



Manage Leave and Shift Requests User Guide

Scheduling Module



Introduction

As a schedule administrator, one of the key tasks you will need to perform is the management of employee shift and leave requests including shift changes, trades, and leave requests. Our goal is to provide all the requisite knowledge to quickly respond to these requests, where to view them, and to help you become familiar with the interface.

By mastering the management of leave and shift requests, you increase response times for responding to shift requests, ensure that employees promptly receive notification when their requests are responded to, and increase the efficiency of your organization.

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Manage Leave Requests

To begin managing leave requests, navigate to the manage tab within the Scheduling module. (Figure 1)

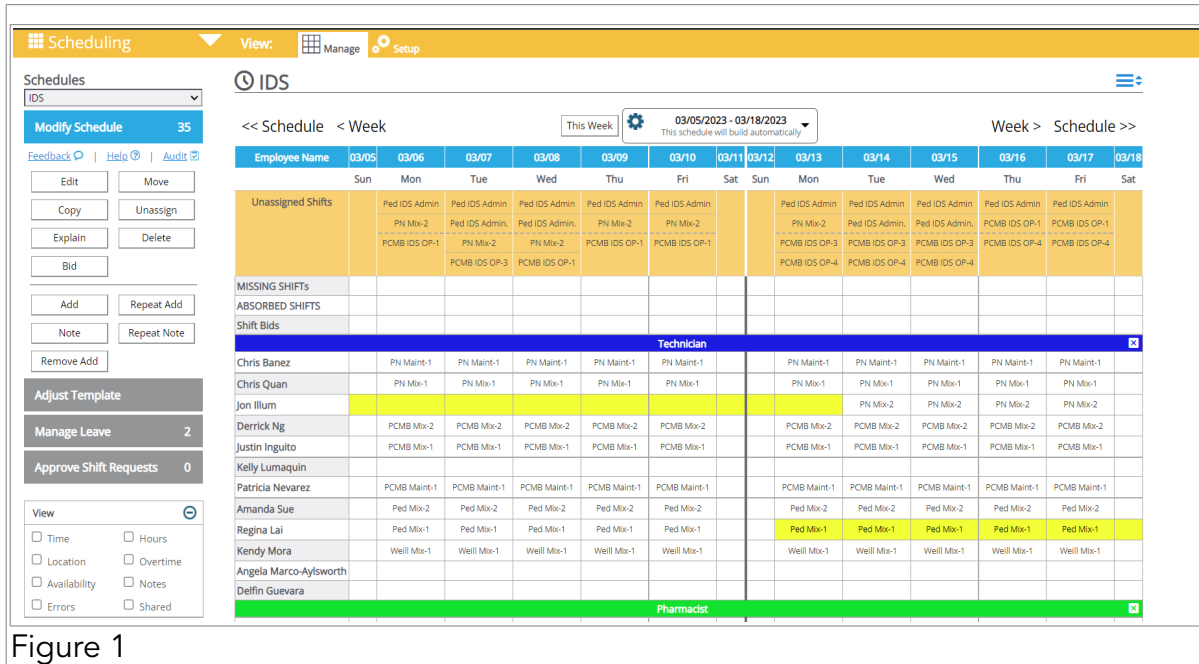


Figure 1

At the top of the grid editor in the gold row, you can view the amount of confirmed leave, partial leave, and requested leave requests for each date. (Figure 2)

Leave Requests	03/05	03/06	03/07	03/08	03/09	03/10	03/11	03/12	03/13	03/14	03/15	03/16	03/17	03/18
Confirmed	C: 0	C: 0	C: 0	C: 0	C: 0	C: 0	C: 0	C: 0	C: 0	C: 0	C: 0	C: 0	C: 0	C: 0
Partial	P: 0	P: 0	P: 0	P: 0	P: 0	P: 0	P: 0	P: 0	P: 0	P: 0	P: 0	P: 0	P: 0	P: 0
Request	R: 0	R: 0	R: 0	R: 0	R: 0	R: 0	R: 0	R: 0	R: 0	R: 0	R: 0	R: 0	R: 0	R: 0
See Schedule	S: 0	S: 0	S: 0	S: 0	S: 0	S: 0	S: 0	S: 0	S: 0	S: 0	S: 0	S: 0	S: 0	S: 0
Availability	A: 0	A: 0	A: 0	A: 0	A: 0	A: 0	A: 0	A: 0	A: 0	A: 0	A: 0	A: 0	A: 0	A: 0

Figure 2

Hovering over any request will display the Request Date. (Figure 3)

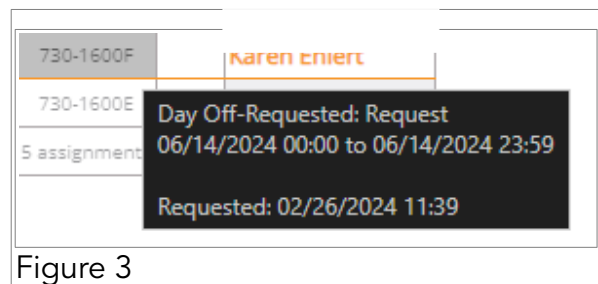


Figure 3

New Leave Requests

From the manage leave navigation panel (**Figure 1**), select new and then select a cell in the calendar for the employee you wish to create a request for.

