# Using NICE Employee Engagement Manager (EEM) on Mobile Device

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**Description:** Provides instructions for setting up and using NICE Employee Engagement Manager (EEM) on an Android or Apple device.

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| Log In |

 You must first [register (057037)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f5d70878-3c1e-4955-8877-e9ebd283be37) **before** using EEM on your mobile device.

Complete the steps below:

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| **Step** | **Action** |
| **1** | Access the NICE Employee Engagement Manager application from your mobile device. |
| **2** | Enter username and password and click **Sign In**. |

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| View Schedule |

* Days in blue indicate a scheduled activity for that day.
* Days in white indicate you are not working that day.

Complete the steps below:

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| **Step** | **Action** |
| **1** | Select **Schedule** from the navigation menu.    **Result:** Schedule page displays.   * Days in blue indicate days you are scheduled to work. * Days in white indicate days you are not scheduled to work. |
| **2** | Click a specific day to see your scheduled activities for that day. |

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| View and Respond to Notifications |

Complete the steps below:

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| **Step** | **Action** |
| **1** | Click the notification icon in the top right of the screen. |
| **2** | Respond to notifications as needed.  **Example:** |

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| Manage Profile |

**Note:** This only needs to be completed once unless your contact information or preferences change.

Complete the steps below:

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| **Step** | **Action** |
| **1** | Select **Settings** and then **My Profile** from the navigation menu. |
| **2** | Verify contact information.   * Select the edit icon to update phone and email information. * Check the box(es) next to your contact preferences. * Update trade request parameters. |
| **3** | Scroll down to review the Participation Agreement and click **Yes** to activate settings. |

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| Manage Do Not Disturb Preferences |

Setting Do Not Disturb preferences will deactivate EEM notifications during selected time frames.

Complete the steps below:

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| **Step** | **Action** |
| **1** | Select **Settings** and then **My Preferences** from the navigation menu.    **Result:** The My Preferences screen displays. |
| **2** | Select the **Do Not Disturb** tab. |
| **3** | Select a day of the week.  **Result:** The selected day with times in 30-minute intervals displays. |
| **4** | Tap squares you want to activate and/or deactivate Do Not Disturb and click **Save**.  **Notes:**   * White squares indicate you are available to receive EEM schedule notifications. * Blue squares indicate Do Not Disturb is activated and you are unavailable to receive notifications.   **Result:** White squares will turn blue. Blue squares will turn white. |
| **5** | Click **Ok** on the confirmation pop-up. |
| **6** | Repeat Steps 2-5 for additional days OR copy settings as needed.   * To copy settings:   1. Click the three dots to the right of the day you want to copy.      * 1. Select the day(s) you want to copy the preferences to and then click **Copy**. |

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| Manage Time On Preferences |

Update time on preferences for availability to receive extra hours requests.

Complete the steps below:

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| **Step** | **Action** |
| **1** | Select **Settings** and then **My Preferences** from the navigation menu.    **Result:** The My Preferences screen displays. |
| **2** | Select the **Time on** tab. |
| **3** | Select a day of the week.  **Result:** The selected day with times in 30-minute intervals displays. |
| **4** | Tap squares you want to activate and/or deactivate and click **Save**.  **Notes:**   * White squares indicate you are unavailable to receive requests. * Blue squares indicate you are available to receive requests.   **Result:** White squares will turn blue. Blue squares will turn white. |
| **5** | Click **Ok** on the confirmation pop-up. |
| **6** | Repeat Steps 2-5 for additional days OR copy settings as needed.   * To copy settings:   1. Click the three dots to the right of the day you want to copy.      * 1. Select the day(s) you want to copy the preferences to and then click **Copy**. |

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| Manage Time Off Preferences |

Update time off preferences for availability to receive time off requests.

