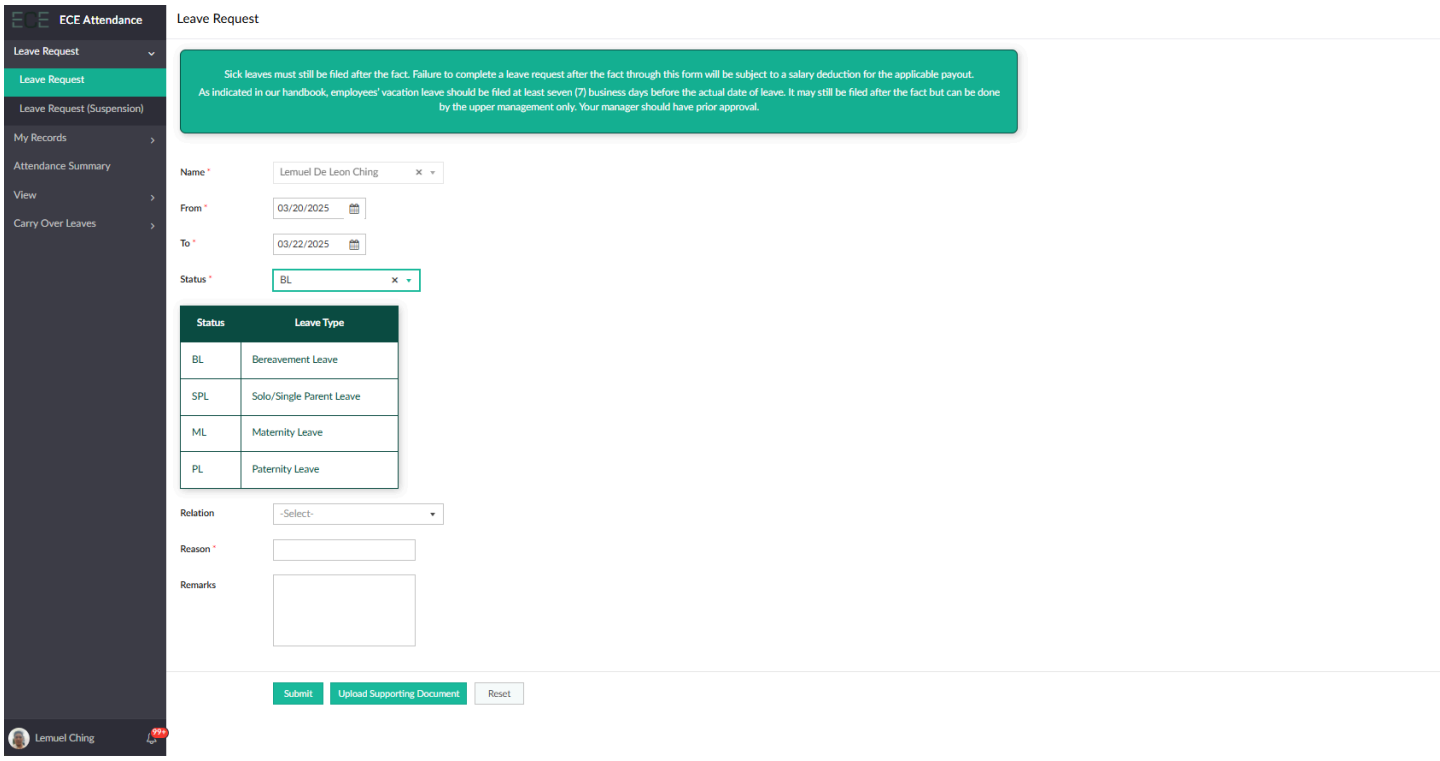
Bereavement Leave – Workforce RTA Team

Bereavement Leave Filing Process (Agent Side)

1. Access the Leave Request page through Zoho Attendance



Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Bereavement Leave – Workforce RTA Team

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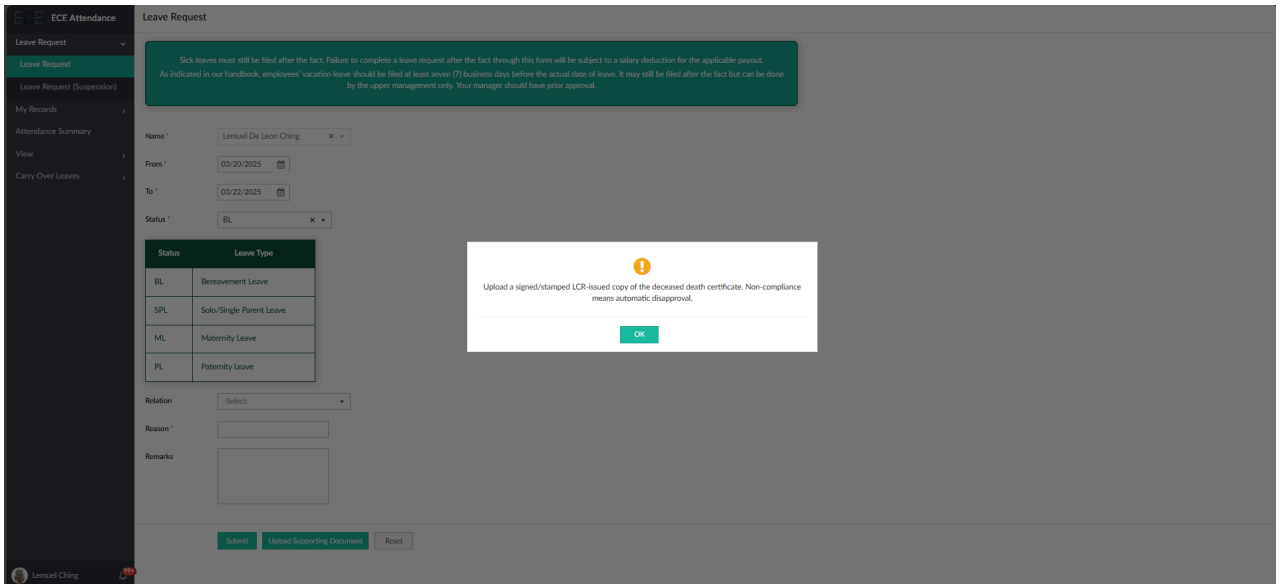
2. Fill in the dates that will be availed for the Bereavement Leave, ensure that the dates has a max range of 3 days. A pop-up confirmation will appear advising filing agent to ensure that they upload a Death Certificate/Embalming Certificate that is stamped and processed by the Local Civil Registry Office. Uploading of any other file will be automatic disapproval (even if the uploaded image is a literal image of the deceased)



3. Continue filling in the form with the following details:
    a. Status: BL (Bereavement Leave; not to be confused with Birthday Leave)
    b. Relation: Your relation to the deceased
    c. Reason: Bereavement Leave (This is a standard field box shared by SL and VL so let's just reiterate BL here)
    d. Remarks: Notes or any reason in general that needs to be shared.

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Bereavement Leave – Workforce RTA Team

Name * Lemuel De Leon Ching

From * 03/20/2025

To * 03/22/2025

Status * BL

Status	Leave Type
BL	Bereavement Leave
SPL	Solo/Single Parent Leave
ML	Maternity Leave
PL	Paternity Leave

Relation Spouse

Reason * Bereavement Leave

Remarks Sample Submission

Submit | Upload Supporting Document | Reset

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Bereavement Leave – Workforce RTA Team

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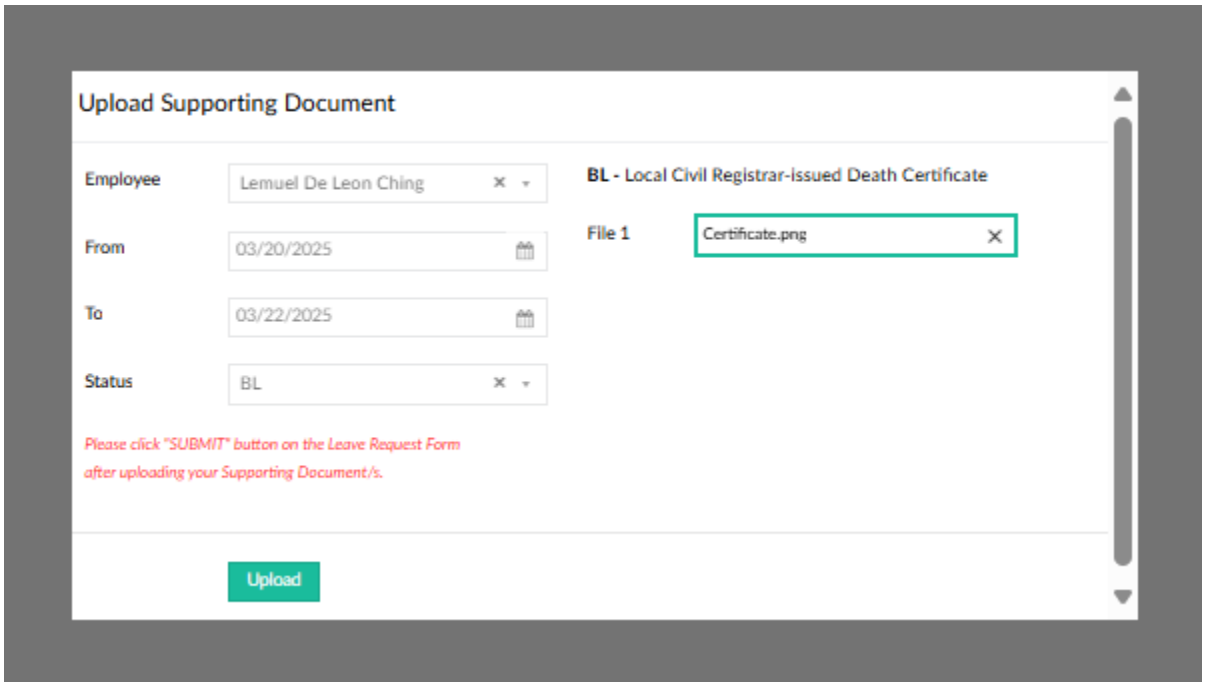
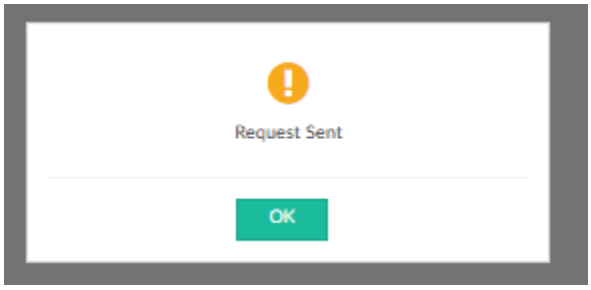
4. Click on the “Upload Supporting Document” button and a pop-up window will show requesting for the document to be uploaded.



Attach the death certificate on this box and hit upload.

5. Once the Document has been uploaded, hit submit. Your Bereavement Leave request has been filed.



Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Bereavement Leave – Workforce RTA Team

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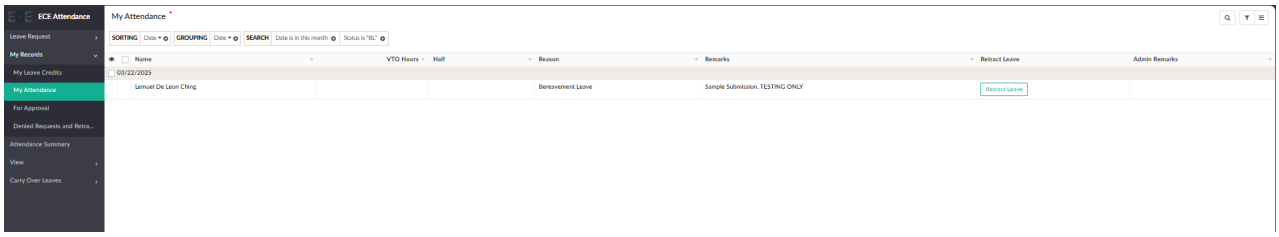
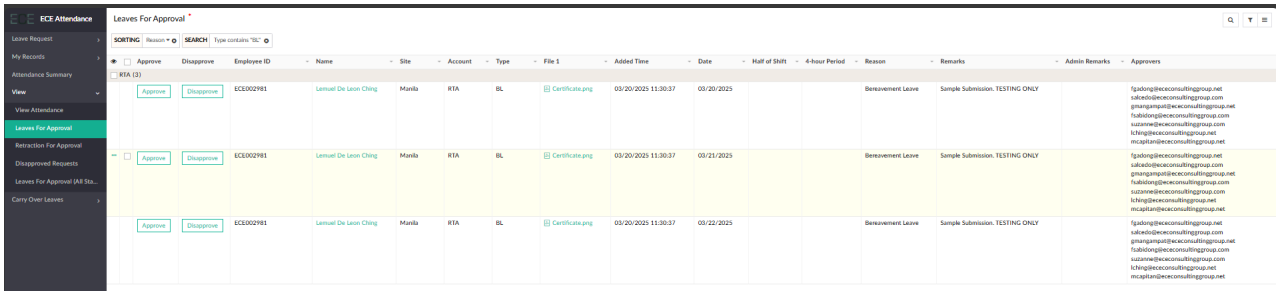
6. For leave retractions, you may go to the My Records > My Attendance Page and click on the “Retract Leave” button and inform any RTA to approve the retraction.



Bereavement Leave Approval Process (Workforce Side)

1. Access the Leave Request page through Zoho Attendance. Go to the Leaves for approval page and filter “Type” to “BL”



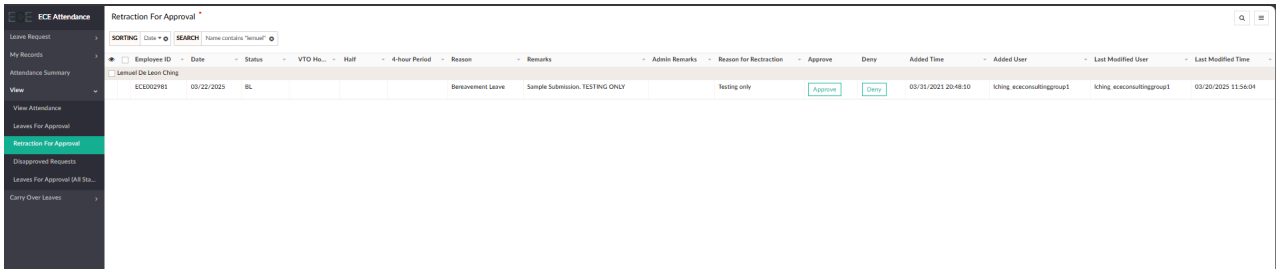
On this page, make sure to check the attached Death Certificate/Embalming Certificate for validity. Let us make sure that the date is recent and matches any declared date on the email sent by the employee and also that the certificate is processed and stamped by the local civil registry or Philippine Statistic Authority.

2. Once the certificate is reviewed and validated, click on the “Approve” button.

3. Should there be any need to retract a bereavement leave, have the agent retract their filed leave and then navigate to the View > Retractions for Approval Page.

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Bereavement Leave – Workforce RTA Team



4. Click on the “Approve” button to retract the filed leave.

FAQs:

Q. Am I entitled to 3 days of bereavement leave per year?
A: You are entitled to 3 days of bereavement leave per qualified family member regardless of year coverage.

Q: Who are the eligible members of my family for me to avail this Bereavement Leave?
A: As per the Handbook, the eligible members are as follows:

- An employee's immediate family includes his/her spouse, children, parents, siblings, parents-in-law, grandparents, and guardian/s, provided that a supporting document is submitted showing the employee's relationship with the deceased.

Q: If I have unused Bereavement leave, can I have these converted to cash just like the VL and SL credits?
A: No, as per the handbook,

- Time taken for the purpose of bereavement will not be counted against the employee when determining Attendance Incentive eligibility. Unused Bereavement Leave credits are not convertible to cash.

Q: How many days do I have to submit the Death Certificate required from me?
A: No specified number of days are set for this. Although, you are required to submit the said documentation as soon as it is released by the Local Civil Registry.

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Bereavement Leave – Workforce RTA Team

Q: Can I file for BL as soon as I've heard/known about the passing of my family member?
A: No, you can only file for BL as soon as you have the required documents in hand. Submitting a BL request without the documentation will be an automatic denial of the request.

Q: If multiple members of my family have sadly passed away, can I use Bereavement Leave credits separately for each member? For instance, if two family members have died, would I be able to take a total of six days off—three days for each member?
A: This would depend on the timing of their passing. If they passed away at the same time, only three days of bereavement leave can be used for both relatives. However, if their passing occurred at different times, bereavement leave can be applied separately for each relative, as long as there is a gap of at least three days between their passing.

✅ Leave Approval Page

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Leave Approval Page – Workforce RTA Team

Step-by-Step Guide: Accessing the Zoho Leave Approval Page

Listen to this tab

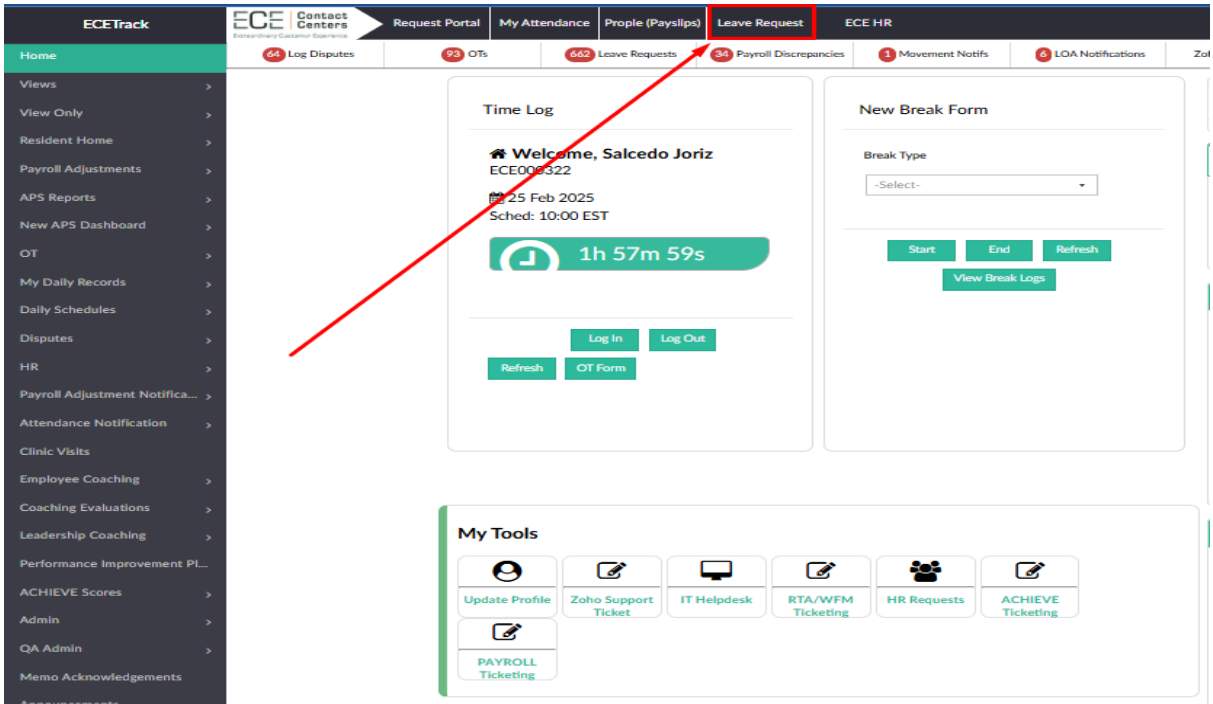
Managing leave requests efficiently is crucial for workforce operations. Below is a **detailed step-by-step process** to access, review, and approve/disapprove leave requests through Zoho.

Step 1: Log in to ECETrack

1. Open your preferred web browser (Google Chrome, Mozilla Firefox, or Microsoft Edge).
2. Navigate to the **ECETrack website** by entering the designated URL provided by your company.
3. Enter your **username** and **password** in the login fields.
4. Click the **"Sign In"** button to access your dashboard.

Step 2: Navigate to the Leave Request Page

1. Once on the **ECETrack home page**, locate the **top menu bar**.
2. Click on the Leave Request tab at the top of the page.
3. This will **redirect** you to the **Zoho Leave Request Portal**, where all leave requests are processed.