This will open the **New Leave Request** pop-up window. (**Figure 2**)

Within the pop-up window, you choose the start time and the time that the leave period will end. You can also select what type of leave the request is for.

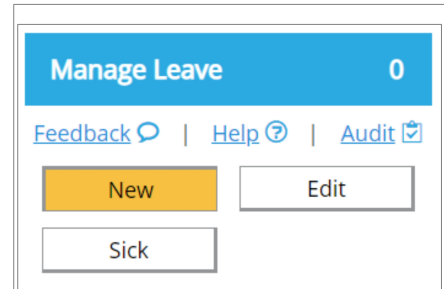


Figure 1

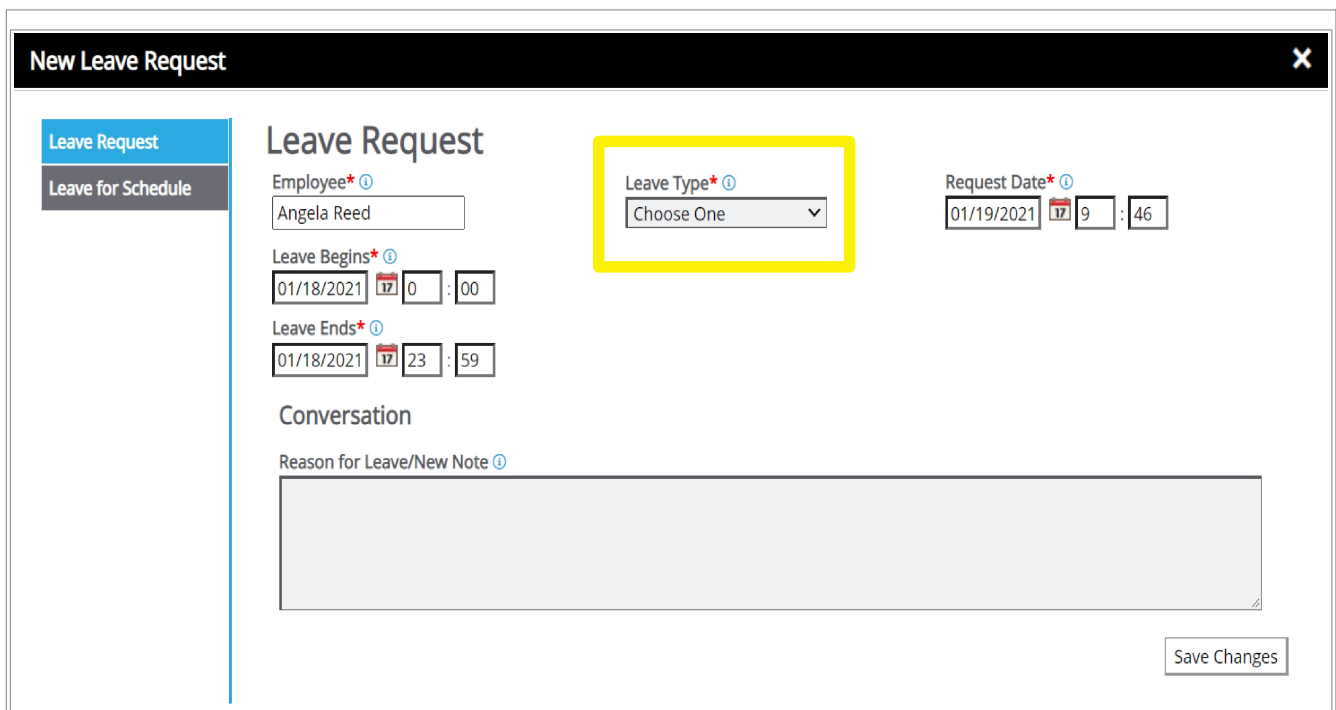


Figure 2

You can choose from whichever leave types your organization currently has set up in the **Leave Type** dropdown menu. (**Yellow box, Figure 2**)

You can also choose to add a note to your request by entering text in the **Reason for Leave** field. Once you've entered in all required details, select the **Save Changes** button.

Edit Leave Requests

To edit an existing leave request, first select the **Edit** function from the navigation panel (Figure 1) and then select one of the leave requests on the calendar. Leave requests will display on the calendar highlighted in different colors which can be customized to your organization's needs. (Figure 2)

Selecting the leave request you wish to update will open the **Update Leave Request** popup menu. (Figure 3)

You can choose to **Confirm**, **Edit**, **Delete**, or **Deny** the request. Selecting **Edit** will open the **Edit Leave Request** popup menu. You can readjust start and ending time and type as needed. (Figure 4)

You can also access the history of the request and if the employee sent any messages to you.

