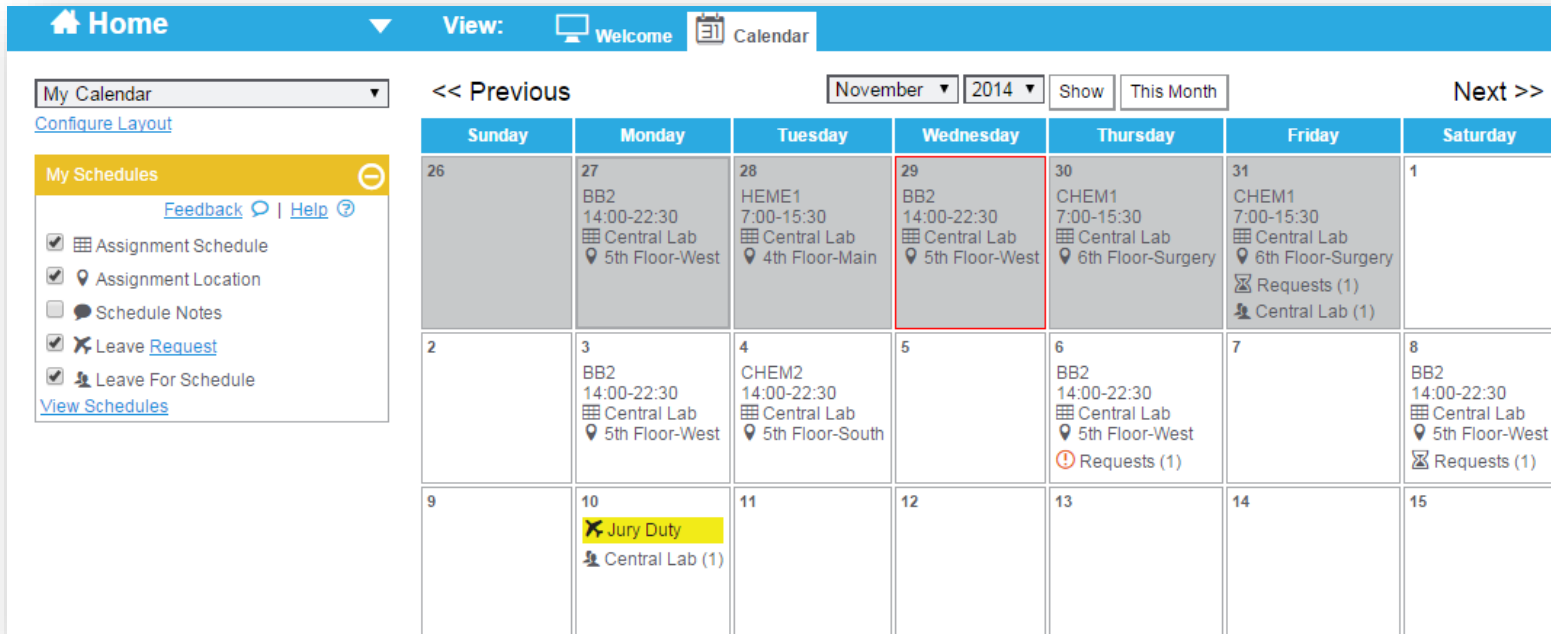


Calendar View

My Schedules

This reference guide provides a process overview of the **My Schedules** submenu within the **Calendar** view in the StaffReady Scheduling Module. The following process steps and instructional information are provided within this document

- Review My Schedule
- Submit a Shift Request
- Review Shift and Bid Requests
- Cancel a Shift Request
- Accept and Reject Bid Requests
- Submit Leave Request
- Edit/Review Existing Leave Request





The screenshot displays the StaffReady Calendar interface. The top navigation bar includes 'Home', 'View: Welcome', and 'Calendar'. The main content area shows a calendar for November 2014, with navigation controls for 'Previous' and 'Next'. The calendar grid is organized by day of the week, with dates 26 through 15. The Wednesday, November 26th cell is highlighted with a red border, showing a shift for 'BB2' from 14:00-22:30 at 'Central Lab' on the '5th Floor-West'. The Monday, November 10th cell is highlighted in yellow, showing a 'Jury Duty' event at 'Central Lab (1)'. A sidebar on the left contains a 'My Schedules' section with a 'Feedback' link and a list of schedule-related items: 'Assignment Schedule', 'Assignment Location', 'Schedule Notes', 'Leave Request', and 'Leave For Schedule'. The 'View Schedules' link is also present.


Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
26	27 BB2 14:00-22:30 Central Lab 5th Floor-West	28 HEME1 7:00-15:30 Central Lab 4th Floor-Main	29 BB2 14:00-22:30 Central Lab 5th Floor-West	30 CHEM1 7:00-15:30 Central Lab 6th Floor-Surgery	31 CHEM1 7:00-15:30 Central Lab 6th Floor-Surgery Requests (1) Central Lab (1)	1
2	3 BB2 14:00-22:30 Central Lab 5th Floor-West	4 CHEM2 14:00-22:30 Central Lab 5th Floor-South	5	6 BB2 14:00-22:30 Central Lab 5th Floor-West Requests (1)	7	8 BB2 14:00-22:30 Central Lab 5th Floor-West Requests (1)
9	10 Jury Duty Central Lab (1)	11	12	13	14	15

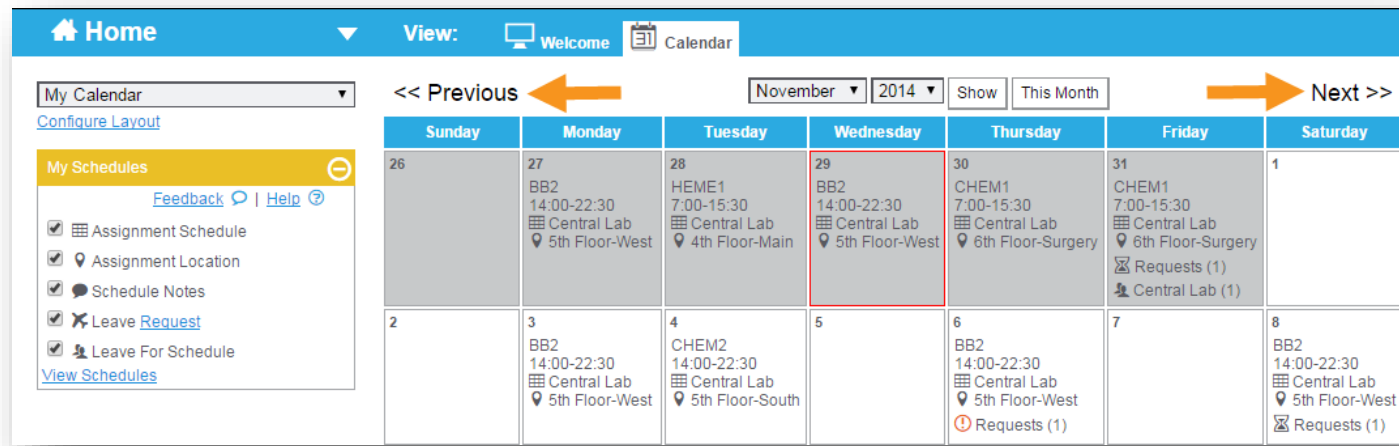
Review My Schedule

You can view your schedule, request leave, initiate shift trades with coworkers, bid on open shifts, and see notes posted by schedule managers using the **My Schedules** submenu within the **Calendar** view. The current calendar month is the default display.

Review My Schedule

1. Click the **Calendar** view.
2. Click **Previous** to view the previous month.
3. Click **Next** to view the next month.
4. Select the **Assignment Schedule** () check box to view the name of the schedule the shift was assigned from.
5. Select the **Assignment Location** () check box to view the locations of scheduled shifts.