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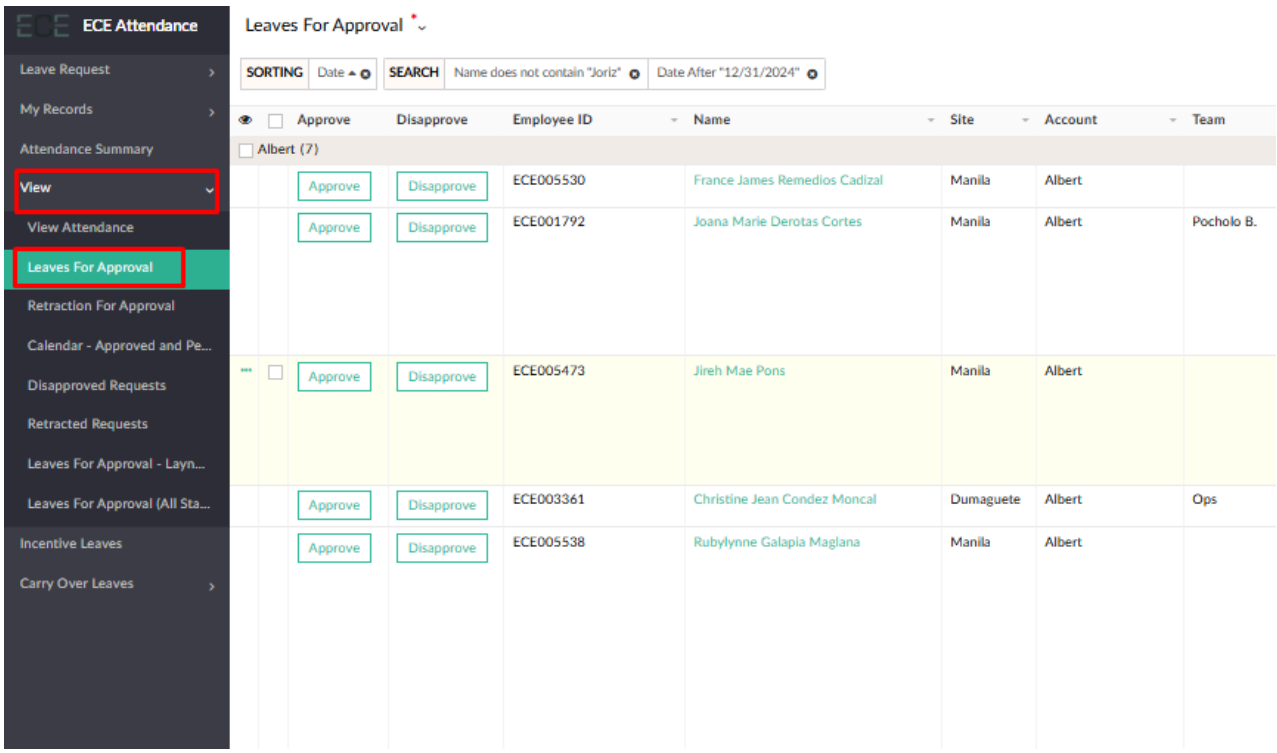
Leave Approval Page – Workforce RTA Team

Step 3: Access the Leave Approval Section

1. In the **Zoho Leave Request Portal**, locate the **left-side navigation panel**.
2. Find the tab labeled **"View"** and **click on it**.
3. From the dropdown menu, select **"Leaves for Approval"**.
4. This section will display a **list of all pending leave requests** submitted by employees.



Note: If you cannot view a certain program/account, please reach out to your RTA leader to request for the access/approver's view of the program/account.

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Leave Approval Page – Workforce RTA Team

Step 4: Reviewing Leave Requests

1. In the **Leaves for Approval** section, you will see the following details:
   - **Employee Name**
   - **Type of Leave (Sick Leave, Vacation Leave, Bereavement Leave, etc.)**
   - **Date Range of the Leave**
   - **Leave Reason (if provided by the employee)**
   - **Current Status (Pending, Approved, or Disapproved)**
2. Click on an employee's request to view additional details.
3. If necessary, cross-check the employee's attendance records in **Zoho Time Logs** to verify leave eligibility.

Step 5: Approving or Disapproving a Leave Request

1. **To Approve a Leave Request:**
   - Click the **"Approve"** button next to the request.
   - The system will automatically update the leave status to **"Approved"** and notify the employee.
2. **To Disapprove a Leave Request:**
   - Click the **"Disapprove"** button.
   - A **pop-up window** will appear, prompting you to enter the reason for disapproval.
   - Type in a **clear and specific reason** (e.g., "Insufficient leave balance" or "Schedule conflict").
   - Click **"Confirm"** to finalize the disapproval.
   - The employee will receive an **automated notification** regarding the disapproval along with the reason provided.

Step 6: Ensuring Accuracy and Compliance

1. Double-check leave requests before approving to prevent **scheduling conflicts** and ensure proper **staffing levels**.

---

2. If the leave request is unclear or missing details, **coordinate with the employee's immediate supervisor** for clarification.
3. Ensure the **Zoho Leave Approval Page is updated** daily to maintain real-time accuracy in scheduling.

Final Notes:

- **Always process leave approvals on time** to avoid payroll discrepancies.
- If there are **technical issues** accessing Zoho, report them to the Programming and Date Team immediately.
- For **urgent leave requests**, ensure real-time coordination with the operations team to maintain adequate workforce coverage.

✅ Retraction Approval

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Retraction Approval – Workforce RTA Team

Step-by-Step Guide: Accessing Zoho Retraction Page Listen to this tab

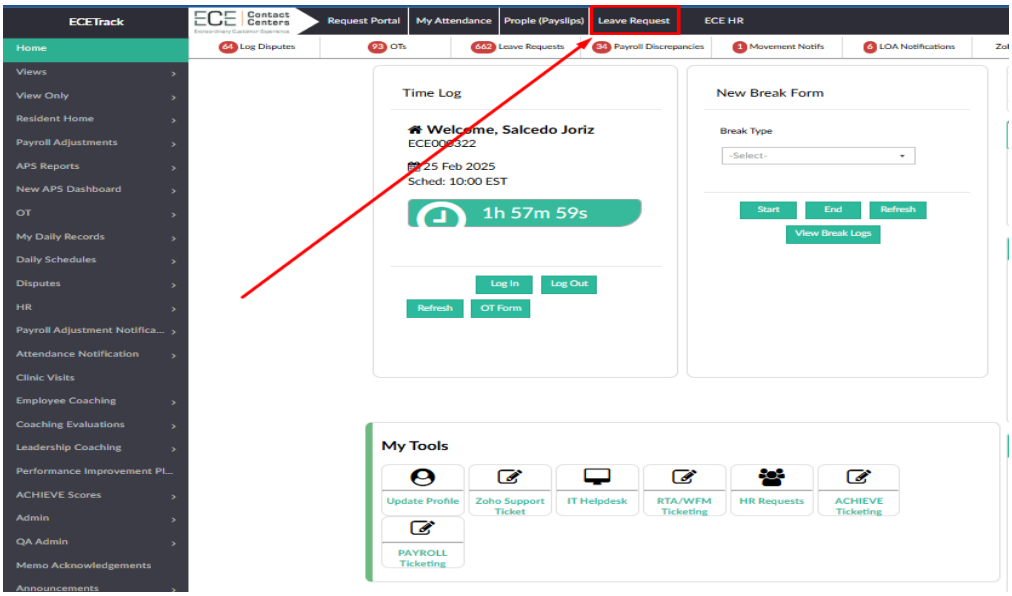
Managing employee leave requests and retractions accurately is crucial for workforce planning and scheduling. Below is a **detailed step-by-step guide** to access, review, approve, or deny retractions using the Zoho Leave Approval Page.

Step 1: Log in to ECETrack

1. Open your preferred web browser (Google Chrome, Mozilla Firefox, or Microsoft Edge).
2. Navigate to the **ECETrack website** by entering the designated URL provided by your company.
3. Enter your **username** and **password** in the login fields.
4. Click the **"Sign In"** button to access your dashboard.

Step 2: Navigate to the Leave Request Page

1. Once on the **ECETrack home page**, locate the **top menu bar**.
2. Click on the Leave Request tab at the top of the page.
3. This will **redirect** you to the **Zoho Leave Request Portal**, where all leave requests are processed.



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Retraction Approval – Workforce RTA Team

Step 3: Accessing Leave Retraction Requests

Method 1: Using the Retraction for Approval Page

1. Inside the **Zoho Leave Request Portal**, go to the **left-side navigation panel**.
2. Click on **"View"** and select **"Retraction for Approval"** from the dropdown menu.
3. This page lists all pending retraction requests submitted by employees.
4. Click on an entry to view the details of the leave request being retracted.

Reviewing Retraction Requests:

- RTAs must verify that the retraction request is valid before approval.
- Consider factors such as:
  - Whether the employee has already taken the leave.
  - Whether retracting the leave will affect workforce coverage.
  - Any scheduling conflicts that may arise due to the retraction.

To Approve a Leave Retraction Request:

1. Click the **"Approve"** button beside the request.
2. The system will **automatically update the leave status**, removing it from the leave records.
3. The employee will receive a **notification confirming the retraction**.

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

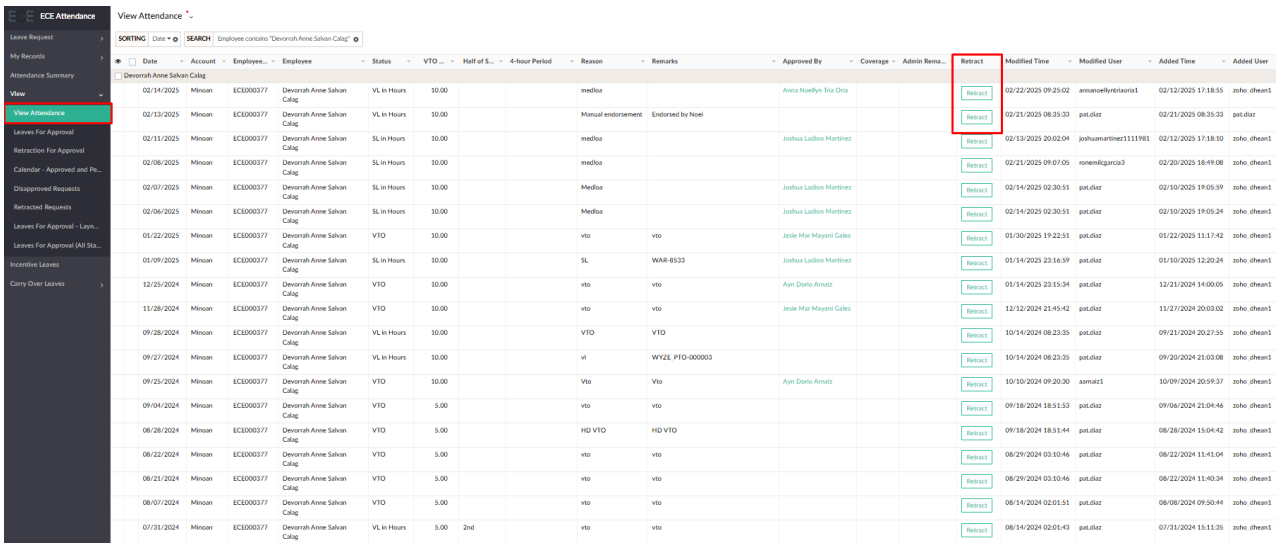
Retraction Approval – Workforce RTA Team

To Deny a Leave Retraction Request:

1. Click the **"Deny"** button.
2. A **pop-up window** will appear, prompting you to enter the reason for denial.
3. Provide a clear reason (e.g., “Employee has already taken leave” or “Workforce coverage impact”).
4. Click **"Confirm"** to finalize the denial.
5. The employee will receive an **automated notification** with the reason for denial.

Step 4: Alternative Method to Retract Leave via the View Attendance Page

1. Inside **Zoho**, navigate to the **View Attendance Page**.
2. Locate the **leave request entry** that needs to be retracted.
3. Click the **"Retract"** button beside the leave request.
4. The system will **automatically remove** the leave request without needing further approval.



Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Retraction Approval – Workforce RTA Team

Step 5: Ensuring Compliance and Accuracy

1. **Verify all leave requests and retractions before approval** to prevent workforce scheduling conflicts.
2. **If a leave retraction is unclear**, coordinate with the employee's immediate supervisor for clarification.
3. **Update workforce tracking tools accordingly** to reflect the most recent leave approvals and retractions.
4. **Ensure the Zoho Leave Approval Page is updated regularly** to maintain real-time accuracy.

Final Notes:

- Employees **must submit leave retraction requests properly** to avoid unauthorized schedule changes.
- If any **technical issues** occur while accessing Zoho, report them to the IT Support Team immediately.
- **Always validate retraction requests** to ensure they align with workforce policies and avoid staffing issues.

✅ Reprocessing Previously Denied Leave Requests

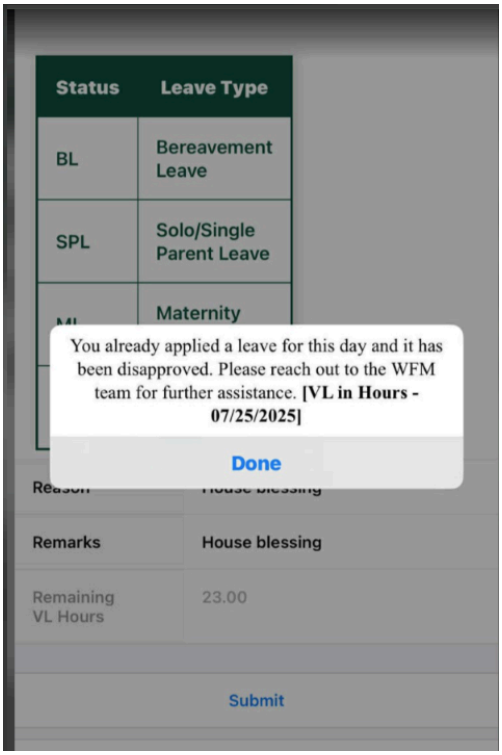
Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Reprocessing Previously Denied Leave Requests

Reprocessing Previously Denied Leave Requests Listen to this tab

Context:

There might be some leave requests that have been denied by the Workforce RTA team due to slot limitations or business need restrictions. In such cases, the employee must reach out to the WFM RTA team to receive further instructions and guidance on the next steps.



Step-by-Step Process for Reprocessing Previously Denied Leave Requests

Step 1: Log In to ECETrack

- Open your preferred browser (Google Chrome, Mozilla Firefox, or Microsoft Edge).

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Reprocessing Previously Denied Leave Requests

- Go to the ECETrack website using the designated company URL.
- Enter your login credentials (username and password).
- Click on the **"Sign In"** button to access your dashboard.

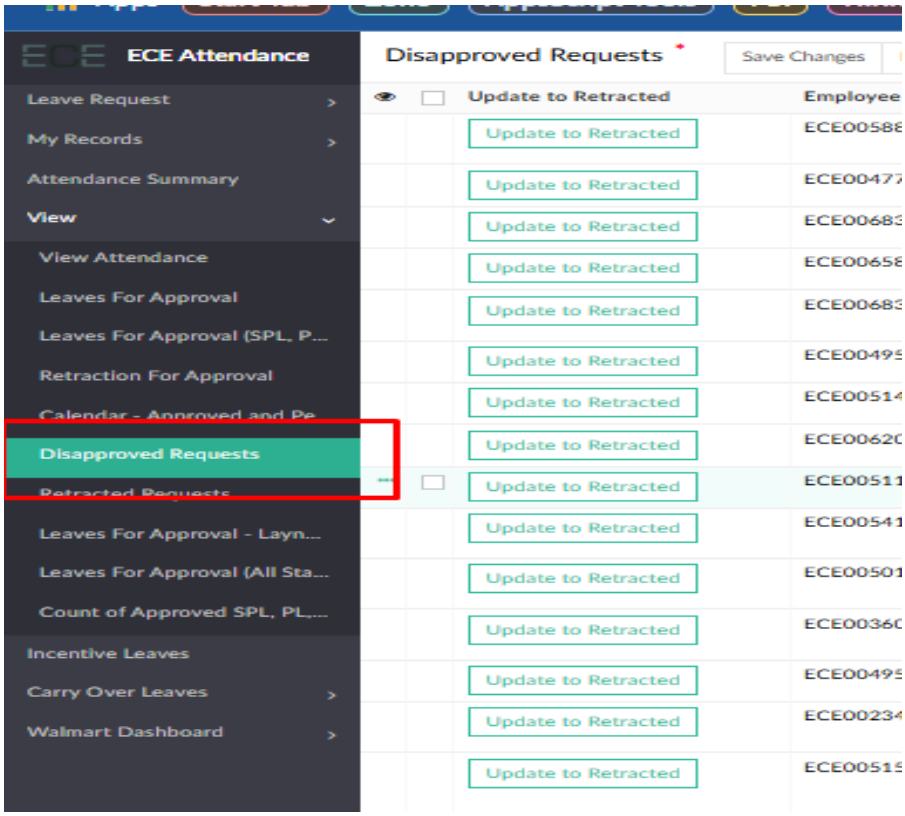
Step 2: Access the Disapproved Leave Requests

- On the ECETrack homepage, navigate to the top menu bar.
- Click on **"Leave Request."**
- Click Disapproved Requests or alternatively, go directly to this link:

  https://creatorapp.zoho.com/ececonsultinggroup/ece-attendance-manila/#Report:Disapproved_Requests

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

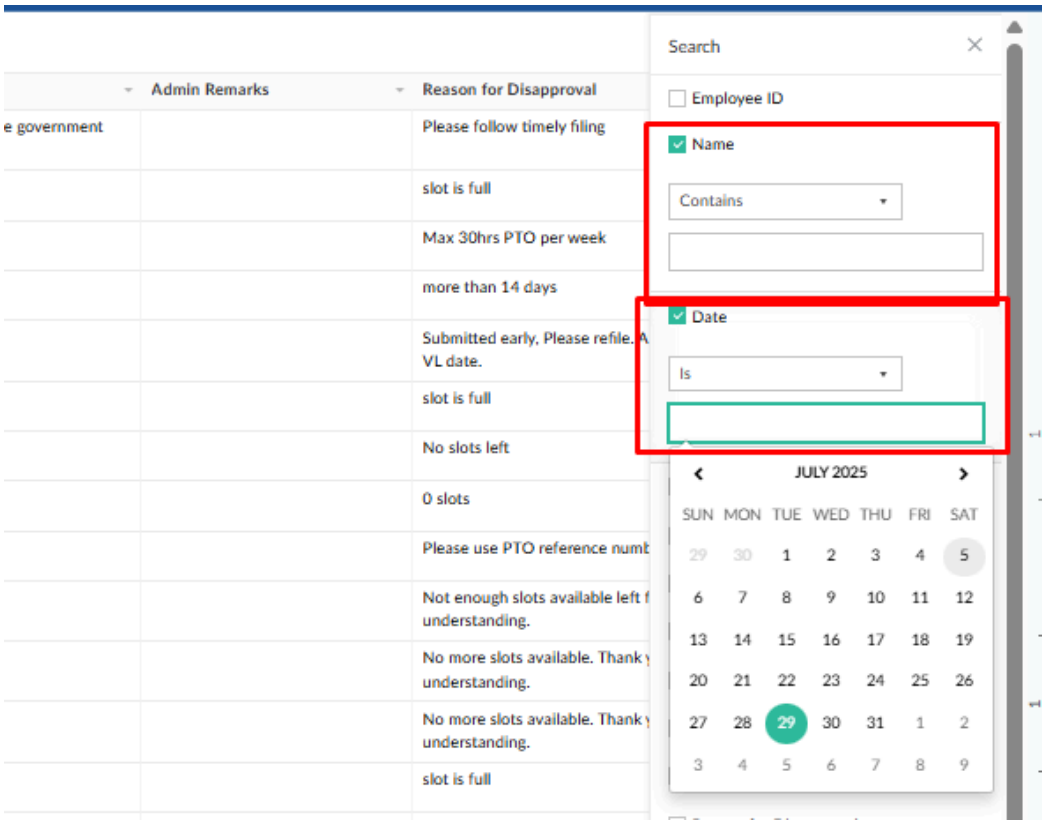
Reprocessing Previously Denied Leave Requests



- Filter the page using the **employee's name** and **date of the leave application** to locate the denied request.

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Reprocessing Previously Denied Leave Requests



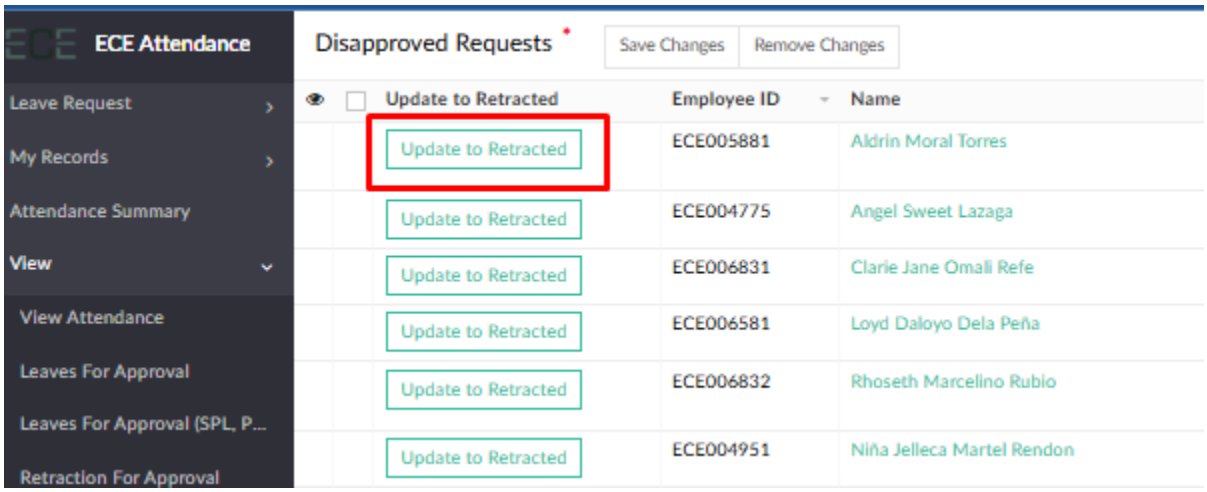
Step 3: Determine the Appropriate Action Based on Scenario

✅ Scenario 1: Additional Documentation Is Required (e.g., SL, SPL, BL, etc.)