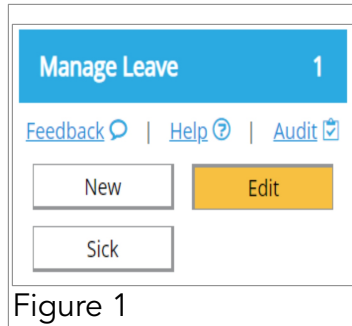


Figure 1

Derek Reese		WeekDays	WeekNights
Blair Williams	Surgery 1	OverNight	
Danny Dyson			
Kate Connor			

Figure 2

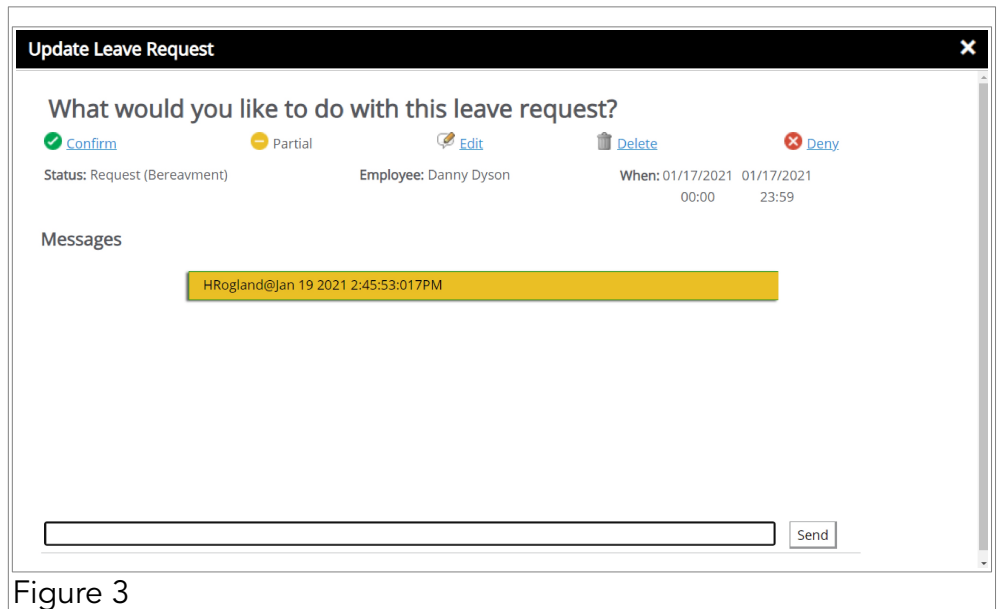


Figure 3

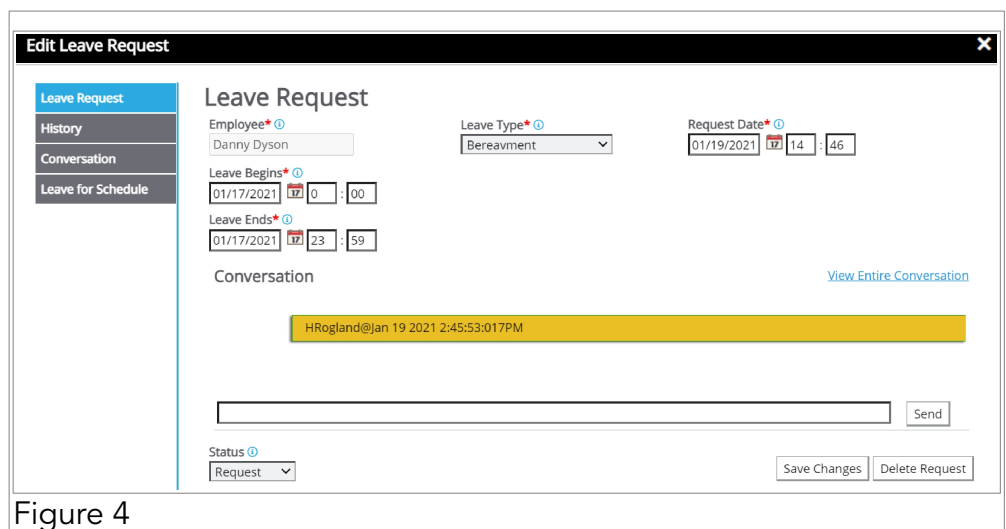


Figure 4

Sick Leave

To create a new sick leave request, first select **Sick** from the **Manage Leave** navigation panel. (Figure 1)

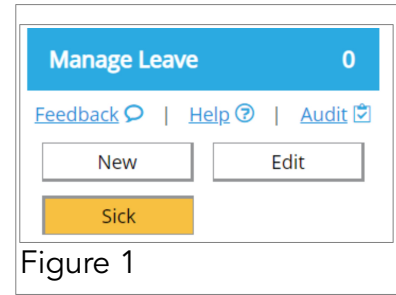


Figure 1

Next, select the cell on the calendar for the employee and day that the employee is sick. This will open the **Create Sick Leave** popup menu. (Figure 2)

Enter the date range for the sick request and then select **Next**.