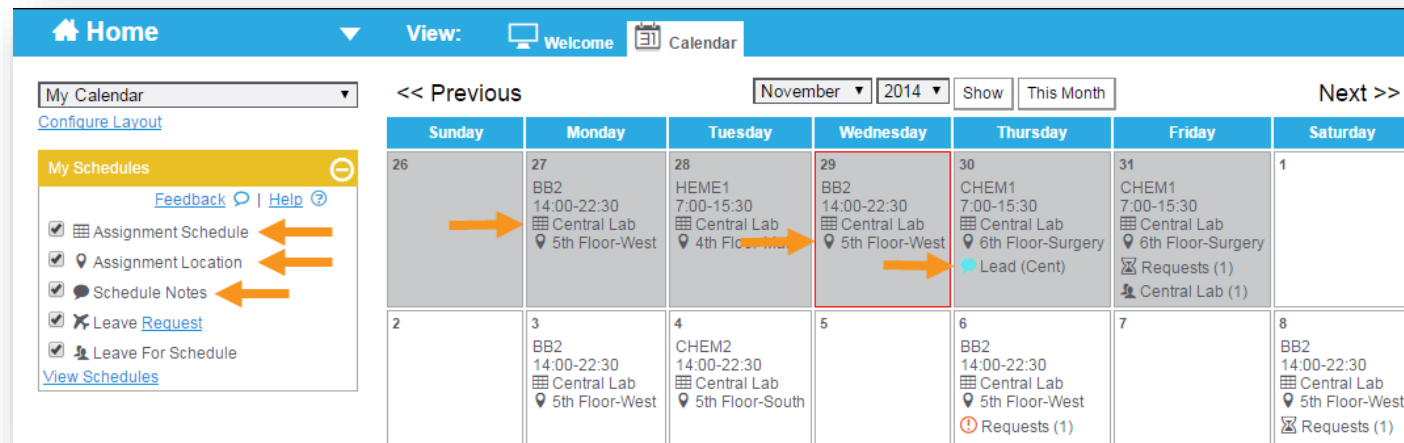
Select the **Schedule Notes** () check box to view the notes on the schedule.



Home View: Welcome Calendar

My Calendar << Previous November 2014 Show This Month Next >>

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
26	27 BB2 14:00-22:30 Central Lab 5th Floor-West	28 HEME1 7:00-15:30 Central Lab 4th Floor-Main	29 BB2 14:00-22:30 Central Lab 5th Floor-West	30 CHEM1 7:00-15:30 Central Lab 6th Floor-Surgery	31 CHEM1 7:00-15:30 Central Lab 6th Floor-Surgery Requests (1) Central Lab (1)	1
2	3 BB2 14:00-22:30 Central Lab 5th Floor-West	4 CHEM2 14:00-22:30 Central Lab 5th Floor-South	5	6 BB2 14:00-22:30 Central Lab 5th Floor-West Requests (1)	7	8 BB2 14:00-22:30 Central Lab 5th Floor-West Requests (1)



Home View: Welcome Calendar

My Calendar << Previous November 2014 Show This Month Next >>

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
26	27 BB2 14:00-22:30 Central Lab 5th Floor-West	28 HEME1 7:00-15:30 Central Lab 4th Floor-Main	29 BB2 14:00-22:30 Central Lab 5th Floor-West	30 CHEM1 7:00-15:30 Central Lab 6th Floor-Surgery Lead (Cent)	31 CHEM1 7:00-15:30 Central Lab 6th Floor-Surgery Requests (1) Central Lab (1)	1
2	3 BB2 14:00-22:30 Central Lab 5th Floor-West	4 CHEM2 14:00-22:30 Central Lab 5th Floor-South	5	6 BB2 14:00-22:30 Central Lab 5th Floor-West Requests (1)	7	8 BB2 14:00-22:30 Central Lab 5th Floor-West Requests (1)

7. Click **View Schedules** to view and print all schedules employee is associated with. There are different versions available for the user to print (HTML, PDF Landscape, PDF portrait)
8. Click the drop down menu to select another schedule if you have access to more than one schedule.