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Reprocessing Previously Denied Leave Requests

- If the denied leave was due to **missing or incomplete documents**:
  - Click the **"Update to Retracted"** button.
  - Advise the employee to refile the leave request with complete documentation (e.g., medcert, SPL proof, etc.).
  - Once resubmitted, follow the standard **Leave Request Approval** process to review and approve the request.

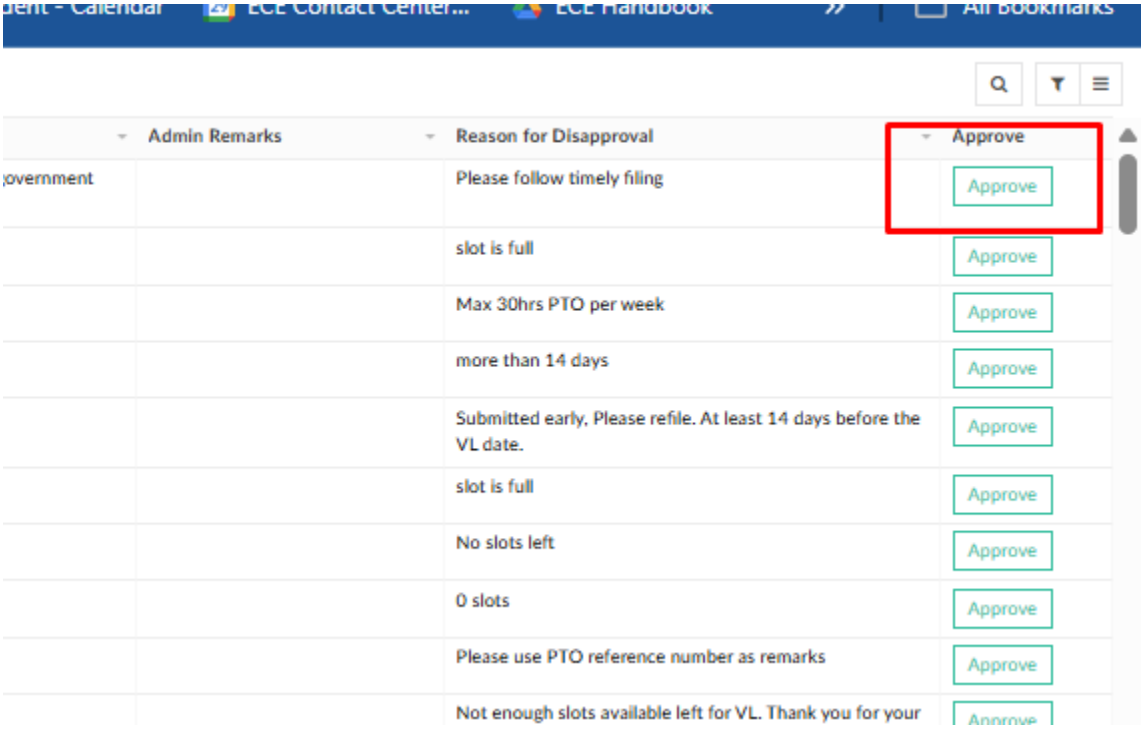


✅ Scenario 2: No Additional Documentation Needed (e.g., VL or previously verified SL)

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Reprocessing Previously Denied Leave Requests

- If the request was **denied due to slot limitations** or **business needs**, and now there's available allocation:
  - Click the **"Approve"** button directly from the Disapproved Requests page.
  - No need for the employee to refile.
  - This is commonly applied for **Vacation Leave (VL)** or previously reviewed SLs without documentation issues.



✅ Scenario 3: RTA Error in Disapproval

- If the denial was done by **mistake or clerical error** by the RTA:
    - Re-validate the request.
    - Click the **"Approve"** button directly without requiring the employee to refile.

Step 4: Notify the Employee

- Regardless of the scenario, notify the employee via Cliq or email of the action taken:
    - Whether the leave was retracted for refiling.
    - Or if the request has been reapproved.
- This ensures proper documentation and alignment with the employee's schedule and payroll.

Important Reminders

- RTAs should monitor these reprocessed requests to ensure they reflect in Zoho Time Logs.
- All reapproved leaves should match the **leave type policy** and should not exceed allocated limits.
- Any discrepancy must be flagged to the Workforce RTA SME or RTA Leads.

✅ Attendance Notification

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Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Attendance Notification Process – Workforce RTA Team

Attendance Notification Process

Listen to this tab

1. Purpose

This SOP establishes a standardized process for attendance notifications to ensure proper documentation and tracking of employee absences and tardiness. It aims to maintain workforce efficiency by ensuring RTAs and immediate supervisors are informed and aligned.

---

2. Scope

This SOP applies to all Workforce Real-Time Analysts (RTA), employees, and operations team members responsible for tracking attendance notifications. It covers all instances of employee tardiness and absences, whether reported through Batphone, immediate supervisors, or other approved channels.

---

3. Responsibilities

- Employees must notify their immediate supervisor or the designated attendance reporting channel (Batphone, email, or any approved method).
- Immediate supervisors/RTAs must log any reported attendance notifications into the Zoho Attendance Notification Form if the employee fails to do so.
- RTAs are responsible for monitoring, verifying, and ensuring all attendance notifications are logged correctly.
- The Workforce team must track attendance trends and escalate recurring violations when necessary.

---

4. Attendance Notification Process

Step 1: Employee Notification

- Employees must inform their immediate supervisor/RTA or use Batphone as soon as they become aware that they will be late or absent.
- Notifications must be made at least at least **2 hours before and 2 hours after** that s/he will be out of work.

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Attendance Notification Process – Workforce RTA Team

- If an employee fails to notify, it will be considered a No Call No Show (NCNS), which may lead to disciplinary action.

D. No-Call, No-Show

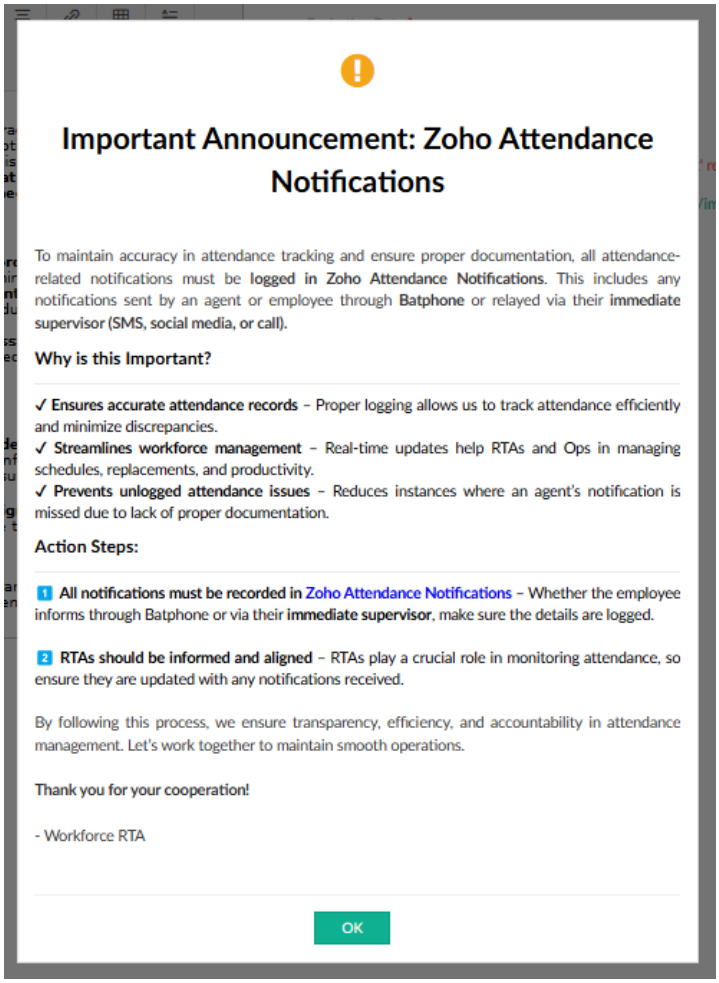
An employee who fails to observe the notification procedure in section C above and who fails to inform their Supervisor of their tardiness or absence from work at least two (2) hours before and two (2) hours after the start of their shift shall be considered to be on No-Call, No-Show (NCNS), hence absent, and will be dealt with accordingly.

Step 2: Logging Attendance Notification in Zoho

- All notifications must be recorded in the **Zoho Attendance Notification Form** by either the employee or the immediate supervisor/RTA if the employee is unable to do so.

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Attendance Notification Process – Workforce RTA Team



Important Announcement: Zoho Attendance Notifications

To maintain accuracy in attendance tracking and ensure proper documentation, all attendance-related notifications must be **logged in Zoho Attendance Notifications**. This includes any notifications sent by an agent or employee through **Batphone** or relayed via their **immediate supervisor (SMS, social media, or call)**.

Why is this Important?

✓ **Ensures accurate attendance records** – Proper logging allows us to track attendance efficiently and minimize discrepancies.
✓ **Streamlines workforce management** – Real-time updates help RTAs and Ops in managing schedules, replacements, and productivity.
✓ **Prevents unlogged attendance issues** – Reduces instances where an agent's notification is missed due to lack of proper documentation.

Action Steps:

1 **All notifications must be recorded in Zoho Attendance Notifications** – Whether the employee informs through Batphone or via their **immediate supervisor**, make sure the details are logged.

2 **RTAs should be informed and aligned** – RTAs play a crucial role in monitoring attendance, so ensure they are updated with any notifications received.

By following this process, we ensure transparency, efficiency, and accountability in attendance management. Let's work together to maintain smooth operations.

Thank you for your cooperation!

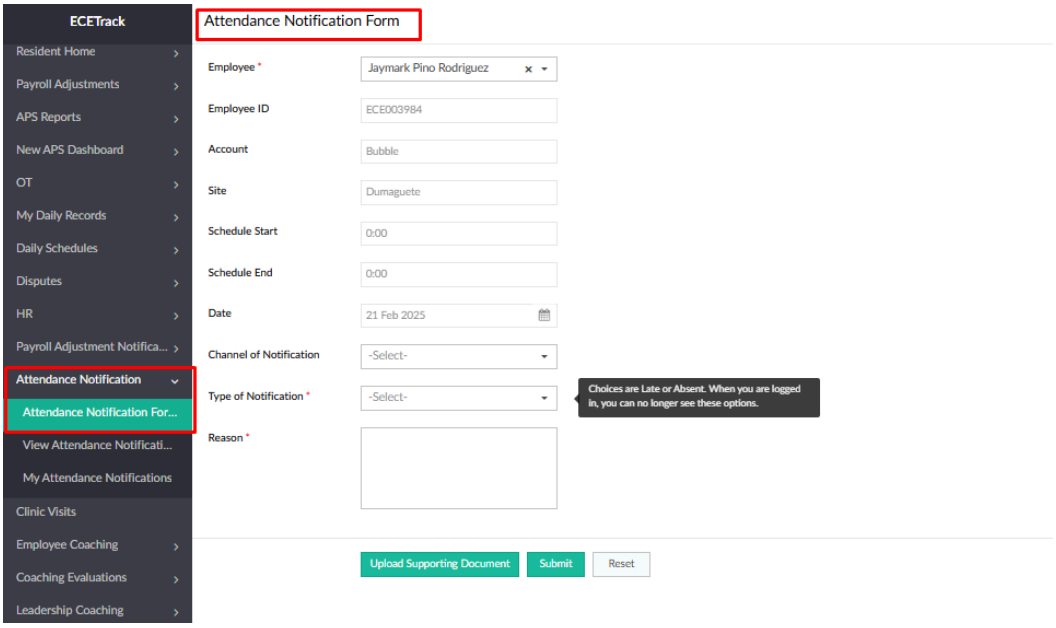
- Workforce RTA

OK

- Required details to be filled out:
  - Employee Name
  - Channel of Notification (Batphone, Direct Message, Email, Supervisor Report, etc.)
  - Type of Notification (Absent or Late)
  - Reason for Absence or Tardiness (Personal, Medical, Emergency, etc.)
  - Expected Return Date (if applicable)
  - Additional Notes (Supporting Documents, Expected Delays, etc.)

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Attendance Notification Process – Workforce RTA Team



Step 3: RTA Review and Confirmation

- The assigned RTA must review attendance notifications in Zoho and ensure that they are updated correctly.
- Any inconsistencies or missing details should be clarified with the immediate supervisor before finalizing the log.
- RTAs should acknowledge the receipt of the attendance notification in Zoho to confirm that the absence or tardiness has been properly recorded.

Step 4: Updating Workforce Tools & Staffing Impact Assessment

- RTAs should update workforce tools to reflect attendance notifications in real-time.
- If an employee's absence affects staffing levels, RTAs should notify operations to coordinate any necessary adjustments such as reassigning workload or securing additional support.

---

5. Situational Events & Mitigations

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Attendance Notification Process – Workforce RTA Team

Scenario 1: Employee Fails to Notify

- If an employee does not inform their absence or tardiness within the required time frame, the immediate supervisor should attempt to contact them.
- If no response is received within the first two hours of the shift, it will be marked as **NCNS**, and the case should be escalated to HR.
- RTA should log the incident for documentation purposes.

Scenario 2: Employee Notifies Outside Zoho

- If an employee notifies via personal message, chat, or other informal methods, the immediate supervisor must log it into Zoho on their behalf.
- RTA should cross-check and confirm the accuracy of manually entered attendance notifications.

Scenario 3: Repeated Attendance Violations

- If an employee exhibits repeated tardiness or absences, RTAs should track the pattern and notify operations.
- If needed, operations should initiate an investigation and issue a Notice to Explain (NTE) based on the company's attendance policy.

Scenario 4: Late Submission of Notification

- If an employee submits a late notification (after the shift has started), it will still be logged, but a note should be added indicating the late report.
- The employee's immediate supervisor should follow up with the employee to remind them of the proper notification timeframes.

Scenario 5: Absence Due to Emergency

- If an employee is unable to notify due to an emergency, they must provide a valid explanation upon returning to work.
- Supporting documents (such as medical certificates) should be submitted if applicable.
- The RTA should coordinate with HR if further documentation is needed.

---

6. Compliance & Monitoring

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Attendance Notification Process – Workforce RTA Team

- RTAs must ensure that the Zoho Attendance Notification Form is regularly updated and reviewed.
- Attendance trends should be analyzed monthly to identify recurring attendance issues and potential corrective actions.
- HR and Operations should work together to reinforce the attendance policy and take necessary disciplinary actions when required.

---

7. Review & Updates

- This SOP should be reviewed periodically to incorporate improvements in the attendance notification process.
- Any updates or revisions should be communicated to all relevant stakeholders.

Updates

NCNS Policy Clarification - 2/13/2025

- Clarification on tagging of No Call, No Show (NCNS).
- Employees who report to work despite not notifying within the required attendance notification window:
  - Will NOT be tagged as NCNS.
  - Will accrue APS based on:
    - Late arrival, or
    - Half-Day (HD) Absence.
- NCNS tagging is automated.
- If incorrectly tagged:
  - Employee must file a dispute via the WFM ticketing system for correction.

✅ Suspension Process

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Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Employee Suspension Process – Workforce RTA Team

Suspension Process

Effective Date: February 24, 2025 Listen to this tab

Overview

All employee suspensions must be properly documented and plotted by the Workforce RTA team to ensure accurate staffing projections and prevent unauthorized logins or leave filings during the suspension period. Suspensions may occur due to the following reasons:

- Suspension due to Attendance Pointing System (APS)
- Suspension due to other handbook violations
- Preventive Suspension

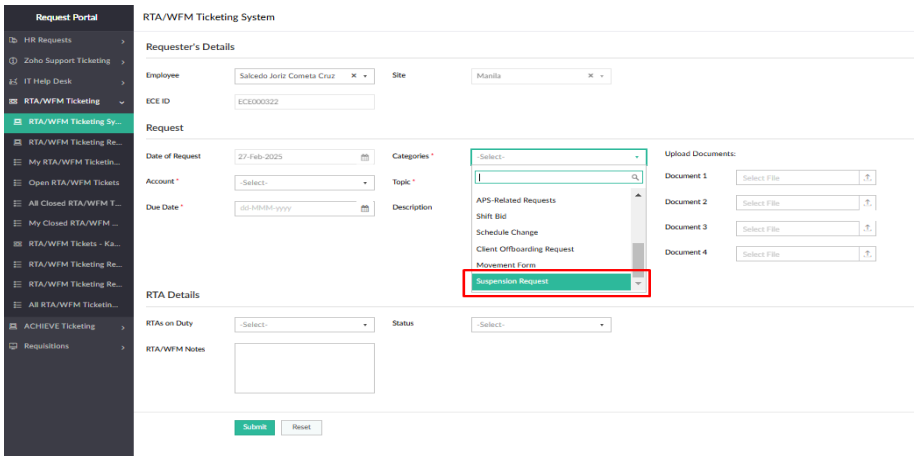
Process Flow

1. Suspension Due to Handbook Violations and Preventive Suspension

1. **Operations Team Request:**
    - The Operations team must file a **Workforce Management (WFM) ticket** selecting the category **"Suspension Request"** and indicating:
        - Employee name and details
        - Violation or reason for suspension
        - Recommended suspension dates
        - Any relevant documentation (e.g., NOD, screenshots, or case notes)

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

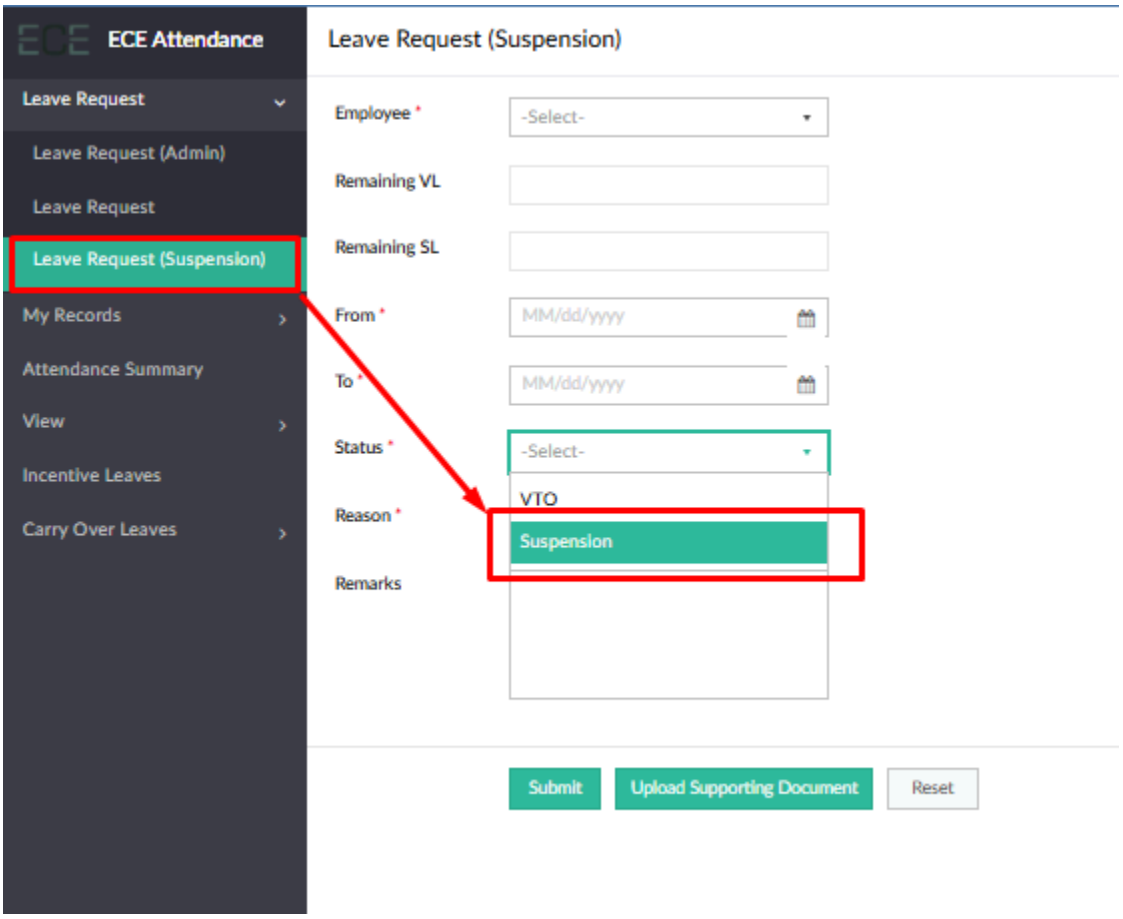
Employee Suspension Process – Workforce RTA Team



2. **Coordination with RTA:**
   - The Operations team must coordinate with the assigned RTA for the program.
   - The RTA will evaluate the proposed suspension dates based on staffing availability.
   - Adjustments may be recommended to minimize staffing impact while ensuring compliance with disciplinary action timelines.
3. **Filing the Suspension in Zoho:**
   - The RTA will input the approved suspension details into the **Zoho Leave Request (Suspension) Form** (NOT the standard Leave Request Form).
   - The suspension must be properly labeled with the reason and approved dates.
   - The RTA must confirm the final plotted suspension with the Operations team.