Within the **Manage Shifts** section, a blue arrow icon will display next to the currently active shift. (Figure 3)



Figure 2

You can choose the **Unassign** link to move the shift to the Unassigned Shifts row in the schedule grid or you can select the **Assign Shift** link if you want a qualified employee to take the shift.

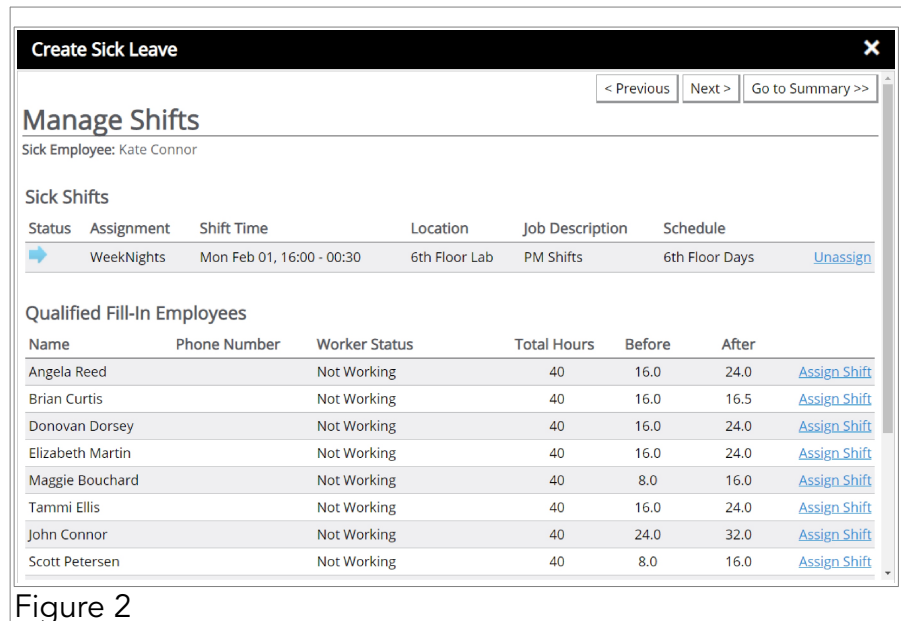


Figure 2

Select **Next** to manage the next shift during the sick leave range, or, if this is the last shift, to go to the **Summary** screen.

Select **Go To Summary** to advance to the **Summary** menu. Summary is a brief overview of all actions that were completed in the Create Sick Leave window. (Figure 4)

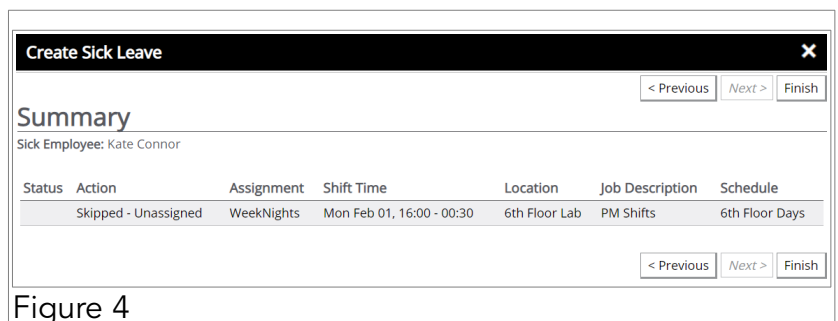


Figure 4

Select **Finish** once you have assigned all the shifts within the **Shift Information** table.

Approving Shift Requests

Next, we’re going to look at how to approve shift requests. First navigate to the **Approve Shift Requests** navigation panel in the **Manage** tab of the Scheduling module. (Figure 1)

There are four types of shift requests that can be approved or denied within the navigation panel:

Shift Trade: two employees agree to swap one shift assignment for a different assignment with each other. Shift trade requests are not presented to a schedule administrator for approval until both employees have agreed to the trade in StaffReady.

Shift Give Away: one employee requests for another employee to work their assigned shift without swapping. Shift give away requests are not presented to a schedule administrator for approval until both employees have agreed to the giveaway in StaffReady.

Shift Unassign: one employee requests to be removed from a scheduled shift assignment. The schedule administrator can approve or deny the unassign request as soon as the requesting employee submits it.

Shift Bid: an unassigned shift that a schedule manager has submitted to employees who can work the shift. Schedule managers can select from employees who accept the shift bid and automatically assign the shift through the **Approve Shift Bid** interface.