The screenshot shows the StaffReady web application interface. On the left, a sidebar titled "My Schedules" contains several options with checkboxes: "Assignment Schedule", "Assignment Location", "Schedule Notes", "Leave Request", and "Leave For Schedule". The "View Schedules" link at the bottom of the sidebar is highlighted with a red arrow. The main content area shows a calendar for November 2014. A modal window titled "View Schedules" is open, displaying a table of schedules for "Central Lab". The table has columns for "First Date", "Last Date", "HTML", "PDF Landscape", and "PDF Portrait". The row for dates 10/12/2014 to 11/08/2014 is highlighted in yellow, and red arrows point to the PDF icons in that row. The modal also includes a "Schedules:" dropdown menu set to "Central Lab" and a "WICKET AJAX DEBUG" button at the bottom right.

First Date	Last Date	HTML	PDF Landscape	PDF Portrait
02/01/2015	02/28/2015	Not Posted	Not Posted	Not Posted
01/04/2015	01/31/2015	Not Posted	Not Posted	Not Posted
12/07/2014	01/03/2015	Not Posted	Not Posted	Not Posted
11/09/2014	12/06/2014	Not Posted	Not Posted	Not Posted
10/12/2014	11/08/2014	Not Posted	Not Posted	Not Posted
09/14/2014	10/11/2014	Not Posted	Not Posted	Not Posted

Submit a Shift Request

There are three types of shift requests that can be submitted within the **My Schedule** 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 Staff Ready.
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 giveaway 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.

Submit a Shift Trade Request

1. Click on the scheduled shift you wish to trade.

The screenshot displays the StaffReady calendar interface. The top navigation bar includes 'Home', 'View: Welcome', and 'Calendar'. The main area shows a calendar for October 2014. The calendar grid has columns for Sunday through Saturday. The date 31st is highlighted with a red border, and an orange arrow points to it from the right. The shift assignment for 31st is 'CHEM1 7:00-15:30' at 'Central Lab' on the '6th Floor-Surgery'. Below the shift name, there is a 'Lead (Cent)' icon and a 'Requests (1)' icon. The left sidebar contains 'My Schedules' with a 'Feedback | Help' link and a list of schedule-related options: 'Assignment Schedule', 'Assignment Location', 'Schedule Notes', 'Leave Request', and 'Leave For Schedule'. The top right of the calendar shows navigation controls for 'Previous', 'October 2014', 'Show This Month', and 'Next >>'.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
28	29	30	1	2	3	4
5	6	7 Requests (1)	8	9	10 Requests (1)	11 Requests (1)
12	13 BB2 14:00-22:30 Central Lab 5th Floor-West	14 HEME1 7:00-15:30 Central Lab 4th Floor-Main	15	16 CHEM2 14:00-22:30 Central Lab 5th Floor-South	17	18 BB2 14:00-22:30 Central Lab 5th Floor-West
19 BB2 14:00-22:30 Central Lab 5th Floor-West	20 HEME1 7:00-15:30 Central Lab 4th Floor-Main	21	22	23 BB2 14:00-22:30 Central Lab 5th Floor-West	24 CHEM2 14:00-22:30 Central Lab 5th Floor-South	25
26	27 BB2 14:00-22:30 Central Lab 5th Floor-West	28 HEME1 7:00-15:30 Central Lab 4th Floor-Main	29 BB2 14:00-22:30 Central Lab 5th Floor-West	30 CHEM1 7:00-15:30 Central Lab 6th Floor-Surgery Lead (Cent)	31 CHEM1 7:00-15:30 Central Lab 6th Floor-Surgery Requests (1) Central Lab (1)	1

2. Click **Trade shifts with another employee.**

3. Click **Choose the recipient** menu.

4. Click **Choose the day** box.

5. Click **Choose the Shift** menu.

6. Click **Save Changes.**

Employee Schedule Management

Shift Requests

What would you like to do with this shift?