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Employee Suspension Process – Workforce RTA Team



4. **Preventing Unauthorized Work During Suspension:**
   - Once filed, the suspension details must be logged to prevent the affected employee from:
     - Logging into the system on the suspension date
     - Filing **Sick Leave (SL)** or **Vacation Leave (VL)** during the suspension period
   - If the employee attempts to log in or file leave, the RTA must notify the Operations team immediately for corrective action.

2. Suspension Due to Attendance Pointing System (APS)

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Employee Suspension Process – Workforce RTA Team

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1. **Receipt of NOD for Suspension:**
   - The **APS Point of Contact (POC)** creates the **Notice of Decision (NOD) for Suspension** for an employee due to APS violations.
   - The APS POC must coordinate with the assigned RTA and Operations team to determine the appropriate suspension date.
2. **Scheduling Suspension Dates:**
   - The RTA will evaluate the staffing impact and work with the Operations team to select the best dates for suspension.
   - Adjustments can be made to avoid staffing shortages while ensuring compliance with the APS disciplinary process.
3. **Filing in Zoho:**
   - Once a date is confirmed, the **APS POC** must log the suspension in the **Zoho Leave Request (Suspension) Form**, ensuring all required details are included.
   - The reason for suspension must be clearly labeled as **APS Suspension** to differentiate it from other disciplinary suspensions.
4. **Ensuring Compliance:**
   - The RTA must cross-check employee schedules to ensure no conflicting leave requests exist.
   - If an employee attempts to file leave or log in on their suspension date, the RTA must escalate the issue to the Operations team for intervention.

Situational Events and Mitigation Plans

Scenario 1: Employee Attempts to Work on a Suspension Date

Issue: The suspended employee logs in despite the recorded suspension.

Mitigation:

- The RTA must immediately flag the login activity and notify the Operations team.
- If the login was intentional, HR should be informed for further disciplinary action.

- If the login was due to a system error, IT/Programming team should be engaged to correct access permissions.

Scenario 2: Employee Files Leave on a Suspension Date

Issue: The employee submits a leave request (SL/VL) to avoid suspension.

Mitigation:

- The RTA must reject any leave request that overlaps with the scheduled suspension.
- The Operations team must remind the employee that suspension days are mandatory and cannot be converted into leave days.

Scenario 3: Conflict Between Suspension Date and Critical Staffing Needs

Issue: The proposed suspension date coincides with a period of high call volume.

Mitigation:

- The RTA should recommend adjusting the suspension date to a period of lower demand while still ensuring compliance with disciplinary timelines.
- If the adjustment is not possible, additional temporary staffing measures should be considered to maintain service levels.

Scenario 4: Operations Team Fails to Submit Suspension Request

Issue: An employee's violation has been confirmed, but the Operations team has not submitted the required WFM ticket.

Mitigation:

- The RTA must proactively follow up with the Operations team if a suspension request is expected but not received.
- If the delay is critical, escalate the issue to the Workforce Manager or HR Director to ensure compliance with disciplinary procedures.

Final Confirmation and Documentation

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

Employee Suspension Process – Workforce RTA Team

- Once a suspension is plotted, the RTA must **confirm the final suspension dates** with the Operations team.
- A record of all suspensions must be kept for audit purposes, and HR should be informed if any discrepancies arise.

This SOP ensures that all suspension processes are executed smoothly, minimizing operational disruptions while maintaining compliance with company policies.

✅ WFM Ticketing

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Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

WFM Ticketing System

WFM Ticketing System

Listen to this tab

Objective

This Standard Operating Procedure (SOP) outlines the guidelines for the RTA/WFM (Real-Time Analytics/Workforce Management) Ticketing System, with a focus on the benefits, processes, and best practices for streamlining RTA-related requests, managing, and prioritizing them effectively.

Introduction

The RTA/WFM Ticketing System is a crucial component of our organization's workflow, designed to streamline the process of handling RTA-related requests, ensuring efficient management and prioritization. This system helps us maintain operational excellence by addressing issues promptly, optimizing resources, and enhancing customer satisfaction.

Benefits of the RTA/WFM Ticketing System:

- **Efficiency and Organization:** The ticketing system centralizes all RTA-related requests, creating an organized repository. This streamlines communication and ensures that no request is overlooked.
- **Prioritization:** Tickets allow us to prioritize requests based on their urgency and impact on operations, ensuring that critical issues receive immediate attention.
- **Accountability:** By assigning tickets to responsible individuals or teams, the system promotes accountability and transparency in managing RTA requests.
- **Historical Data:** The system archives all ticket data, providing a valuable resource for analysis, trend identification, and process improvement.

Ticket Creation Process:

- **Request Submission:**RTA-related requests can be submitted using the designated RTA/WFM Ticketing System Form available at the following link: RTA/WFM Ticketing System Form. This online form serves as the primary channel for submitting RTA-related requests. The ticket should include:
  - ➔ Requester's information
    - ◆ Employee name, ECE ID, Site and Account.
  - ➔ Category

Category	Description

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

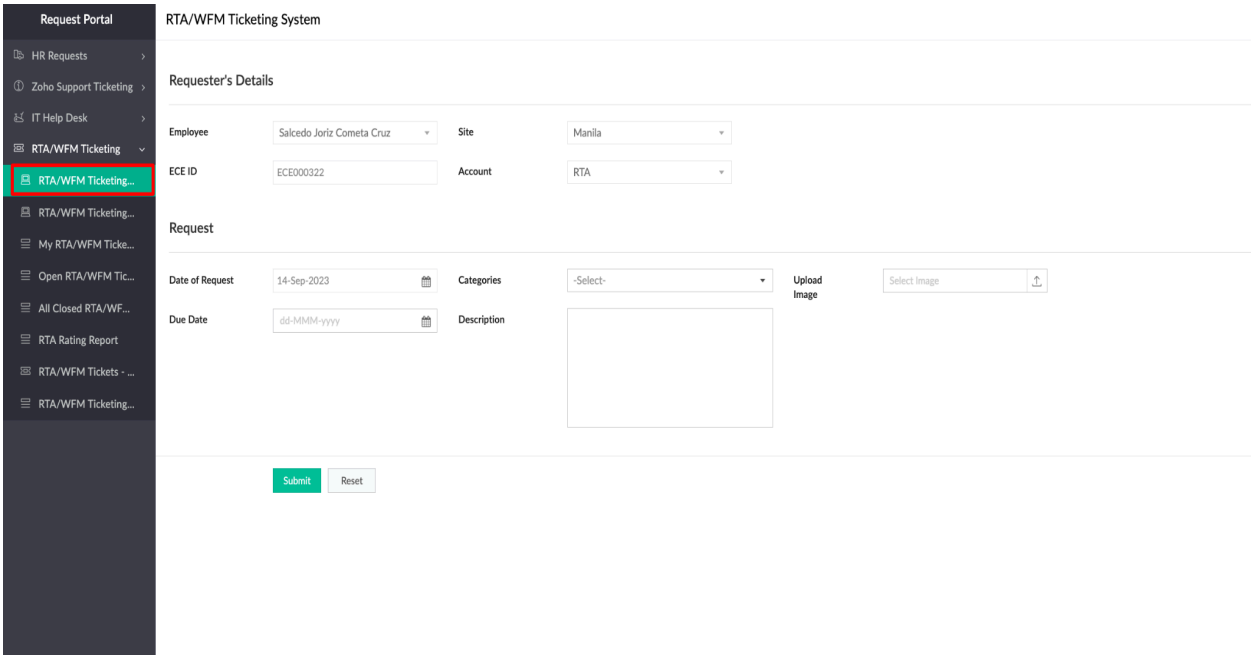
WFM Ticketing System

Productivity Report	Reports focusing on measuring and analyzing productivity levels within the program
Attendance-Related Report	Reports detailing attendance records and related metrics, such as adherence and absenteeism.
Client Request	Requests from clients for specific services, information, or assistance from the program.
Staffing Analysis	Reports analyzing staffing levels, including workforce optimization, staffing gaps, and resource allocation.
Billable Hours	Records and reports tracking the number of hours worked by employees.
WBR or MBR Report-Related	Reports related to Weekly Business Reviews (WBR) or Monthly Business Reviews (MBR), providing insights on performance and goals.
Shift Bid	Requests or processes related to employees bidding for shifts.
Incentive Report	Reports detailing incentives or rewards earned by employees based on performance, sales, or other criteria.
Offline Activity Request	Requests or CRM plotting of event related to activities conducted offline requests such as coaching, meeting, training etc.
Schedule Change	Requests for changes to employee schedules, including shift swaps, time off requests, or adjustments in working hours.
APS-Related Requests	Requests or inquiries related to the Attendance Pointing System (APS)
Movement Form	Requests for changes in position, account, promotion, or transition from non-billable to billable roles and change of team leaders or senior team leaders.
Client Offboarding Request	Requests for deactivation of client-provided tools and system access when offboarding employees.
Suspension Request	Requests for temporary suspension of an employee

- ➔ Detailed description of the request
- ➔ Due Date
- ➔ Attachments such as image or relevant documents.

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

WFM Ticketing System



- **Ticket Creation:** Upon receipt, a designated team member will accept the ticket in the RTA/WFM Ticketing System.
- **Initial Assessment:** The ticket assignee reviews the request and assesses its urgency and impact on operations. They may request additional information if needed.

Ticket Management:

- **Assigning Tickets:** Tickets are assigned to the appropriate RTA or team based on their nature. This ensures that the right expertise is applied to each request. Fernando Gadong II Suzanne Arnelyn Funelas Jhon Patrick Aseñas Joriz Cruz will assign the tickets to the right RTA based on expertise through this view or the RTA can accept the ticket on their own.

Ticket Assignment Criteria

1. **Program Support**
   - Each RTA is assigned to a specific program or set of accounts.

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

WFM Ticketing System

- Tickets will first be routed to RTAs supporting the relevant program based on their login time and number of pending tickets on their bucket (Maximum pending tickets is 6)

2. **Category-Based Assignment**
   - Different types of requests require specific expertise.
   - Tickets will be assigned based on the request category and the skill set needed to process them.
3. **Skill-Based Assignment**
   - RTAs have designated skills and areas of expertise.
   - Tickets will be handled by the appropriate personnel according to the category of request.

Skills	Categories
Team Leader	Attendance-Related Report,Billable Hours Incentive Report Productivity Report Staffing Analysis WBR or MBR Report-Related Client Request Offline Activity Request APS-Related Requests Shift Bid Movement Request
APS Specialist	APS-Related Requests
Workforce Management Analyst	Staffing Analysis
Billable Hour Analyst	Billable Hours
Data Analyst	Attendance-Related Report Incentive Report Productivity Report WBR or MBR Report-Related Client Request Shift Bid Schedule Change Client Offboarding Request Suspension Request
Real Time Analyst	Attendance-Related Report Offline Activity Request Schedule Change Client Offboarding Request Suspension Request

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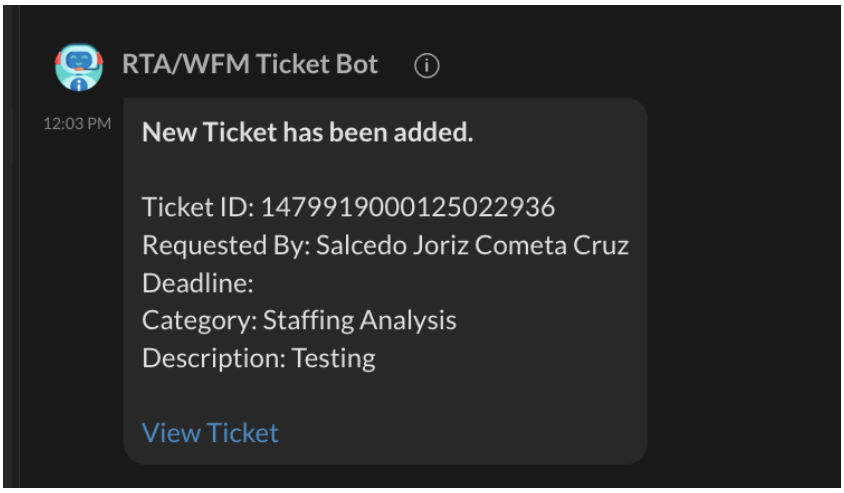
Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

WFM Ticketing System

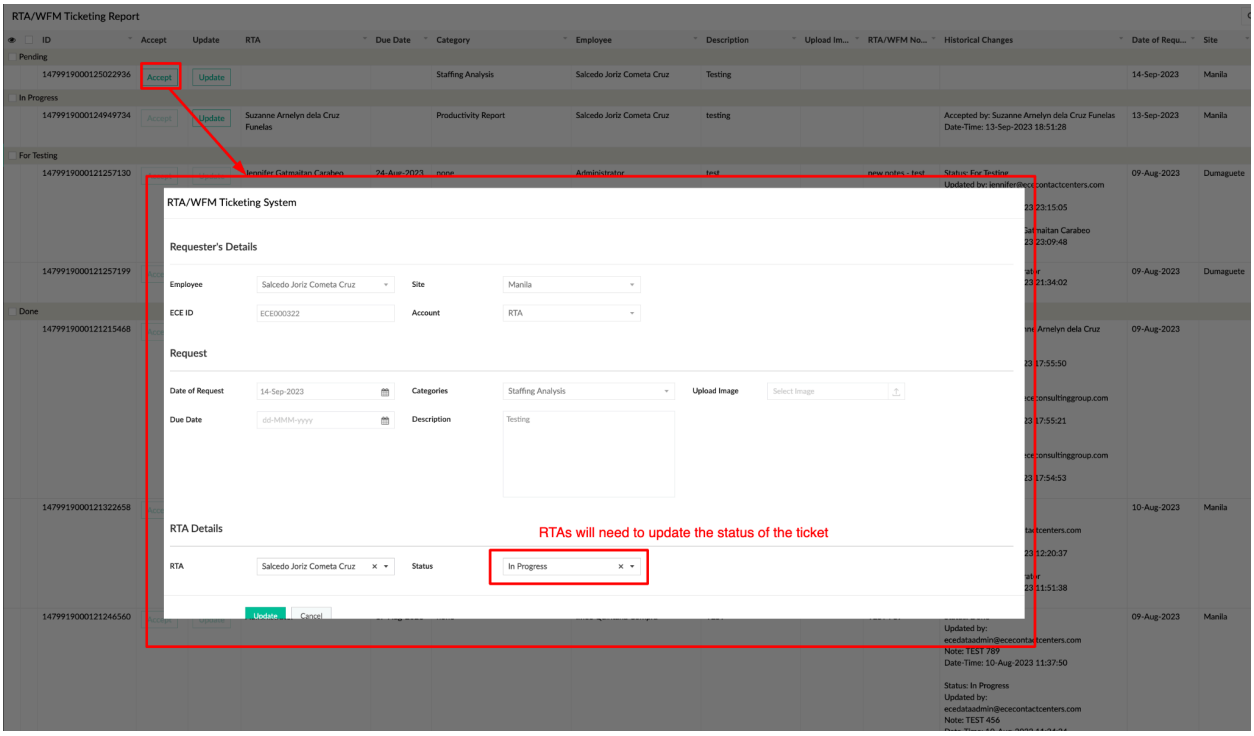
RTA Action Item

RTA Accepting the ticket:

- *Once the ticket has been submitted, a bot message from Cliq will be received indicating a new request has been submitted. All RTAs will be notified.*



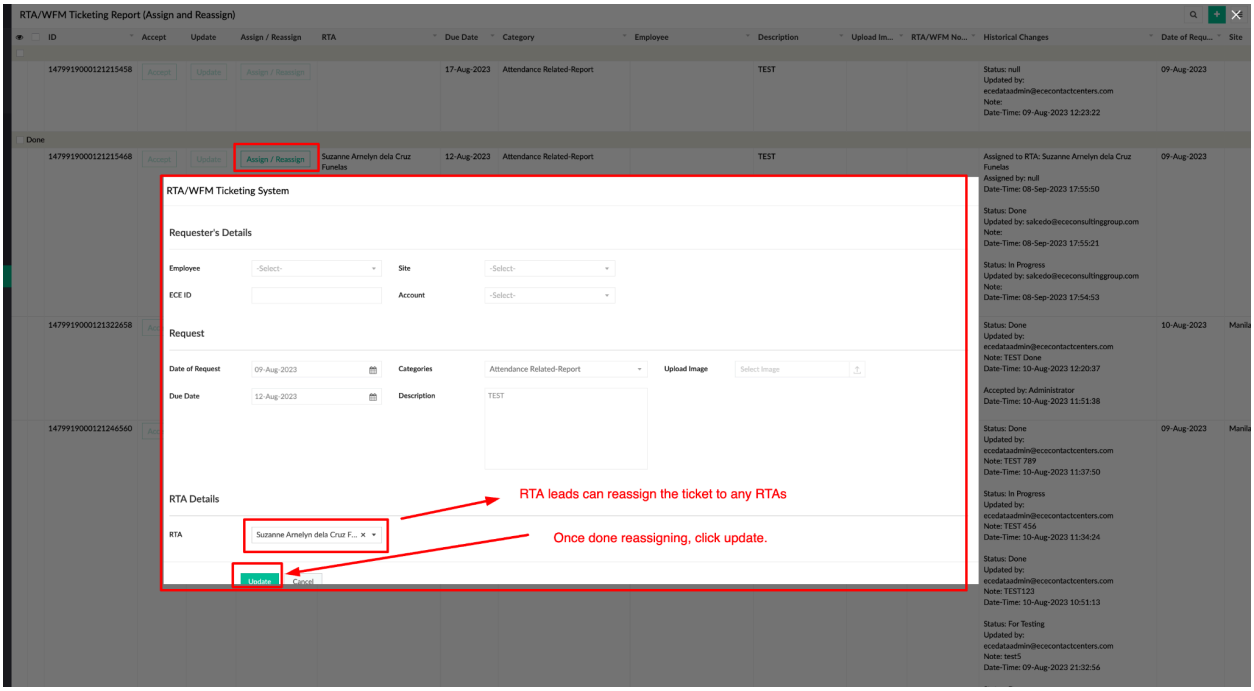
- *Upon receiving the bot notification, RTAs & RTA leads will review the newly submitted ticket in the RTA/WFM Ticketing System. RTAs can accept the ticket from their assigned account requestor within the system.*



Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

WFM Ticketing System

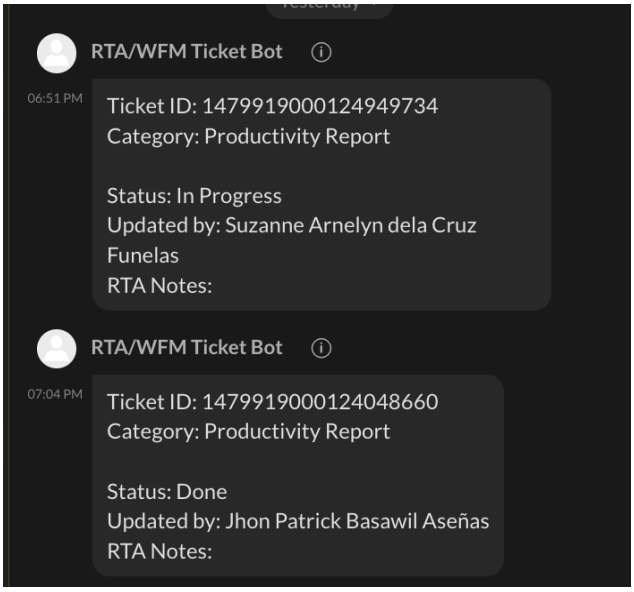
- *RTA leads have the authority to reassign or assign the ticket to any RTA based on their expertise or workload considerations.*



- **Monitoring Progress:** The ticketing system allows for real-time monitoring of ticket status. Regular updates must be provided to keep stakeholders informed. The requestor can also monitor the progress of their request via the following report link: My RTA/WFM Ticketing Report. Additionally, the requestor will receive bot messages indicating the progress of their request, ensuring transparency and keeping them informed throughout the ticket lifecycle.