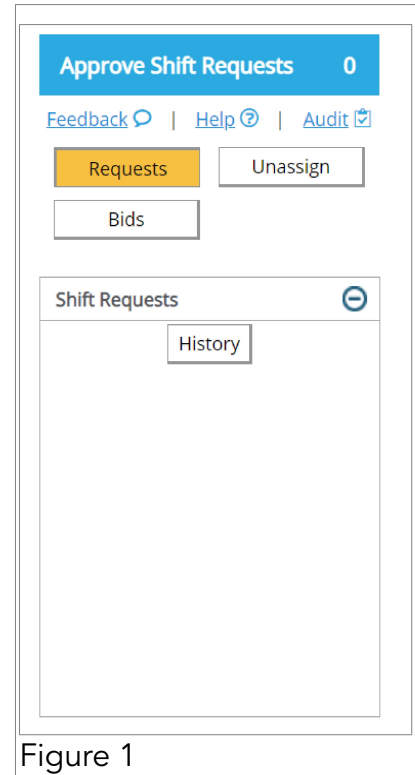


Figure 1

Shift Requests														
Bid	B: 0	B: 0	B: 0	B: 0	B: 0	B: 0	B: 0	B: 0	B: 0	B: 0	B: 0	B: 0	B: 0	B: 0
Give	G: 0	G: 0	G: 0	G: 0	G: 0	G: 0	G: 0	G: 0	G: 0	G: 0	G: 0	G: 0	G: 0	G: 0
Trade	T: 0	T: 0	T: 0	T: 0	T: 0	T: 0	T: 0	T: 0	T: 0	T: 0	T: 0	T: 0	T: 0	T: 0
Unassign	U: 0	U: 0	U: 0	U: 0	U: 0	U: 0	U: 0	U: 0	U: 0	U: 0	U: 0	U: 0	U: 0	U: 0

Figure 2

At the top of the grid editor in the gold row you can view the total number of bids, giveaways, trades, and unassign requests for each day. (Figure 2)

The left-side menu selector of the **Approve Shift Requests** submenu displays the number of shift requests pending for the selected schedule period.

Unassign Shift Requests

Select the **Approve Shift Request** navigation panel to expand it. (Figure 1)

Select **Request** and then select the shift request you want to review on the calendar grid.

This will open the **Approve Shift Unassign** popup menu. (Figure 2)

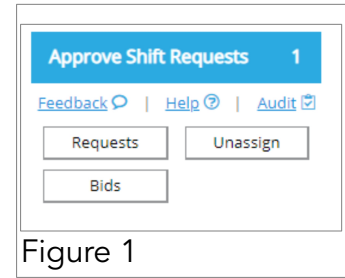


Figure 1

Ronnie Martin	UA 1	HE Days1	On Call	Rapid Testing A		UA 3	HE Days1	Rapid Testing C	Chem 1				
Jonathan Turner	On Call	Rapid Testing B	HE Days1	Immunochemistry B	Supv			Immunochemistry B	Immunochemistry C	UA 3	Supv	Immunochemistry C	
Barbara Dodd		UA 2	UA 2	UA 1	UA 2			HE Days1	Rapid Testing C	HE Days1	UA 3	On Call	
Johnny Myers													
Amber Ross													
Keith Edwards			Immunochemistry A					Immunochemistry A			Immunochemistry A		

Figure 2

The pop-up will display the type of shift request that was submitted (**Trade**, **Give Away**, or **Unassign**), the schedule outcome of the proposed request, changes to hours worked in the pay period for each employee before and after the trade (for Shift trades only), and it will also display any warnings that the schedule manager should be aware of before deciding on the trade or give away request. (Figure 3)

From here, you can choose to view details, confirm and unassign the shift request, or deny it.

Selecting the details link will allow you to view additional information about the shift request as well as the history of the request. It will also inform you if any scheduling conflicts will be created by making the desired edit to the schedule. (Figure 4)