Unassign shift
 Give the shift to another employee
 Trade shifts with another employee

Add a Reason

Choose the recipient* Elizabeth Bruch
Choose the day* 10/31/2014
Choose the shift* SER

Angela Reed	Elizabeth Bruch
Fri, Oct 31 <u>CHEM1</u> (7:00 - 15:30)	Fri, Oct 31 SER (9:00 - 17:30)
Fri, Oct 31 CHEM1 (7:00 - 15:30)	Fri, Oct 31 <u>SER</u> (9:00 - 17:30)

Conflicts

Elizabeth Bruch: The employee is not available to work during the time of the shift.

Angela Reed: The employee does not have the Serology job description.

Save Changes

Submit a Shift Give Away Request

Submit a Shift Give Away Request

1. Click on the **scheduled shift** you wish to give away.

The screenshot shows the StaffReady calendar interface. The top navigation bar includes 'Home', 'View: Welcome', and 'Calendar'. The main area displays a calendar for October 2014. The calendar grid shows dates from 28th to 4th. The 30th and 31st are highlighted with a red border. The 30th shows a shift for CHEM1 (7:00-15:30) at Central Lab, 6th Floor-Surgery, with a 'Lead (Cent)' icon. The 31st shows a shift for CHEM1 (7:00-15:30) at Central Lab, 6th Floor-Surgery, with 'Requests (1)' and 'Central Lab (1)' icons. An orange arrow points to the 31st shift. The left sidebar contains 'My Schedules' with a list of items: Assignment Schedule, Assignment Location, Schedule Notes, Leave Request, and Leave For Schedule. The bottom of the page features the StaffReady logo and copyright information.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
28	29	30	1	2	3	4
5	6	7 ⊗ Requests (1)	8	9	10 ⊗ Requests (1)	11 ⊗ Requests (1)
12	13 BB2 14:00-22:30 Central Lab 5th Floor-West	14 HEME1 7:00-15:30 Central Lab 4th Floor-Main	15	16 CHEM2 14:00-22:30 Central Lab 5th Floor-South	17	18 BB2 14:00-22:30 Central Lab 5th Floor-West
19 BB2 14:00-22:30 Central Lab 5th Floor-West	20 HEME1 7:00-15:30 Central Lab 4th Floor-Main	21	22	23 BB2 14:00-22:30 Central Lab 5th Floor-West	24 CHEM2 14:00-22:30 Central Lab 5th Floor-South	25
26	27 BB2 14:00-22:30 Central Lab 5th Floor-West	28 HEME1 7:00-15:30 Central Lab 4th Floor-Main	29 BB2 14:00-22:30 Central Lab 5th Floor-West	30 CHEM1 7:00-15:30 Central Lab 6th Floor-Surgery Lead (Cent)	31 CHEM1 7:00-15:30 Central Lab 6th Floor-Surgery Requests (1) Central Lab (1)	1

2. Click **Give the shift to another employee.**

3. Click **Choose the recipient** menu.

Note: The **Conflicts** box describes any conflicts that may dissuade the schedule manager from approving your shift give away request.

4. Click **Save Changes.**

Employee Schedule Management

Shift Requests

What would you like to do with this shift?

Unassign shift

Give the shift to another employee

Trade shifts with another employee

Add a Reason

Choose the recipient*

Angela Reed

Fri, Oct 31
CHEM1 (7:00 - 15:30)

Elizabeth Bruch

Fri, Oct 31
SER (9:00 - 17:30)

Conflicts

Elizabeth Bruch: The employee is already working the SER shift during an overlapping time.

Save Changes

Submit an Unassign Shift Request

Submit a Shift Give Away Request

1. Click **Unassign Shift.**

2. Click **Save Changes.**

Employee Schedule Management

Shift Requests

What would you like to do with this shift?