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

WFM Ticketing System

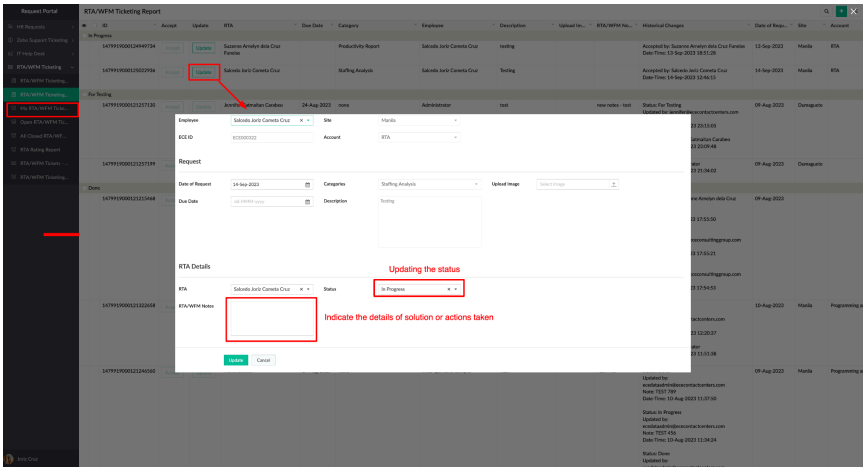


4.3. Communication: RTAs handling the ticket should maintain clear and consistent communication with the requester regarding progress, expected resolution time, and any changes in status.

Ticket Resolution:

- **Resolution and Documentation:** Upon resolution of the request, the ticket assignee documents the solution, actions taken, and any relevant notes within the ticket.

RTA Action Item: My RTA/WFM Ticketing Report



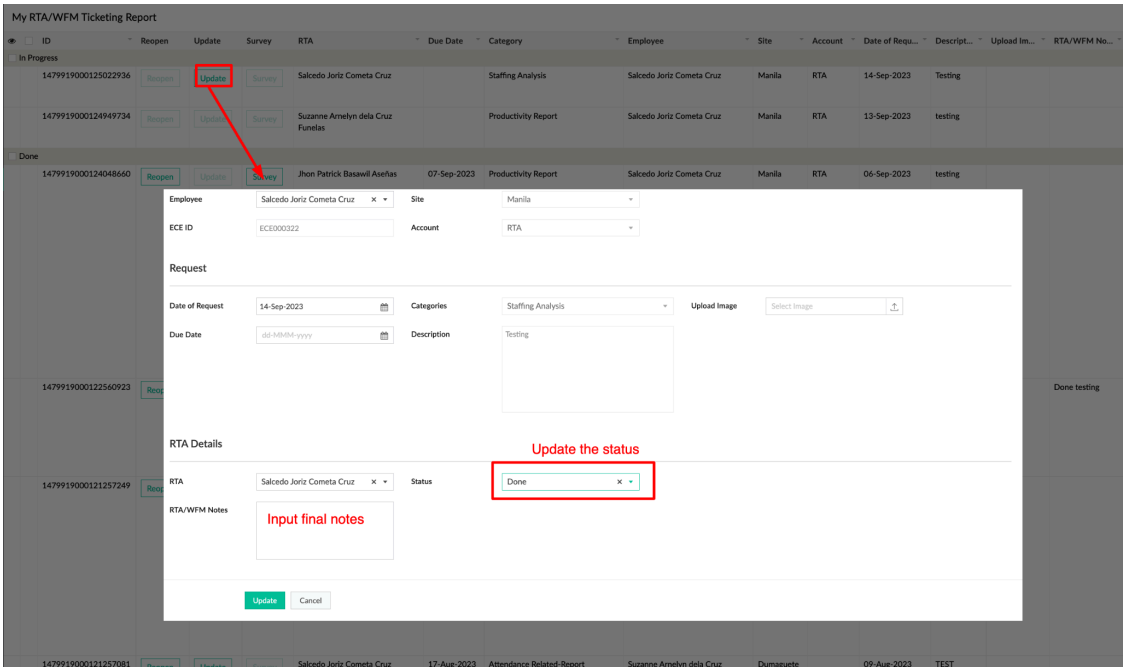
Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

WFM Ticketing System

- **Verification:** A verification step may be necessary to ensure that the request has been successfully addressed and meets the requester's requirements.

Ticket Closure:

- **Final Review:** A final review of the ticket ensures that all aspects of the request have been addressed, and the resolution is satisfactory.
- **Closure Confirmation:** Once confirmed, the ticket is marked as "Done" and

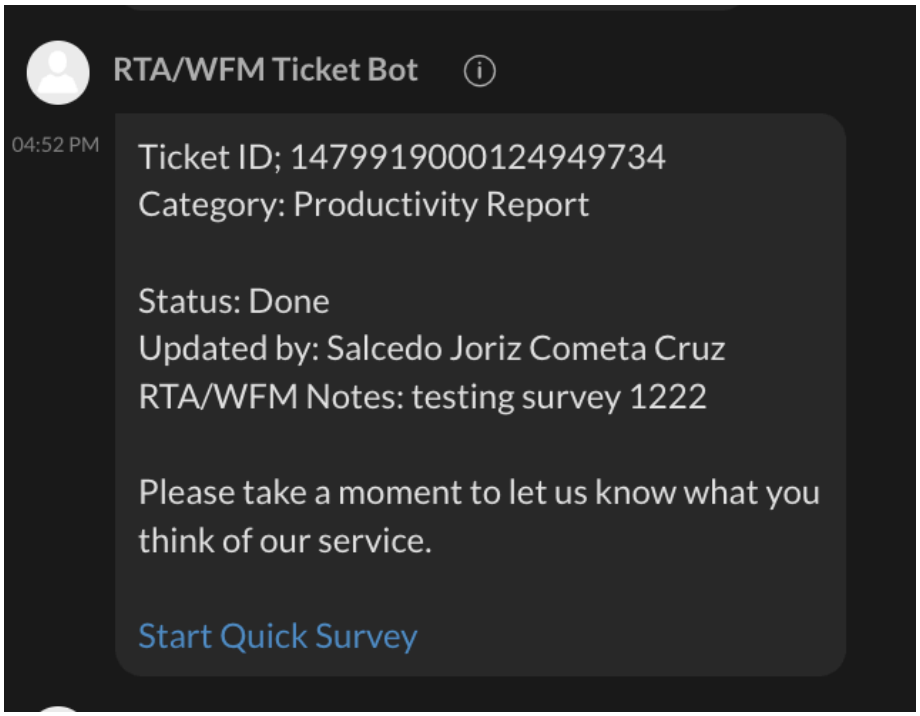


closed.

- **Post-Resolution Survey:** After the ticket is marked as "Done" and closed, the system will automatically trigger a post-resolution survey. This survey will be sent to the requestor through bot chat in Cliq, inviting them to provide feedback on their experience with our RTA/WFM services. The feedback collected from these surveys will be used to assess customer satisfaction and identify areas for improvement in our services.

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

WFM Ticketing System



Ticket Reporting and Analysis:

- **Regular Reporting:** Periodic reports are generated from the ticketing system data to analyze trends, identify recurring issues, and measure performance against service level agreements (SLAs).
- **Continuous Improvement:** Insights from ticket data should be used to drive process improvements and enhance the RTA/WFM operations continually.

2. **Escalation Process:**
   In case of unresolved issues or requests requiring higher-level attention, an escalation process should be in place, clearly defining the steps and individuals involved in escalating a ticket.

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Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

WFM Ticketing System

Training and Documentation:

Ensure that all RTA involved in the RTA/WFM Ticketing System are adequately trained in its use and that documentation is readily available for reference.

Conclusion:

The RTA/WFM Ticketing System is a critical tool for managing RTA-related requests efficiently. By following this SOP and leveraging the system effectively, we can streamline processes, prioritize tasks, and maintain a high level of customer satisfaction while continuously improving our operations.

✅ RTA Task Tracker

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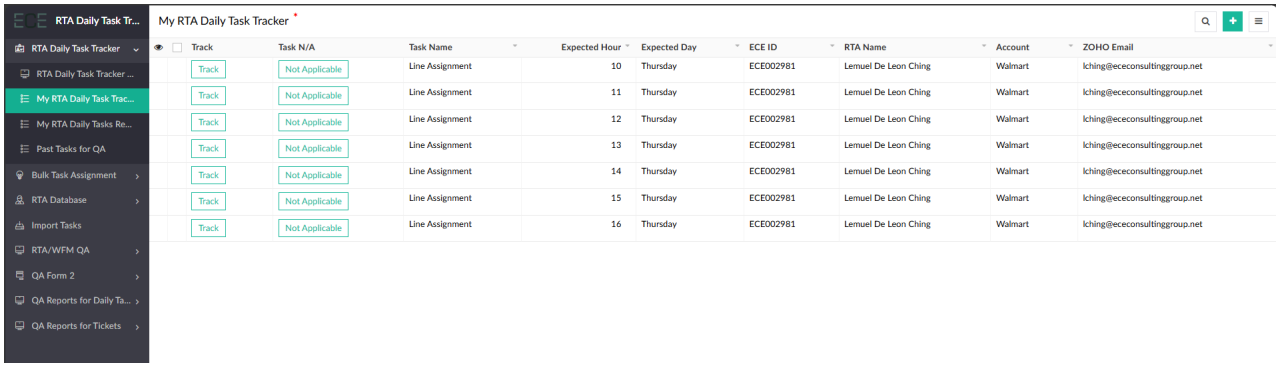
Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

RTA Task Tracker Process – Workforce RTA Team

RTA - Task Tracker and Correct Tracking Listen to this tab

Purpose: The RTA Task Tracker serves as a guide for RTAs by outlining their daily tasks and enabling measurement as a quantifiable metric.

1. Working on the task tracker
   The task tracker will be viewable as a table with interactive buttons on the left side, [Track] and [Not Applicable].



Track	Task N/A	Task Name	Expected Hour	Expected Day	ECE ID	RTA Name	Account	ZOHO Email
Track	Not Applicable	Line Assignment	10	Thursday	ECE002981	Lemuel De Leon Ching	Walmart	lching@ececonsultinggroup.net
Track	Not Applicable	Line Assignment	11	Thursday	ECE002981	Lemuel De Leon Ching	Walmart	lching@ececonsultinggroup.net
Track	Not Applicable	Line Assignment	12	Thursday	ECE002981	Lemuel De Leon Ching	Walmart	lching@ececonsultinggroup.net
Track	Not Applicable	Line Assignment	13	Thursday	ECE002981	Lemuel De Leon Ching	Walmart	lching@ececonsultinggroup.net
Track	Not Applicable	Line Assignment	14	Thursday	ECE002981	Lemuel De Leon Ching	Walmart	lching@ececonsultinggroup.net
Track	Not Applicable	Line Assignment	15	Thursday	ECE002981	Lemuel De Leon Ching	Walmart	lching@ececonsultinggroup.net
Track	Not Applicable	Line Assignment	16	Thursday	ECE002981	Lemuel De Leon Ching	Walmart	lching@ececonsultinggroup.net

2. Each task has a corresponding Expected Hour, and RTAs are required to track each line item accordingly. To allow flexibility, tasks can be tracked up to 59 minutes before or 59 minutes after the target Expected Hour.
   Eg. Expected Hour = 10:00. You can track the said task between 09:01 to 10:59 and still be in adherence.
3. When the task is tracked within the expected time, the [In Adherence] and [Tracked] columns will be highlighted green. Tracking regardless of expected hours will highlight [Tracked] as green and [In Adherence] in red.
4. If a task is no longer applicable to your workload (stopped report, old process) then you can click on the [Not Applicable] button and inform your team lead so they can have it removed on succeeding tasks.

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Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

RTA Task Tracker Process – Workforce RTA Team

Task Tracking Impact

Task Tracking is one of the major metrics in the RTA Scorecard - along with Attendance and QA. Incorrect Tracking can cause low Task Tracker Adherence and can cost you the scorecard incentive. This also greatly affects the team scorecard.

FAQs:

Q: I accidentally tracked the task outside the allowable hours, can I have this edited?
A: RTAs cannot edit the task tracker. As such, take extra care with tracking the right task at the right time.

Q: I was on SL/VL on a specific day and my tasks were left untracked. What can I do about this?
A: You can reach out to your Team Lead so that the said day can be removed from your tracker. Only days with no expected productivity can be removed so be very careful with tracking on time.

Q: I forgot to track my task since I was preoccupied with an urgent task. I tracked the task as soon as I remembered but I am already out of adherence.
A: While the tracking itself is not flexible to your task at hand, the task assignment is negotiable with your team lead. If you have a repeating task that you are expecting would take most of your time on specific days, you can reach out to your lead and request to have those hours vacated and move your tracker to another hour instead.

Q: I didn't have any tasks to track on specific hours of the day but when I refreshed the tracker at a later time, I suddenly saw tasks pop up on those lapsed hours. What can I do?
A: Reach out to your lead so they can investigate and modify the task accordingly.

Q: I have a task that I am not familiar with or I have a task on a day where I am supposedly on rest day.

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

RTA Task Tracker Process – Workforce RTA Team

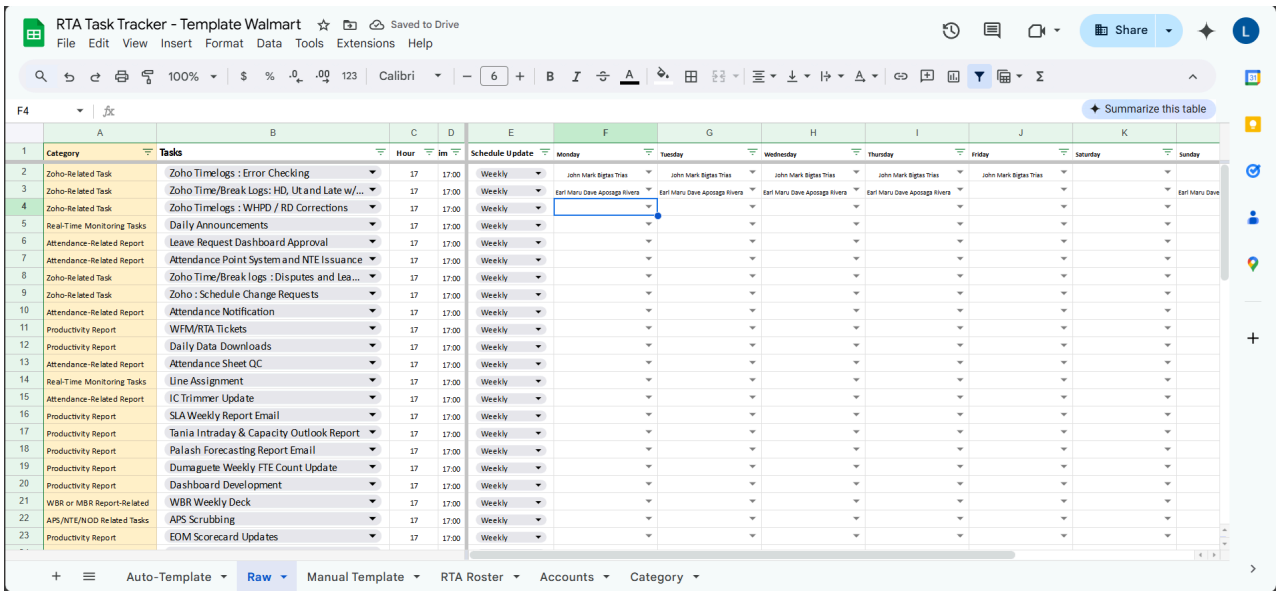
A: If you are unfamiliar with the task, communicate this with your lead so they can cascade or explain the task to you. They can either teach you the task or remove it altogether. If you have a task on your rest day, inform your lead so it can be removed.

RTA LEAD - Assigning Tasks and Troubleshooting

Tools needed:

Template Sheet: [RTA Task Tracker - Template Walmart - Google Sheets]

Overview:



The Template Workbook contains 6 core sheets:

1. Auto-Template: This sheet is the generated template for uploading to Zoho Task Tracker. Once this sheet has been filled up, download it as CSV and upload to Zoho Task Tracker - Bulk upload.

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

RTA Task Tracker Process – Workforce RTA Team

RTA Name	Account	Category	Task Name	Expected Hour	Schedule Update	Expected Day	From	To	Date Range Confirmation
John Mark Bigtas Trias	Walmart	Zoho-Related Task	Zoho Timelogs : Error Checking	17	Weekly	Monday	12/2/2024	4/1/2025	Indefinite
John Mark Bigtas Trias	Walmart	Zoho-Related Task	Zoho Timelogs : Error Checking	17	Weekly	Tuesday	12/2/2024	4/1/2025	Indefinite
John Mark Bigtas Trias	Walmart	Zoho-Related Task	Zoho Timelogs : Error Checking	17	Weekly	Wednesday	12/2/2024	4/1/2025	Indefinite
John Mark Bigtas Trias	Walmart	Zoho-Related Task	Zoho Timelogs : Error Checking	17	Weekly	Thursday	12/2/2024	4/1/2025	Indefinite
John Mark Bigtas Trias	Walmart	Zoho-Related Task	Zoho Timelogs : Error Checking	17	Weekly	Friday	12/2/2024	4/1/2025	Indefinite
arl Maru Dave Aposaga Rivera	Walmart	Zoho-Related Task	Zoho Time/Break Logs: HD, Ut and Late w/o Lunch Adjustments	17	Weekly	Monday	12/2/2024	4/1/2025	Indefinite
arl Maru Dave Aposaga Rivera	Walmart	Zoho-Related Task	Zoho Time/Break Logs: HD, Ut and Late w/o Lunch Adjustments	17	Weekly	Tuesday	12/2/2024	4/1/2025	Indefinite
arl Maru Dave Aposaga Rivera	Walmart	Zoho-Related Task	Zoho Time/Break Logs: HD, Ut and Late w/o Lunch Adjustments	17	Weekly	Wednesday	12/2/2024	4/1/2025	Indefinite
arl Maru Dave Aposaga Rivera	Walmart	Zoho-Related Task	Zoho Time/Break Logs: HD, Ut and Late w/o Lunch Adjustments	17	Weekly	Thursday	12/2/2024	4/1/2025	Indefinite
arl Maru Dave Aposaga Rivera	Walmart	Zoho-Related Task	Zoho Time/Break Logs: HD, Ut and Late w/o Lunch Adjustments	17	Weekly	Sunday	12/2/2024	4/1/2025	Indefinite

2. Raw: This sheet contains the raw data that will be used by the auto-template. All modification will be done here.

Category	Tasks	Hour	im	Schedule Update	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Account	Helper
Zoho-Related Task	Zoho Timelogs : Error Checking	17	17:00	Weekly	John Mark Bigtas Trias	John Mark Bigtas Trias	John Mark Bigtas Trias	John Mark Bigtas Trias	John Mark Bigtas Trias			Walmart	include
Zoho-Related Task	Zoho Time/Break Logs: HD, Ut and Late w/...	17	17:00	Weekly	Earl Maru Dave Aposaga Rivera	Earl Maru Dave Aposaga Rivera	Earl Maru Dave Aposaga Rivera	Earl Maru Dave Aposaga Rivera			Earl Maru Dave Aposaga Rivera	Walmart	include
Zoho-Related Task	Zoho Timelogs : WHPD / RD Corrections	17	17:00	Weekly								Walmart	
Real-Time Monitoring Tasks	Daily Announcements	17	17:00	Weekly								Walmart	
Attendance-Related Report	Leave Request Dashboard Approval	17	17:00	Weekly								Walmart	
Attendance-Related Report	Attendance Point System and NTE Issuance	17	17:00	Weekly								Walmart	

3. Manual Template: On instances where Auto-Template is not working, we can use the Manual Template to generate the CSV file for uploading in Zoho.