Complete the steps below:

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| **Step** | **Action** |
| **1** | Select **Settings** and then **My Preferences** from the navigation menu.    **Result:** The My Preferences screen displays. |
| **2** | Select the **Time off** tab. |
| **3** | Select a day of the week.  **Result:** The selected day with times in 30-minute intervals displays. |
| **4** | Tap squares you want to activate and/or deactivate and click **Save**.  **Notes:**   * White squares indicate you are unavailable to receive requests. * Blue squares indicate you are available to receive requests.   **Result:** White squares will turn blue. Blue squares will turn white. |
| **5** | Click **Ok** on the confirmation pop-up. |
| **6** | Repeat Steps 2-5 for additional days OR copy settings as needed.   * To copy settings:   1. Click the three dots to the right of the day you want to copy.      * 1. Select the day(s) you want to copy the preferences to and then click **Copy**. |

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| Trade Shifts |

Complete the steps below:

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| **Step** | **Action** | | | |
| **1** | Select **Schedule** from the navigation menu.    **Result:** Schedule page displays.   * Days in blue indicate days you are scheduled to work. * Days in white indicate days you are not scheduled to work. | | | |
| **2** | Select the date you want to trade. | | | |
| **3** | Select the three (3) dots icon and then select the icon with two (2) people.    **Result:** Shifts for the selected day display in 30-minute intervals.    **Note:** Trade with Agent Availability varies depending on department, shift, and day of the week. Time slots available for trade will display green as shown above. | | | |
| **4** | Slide the interval from right to left to select the interval times you want to trade.     * To select the entire shift, press and hold the top interval shift and then click **Select All.** | | | |
| **5** | Click **Next**. | | | |
| **6** | Enter request information: | | | |
| **Step** | **Action** | | |
| **1** | Select the group to receive the trade request.   * **All Agents** sends request to all agents available to trade * **Agent** sends request to specific agent(s) * **Group** sends request to groups which you belong (**Example:** My Team, My Program, My Site) | | |
| **To send the request to…** | **Then…** | |
| All Agents | 1. Select **All Agents**. 2. Proceed to Step 2. | |
| Agent | 1. Select **Agent**. 2. Select the agent(s) to send the request to.   **Result:** Those you select will turn blue  **Note:** Up to 10 agents can be selected.   1. Proceed to Step 2 | |
| Group | 1. Select **Group**. 2. Proceed to Step 2. | |
| **2** | Select trade preferences. | | |
| **If agent…** | | **Then…** |
| Prefers to give shift away without making up the time | | 1. Click the Toggle button next to Give Away Trade to **On**.      1. Proceed to Step 7. |
| Has a shift preference for making up the time | | 1. Click the toggle button to on next to Shift Preference to **On**.      1. Set day of the week and time parameters. 2. Proceed to Step 7. |
| **7** | Click **Send Trade Request**. | | | |
| **8** | Click **Ok** on confirmation pop-up.    **Note:** Trade Requests expire 30 minutes after submitted if not accepted by an agent. | | | |

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| Access the Self-Service Feature |

The Self-Service feature allows agents to add hours or take time off when available. This may change the total hours for the week.

Refer to the table below:

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| --- | --- | --- | --- |
| **Step** | **Action** | | |
| **1** | Access the Self-Service Feature. | | |
| **To access from the…** | | **Then…** |
| Navigation bar | | Click the navigation menu icon  and select **Adjust Schedule** and then **Change Work Hours**. |
| Schedule page | | 1. Click the navigation menu icon  and select **Schedule**. 2. Tap on a day with the shift you want to change. |
| **Result:** The Adjust Schedule page displays with the intervals color coded. Unlike the agent portal on your desktop, availability for time off and time on (extra hours) displays on the same page, rather than on different tabs.   * + To select a different day, click on the date at the top of the screen and select a different date. Then slide the week to display a new week.     **Notes:** In the week displayed at the top:   * The selected day shows highlighted in dark blue. * If adding extra hours or taking time off, days with available intervals appear in light blue. * If swapping time intervals, initially days with time intervals available for you to remove from your schedule appear highlighted in light blue. After you remove time intervals, the days with time intervals available for you to add to your schedule appear highlighted in light blue. * If no time off options are available, such as PTO or UTO, the team cannot afford any additional agents to be out of the office.   Refer to the table below for the interval color codes: | | |
| **Color** | **Description** | |
| Gray | You cannot change these intervals on your schedule. | |
| Green | You can change these intervals without approval (highly available).   * Time On Available: The contact center needs more agents during this time. * Time Off Available: The contact center needs fewer agents during this time. | |
| Blue | You need approval to change these intervals (limited availability).   * Request Time On: The contact center might need more agents during this time. * Request Time Off: The contact center might need fewer agents during this time. | |
| Dark Gray | Either the schedule change request needs approval for the interval or the schedule is updating. | |
| Purple | You can swap this interval out of your schedule (take time off). For each interval you swap out, you add another interval back in to your schedule. | |

