

# Smart Scheduling

## Shift Swap Management

Employees that swap shifts with no oversight may be unqualified for the assignment and could contribute to unnecessary costs or become dangerously fatigued. Using a centralized solution like FW | Workforce to manage shift swaps provides personnel the flexibility of trading shifts while assuring that all trades are compliant with agency policies.

### Automate Requirements for Optimal Oversight

With FW | Workforce, the most complex shift trading rules are automatically applied to each employee's swap experience. Swap rules can apply to different schedule types and different types of trades.

Rules can be based on the number of trades, time of the trade, minimum days to trade, and minimum days from a trade to a trade-back. Rules can also be based on employee information, such as job classes, union associations, skills, or work organizations.

### Centralized Coordination Improves Scheduling Efficiencies

As a centralized scheduling solution, configured swap rules prevent overlapping conflicts due to approved time-off, overtime, or off-duty events.

These may affect other rules as well, such as shift hold-overs for certain organizations and job classifications. Or they may have exclusions, such as certain leave-types that disallow swaps.

With unified control and compliance employee trades are continuously aligned with your policies.

ID	Employee 1	Employee 2	Calendar	Start Date	End Date	Watch	Hours	Employee 2	Calendar	Start Date	End Date	Watch	Hours	Employee Status	Management Status	Approved By
33	PETERS, CHARLES	NEWMANN, MARK	6/4/2022	6/4/2022 2:00 PM	6/5/2022 12:00 AM	SWINGS	10	NEWMANN, MARK	6/7/2022	6/7/2022 2:00 PM	6/8/2022 12:00 AM	SWINGS	10	Pending	Pending	
32	NEWMANN, MARK	SCOTT, PETER	2/25/2022	2/25/2022 2:00 PM	2/26/2022 12:00 AM	SWINGS	10	SCOTT, PETER	3/2/2022	3/2/2022 2:00 PM	3/23/2022 12:00 AM	SWINGS	10	Approved	Approved	ADMIN, ORION
30	COLLINS, CHRISTOPHER	RAMIREZ, TERESA	2/10/2022	2/10/2022 6:00 AM	2/10/2022 6:00 PM	TOUR 2	12	RAMIREZ, TERESA	2/12/2022	2/12/2022 6:00 AM	2/12/2022 6:00 PM	TOUR 2	12	Approved	Approved	ADMIN, ORION
31	NEWMANN, MARK	PETERS, CHARLES	2/8/2022	2/8/2022 2:00 PM	2/9/2022 12:00 AM	SWINGS	10	PETERS, CHARLES	2/12/2022	2/12/2022 2:00 PM	2/13/2022 12:00 AM	SWINGS	10	Approved	Pending	ADMIN, ORION
10	WATERS, JAMES	VIDMAR, LARRY	2/1/2022	2/1/2022 2:00 PM	2/2/2022 12:00 AM	SWINGS	10	VIDMAR, LARRY	3/8/2022	3/8/2022 2:00 PM	3/9/2022 12:00 AM	SWINGS	10	Conflict	Pending	
27	COLLINS, CHRISTOPHER	BLANK, ROBERT	1/31/2022	1/31/2022 6:00 AM	1/31/2022 6:00 PM	TOUR 2	12	BLANK, ROBERT	2/2/2022	2/2/2022 6:00 AM	2/2/2022 6:00 PM	TOUR 2	12	Conflict	Pending	
14	COLLINS, CHRISTOPHER	BRENNKERT, ERIN	1/26/2022	1/26/2022 6:00 AM	1/26/2022 6:00 PM	TOUR 2	12	BRENNKERT, ERIN	1/28/2022	1/28/2022 6:00 AM	1/28/2022 6:00 PM	TOUR 2	12	Approved	Approved	ADMIN, ORION
17	ABBOTTS, ANDREW	BRENNKERT, ERIN	1/21/2022	1/21/2022 6:00 AM	1/21/2022 6:00 PM	TOUR 2	12	BRENNKERT, ERIN	1/26/2022	1/26/2022 6:00 AM	1/26/2022 6:00 PM	TOUR 2	12	Approved	Approved	ADMIN, ORION
16	BROWN, EMILY	BONNER, ERIC	1/19/2022	1/19/2022 6:00 AM	1/19/2022 6:00 PM	TOUR 2	12	BONNER, ERIC	1/21/2022	1/21/2022 6:00 AM	1/21/2022 6:00 PM	TOUR 2	12	Approved	Pending	
13	EDMONDS, KYLE	CROPPER, BINNY	1/17/2022	1/17/2022 1:00 AM	1/17/2022 1:00 PM	TOUR 1	12	CROPPER, BINNY	1/25/2022	1/25/2022 1:00 AM	1/25/2022 1:00 PM	TOUR 1	12	Approved	Approved	CROPPER, BINNY
18	GENTA, FRED	PLANT,	1/17/2022	1/17/2022	1/17/2022	TOUR 2	12	PLANT,	1/18/2022	1/18/2022	1/18/2022	TOUR 2	12	Approved	Pending	

