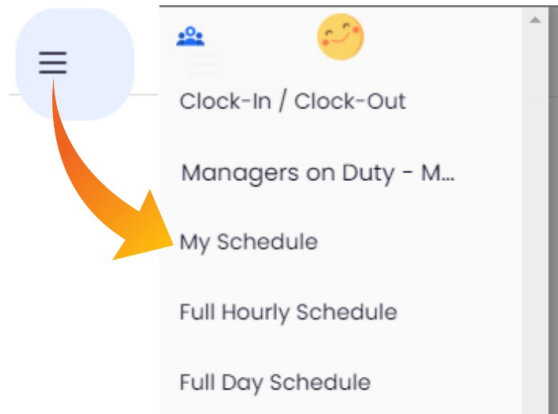


Shift Trades & Swaps

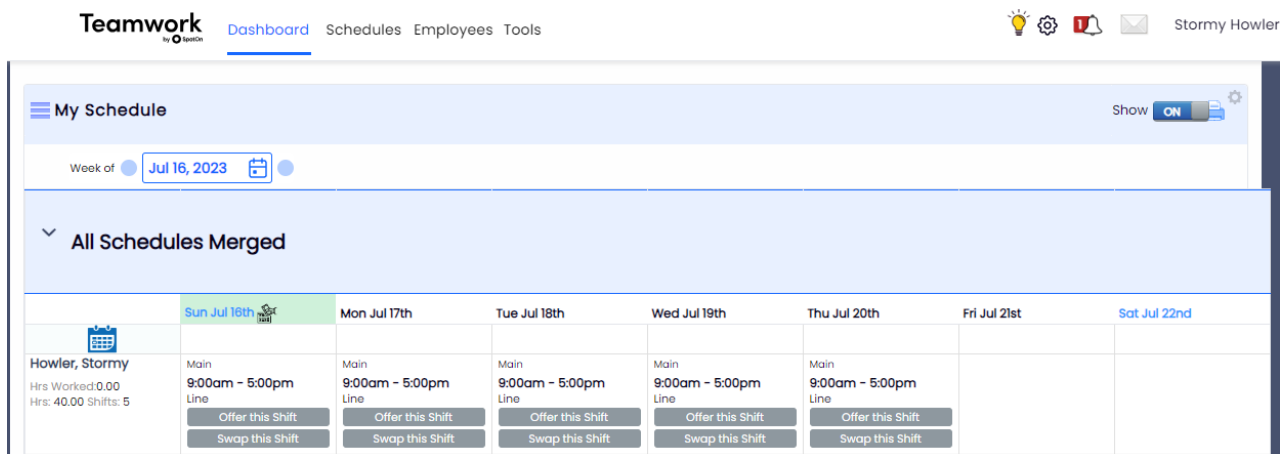
Last Modified on 10/03/2023 11:33 pm MDT

After a schedule has been published, employees are able to view their shifts on mobile or desktop, and may release shifts for other employees to cover, or requests a direct swap with a select employee.

Employees view shifts from mobile dashboard:



Or from the full site dashboard:



To release a shift for other employees to pick up, employee should press **Offer this Shift**.



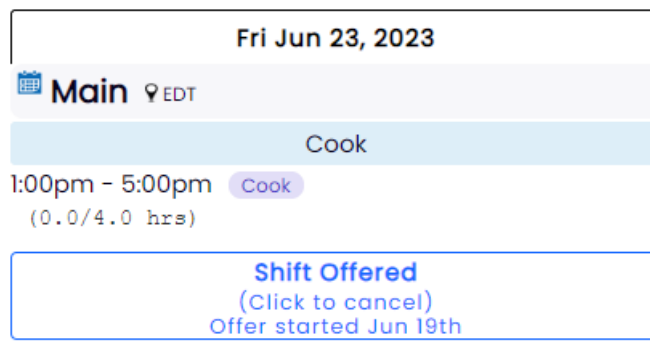
This prompts a pop up for the employee to list an *optional* reason for trading the shift.

Click **Offer**.



A dialog box titled "Shift Offer" with a text input field labeled "Reason for Trading this Shift". Below the input field are two buttons: "Offer" and "Cancel". The dialog box is positioned over a blurred background of a shift schedule.

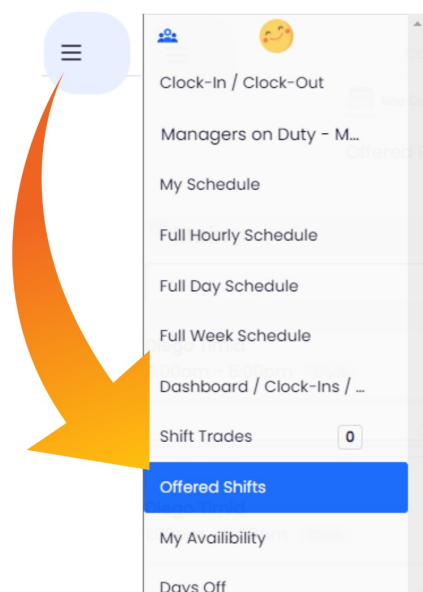
- The status of the shift changes to **Offered**, and the offer can be canceled by pressing the cancel button (prior to its acceptance and approval)



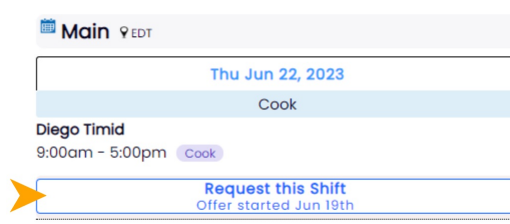
A notification card for a shift on "Fri Jun 23, 2023". The shift is for the "Main" department, "EDT" time zone, and the role of "Cook". The shift time is "1:00pm - 5:00pm" with a duration of "(0.0/4.0 hrs)". A blue box at the bottom of the card states "Shift Offered (Click to cancel) Offer started Jun 19th".