	A	B	C	D	E	F	G	H	I	J
1	RTA Name	Account	Category	Task Name	Expected Hour	Schedule Update	Expected Day	From	To	Date Range Confirmation
2	hillip Glenn Ramirez Strong	Perfect Serve	Real-Time Monitoring Tasks	Five9 - Real-time monitoring of Queue	9	Hourly	Saturday	5/26/2024	6/1/2024	Definite
3	hillip Glenn Ramirez Strong	Perfect Serve	Real-Time Monitoring Tasks	Five9 - Real-time monitoring of Queue	9	Hourly	Tuesday	5/26/2024	6/1/2024	Definite
4	hillip Glenn Ramirez Strong	Perfect Serve	Real-Time Monitoring Tasks	Five9 - Real-time monitoring of Queue	9	Hourly	Wednesday	5/26/2024	6/1/2024	Definite
5	hillip Glenn Ramirez Strong	Perfect Serve	Real-Time Monitoring Tasks	Five9 - Real-time monitoring of Queue	9	Hourly	Thursday	5/26/2024	6/1/2024	Definite
6	hillip Glenn Ramirez Strong	Perfect Serve	Real-Time Monitoring Tasks	Five9 - Real-time monitoring of Queue	10	Hourly	Saturday	5/26/2024	6/1/2024	Definite
7	hillip Glenn Ramirez Strong	Perfect Serve	Real-Time Monitoring Tasks	Five9 - Real-time monitoring of Queue	10	Hourly	Tuesday	5/26/2024	6/1/2024	Definite
8	hillip Glenn Ramirez Strong	Perfect Serve	Real-Time Monitoring Tasks	Five9 - Real-time monitoring of Queue	10	Hourly	Wednesday	5/26/2024	6/1/2024	Definite
9	hillip Glenn Ramirez Strong	Perfect Serve	Real-Time Monitoring Tasks	Five9 - Real-time monitoring of Queue	10	Hourly	Thursday	5/26/2024	6/1/2024	Definite
10	hillip Glenn Ramirez Strong	Perfect Serve	Real-Time Monitoring Tasks	Five9 - Real-time monitoring of Queue	11	Hourly	Saturday	5/26/2024	6/1/2024	Definite
11	hillip Glenn Ramirez Strong	Perfect Serve	Real-Time Monitoring Tasks	Five9 - Real-time monitoring of Queue	11	Hourly	Tuesday	5/26/2024	6/1/2024	Definite
12	hillip Glenn Ramirez Strong	Perfect Serve	Real-Time Monitoring Tasks	Five9 - Real-time monitoring of Queue	11	Hourly	Wednesday	5/26/2024	6/1/2024	Definite
13	hillip Glenn Ramirez Strong	Perfect Serve	Real-Time Monitoring Tasks	Five9 - Real-time monitoring of Queue	11	Hourly	Thursday	5/26/2024	6/1/2024	Definite
14	hillip Glenn Ramirez Strong	Perfect Serve	Real-Time Monitoring Tasks	Five9 - Real-time monitoring of Queue	12	Hourly	Saturday	5/26/2024	6/1/2024	Definite
15	hillip Glenn Ramirez Strong	Perfect Serve	Real-Time Monitoring Tasks	Five9 - Real-time monitoring of Queue	12	Hourly	Tuesday	5/26/2024	6/1/2024	Definite
16	hillip Glenn Ramirez Strong	Perfect Serve	Real-Time Monitoring Tasks	Five9 - Real-time monitoring of Queue	12	Hourly	Wednesday	5/26/2024	6/1/2024	Definite
17	hillip Glenn Ramirez Strong	Perfect Serve	Real-Time Monitoring Tasks	Five9 - Real-time monitoring of Queue	12	Hourly	Thursday	5/26/2024	6/1/2024	Definite

4. RTA Roster: This sheet is run by an importrange formula linked to the primary roster sheet of the RTA team. Do not modify this sheet.

A1 fx =IMPORTRANGE("https://docs.google.com/spreadsheets/d/1Zz659VjzK0DoTWzn5IS0Y_CUCuSsCPp31xjlkCoI6UE/edit#gid=980412145","Main RTA Roster!A:N")

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Status	Employee Number	Zoho Name Format	Site	Account	LOB	Position	Zoho Email	ECE Gmail	Team	Team Leader	Team Lead ECE Gmail	Manager
2	Active	ECE000108	Jay-R Sombero Villanueva	Manila	Resident Home	Workforce RTA	RTA	jayvillanueva@ececonsultinggroup.com	jayvillanueva@ececontactcenters.com	Workforce Team	Suzanne Arnelyn Dela Cruz Funelas	suzanne@ececontactcenters.com	Jennifer C
3	Active	ECE000322	Salcedo Joriz Cometa Cruz	Manila	Resident Home	Workforce RTA	Workforce Manager	salcedo@ececonsultinggroup.com	salcedo@ececontactcenters.com	Workforce Team	Salcedo Joriz Cometa Cruz	salcedo@ececontactcenters.com	Jennifer C
4	Active	ECE000448	Suzanne Arnelyn Dela Cruz Funelas	Manila	Resident Home	Workforce RTA	RTA Team Lead	suzanne@ececonsultinggroup.com	suzanne@ececontactcenters.com	Workforce Team	Salcedo Joriz Cometa Cruz	salcedo@ececontactcenters.com	Jennifer C
5	Resigned	ECE001027	Glenn Romano Flores	Manila	Walmart	Workforce RTA	RTA	gflores@ececonsultinggroup.com	gflores@ececontactcenters.com	Workforce Team	Suzanne Arnelyn Dela Cruz Funelas	suzanne@ececontactcenters.com	Jennifer C
6	Active	ECE001957	Francis Emmanuel Elesteria Sabidong	Dumaguete	Resident Home	Workforce RTA	RTA Team Lead	fsabidong@ececonsultinggroup.com	fsabidong@ececontactcenters.com	Workforce Team	Salcedo Joriz Cometa Cruz	salcedo@ececontactcenters.com	Jennifer C
7	Resigned		Dwight Robert Yee Dela Rama	Dumaguete	Wyze	Workforce RTA	RTA	drama@ececonsultinggroup.com	drama@ececontactcenters.com	Workforce Team	Jhon Patrick Basawil Aseñas	jasenas@ececontactcenters.com	Jennifer C
8	Active	ECE002038	Joshua Ladion Martinez	Dumaguete	Wyze	Workforce RTA	RTA	jmartinez@ececonsultinggroup.net	jlmartinez@ececontactcenters.com	Workforce Team	Francis Emmanuel Elesteria Sabido	fsabidong@ececontactcenters.cor	Jennifer C
9	Resigned	ECE003045	Jhon Patrick Basawil Aseñas	Dumaguete	Wyze	Workforce RTA	RTA Team Lead	jasenas@ececonsultinggroup.com	jasenas@ececontactcenters.com	Workforce Team	Salcedo Joriz Cometa Cruz	salcedo@ececontactcenters.com	Jennifer C
10	Active	ECE002557	Jaymarr Tabucan Corpuz	Dumaguete	Wyze	Workforce RTA	RTA	jcorpuz@ececonsultinggroup.net	jcorpuz@ececontactcenters.com	Workforce Team	Mark Darwin Maputi Capitan	mcapitan@ececontactcenters.com	Jennifer C
11	Active	ECE000247	Francis Joseph Gatmaitan Carabeo	Manila	Resident Home	Workforce RTA	RTA	fcarabeo@ececonsultinggroup.com	fcarabeo@ececontactcenters.com	Workforce Team	Suzanne Arnelyn Dela Cruz Funelas	suzanne@ececontactcenters.com	Jennifer C
12	Active	ECE002266	Bernardo Joaquin Fabian	Manila	Resident Home	Workforce RTA	RTA	bfabian@ececonsultinggroup.net	bfabian@ececontactcenters.com	Workforce Team	Suzanne Arnelyn Dela Cruz Funelas	suzanne@ececontactcenters.com	Jennifer C
13	Active	ECE002237	Alvin Jopia Estrellanes	Dumaguete	Earnin	Workforce RTA	RTA	alvin@ececonsultinggroup.net	aestrellanes@ececontactcenters.com	Workforce Team	Fernando II Gutana Gadong	fgadong@ececontactcenters.com	Jennifer C
14	Resigned	ECE001354	Ma. Theresa Castillo Barte	Dumaguete	Earnin	Workforce RTA	RTA	abarte@ececonsultinggroup.com	abarte@ececontactcenters.com	Workforce Team	Fernando II Gutana Gadong	fgadong@ececontactcenters.com	Jennifer C

5. Accounts: This sheet lists all accounts that the RTAs are handling. Add any account that is needed for the tracker on this sheet.

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

RTA Task Tracker Process – Workforce RTA Team

	A
1	Account
2	Walmart
3	PerfectServe
4	Hippo
5	ZenBusiness
6	Sundays for Dogs
7	PLS
8	
9	
10	
11	

6. Category: This sheet lists all the tasks that the RTAs are handling. It also has an adjacent columns that identifies the category of the task and description of the task. Modify this sheet to suit the tasks that the RTA is handling.

	A	B	C
1	**Tasks**	**Category**	**Specific Task**
2	Zoho Timelogs : Error Checking	Zoho-Related Task	Error Checking column in Zoho Timelogs means there are issues with the entry that needs to be fixed
3	Zoho Time/Break Logs: HD, Ut and Late w/o Lunch Adjustments	Zoho-Related Task	Automatic tagging of Halfday for lates or undertime exceeding halfday of shift. Correction of Zoho login status. Removal of Lunch hours for Half Day shift.
4	Zoho Timelogs : WHPD / RD Corrections	Zoho-Related Task	Ensuring that all agents will have the correct WHPD & Restdays per week
5	Daily Announcements	Real-Time Monitoring Tasks	Everyday to be announced on RTA's Start of Shift - Zoho Disputes, Correct IC tagging, Check VLs approved, Break Schedule Adherence ; Bi-Weekly Announcement of billable cutoff
6	Leave Request Dashboard Approval	Attendance-Related Report	VL Dashboard Approvals
7	Attendance Point System and NTE Issuance	Attendance-Related Report	APS Checking and NTE Issuance for timelogs/attendance infractions
8	Zoho Time/Break logs : Disputes and Leave Approval + OT Approvals	Zoho-Related Task	Approval of disputes, leaves and OTs in Zoho
9	Zoho : Schedule Change Requests	Zoho-Related Task	Approval of Schedule changes in Zoho
10	Attendance Notification	Attendance-Related Report	Checking of attendance notifications and reminding of CWD documents to support channel
11	WFM/RTA Tickets	Productivity Report	Daily checking of WFM Ticketing
12	Daily Data Downloads	Productivity Report	Downloads for IRR US & CA (Volume & Closed), RO (Volume, Closed & Backlogs), IRR MX, Pre-Items (Volume & Closed), IC Agent State Logs
13	Attendance Sheet QC	Attendance-Related Report	
14	Line Assignment	Real-Time Monitoring Tasks	
15	IC Trimmer Update	Attendance-Related Report	
16	SLA Weekly Report Email	Productivity Report	
17	Tania Intraday & Capacity Outlook Report	Productivity Report	
18	Palash Forecasting Report Email	Productivity Report	
19	Dumaguete Weekly FTE Count Update	Productivity Report	
20	Dashboard Development	Productivity Report	
21	WBR Weekly Deck	WBR or MBR Report-Related	
22	APS Scrubbing	APS/NTE/NOD Related Tasks	
23	EOM Scorecard Updates	Productivity Report	
24	Billables Report	Billable Hours	
25	Billables Crosschecking Report	Billable Hours	
26			

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Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

RTA Task Tracker Process – Workforce RTA Team

Assigning Tasks:

1. Checking the basics:
    a. First ensure that the RTA we're assigning the task to is already in the roster

A	B	C	D	E	F	G	H	I	J	K	L	M
Status	**Employee Number**	**Zoho Name Format**	**Site**	**Account**	**LOB**	**Position**	**Zoho Email**	**ECE Gmail**	**Team**	**Team Leader**	**Team Lead ECE Gmail**	**Manager**
Active	ECE000108	Jay-R Sombero Villanueva	Manila	Resident Home	Workforce RTA	RTA	jayvillanueva@ececonsultinggroup.com	jayvillanueva@ececontactcenters.com	Workforce Team	Suzanne Arnelyn Dela Cruz Funelas	suzanne@ececontactcenters.com	Jennifer C
Active	ECE000322	Salcedo Joriz Cometa Cruz	Manila	Resident Home	Workforce RTA	Workforce Manager	salcedo@ececonsultinggroup.com	salcedo@ececontactcenters.com	Workforce Team	Salcedo Joriz Cometa Cruz	salcedo@ececontactcenters.com	Jennifer C
Active	ECE000448	Suzanne Arnelyn Dela Cruz Funelas	Manila	Resident Home	Workforce RTA	RTA Team Lead	suzanne@ececonsultinggroup.com	suzanne@ececontactcenters.com	Workforce Team	Salcedo Joriz Cometa Cruz	salcedo@ececontactcenters.com	Jennifer C
Resigned	ECE001027	Glenn Romano Flores	Manila	Walmart	Workforce RTA	RTA	gflores@ececonsultinggroup.com	gflores@ececontactcenters.com	Workforce Team	Suzanne Arnelyn Dela Cruz Funelas	suzanne@ececontactcenters.com	Jennifer C
Active	ECE001957	Francis Emmanuel Elesteria Sabidong	Dumaguete	Resident Home	Workforce RTA	RTA Team Lead	fsabidong@ececonsultinggroup.com	fsabidong@ececontactcenters.com	Workforce Team	Salcedo Joriz Cometa Cruz	salcedo@ececontactcenters.com	Jennifer C
Resigned		Dwight Robert Yee Dela Rama	Dumaguete	Wyze	Workforce RTA	RTA	drama@ececonsultinggroup.com	drama@ececontactcenters.com	Workforce Team	Jhon Patrick Basawil Aseñas	jasenas@ececontactcenters.com	Jennifer C
Active	ECE002038	Joshua Ladion Martinez	Dumaguete	Wyze	Workforce RTA	RTA	jmartinez@ececonsultinggroup.net	jlmartinez@ececontactcenters.com	Workforce Team	Francis Emmanuel Elesteria Sabido	fsabidong@ececontactcenters.cor	Jennifer C
Resigned	ECE003045	Jhon Patrick Basawil Aseñas	Dumaguete	Wyze	Workforce RTA	RTA Team Lead	jasenas@ececonsultinggroup.com	jasenas@ececontactcenters.com	Workforce Team	Salcedo Joriz Cometa Cruz	salcedo@ececontactcenters.com	Jennifer C
Active	ECE002557	Jaymarr Tabucan Corpuz	Dumaguete	Wyze	Workforce RTA	RTA	jcorpuz@ececonsultinggroup.net	jcorpuz@ececontactcenters.com	Workforce Team	Mark Darwin Maputi Capitan	mcapitan@ececontactcenters.com	Jennifer C
Active	ECE000247	Francis Joseph Gatmaitan Carabeo	Manila	Resident Home	Workforce RTA	RTA	fcarabeo@ececonsultinggroup.com	fcarabeo@ececontactcenters.com	Workforce Team	Suzanne Arnelyn Dela Cruz Funelas	suzanne@ececontactcenters.com	Jennifer C
Active	ECE002266	Bernardo Joaquin Fabian	Manila	Resident Home	Workforce RTA	RTA	bfabian@ececonsultinggroup.net	bfabian@ececontactcenters.com	Workforce Team	Suzanne Arnelyn Dela Cruz Funelas	suzanne@ececontactcenters.com	Jennifer C
Active	ECE002237	Alvin Jopia Estrellanes	Dumaguete	Earnin	Workforce RTA	RTA	alvin@ececonsultinggroup.net	aestrellanes@ececontactcenters.com	Workforce Team	Fernando II Gutana Gadong	fgadong@ececontactcenters.com	Jennifer C
Resigned	ECE001354	Ma. Theresa Castillo Barte	Dumaguete	Earnin	Workforce RTA	RTA	abarte@ececonsultinggroup.com	abarte@ececontactcenters.com	Workforce Team	Fernando II Gutana Gadong	fgadong@ececontactcenters.com	Jennifer C
Active	ECE002089	Phillip Glenn Ramirez Strong	Dumaguete	Kin Insurance	Workforce RTA	RTA	phillip@ececonsultinggroup.net	phillip@ececontactcenters.com	Workforce Team	Francis Emmanuel Elesteria Sabido	fsabidong@ececontactcenters.cor	Jennifer C
Resigned	ECE002364	Rhean Julie Bucad Bruselas	Dumaguete	PLS	Workforce RTA	RTA	rbruselas@ececonsultinggroup.net	rbruselas@ececontactcenters.com	Workforce Team	Jhon Patrick Basawil Aseñas	jasenas@ececontactcenters.com	Jennifer C
Active	ECE001452	Ritchie Awid Quisel	Dumaguete	Ashley	Workforce RTA	RTA	ritchie@ececonsultinggroup.com	ritchie@ececontactcenters.com	Workforce Team	Francis Emmanuel Elesteria Sabido	fgadong@ececontactcenters.com	Jennifer C
Active	ECE002564	Shania Amores Espina	Dumaguete	Earnin	Workforce RTA	RTA	sespina@ececonsultinggroup.com	sespina@ececontactcenters.com	Workforce Team	Fernando II Gutana Gadong	fgadong@ececontactcenters.com	Jennifer C
Active	ECE001634	Jerrick Quinilitan Rivas	Dumaguete	Earnin	Workforce RTA	RTA/Data Analyst	jrivas@ececonsultinggroup.com	jrivas@ececontactcenters.com	Workforce Team	Fernando II Gutana Gadong	fgadong@ececontactcenters.com	Jennifer C
Active	ECE001396	Jennifer Nacua Samoranos	Dumaguete	Earnin	Workforce RTA	RTA	jsamoranos@ececonsultinggroup.com	jsamoranos@ececontactcenters.com	Workforce Team	Mark Darwin Maputi Capitan	mcapitan@ececontactcenters.com	Jennifer C
Active	ECE001605	Regie Delvo Gajelomo	Dumaguete	IAA	Workforce RTA	RTA	rgajelomo@ececonsultinggroup.com	rgajelomo@ececontactcenters.com	Workforce Team	Francis Emmanuel Elesteria Sabido	fsabidong@ececontactcenters.cor	Jennifer C
Active	ECE002332	Fernando II Gutana Gadong	Dumaguete	Earnin	Workforce RTA	RTA Team Lead	fgadong@ececonsultinggroup.net	fgadong@ececontactcenters.com	Workforce Team	Salcedo Joriz Cometa Cruz	salcedo@ececontactcenters.com	Jennifer C
Resigned	ECE002179	Jerald Rowell Cuevas Cañete	Dumaguete	Homebase	Workforce RTA	RTA	jerald@ececonsultinggroup.net	jerald@ececontactcenters.com	Workforce Team	Fernando II Gutana Gadong	fgadong@ececontactcenters.com	Jennifer C
Active	ECE001257	Jacob Ladion Martinez	Dumaguete	Resident Home	Workforce RTA	RTA	jmartinez@ececonsultnggroup.com	jmartinez@ececontactcenters.com	Workforce Team	Francis Emmanuel Elesteria Sabido	suzanne@ececontactcenters.com	Jennifer C
Active	ECE003172	Rodolfo Dayot Luga II	Dumaguete	Walmart	Workforce RTA	RTA	rluga@ececonsultinggroup.net	rluga@ececontactcenters.com	Workforce Team	Lemuel De Leon Ching	suzanne@ececontactcenters.com	Jennifer C
Active	ECE004148	Niña Angelica Escarpe Dayucos	Dumaguete	Earnin	Workforce RTA	RTA	ndayucos@ececonsultinggroup.net	ndayucos@ececontactcenters.com	Workforce Team	Fernando II Gutana Gadong	fgadong@ececontactcenters.com	Jennifer C
Active	ECE002949	Gianne Carlo Fernandez Mangampat	Manila	Earnin	Workforce RTA	SME RTA	gmangampat@ececonsultinggroup.net	gmangampat@ececontactcenters.com	Workforce Team	Salcedo Joriz Cometa Cruz	salcedo@ececontactcenters.com	Jennifer C
Resigned	ECE003281	Brent Anthony Vailoces Flores	Dumaguete	Lytx	Workforce RTA	RTA	bflores@ececonsultinggroup.net	bflores@ececontactcenters.com	Workforce Team	Jhon Patrick Basawil Aseñas	jasenas@ececontactcenters.com	Jennifer C
Active	ECE002331	Christine Ann Benigay Egerra	Dumaguete	Hippo	Workforce RTA	RTA	cegerra@ececonsultinggroup.net	cegerra@ececontactcenters.com	Workforce Team	Lemuel De Leon Ching	lching@ececontactcenters.com	Jennifer C
Active	ECE002973	Jesie Mar Mayani Gales	Manila	Wyze	Workforce RTA	RTA	jgales@ececonsultinggroup.net	jgales@ececontactcenters.com	Workforce Team	Francis Emmanuel Elesteria Sabido	fsabidong@ececontactcenters.cor	Jennifer C
Active	ECE002981	Lemuel De Leon Ching	Manila	Walmart	Workforce RTA	RTA Team Lead	lching@ececonsultinggroup.net	lching@ececontactcenters.com	Workforce Team	Salcedo Joriz Cometa Cruz	salcedo@ececontactcenters.com	Jennifer C
Active	ECE004059	Rocky Reyes Manso	Dumaguete	Bluehoard	Workforce RTA	RTA	rmanso@ececonsultinggroup.link	rmanso@ececontactcenters.com	Workforce Team	Lemuel De Leon Ching	lching@ececontactcenters.com	Jennifer C

+ ≡ Auto-Template Raw Manual Template RTA Roster Accounts Category

    b. Ensure that the Account is also listed under the accounts sheet

	A
1	Account
2	Walmart
3	PerfectServe
4	Hippo
5	ZenBusiness
6	Sundays for Dogs
7	PLS

    c. Finally, ensure that the tasks, its categories and descriptions are encoded correctly in the Category Sheet

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Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