Unassign shift

Give the shift to another employee

Trade shifts with another employee

Add a Reason

Angela Reed

Fri, Oct 31
CHEM1 (7:00 - 15:30)

Unassigned Shifts






Conflicts

Save Changes

Review Shift and Bid Requests

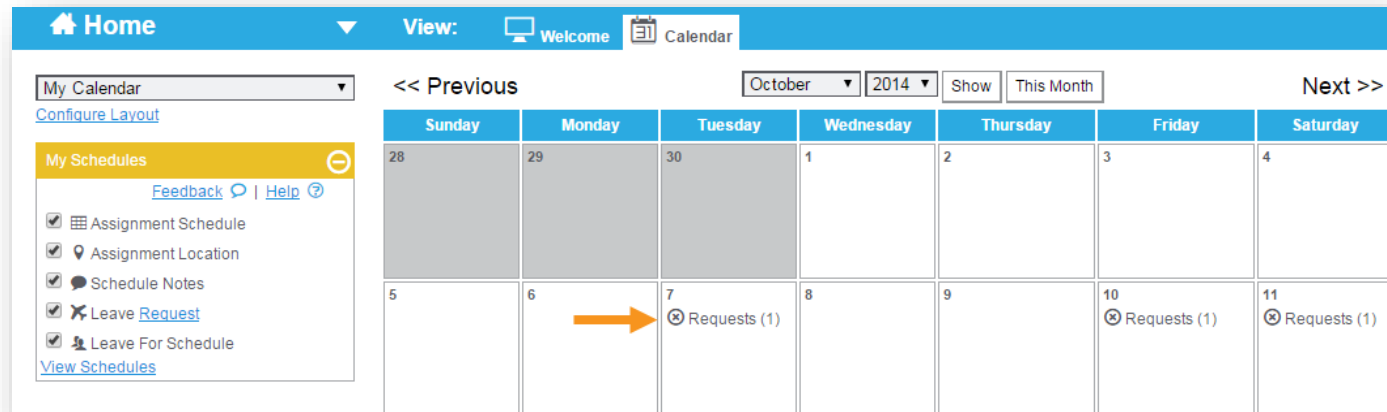
From the **My Schedules** submenu, you can review and change shift trade requests coworkers have submitted to you, monitor shift requests that you have submitted to coworkers and schedule managers, and accept or decline shift bids sent to you by your schedule manager.

Shift requests appear on your schedule calendar with icons that provide a visual representation of the status of shift requests and shift bids. The following legend defines the meaning of each icon:

-  The submitted shift request has been approved and there are not any outstanding decisions left to be made by you, the coworker involved in the trade, or the schedule manager.
-  The submitted shift request requires a decision be made either by a coworker or by your schedule manger.
-  A coworker is waiting for you to decide on a proposed shift trade.
-  You have a shift bid from your schedule manager that you can either accept or deny.
-  Your shift request has been cancelled.

Review Shift and Bid Requests

1. Click **Requests**.



The screenshot shows the StaffReady calendar interface. The top navigation bar includes "Home", "View: Welcome", and "Calendar". The main area displays a calendar for October 2014. The calendar grid shows days from Sunday to Saturday. On Monday, Tuesday, Friday, and Saturday, there are icons indicating requests. An orange arrow points to the Tuesday icon.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
28	29	30	1	2	3	4
5	6	7 ⊗ Requests (1)	8	9	10 ⊗ Requests (1)	11 ⊗ Requests (1)

2. Click **Details**.

Employee Schedule Management

Request Activity (1)
Day Chosen: Friday, October 31, 2014

Your Scheduled Shifts

Status	Shift	Time	Location
Pending Employee Response	CHEM1	7:00 - 15:30	6th Floor-Surgery

Shift Request Activity

Status	Summary
Pending Employee Response	Details to give the CHEM1 (7:00 - 15:30) shift on Fri, Oct 31 to Jeremy Cooper. Cancel Request

3. Click the **Close** button



Shift Request Activity > Details

Reason for Shift Request:

Angela Reed

Fri, Oct 31
CHEM1 (7:00 - 15:30)

→

Jeremy Cooper

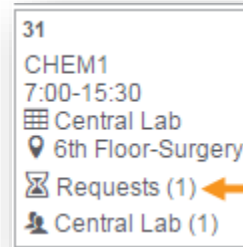
Fri, Oct 31

Conflicts

Jeremy Cooper: The employee does not have the Chemistry - Day job description.