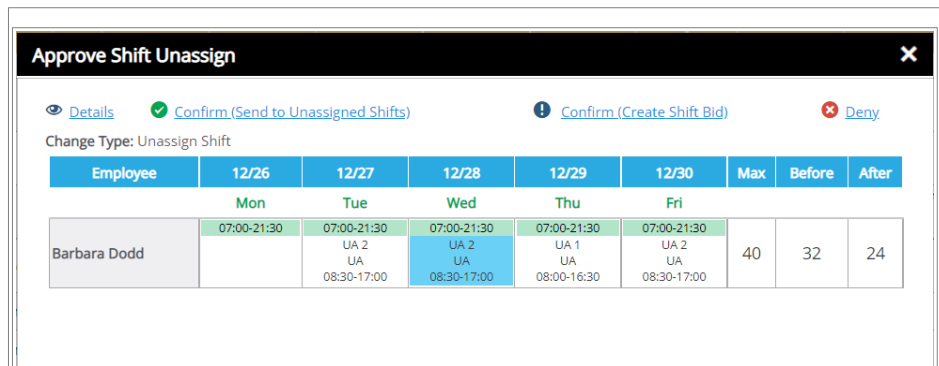


Figure 3

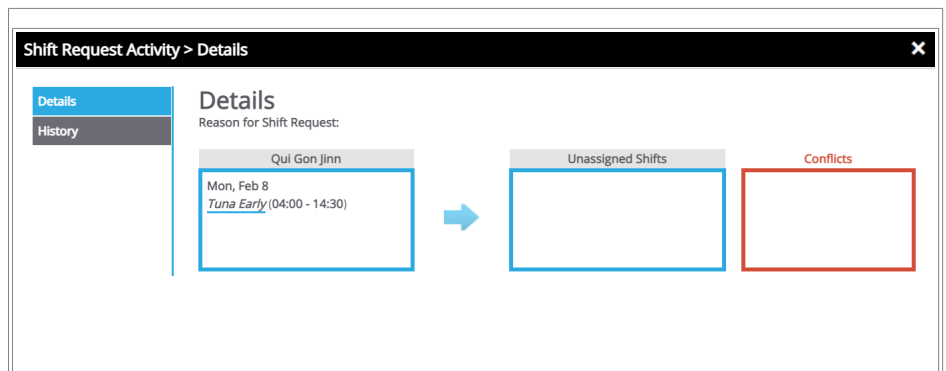


Figure 4

Shift Give Away Requests

Shift Give Away requests require an additional step in order for them to be visible to the manager.

When give away requests are first submitted, the recipient is chosen and any potential scheduling conflicts will be listed in the conflicts section. (Figure 1)

Give Away requests are first sent to the employee that the requesting employee wants to give the shift to. (Figure 2)

Only if or when that employee accepts the give away request does it become visible for manager approval.

The request will be visible to you in the **Shift Requests** color bar in the Welcome screen. It will display a summary of the request, the date the request was made, which employee made the request and which one accepted it, and the type of request. (Figure 3)