### Experience Swapping Flexibility Based on Your Policy Rules

As employees initiate swap requests, any scheduling conflicts are presented with on-screen message explanations. Swap-on personnel are automatically notified via email or text message so they can respond to the request.

Supervisory workflows can be established that require approval. As an alternative, automatic approval can be configured using your criteria as qualifiers. Once authorized, each employee's shift roster, calendar, and home screen display their traded dates.

## Benefits

- » Scheduling coordination eliminates overlaps and conflicts
- » Reduces costly abuse of unqualified trades
- » Improves employee satisfaction while ensuring policy compliance
- » Saves time and reduces errors with timekeeping coordination

	Calendar Day	ScheduleType	Hours	Start Date	End Date	En S
e: NEWMANN, MARK (OFFICER) - (Total Hours=80)						
<input type="checkbox"/>	<a href="#">Edit</a>	02/20/2022	RDO	0	02/20/2022 14:00	02/21/2022 00:00
<input type="checkbox"/>	<a href="#">Edit</a>	02/21/2022	RDO	0	02/21/2022 14:00	02/22/2022 00:00
<input type="checkbox"/>	<a href="#">Edit</a>	02/22/2022	REG	10	02/22/2022 14:00	02/23/2022 00:00
<input type="checkbox"/>	<a href="#">Edit</a>	02/23/2022	REG	10	02/23/2022 14:00	02/24/2022 00:00
<input type="checkbox"/>	<a href="#">Edit</a>	02/24/2022	REG	10	02/24/2022 14:00	02/25/2022 00:00
<input type="checkbox"/>	<a href="#">Edit</a>	02/25/2022	RDO( SWAPOFF:SCOTT, P 03/21)	0	02/25/2022 14:00	02/26/2022 00:00
<input type="checkbox"/>	<a href="#">Edit</a>	02/26/2022	RDO	0	02/26/2022 14:00	02/27/2022 00:00
<input type="checkbox"/>	<a href="#">Edit</a>	02/27/2022	RDO	0	02/27/2022 14:00	02/28/2022 00:00
<input type="checkbox"/>	<a href="#">Edit</a>	02/28/2022	OT: CALL OUT	10	02/28/2022 14:00	03/01/2022 00:00
<input type="checkbox"/>	<a href="#">Edit</a>	03/01/2022	REG	10	03/01/2022 14:00	03/02/2022 00:00
<input type="checkbox"/>	<a href="#">Edit</a>	03/02/2022	REG	10	03/02/2022 14:00	03/03/2022 00:00
<input type="checkbox"/>	<a href="#">Edit</a>	03/03/2022	REG LEAVE: TRAINING	10	03/03/2022 14:00	03/04/2022 00:00
<input type="checkbox"/>	<a href="#">Edit</a>	03/04/2022	REG	10	03/04/2022 14:00	03/05/2022 00:00
<input type="checkbox"/>	<a href="#">Edit</a>	03/05/2022	RDO	0	03/05/2022 14:00	03/06/2022 00:00

Traded shift dates and hours are automatically tracked in shift rosters and on each employee's Shift Swap screen. Traded times worked are pre-populated in employee's online timesheets -- increasing efficiencies and reducing redundancies as conditions may change throughout a shift.

## For Employees

- » Self-service swap requests via FW | Workforce or the Workforce Mobile app
- » Automatic schedule conflict checking
- » Trade approved vacation dates if desired
- » View approved swaps on the home screen, monthly calendar, and rosters

## For Supervisors

- » Swap request conflict checking
- » Rules-based qualification enforcement
- » Auto-approvals based on defined criteria adherence
- » Submit swap requests on behalf of others

## For Administrators

- » Configurable swap rules that support policies for different groups
- » Real-time processing with timekeeping for payroll submissions
- » Complete audit trails

Contact us today at 866-779-1689.