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| Add Hours or Take Time Off |

**Note:** Self-service change requests may not be available if there are pre-planned activities on the date(s) in question.

**Note:** Refer to [Workday](https://www.myworkday.com/cvshealth/d/home.htmld) for accurate Time Off Balance. EEM will automatically approve Time Off requests even if PTO balance is not available, which could result in the employee receiving an occurrence.

Refer to the Table below:

|  |  |  |  |
| --- | --- | --- | --- |
| **Step** | **Action** | | |
| **1** | Complete the steps to [access the Self-Service feature](#_Access_the_Self-Service). | | |
| **2** | Slide left on the green or blue time intervals you want to work or take time off. | | |
| **If…** | **Then…** | |
| Adding hours to work | Proceed to Step 3. | |
| Taking time off | 1. Click **Submit**. 2. Select whether to take **Paid Time Off** or **Unpaid Time Off** and then select an **Activity Code**.   **Note:** You cannot select the Activity Code for Paid and Unpaid when time off is selected for the current date.     1. Proceed to Step 3.   **Note:** If no time off options are available, such as PTO or UTO, this means that the team cannot afford any additional agents to be out of the office. | |
| **3** | Click **Submit**.   * If your schedule changes include time off intervals with a schedule code specified, you will receive a notification of the time off code. Click **OK**.     **Result:** Refer to the table below: | | |
| **Schedule Changes** | **Description** | |
| Green (highly available) time intervals only | A message appears confirming your schedule changes and your schedule automatically updates. | |
| Blue (limited availability) time intervals only | A message appears confirming your schedule change submitted successfully pending approval by a real-time coordinator. While waiting for approval, the interval displays in dark gray on the Adjust Schedule page. Once approved, your schedule updates to reflect the changes. | |
| Green (highly available) and Blue (limited availability) time intervals | A message displays asking if you want these intervals reviewed individually or as a group. In other words, if you cannot have the limited availability (blue) time intervals, do you still want the highly available (green) time intervals? | |
| **If you want the…** | **Then…** |
| Time off or extra hours during the highly available (green) time intervals regardless of whether the limited availability (blue) time intervals become available | Select **Individual**.  **Result:** EEM updates the highly available intervals on your schedule and sends a notification for the limited availability intervals to a real-time coordinator for approval. While waiting for approval, the interval displays as dark gray on the Adjust Schedule page. Once approved, your schedule updates to reflect the changes. |
| Highly available (green) time intervals only if the limited (blue) intervals become available | Select **Group**.  **Result:** Highly available intervals appear as dark gray until EEM processes the update. EEM sends a notification for the limited availability intervals for approval. These intervals appear as dark gray until approved and EEM updates your schedule. |

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| Swap Schedule |

 The Swap feature is **not** available to offline and non-inbound teams.

The Swap feature enables you to remove hours from your weekly schedule and add the same number of hours to another part of the week.

**Notes:**

* You must maintain your total number of weekly scheduled hours.
* Swaps must be done within the same Sunday through Saturday time frame to maintain weekly working hours. Availability for Swaps is based on business needs for each skill.

 The Swap feature is more readily available than Time Off. If Time Off is not available, consider utilizing the Swap feature. This feature allows you to rearrange your schedule based on business conditions while maintaining your weekly hours. Always check for swap availability prior to requesting an absence.