Cancel a Shift Request

1. Click **Requests (#)**.



2. Click **Cancel Request**.

Employee Schedule Management [Close]

New Leave Request
Leave For Schedule
Request Activity (1)
Shift Bids (0)
Request History (0)

Request Activity (1)

Day Chosen: Friday, October 31, 2014

Your Scheduled Shifts

Status	Shift	Time	Location
Pending Employee Response	CHEM1	7:00 - 15:30	6th Floor-Surgery

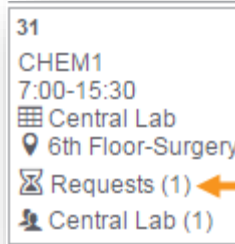
Shift Request Activity

Status	Summary
Pending Employee Response	Details You want to give the CHEM1 (7:00 - 15:30) shift on Fri, Oct 31 to Jeremy Cancel Request

Accept or Reject Bid Requests

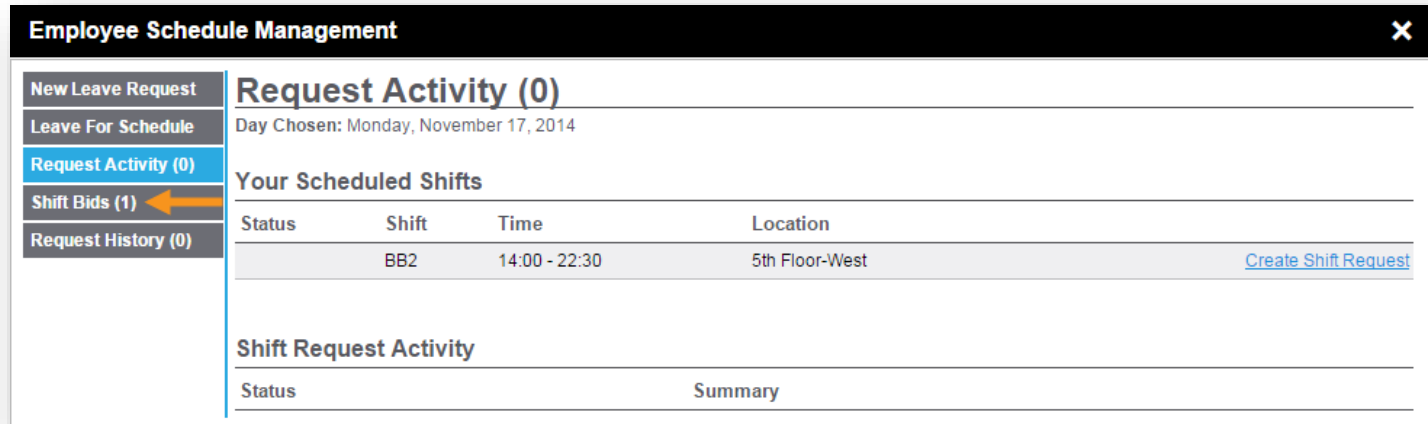
Accept or Reject Bid Requests

1. Click **Requests (#)**.



31
CHEM1
7:00-15:30
Central Lab
6th Floor-Surgery
Requests (1) ←
Central Lab (1)

2. Click **Shift Bids**.



Employee Schedule Management [X]

New Leave Request | **Request Activity (0)**
Day Chosen: Monday, November 17, 2014

Leave For Schedule

Request Activity (0)

Shift Bids (1) ←

Request History (0)

Your Scheduled Shifts

Status	Shift	Time	Location	
	BB2	14:00 - 22:30	5th Floor-West	Create Shift Request

Shift Request Activity

Status	Summary
--------	---------

3. Click **Agree** to accept.

Note: Agreeing to work a shift bid **does not guarantee** that you will be approved to work it.

