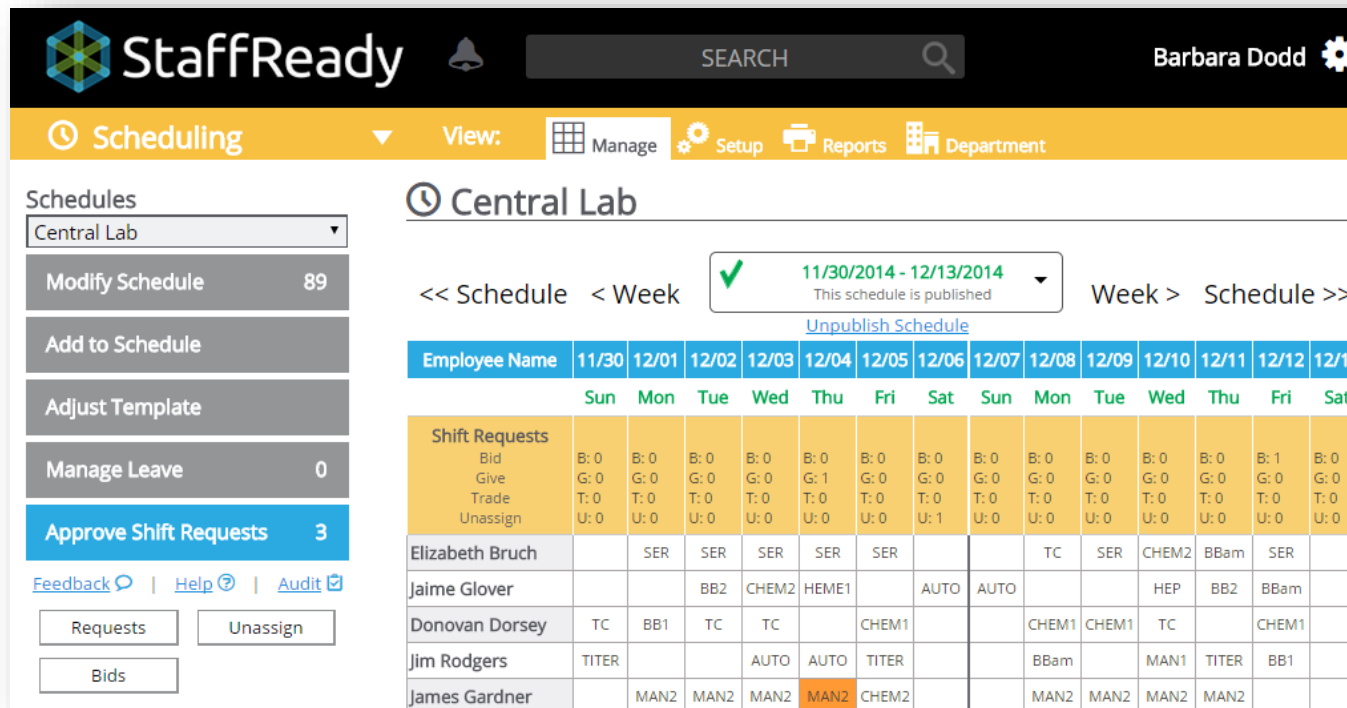


Scheduling Perspective – Manage View

Approve Shift Requests

This reference guide provides an overview of each mode from the **Approve Shift Requests** submenu within the **Manage** View in the StaffReady Scheduling Module. The following process steps and instructional information are provided within this document:

- **Overview**
- **Shift**
- **Unassign**
- **Bid**
- **History**



The screenshot displays the StaffReady Scheduling Manage View for 'Central Lab'. The interface includes a navigation bar with 'Scheduling' and 'View: Manage' options. A sidebar on the left lists various actions: 'Modify Schedule' (89), 'Add to Schedule', 'Adjust Template', 'Manage Leave' (0), and 'Approve Shift Requests' (3). The main content area shows a calendar for the week of 11/30/2014 to 12/13/2014. A table below the calendar lists shift requests for several employees, with the 'MAN2' request for James Gardner on 12/04 highlighted in orange.