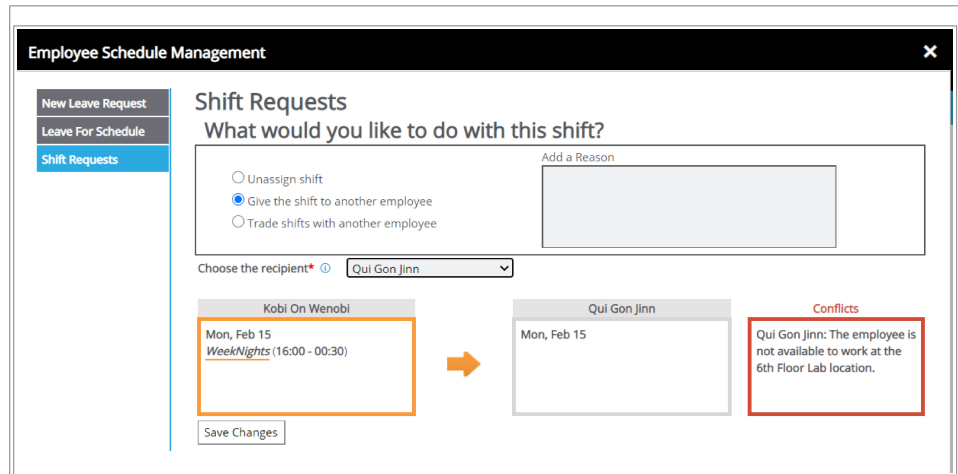


Figure 1

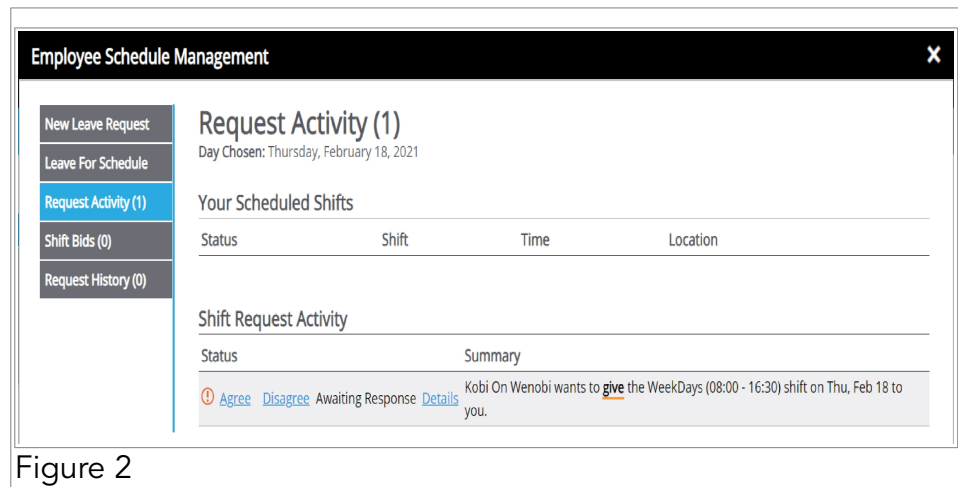


Figure 2

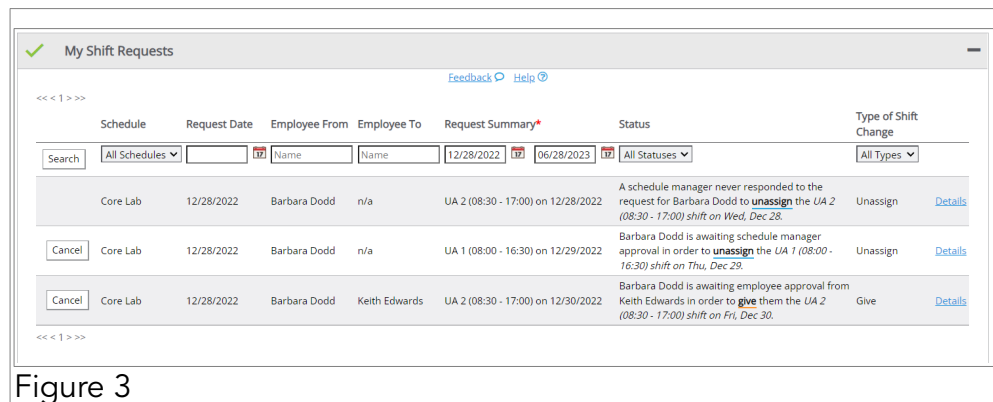


Figure 3

Shift Trade Requests

Shift Trade Requests also require an additional step. The requester must select a recipient, a day, and also choose which shift they want to receive from the recipient. **(Figure 1)**

As before, the request will first go to the employee the request is addressed to. It will display basic information about the shift and also what status the shift is in. Before the employee approves the request, its status will be Awaiting Employee Approval. **(Yellow box)**.

Once the employee approves it, the request will be visible to the manager. When viewed in the shift requests color bar, the status will now read Awaiting Manager Approval. **(Figure 3)** Confirming or denying the request will remove it from the list of pending requests.

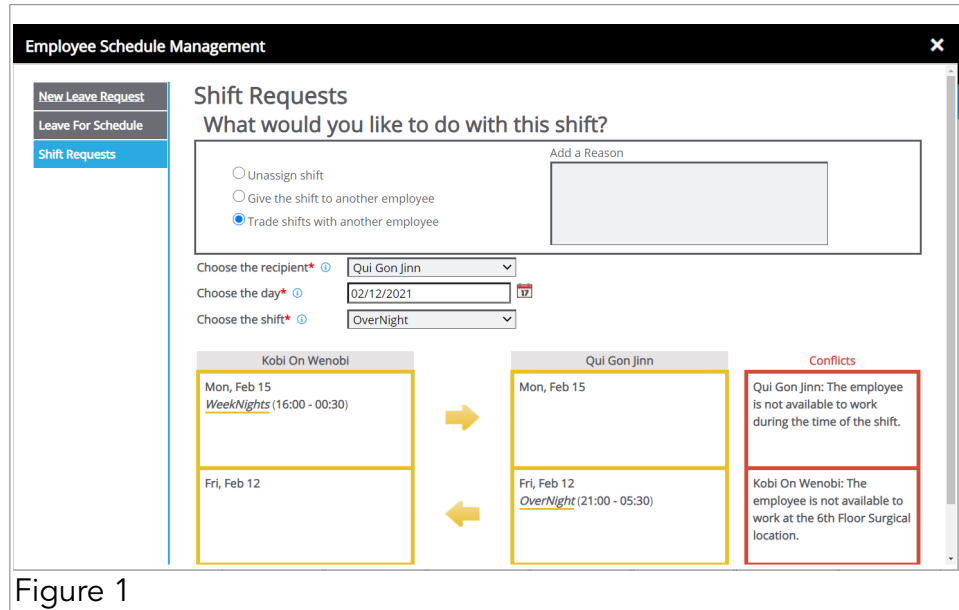


Figure 1

Note: Traded Shifts will display a note indicating that the shift was traded. Any existing notes will be amended to reflect the traded status. If a user wants to add a note in the future, they will need to edit the existing note rather than create a new one.