4. Click **Disagree** to decline.

Employee Schedule Management

Shift Bids (1)

Day Chosen: Monday, November 17, 2014

Shift Bid List

Status	Summary
Waiting Response	The MAN1 (8:00 - 16:30) shift on Mon, Nov 17 is up for bid.

Buttons: [Agree](#) [Disagree](#)

Submit a Leave Request

Submit a Leave Request

1. Click **Request** or

My Schedules

[Feedback](#) | [Help](#)

- Assignment Schedule
- Assignment Location
- Schedule Notes
- Leave **Request**
- Leave For Schedule

[View Schedules](#)

2. Click on the day in the Calendar that would be the day (or first day) of the leave request.

<< Previous | November | 2014 | Show | This Month | Next >>

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
26	27 BB2 14:00-22:30 Central Lab 5th Floor-West	28 HEM1 7:00-15:30 Central Lab 4th Floor-Main	29 BB2 14:00-22:30 Central Lab 5th Floor-West	30 CHEM1 7:00-15:30 Central Lab 6th Floor-Surgery Lead (Cent)	31 CHEM1 7:00-15:30 Central Lab 6th Floor-Surgery Requests (1) Central Lab (1)	1
2	3 BB2 14:00-22:30 Central Lab 5th Floor-West	4 CHEM2 14:00-22:30 Central Lab 5th Floor-South	5	6 BB2 14:00-22:30 Central Lab 5th Floor-West Requests (1)	7	8 BB2 14:00-22:30 Central Lab 5th Floor-West Requests (1)

3. Click **Leave Type** menu.

4. Click **Leave Begins** box.

5. Click **Leave Ends** box.

NOTE: To request specific times off within a given day, type the times in the corresponding **time** boxes.

6. Type In the **Reason for Leave/New Note** box.

7. Click **Save Changes**.

The screenshot shows a web application window titled "Employee Schedule Management" with a close button in the top right corner. The main content area is titled "New Leave Request" and has a sidebar on the left with two tabs: "New Leave Request" (selected) and "Leave For Schedule".

The form is divided into three sections:

- What Is Being Requested?**: Contains a "Leave Type*" dropdown menu with "Choose One" selected. An orange arrow points to the dropdown.
- When Are You Wanting Leave?**: Contains "Leave Begins*" and "Leave Ends*" date and time pickers. The "Leave Begins*" field is set to 10/30/2014 at 0:00, and the "Leave Ends*" field is set to 10/30/2014 at 23:59. Orange arrows point to the time boxes. To the right, "Earliest Request Allowed*" is listed as 11/13/2014.
- Conversation**: Contains a "Reason for Leave/New Note" text area. An orange arrow points to the text area.

At the bottom of the form is a "Save Changes" button, with an orange arrow pointing to it.

Edit/Review Existing Leave Requests

Edit/Review Existing Leave Requests

1. Select the **leave type** link that you wish to view or edit.

20 CHEM1 7:00-15:30 Central Lab 6th Floor-Surgery	21 CHEM1 7:00-15:30 Central Lab 6th Floor-Surgery PTO Central Lab (1)	22
27 Holiday Central Lab (52)	28	29 BB2 14:00-22:30 Central Lab 5th Floor-West

2. Make the desired changes, or click **Delete Request** if you wish to cancel the leave request.

3. Click **Save Changes**.

Employee Schedule Management

Edit Leave Request

What Is Being Requested?

Leave Type* Status

When Are You Wanting Leave?

Leave Begins* :
Earliest Request Allowed* 11/20/2014

Leave Ends* :

Conversation

AReed@Oct 29 2014 5:07:00:913PM