Employee Name	11/30	12/01	12/02	12/03	12/04	12/05	12/06	12/07	12/08	12/09	12/10	12/11	12/12	12/13
	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
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: 1	B: 0
Give	G: 0	G: 0	G: 0	G: 0	G: 1	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: 1	U: 0	U: 0	U: 0	U: 0	U: 0	U: 0	U: 0
Elizabeth Bruch		SER	SER	SER	SER	SER			TC	SER	CHEM2	BBam	SER	
Jaime Glover			BB2	CHEM2	HEME1		AUTO	AUTO			HEP	BB2	BBam	
Donovan Dorsey	TC	BB1	TC	TC		CHEM1			CHEM1	CHEM1	TC		CHEM1	
Jim Rodgers	TITER			AUTO	AUTO	TITER			BBam		MAN1	TITER	BB1	
James Gardner		MAN2	MAN2	MAN2	MAN2	CHEM2			MAN2	MAN2	MAN2	MAN2		

Overview

There are four types of shift requests that can be approved or denied within the Approve Shift Requests submenu:

1. **Shift trade:** two employees agree to swap one shift assignment for another shift 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.
2. **Shift give away:** one employee requests for another employee to work his or her assigned shift, without a swap. Shift give away requests are not presented to a schedule administrator for approval until both employees have agreed to the give away in StaffReady.
3. **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.
4. **Shift bid:** an open (unassigned) shift assignment that has been submitted by a schedule manager to select staff to find someone to fill the opening. Once staff members have accepted the shift bid, schedule managers review and ultimately approve or deny, each worker's request to pick up the open shift assignment.

Overview of the Approve Shift Requests Submenu

At the top of the grid editor in the gold row you can view the total number of bid, give away, shift trade, and unassign requests for each date.

The notification window of the **Approve Shift Requests** submenu displays the number of shift requests pending for the current schedule period.

The screenshot shows the StaffReady interface. On the left is a sidebar with navigation options: 'Add to Schedule', 'Adjust Template', 'Manage Leave' (with a count of 0), and 'Approve Shift Requests' (with a count of 1). Below these are links for 'Feedback', 'Help', and 'Audit', and buttons for 'Requests', 'Unassign', and 'Bids'. On the right is a grid with columns for dates from 11/09 to 11/15 and rows for employees. A 'Shift Requests' summary row is at the top of the grid, with orange arrows pointing to the 'U: 1' value for 11/13 and the 'Approve Shift Requests' button in the sidebar.

Employee Name	11/09	11/10	11/11	11/12	11/13	11/14	11/15
	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Shift Requests							
Bid	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
Trade	T: 0	T: 0	T: 0	T: 0	T: 0	T: 0	T: 0
Unassign	U: 0	U: 0	U: 0	U: 0	U: 1	U: 0	U: 0
OPEN SHIFT							
Donovan Dorsey		CHEM1	CHEM1		CHEM1		
Angela Reed	BB2	MAN1			BB2	HEME1	
Elizabeth Bruch		BBam	BB2	SER	MAN1	BB2	
Jim Rodgers	TITER			HEP	CHEM2		
Jaime Glover			SURG	SURG	BBam		AUTO

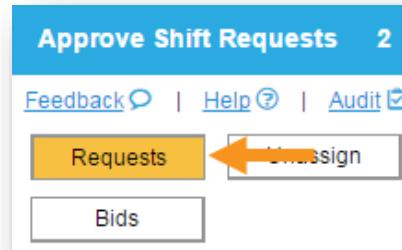
Shift Requests

Using the Requests Mode to Approve or Deny Shift Requests

1. In the left navigation pane, click **Approve Shift Requests**.
2. Click **Requests**.
3. In the row of the shift request you want to review, click **View**.

In the **Approve Shift Change** window, the proposed shift request is illustrated with detailed information:

- The type of Shift Request that was submitted
 - The schedule outcome of the proposed request
 - Changes to hours worked in the pay period for each employee, before and after the trade
 - Warnings that the schedule manager should be aware of before deciding on the shift trade or shift give away request
4. To reject the request, click **Deny** or to approve the request, click **Confirm**.



Approve Shift Change ✕

✔ Confirm ←
✕ Deny →

Change Type: Give Shift ←

Employee	11/27	11/28	11/29	11/30	12/01	Max	Before	After
	Thu	Fri	Sat	Sun	Mon			
Angela Reed	6:00-0:00	OFF	6:00-0:00 BB2 5th Floor-West 14:00-22:30	6:00-0:00 BB2 5th Floor-West 14:00-22:30	6:00-0:00 HEME1 4th Floor-Main 7:00-15:30	40	24	16
Allison McAlister	6:00-0:00	6:00-0:00 BB1 Blood Bank 7:00-15:30	OFF	OFF	6:00-0:00 BB2 5th Floor-West 14:00-22:30	40	32	40

Warnings

Allison McAlister Not Available to work ←

Unassign

Using the Unassign Mode to Accept or Reject Unassign Requests

1. In the left navigation pane, click **Approve Shift Requests**.
2. Click **Unassign**.
3. In the row of the unassign request you want to review, click **View**.