Refer to the table below:

|  |  |
| --- | --- |
| **Step** | **Action** |
| **1** | Complete the steps to [access the Self-Service feature](#_Access_the_Self-Service). |
| **2** | Slide right on **Request Swap** intervals to remove these hours from your schedule and click **Next**.   * To select all Request Swap intervals for the day, press and hold on any Request Swap interval and click **Select All**. |
| **3** | Select the day you want to add hours to your schedule.  **Note:** Hours can be added across multiple days and need not be on the same day or in consecutive blocks of time.   * If times are grayed out, they are not eligible to be swapped. |
| **4** | Slide right on **Swap Available** intervals to add the selected hours to schedule.  **Note:** The amount of time you add to your schedule must equal the amount of time removed in Step 1. |
| **5** | Click **Complete Swap**. |

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| Request Absence |

Request Absence allows you to notify your supervisor if you cannot work all or part of a scheduled shift.

This will still count against you. It would be the equivalent of calling into the attendance line.

**Notes:**

* If you are scheduled to move to a new program (**Example:** A new line of business) on a future date, your schedule displays for your current program before the date of the move. After the date of the move, your schedule displays for your new program. You cannot request an absence during the week you move to a new program unless the change occurs on the start day of week.
* Make sure to add your absence for the exact times you are not in to ensure you are paid correctly.
* ABPST is an option that should be used if you live in an area that allows Mandated Paid Sick Time. If you use this option, three consecutive days of absence will not merge.
* If you have used all your PST, you will want to start using Absence – Unexcused Self-Serve, so your unexcused absences will merge. You can check the Attendance Database and review the PHU column for the hours used for the year.
* Unexcused Self-Serve will result in an unexcused absence for the time frame selected per the enterprise attendance policy.
* Reporting an OTAB absence during a period with scheduled overtime is unexcused and applies to the enterprise attendance policy.
* Utilizing FMPEND will be unexcused until supporting Intermittent FMLA documentation is emailed to the Time and Attendance team by the colleague’s supervisor.
* The FMPEND activity is only utilized for Intermittent FMLA and should not be used for consecutive leaves of absence.

Refer to the table below:

|  |  |
| --- | --- |
| **Step** | **Action** |
| **1** | Click the menu icon  and select **Adjust Schedule**. |
| **2** | Click **Request Absence**.  **Result:** The Absence Request page displays today’s date with your current shift. |
| **3** | Select today or tomorrow’s date. |
| **4** | Select the activity code for the type of time off. |
| **5** | Select the time to start and end time off.  **Note:** This will indicate if the absence is due to Late Arrival, Early Departure, or Full Day absence based on the times you select. |
| **6** | Click **Submit**.    **Result:** EEM sends an email with the absence request information to your supervisor. Requesting an absence will have the same outcome as calling into the Attendance Line and would be considered an Unexcused Absence. For details on what points would be received, refer to [Customer Care Procedures for Reporting Absences (021318)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1a2d4af6-4035-4f03-874f-da6f626f5ca5) or [CVS Health Attendance Policy (DOC 51628)](https://policy.corp.cvscaremark.com/pnp/faces/DocRenderer?documentId=DOC-051628). |

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| Related Documents |

[NICE Webstation and Employee Engagement Engine (EEM) Agent Index(043220)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=9e0ef0c0-7b81-4b4a-821f-e712c3eca532)

[Using NICE Employee Engagement Manager (EEM) on the Web (057039)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ad3a51d3-5432-4398-b3bc-4dba4ae7dda8)

**Parent Documents:**[CVS Health Attendance Policy (DOC 51628)](https://policy.corp.cvscaremark.com/pnp/faces/DocRenderer?documentId=DOC-051628); [Meal Breaks and Rest Periods Policy (DOC-012006)](https://policy.corp.cvscaremark.com/cs/groups/public/@pnp/@nu/@all/@all/@4000/documents/sop/b2mt/mdey/~edisp/doc-012006.pdf)

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