RTA Task Tracker Process – Workforce RTA Team

	A	B	C
1	Tasks	Category	Specific Task
2	Zoho Timelogs : Error Checking	Zoho-Related Task	Error Checking column in Zoho Timelogs means there are issues with the entry that needs to be fixed
3	Zoho Time/Break Logs: HD, Ut and Late w/o Lunch Adjustments	Zoho-Related Task	Automatic tagging of Halfday for lates or undertime exceeding halfday of shift. Correction of Zoho login status. Removal of Lunch hours for Half Day shift.
4	Zoho Timelogs : WHPD / RD Corrections	Zoho-Related Task	Ensuring that all agents will have the correct WHPD & Restdays per week
5	Daily Announcements	Real-Time Monitoring Tasks	Everyday to be announced on RTA's Start of Shift - Zoho Disputes, Correct IC tagging, Check VLs approved, Break Schedule Adherence ; Bi-Weekly Announcement of billable
6	Leave Request Dashboard Approval	Attendance-Related Report	VL Dashboard Approvals
7	Attendance Point System and NTE Issuance	Attendance-Related Report	APS Checking and NTE Issuance for timelogs/attendance infractions
8	Zoho Time/Break logs : Disputes and Leave Approval + OT Approvals	Zoho-Related Task	Approval of disputes, leaves and OTs in Zoho
9	Zoho : Schedule Change Requests	Zoho-Related Task	Approval of Schedule changes in Zoho
10	Attendance Notification	Attendance-Related Report	Checking of attendance notifications and reminding of CWD documents to support channel
11	WFM/RTA Tickets	Productivity Report	Daily checking of WFM Ticketing
12	Daily Data Downloads	Productivity Report	Downloads for IRR US & CA (Volume & Closed), RO (Volume, Closed & Backlogs), IRR MX, Pre-Items (Volume & Closed), IC Agent State Logs
13	Attendance Sheet QC	Attendance-Related Report	
14	Line Assignment	Real-Time Monitoring Tasks	
15	IC Trimmer Update	Attendance-Related Report	
16	SLA Weekly Report Email	Productivity Report	
17	Tania Intraday & Capacity Outlook Report	Productivity Report	
18	Palash Forecasting Report Email	Productivity Report	
19	Dumaguete Weekly FTE Count Update	Productivity Report	
20	Dashboard Development	Productivity Report	
21	WBR Weekly Deck	WBR or MBR Report-Related	
22	APS Scrubbing	APS/NTE/NOD Related Tasks	
23	EOM Scorecard Updates	Productivity Report	
24	Billables Report	Billable Hours	
25	Billables Crosschecking Report	Billable Hours	
26			
27			
28			
29			
30			
31			
32			

+ ≡ Auto-Template Raw Manual Template RTA Roster Accounts Category

2. In the Raw Sheet, Modify columns B, C, E and F to assign tasks

A	B	C	D	E	F	G	H	I	J	K	L	M	N
Category	Tasks	Hour	im	Schedule Update	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Account	Helper
Zoho-Related Task	Zoho Timelogs : Error Checking	17	17:00	Weekly	John Mark Bigtas Trias	John Mark Bigtas Trias	John Mark Bigtas Trias	John Mark Bigtas Trias	John Mark Bigtas Trias			Walmart	include
Zoho-Related Task	Zoho Time/Break Logs: HD, Ut and Late w/...	17	17:00	Weekly	Earl Maru Dave Apocaga Rivera	Earl Maru Dave Apocaga Rivera	Earl Maru Dave Apocaga Rivera	Earl Maru Dave Apocaga Rivera			Earl Maru Dave Apocaga Rivera	Walmart	include
Zoho-Related Task	Zoho Timelogs : WHPD / RD Corrections	17	17:00	Weekly								Walmart	
Real-Time Monitoring Tasks	Daily Announcements	17	17:00	Weekly								Walmart	
Attendance-Related Report	Leave Request Dashboard Approval	17	17:00	Weekly								Walmart	
Attendance-Related Report	Attendance Point System and NTE Issuance	17	17:00	Weekly								Walmart	
Zoho-Related Task	Zoho Time/Break logs : Disputes and Lea...	17	17:00	Weekly								Walmart	
Zoho-Related Task	Zoho : Schedule Change Requests	17	17:00	Weekly								Walmart	
Attendance-Related Report	Attendance Notification	17	17:00	Weekly								Walmart	
Productivity Report	WFM/RTA Tickets	17	17:00	Weekly								Walmart	
Productivity Report	Daily Data Downloads	17	17:00	Weekly								Walmart	

   a. Column B: The Task to be assigned to the agent. This automatically updates column A with the corresponding category as well.
   b. Column C: The time (24 hours time format) that the task should be tracked. This will automatically convert column D into a 24 hour time value format.
   c. Column E: The redundancy of the task. Should be set to Weekly if task is done once a week, Monthly if one a Month, etc.
   d. Columns F to L: These fields have a header with the days of the week. Assign an RTA Name on these columns to designate which RTA works on the task on which day of the week.
   e. Column M: Account Name. This ensures that the RTA is aware that the task their working on is for this specific account.

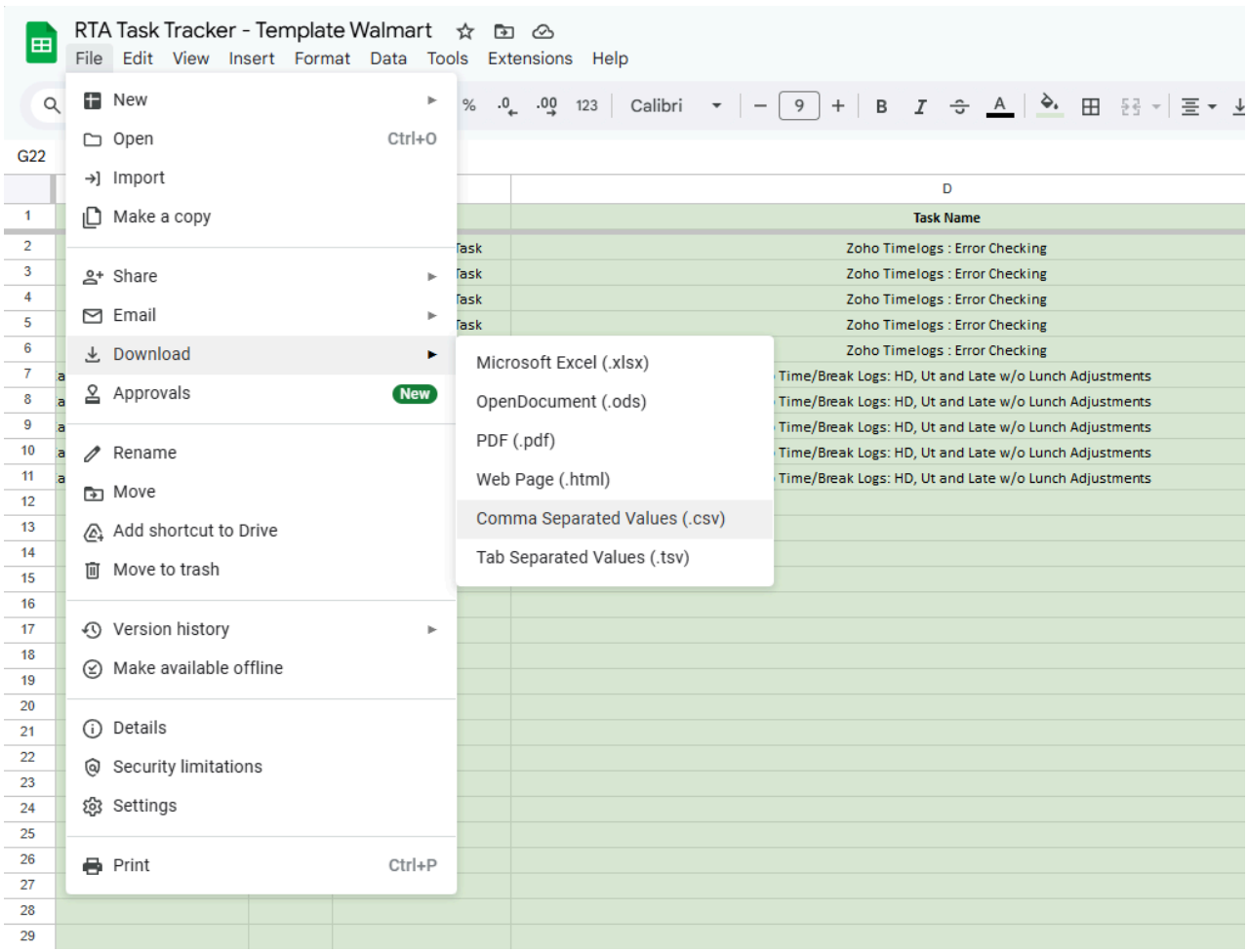
3. Once the Raw Sheet has been completed, the Auto-Template sheet will be automatically filled up. Make sure that the Column J (Date Range Confirmation) is set to Indefinite so that the task will repeat continuously. Also modify the From and To date ranges to set when the task will be running (Columns H:I)

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

RTA Task Tracker Process – Workforce RTA Team

	A	B	C	D	E	F	G	H	I	J
1	RTA Name	Account	Category	Task Name	Expected Hour	Schedule Update	Expected Day	From	To	Date Range Confirmation
2	John Mark Bigtas Trias	Walmart	Zoho-Related Task	Zoho Timelogs : Error Checking	17	Weekly	Monday	12/2/2024	4/1/2025	Indefinite
3	John Mark Bigtas Trias	Walmart	Zoho-Related Task	Zoho Timelogs : Error Checking	17	Weekly	Tuesday	12/2/2024	4/1/2025	Indefinite
4	John Mark Bigtas Trias	Walmart	Zoho-Related Task	Zoho Timelogs : Error Checking	17	Weekly	Wednesday	12/2/2024	4/1/2025	Indefinite
5	John Mark Bigtas Trias	Walmart	Zoho-Related Task	Zoho Timelogs : Error Checking	17	Weekly	Thursday	12/2/2024	4/1/2025	Indefinite
6	John Mark Bigtas Trias	Walmart	Zoho-Related Task	Zoho Timelogs : Error Checking	17	Weekly	Friday	12/2/2024	4/1/2025	Indefinite
7	arl Maru Dave Aposaga Riveri	Walmart	Zoho-Related Task	Zoho Time/Break Logs: HD, Ut and Late w/o Lunch Adjustments	17	Weekly	Monday	12/2/2024	4/1/2025	Indefinite
8	arl Maru Dave Aposaga Riveri	Walmart	Zoho-Related Task	Zoho Time/Break Logs: HD, Ut and Late w/o Lunch Adjustments	17	Weekly	Tuesday	12/2/2024	4/1/2025	Indefinite
9	arl Maru Dave Aposaga Riveri	Walmart	Zoho-Related Task	Zoho Time/Break Logs: HD, Ut and Late w/o Lunch Adjustments	17	Weekly	Wednesday	12/2/2024	4/1/2025	Indefinite
10	arl Maru Dave Aposaga Riveri	Walmart	Zoho-Related Task	Zoho Time/Break Logs: HD, Ut and Late w/o Lunch Adjustments	17	Weekly	Thursday	12/2/2024	4/1/2025	Indefinite
11	arl Maru Dave Aposaga Riveri	Walmart	Zoho-Related Task	Zoho Time/Break Logs: HD, Ut and Late w/o Lunch Adjustments	17	Weekly	Sunday	12/2/2024	4/1/2025	Indefinite
12										Indefinite
13										Indefinite

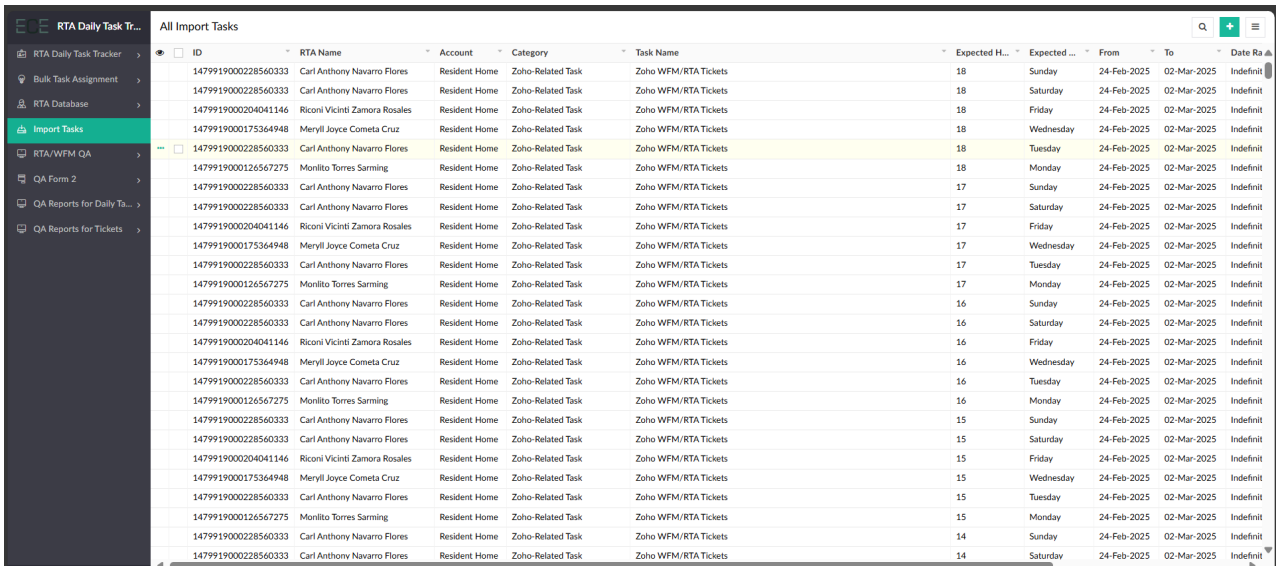
4. Once the Auto-Template sheet is confirmed to be accurate, download the file as CSV by clicking on the File Menu > Download > Comma Separated Values (.csv)



5. Once downloaded, we are ready to upload this to Zoho. Go to Zoho Task Tracker > [Import Tasks](#).

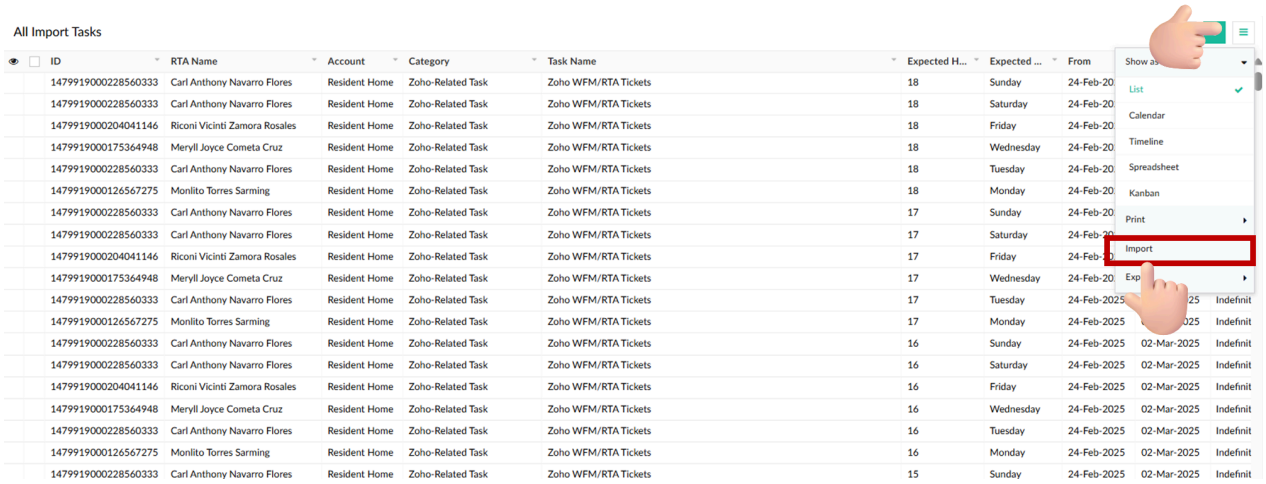
Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

RTA Task Tracker Process – Workforce RTA Team



ID	RTA Name	Account	Category	Task Name	Expected H...	Expected ...	From	To	Date Ra
1479919000228560333	Carl Anthony Navarro Flores	Resident Home	Zoho-Related Task	Zoho WFM/RTA Tickets	18	Sunday	24-Feb-2025	02-Mar-2025	Indefinit
1479919000228560333	Carl Anthony Navarro Flores	Resident Home	Zoho-Related Task	Zoho WFM/RTA Tickets	18	Saturday	24-Feb-2025	02-Mar-2025	Indefinit
1479919000204041146	Riconi Vicinti Zamora Rosales	Resident Home	Zoho-Related Task	Zoho WFM/RTA Tickets	18	Friday	24-Feb-2025	02-Mar-2025	Indefinit
1479919000175364948	Meryll Joyce Cometa Cruz	Resident Home	Zoho-Related Task	Zoho WFM/RTA Tickets	18	Wednesday	24-Feb-2025	02-Mar-2025	Indefinit
1479919000228560333	Carl Anthony Navarro Flores	Resident Home	Zoho-Related Task	Zoho WFM/RTA Tickets	18	Tuesday	24-Feb-2025	02-Mar-2025	Indefinit
1479919000126567275	Monlito Torres Sarming	Resident Home	Zoho-Related Task	Zoho WFM/RTA Tickets	18	Monday	24-Feb-2025	02-Mar-2025	Indefinit
1479919000228560333	Carl Anthony Navarro Flores	Resident Home	Zoho-Related Task	Zoho WFM/RTA Tickets	17	Sunday	24-Feb-2025	02-Mar-2025	Indefinit
1479919000228560333	Carl Anthony Navarro Flores	Resident Home	Zoho-Related Task	Zoho WFM/RTA Tickets	17	Saturday	24-Feb-2025	02-Mar-2025	Indefinit
1479919000204041146	Riconi Vicinti Zamora Rosales	Resident Home	Zoho-Related Task	Zoho WFM/RTA Tickets	17	Friday	24-Feb-2025	02-Mar-2025	Indefinit
1479919000175364948	Meryll Joyce Cometa Cruz	Resident Home	Zoho-Related Task	Zoho WFM/RTA Tickets	17	Wednesday	24-Feb-2025	02-Mar-2025	Indefinit
1479919000228560333	Carl Anthony Navarro Flores	Resident Home	Zoho-Related Task	Zoho WFM/RTA Tickets	17	Tuesday	24-Feb-2025	02-Mar-2025	Indefinit
1479919000126567275	Monlito Torres Sarming	Resident Home	Zoho-Related Task	Zoho WFM/RTA Tickets	17	Monday	24-Feb-2025	02-Mar-2025	Indefinit
1479919000228560333	Carl Anthony Navarro Flores	Resident Home	Zoho-Related Task	Zoho WFM/RTA Tickets	16	Sunday	24-Feb-2025	02-Mar-2025	Indefinit
1479919000228560333	Carl Anthony Navarro Flores	Resident Home	Zoho-Related Task	Zoho WFM/RTA Tickets	16	Saturday	24-Feb-2025	02-Mar-2025	Indefinit
1479919000204041146	Riconi Vicinti Zamora Rosales	Resident Home	Zoho-Related Task	Zoho WFM/RTA Tickets	16	Friday	24-Feb-2025	02-Mar-2025	Indefinit
1479919000175364948	Meryll Joyce Cometa Cruz	Resident Home	Zoho-Related Task	Zoho WFM/RTA Tickets	16	Wednesday	24-Feb-2025	02-Mar-2025	Indefinit
1479919000228560333	Carl Anthony Navarro Flores	Resident Home	Zoho-Related Task	Zoho WFM/RTA Tickets	16	Tuesday	24-Feb-2025	02-Mar-2025	Indefinit
1479919000126567275	Monlito Torres Sarming	Resident Home	Zoho-Related Task	Zoho WFM/RTA Tickets	16	Monday	24-Feb-2025	02-Mar-2025	Indefinit
1479919000228560333	Carl Anthony Navarro Flores	Resident Home	Zoho-Related Task	Zoho WFM/RTA Tickets	15	Sunday	24-Feb-2025	02-Mar-2025	Indefinit
1479919000228560333	Carl Anthony Navarro Flores	Resident Home	Zoho-Related Task	Zoho WFM/RTA Tickets	15	Saturday	24-Feb-2025	02-Mar-2025	Indefinit
1479919000204041146	Riconi Vicinti Zamora Rosales	Resident Home	Zoho-Related Task	Zoho WFM/RTA Tickets	15	Friday	24-Feb-2025	02-Mar-2025	Indefinit
1479919000175364948	Meryll Joyce Cometa Cruz	Resident Home	Zoho-Related Task	Zoho WFM/RTA Tickets	15	Wednesday	24-Feb-2025	02-Mar-2025	Indefinit
1479919000228560333	Carl Anthony Navarro Flores	Resident Home	Zoho-Related Task	Zoho WFM/RTA Tickets	15	Tuesday	24-Feb-2025	02-Mar-2025	Indefinit
1479919000126567275	Monlito Torres Sarming	Resident Home	Zoho-Related Task	Zoho WFM/RTA Tickets	15	Monday	24-Feb-2025	02-Mar-2025	Indefinit
1479919000228560333	Carl Anthony Navarro Flores	Resident Home	Zoho-Related Task	Zoho WFM/RTA Tickets	14	Sunday	24-Feb-2025	02-Mar-2025	Indefinit
1479919000228560333	Carl Anthony Navarro Flores	Resident Home	Zoho-Related Task	Zoho WFM/RTA Tickets	14	Saturday	24-Feb-2025	02-Mar-2025	Indefinit

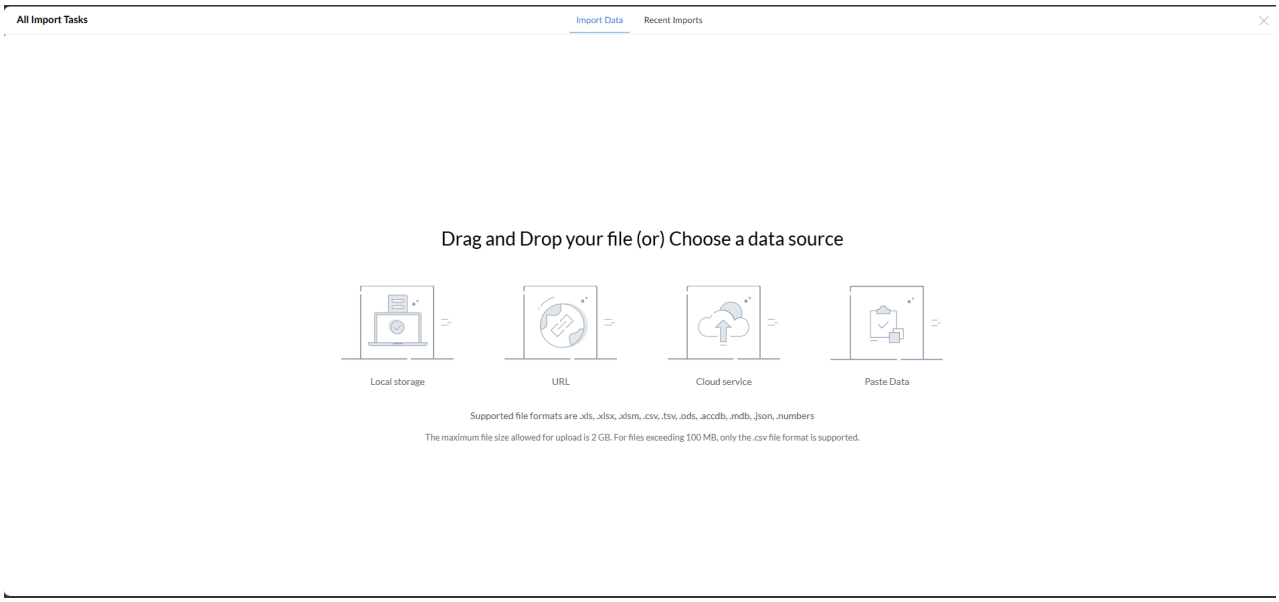
6. On the Import Task Page, click on the Sandwich menu (top right) and click on Import.