In the **Approve Shift Unassign** window, the proposed unassign request is illustrated.

4. To approve the request and send it to unassigned shifts, click **Confirm (Send to Unassigned Shifts)**.

or

To approve the request and send it out to staff as a shift bid, click **Confirm (Create Shift Bid)**.

or

To reject the request, click **Deny**.

Shift Requests		
A. Reed	BB2	11/08
A. Reed	BB2	View

Employee	11/06	11/07	11/08	11/09	11/10	Max	Before	After
	Thu	Fri	Sat	Sun	Mon			
Angela Reed	6:00-0:00 BB2 5th Floor-West 14:00-22:30	OFF	6:00-0:00 BB2 5th Floor-West 14:00-22:30	6:00-0:00 BB2 5th Floor-West 14:00-22:30	6:00-0:00 MAN1 South Campus 8:00-16:30	40	32	24

Bids

Using the Bids Mode

1. In the left navigation pane, click **Approve Shift Requests**.
2. Click **Bids**.
3. In the row of the bid request you want to review, click on **View**.

In the **Approve Shift Bid** window, the proposed bid shift requests are illustrated with detailed information:

- Availability of the requesting employees.
 - Current schedule of the requesting employees.
 - Changes to hours worked in the pay period for each employee.
 - The shift bid in question in **green** on the **Shift Bids** line.
 - Warnings the schedule manager should be aware of before deciding on the shift bid request.
4. Next to the employee name you wish to approve the bid request for, click **Confirm**.

Approve Shift Requests 3

Feedback | Help | Audit

Requests Unassign

Bids ←

Shift Requests

Sunday, 11/23/2014

BB2	14:00	View
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History

Approve Shift Bid ✕

Change Type: Bid Shift

Employee	11/21	11/22	11/23	11/24	11/25	Max	Before	After
	Fri	Sat	Sun	Mon	Tue			
Allison McAlister	OFF	OFF	OFF	6:00-0:00 BB1 Blood Bank 7:00-15:30	6:00-0:00 BB1 Blood Bank 7:00-15:30	40	32	40
Shift Bids	OFF	OFF	OFF BB2 5th Floor-West 14:00-22:30	OFF	OFF	0	0	0

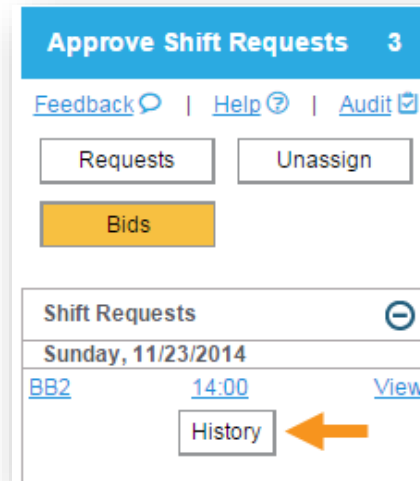
Warnings

Allison McAlister Not Available to work

History

Using the Requests, Unassign, or Bids Mode to View the Bid Request History

1. In the left navigation pane, click **Approve Trades**.
2. Click **Requests**, **Unassign**, or **Bids**.
3. Click **History**.



In the **Shift Trade History** window all historical information for shift trade, shift give away, shift unassign, and shift bid requests can be reviewed.

4. Click the **Close** button .

The screenshot shows a window titled "Shift Trade History" with a close button in the top right corner. Below the title is a pagination control: "<<< 1 2 3 4 5 6 7 8 9 10 >>>". Below that is a table with columns: Type, Assignment, From, To, Trade, Status, and Status Date. There are search filters for each column. The table contains four rows of data.

Type	Assignment	From	To	Trade	Status	Status Date
Bid Shift	BB2 14:00 11/23/2014	Shift Bids	Allison McAlister		Agree	10/31/14 3:52 PM
Give Away Shift	BB2 14:00 11/29/2014	Angela Reed	Allison McAlister		Agree	10/31/14 3:23 PM
Give Away Shift	BB2 14:00 11/29/2014	Angela Reed	Allison McAlister		Request	10/31/14 2:37 PM
Unassign Shift	BB2 14:00 11/13/2014	Angela Reed			Request	10/31/14 2:36 PM