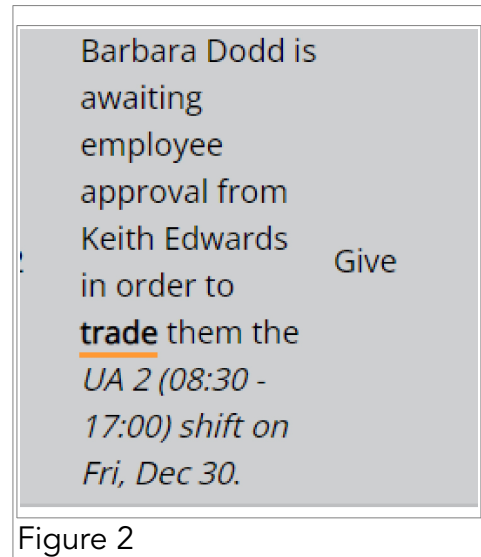


Figure 2

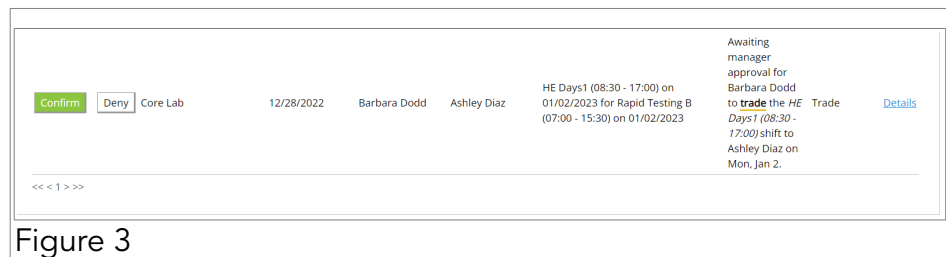


Figure 3

Shift Bids

Shift Bids are created when a supervisor takes an unassigned shift and makes it available for a set list of employees to bid on. This can be determined by seniority or whoever responds first.

Select **Bids** and then select **View** for the **Shift Bid** request you wish to review. This will open the **Approve Shift Bid** pop-up window.

This window displays information about the bid request including availability of the requesting employee(s), their current schedule, and changes to hours worked in the pay period for each employee.

The shift bid in question will be highlighted in green on the Shift Bids line. Warnings for the schedule manager regarding employee availability will be displayed below. **(Figure 2)**

Once you've decided on which employee to grant the shift bid to, select the **Confirm** link.

The shift will become visible on the schedule after it has been confirmed and be removed from the shift requests list.

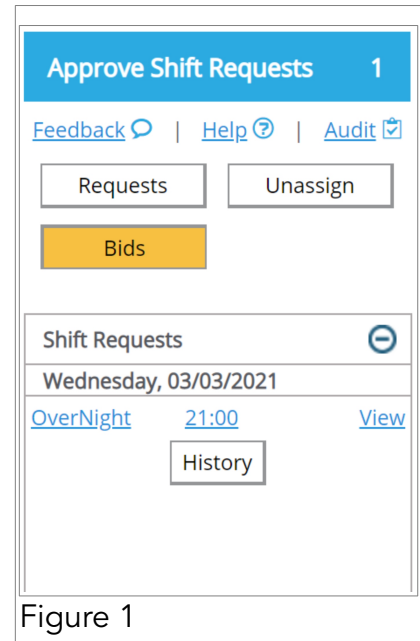


Figure 1

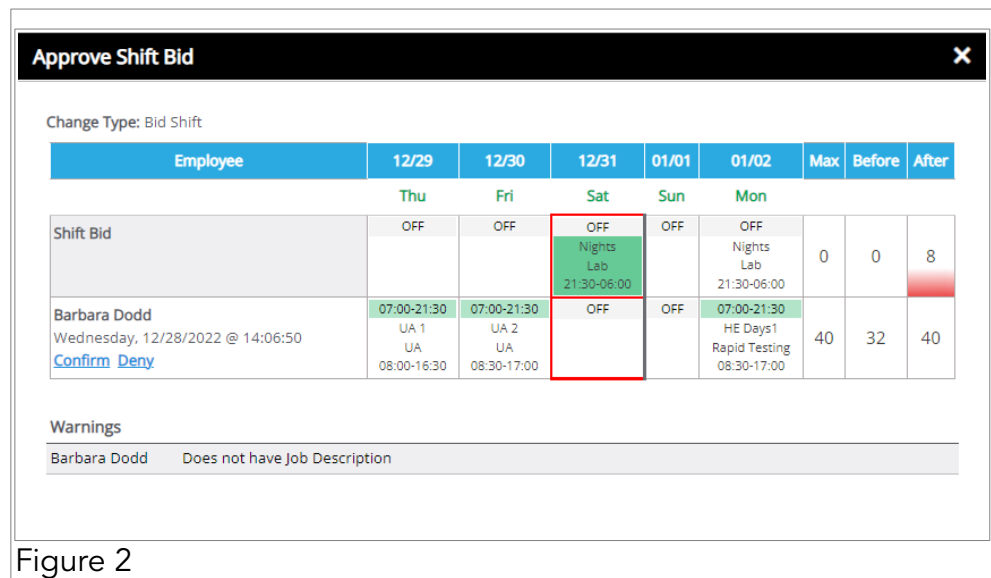


Figure 2

Resources

This concludes the User Guide for **Managing Leave and Shift Requests**. We hope that you have a better understanding of this feature and how it functions within the entire framework of the Scheduling Module.

For more focused Guides on the functions and features discussed in this document, please check out the linked Guides on this page for supplemental reading.

For further assistance, please contact our Support Team directly.

Our service hours are Monday through Friday, 6am to 5pm PST.

Phone: 1-877-229-5230

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