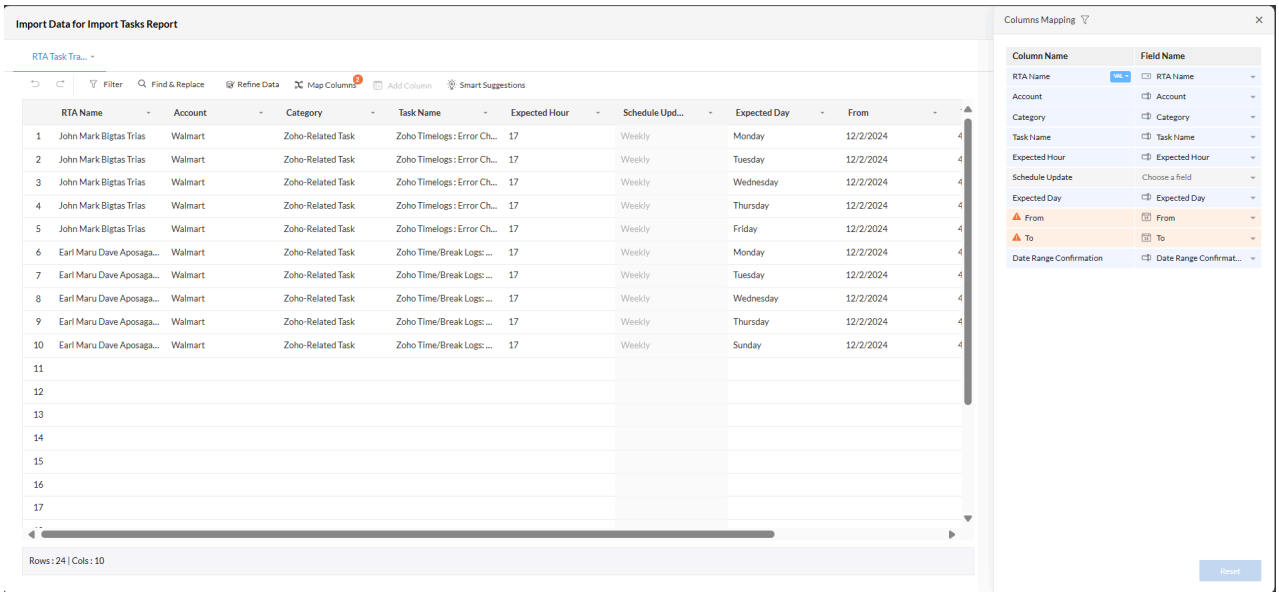
Drag and Drop the downloaded CSV file on this page.

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

RTA Task Tracker Process – Workforce RTA Team

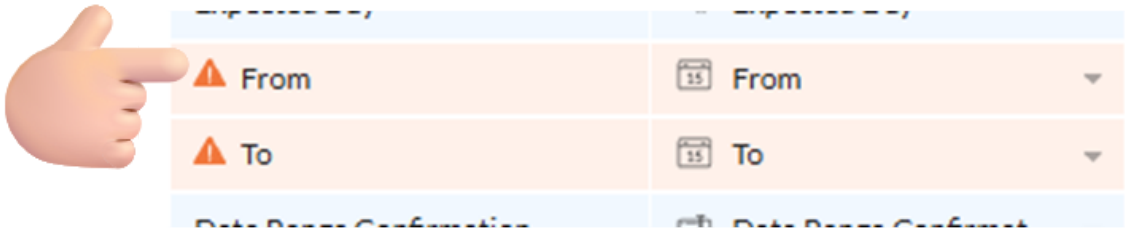


7. Once the file has been imported, click on the warning icon beside the From field at the right side menu (Columns Mapping).

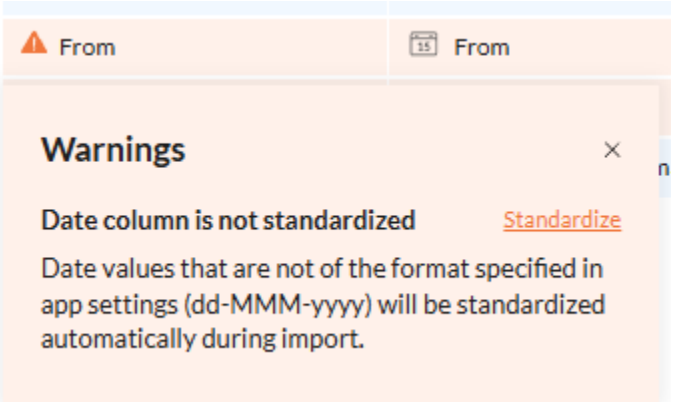


Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

RTA Task Tracker Process – Workforce RTA Team



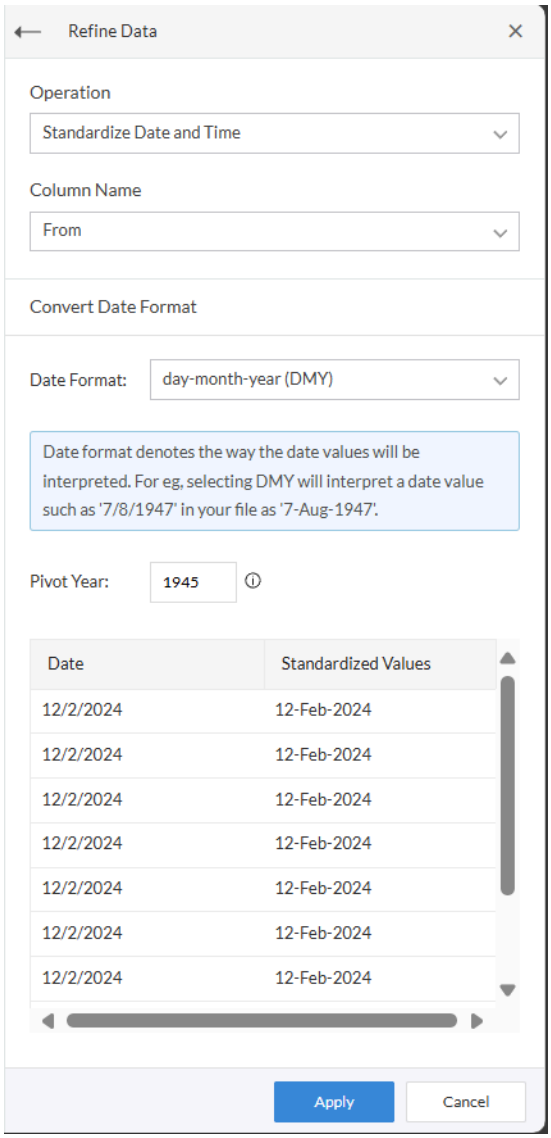
A warning will pop-up. Click “Standardize”. You will have to repeat this process for the “To” column field.

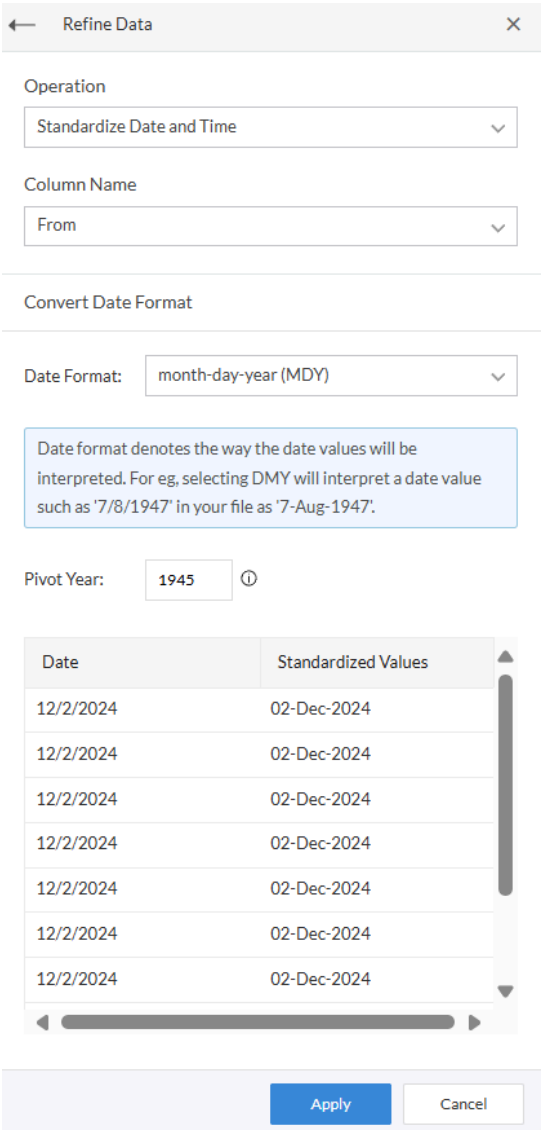


8. In the Refine Data Menu, make sure that the Date format is correct. Standard is MDY.Click **Apply**.

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

RTA Task Tracker Process – Workforce RTA Team





9. Repeat the same with the “To” Column.

10. Next click on the close button [x] at the top right of the Columns Mapping Menu and click on the Settings Button.

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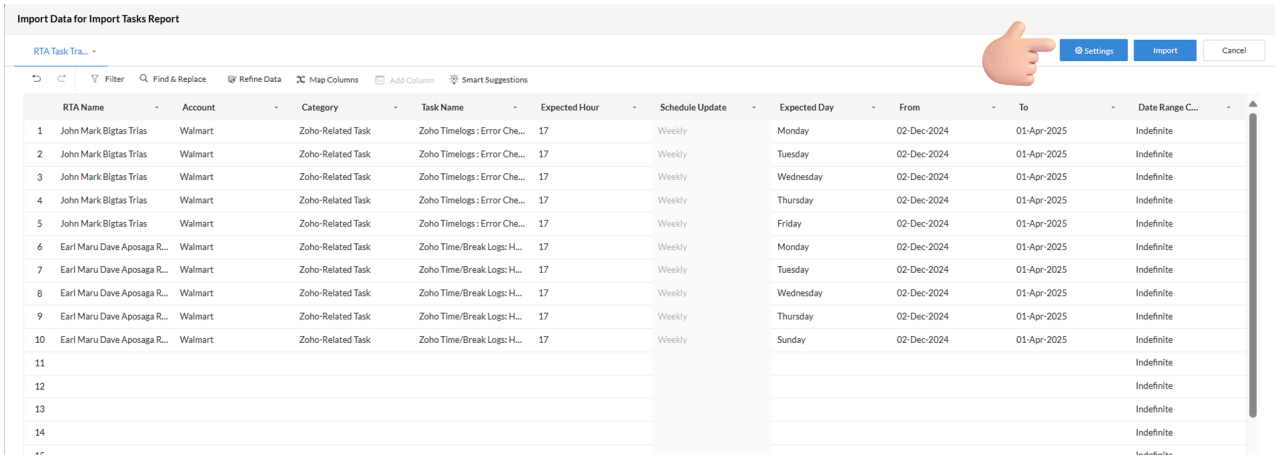
Metro Manila, 1200, Philippines
https://www.ececonsultinggroup.com/

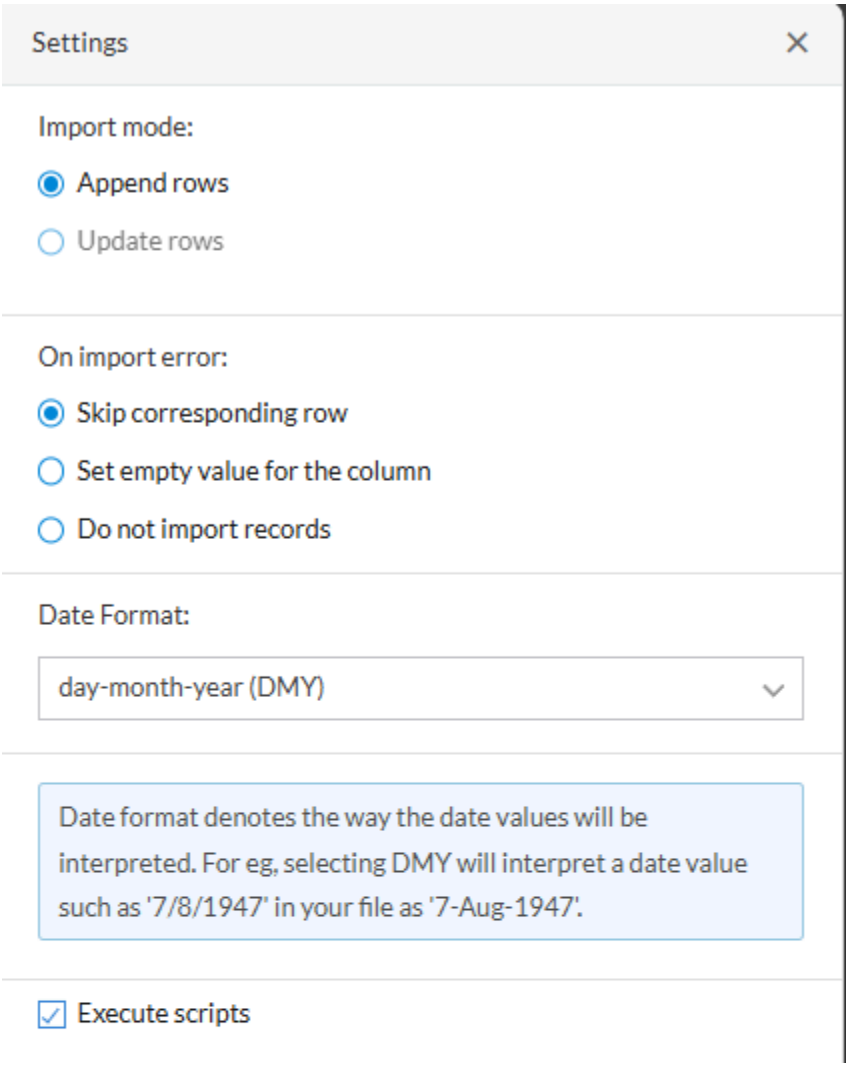
Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

RTA Task Tracker Process – Workforce RTA Team



	RTA Name	Account	Category	Task Name	Expected Hour	Schedule Update	Expected Day	From	To	Date Range C...
1	John Mark Bigtas Trias	Walmart	Zoho-Related Task	Zoho Timelogs : Error Che...	17	Weekly	Monday	02-Dec-2024	01-Apr-2025	Indefinite
2	John Mark Bigtas Trias	Walmart	Zoho-Related Task	Zoho Timelogs : Error Che...	17	Weekly	Tuesday	02-Dec-2024	01-Apr-2025	Indefinite
3	John Mark Bigtas Trias	Walmart	Zoho-Related Task	Zoho Timelogs : Error Che...	17	Weekly	Wednesday	02-Dec-2024	01-Apr-2025	Indefinite
4	John Mark Bigtas Trias	Walmart	Zoho-Related Task	Zoho Timelogs : Error Che...	17	Weekly	Thursday	02-Dec-2024	01-Apr-2025	Indefinite
5	John Mark Bigtas Trias	Walmart	Zoho-Related Task	Zoho Timelogs : Error Che...	17	Weekly	Friday	02-Dec-2024	01-Apr-2025	Indefinite
6	Earl Maru Dave Aposaga R...	Walmart	Zoho-Related Task	Zoho Time/Break Logs: H...	17	Weekly	Monday	02-Dec-2024	01-Apr-2025	Indefinite
7	Earl Maru Dave Aposaga R...	Walmart	Zoho-Related Task	Zoho Time/Break Logs: H...	17	Weekly	Tuesday	02-Dec-2024	01-Apr-2025	Indefinite
8	Earl Maru Dave Aposaga R...	Walmart	Zoho-Related Task	Zoho Time/Break Logs: H...	17	Weekly	Wednesday	02-Dec-2024	01-Apr-2025	Indefinite
9	Earl Maru Dave Aposaga R...	Walmart	Zoho-Related Task	Zoho Time/Break Logs: H...	17	Weekly	Thursday	02-Dec-2024	01-Apr-2025	Indefinite
10	Earl Maru Dave Aposaga R...	Walmart	Zoho-Related Task	Zoho Time/Break Logs: H...	17	Weekly	Sunday	02-Dec-2024	01-Apr-2025	Indefinite
11										Indefinite
12										Indefinite
13										Indefinite
14										Indefinite

11. Always ensure that the “Execute Scripts” tickbox is checked on the settings page.



12. Click “Import” and wait for it to finish. Confirm that the tasks are assigned by checking on the RTA Daily Task Tracker page of Zoho Task Tracker and have your RTA check on their end as well.

Standard Operating Procedure (SOP) for Workforce Real-Time Analyst (RTA)

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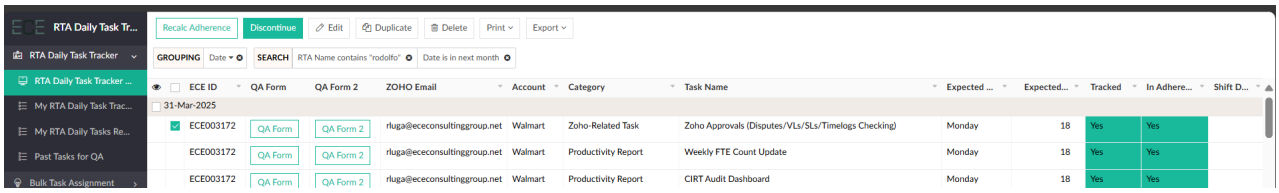
Troubleshooting & FAQs:

Q: I uploaded the tasks and checked the Daily Task Tracker page but couldn't find the uploaded task.
A: Make sure that when you uploaded the task, you ticked the "Execute Scripts" tick box in the settings page.

Q: An RTA reported to me that there was a task that they are not supposed to do on their tracker. How do I remove it?
A: On the Daily Task Tracker Page, you can tick the box on the left side of the task and click on Discontinue. This stops the tracker from generating the same task on the succeeding days/months. After Discontinuing the task, click delete.



For any other questions that are not in this FAQs, please reach out to any Team leads or directly to Ms. Imee Compra for assistance.