

## HOW TO ENTER A SHIFT TRADE

### Important things to know before you enter a shift trade:

1. Do not try to select a co-worker from the Substitute list until you have selected the date you will be trading to them – even though the Substitute field is above the date affected, a list of available co-workers will not populate until the system knows what date to look at for eligible co-workers
2. If you are entering a two-way trade (you have a co-worker that will work for you in exchange you will work one of your co-workers shifts), you must WAIT for the shift time & activity to display after you enter the date that you will be working for the co-worker – then select submit
3. If the co-worker you are trading with is scheduled to a leave code on the day you are entering the requests, examples: PNS, POFF, ABS, SNS, CXM, the trade will not go through – the system knows they are away and thinks they would not see the requests, so it does not send the request to them – if it is a two-way trade have the co-worker enter the requests or you can enter it on a date the co-worker is working or off (with no activity listed)
4. The co-worker's license is expired on the date you are entering for the trade – the Home Team Printed Schedule will display their shift shaded yellow

### ONE-WAY SHIFT TRADE - WHEN YOU REQUEST TO TRADE A SHIFT WITHOUT OFFERING TO WORK IN RETURN:

1. From the home page select Shift Trade in the navigation tabs across the top
2. Select the date of your shift that you are trading away - *the start and end time of your scheduled shift will be displayed*  
  
If you are trading part of your shift, adjust the start and end times to reflect the time you are trading away
3. Select the lookup icon next to the substitute box at the top of the form, and then select your co-worker; you MUST select the date of your shift before you can select a substitute - since you are not offering to work a shift in return you do not need to fill in the bottom section
4. Enter comments (optional), and then select Submit

**NOTE:** *A one-way trade will route to leadership for approval before routing to your co-worker*

### TWO WAY SHIFT TRADE - WHEN YOU ARE OFFERING TO WORK A SHIFT FOR THE SUBSTITUTE IN RETURN: See screenshots with steps on the next page

- **Follow steps 1 through 3 above**
4. In the bottom section select the date of your coworker's shift that you will work
  5. The start and end time of your coworker's shift will be displayed; *only change the times if you are trading part of your shifts*
  6. Enter comments (optional) and then click Submit

**NOTE:** *If you click submit before your coworker's shift time displays, the form will be rejected by the system.*

### REASONS WHY YOUR CO-WORKER MAY NOT BE AVAILABLE FOR YOU TO SELECT AS THE SUBSTITUTE:

1. For your co-worker to show in the substitute list they cannot be scheduled for work, on-call, or time off on the date you are requesting to trade away.

- The co-worker you are trading with must have the job or the skill in their WFM employee profile, with a future end-date for the shift you are requesting to trade. If your trade is for a future month and their license expires before the date you entered, they will not be eligible to trade with you.
- If you are submitting a trade with a coworker who is scheduled for time off such as PTO or Preferred Off (POFF) on the current date (not the date you are trading for this scenario, but the date you are entering the trade), the system does not recognize them as available to respond to your request. You need to submit the trade on a date the employee is off or working or have your coworker enter the trade on a date that you are off or working.

If the trade form does not route to the employee, then one of you may already be in overtime or the trade will cause overtime. In these cases, the shift trade will route to leadership for approval before routing to the employee.

**STEPS WITH SCREENSHOTS FOR ENTERING A TWO WAY SHIFT TRADE:**

Shift Trade | Post/Take Shift | First Off Request | Print My Assignments | Print My Schedule | Qui

Details **1**

### Shift Trade Request

Employee: **Ztrain16708, Connie S**      Substitute \*

*Can't find who you are looking for?  
Scroll to the bottom of the form for shift trade tips!*

**Please Complete this Section for One-way Shift Trades:**  
Substitute will work employee's shift on date and times specified below:

**2** Date Affected: \* 04/15/2024

From: \* 18:45 To: \* 07:15      WRK       Overnight

**Notice no substitute selected yet**

**Five steps in screenshots are for a two-way trade. For a one-way trade steps 1 thru 3 are the same, the difference is you select Submit after step 3**

### Shift Trade Request

Employee: **Ztrain16708, Connie S**      Substitute **3** **Ztrain138306, Madeleine Kay**

*Can't find who you are looking for?  
Scroll to the bottom of the form for shift trade tips!*

**Please Complete this Section for One-way Shift Trades:**  
Substitute will work employee's shift on date and times specified below:

Date Affected: \* 04/15/2024

From: \* 18:45 To: \* 07:15      WRK       Overnight

**Also Complete this Section for Two-way Shift Trades:**  
Employee will work substitute's return shift on date and times specified below:

Date affected: 04/19/2024 **4**

From : 18:45 To : 07:15      WRK       Overnight

...ing to request to cover your shift due  
orks. Contact your manager for help w

**5**

Submit