Employees will (in accordance with their alert settings) be notified when a shift is released.

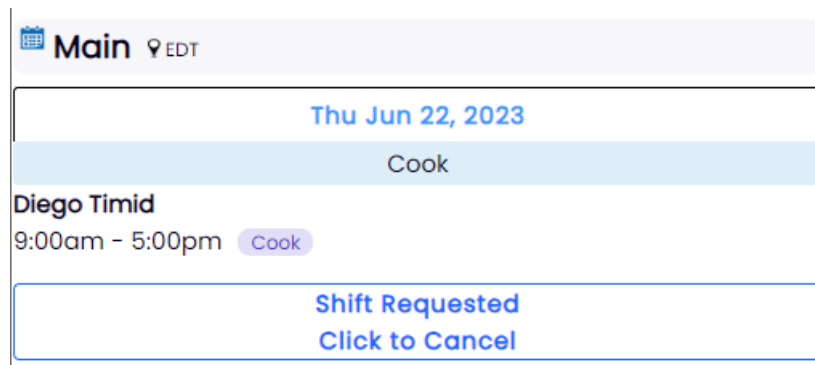
They can view offered shifts on mobile or desktop (dashboard):



- Employees are able to press **Request** (if they are qualified for the Role)

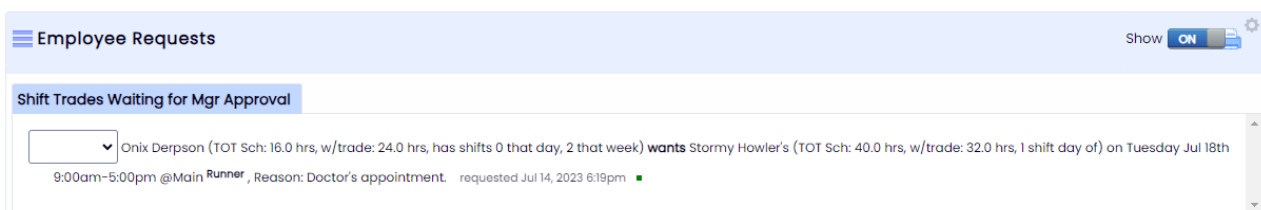


- The status changes, and employees are able to Cancel the request (prior to its acceptance and approval)



Swaps and Trades awaiting Manager approval can be found on the Dashboard (Desktop), or mobile menu

- Managers can view theoretical potential hours / overtime effects of a trade
- Manager can Approve or Deny from the dropdown menu
- Upon approval or denial, an alert is sent to all affected parties, and the schedule is updated.



If multiple requests are made for the same shift, a manager is able to see all requests, with time stamps of requests, along with aging color indicators, and an icon showing which request came in first (see below). Upon confirming a trade with one employee, the others will be automatically denied and notified.

Employee Requests Show ON

Shift Trades Waiting for Mgr Approval

- Stormy Howler (TOT Sch: 32.0 hrs, w/trade: 40.0 hrs, has shifts 0 that day, 4 that week) wants Onix Derpson's (TOT Sch: 32.0 hrs, w/trade: 24.0 hrs, 1 shift day of) on Friday Jul 21st 9:00am-5:00pm @Main **Bartender**, Reason: Working another job. requested Jul 14, 2023 6:20pm
- Onix Derpson (TOT Sch: 32.0 hrs, w/trade: 40.0 hrs, has shifts 0 that day, 4 that week) wants Stormy Howler's (TOT Sch: 32.0 hrs, w/trade: 24.0 hrs, 1 shift day of) on Tuesday Jul 18th 9:00am-5:00pm @Main **Runner**, Reason: Doctor's appointment. requested Jul 14, 2023 6:19pm
- Captain Spots (TOT Sch: 32.0 hrs, w/trade: 40.0 hrs, has shifts 0 that day, 4 that week) wants Onix Derpson's (TOT Sch: 32.0 hrs, w/trade: 24.0 hrs, 1 shift day of) on Monday Jul 17th 9:00am-5:00pm @Main **Bartender**, Reason: Asked for this day off. requested Jul 14, 2023 6:21pm**
- Kraken Keens (TOT Sch: 32.0 hrs, w/trade: 40.0 hrs, has shifts 0 that day, 4 that week) wants Onix Derpson's (TOT Sch: 32.0 hrs, w/trade: 24.0 hrs, 1 shift day of) on Monday Jul 17th 9:00am-5:00pm @Main **Bartender**, Reason: Asked for this day off. requested Jul 14, 2023 6:23pm

Employees are able to see the Status of their proposed activity on their mobile / dashboard.

Employee Requests Show ON

Shifts I've Requested

- Tuesday Jul 18th 9:00am - 5:00pm @Main, from Stormy Howler **Pending** requested Jul 14, 2023

Shifts I've Offered

- Friday Jul 21 9:00am - 5:00pm @ Main **Bartender** **Req by Stormy Howler** Mgr: **Approved** requested Jul 14, 2023 6:20pm
- Monday Jul 17 9:00am - 5:00pm @ Main **Bartender** **Req by Captain Spots** Mgr: **Approved** requested Jul 14, 2023 6:21pm

Direct Swaps

- Employees can initiate a direct swap with another employee, as to not release a shift to the entire staff. In this workflow, the 2nd employee is notified, and upon agreement, the swap is sent to manager(s) for approval.

Fri Jul 21, 2023

Main EDT

Server

9:00am - 5:00pm **Server**
(0.0/8.0 hrs)

Offer this Shift

Swap this Shift

Please see shift swap/trade overview: [Shift Swaps, Offers, and Requests](#)