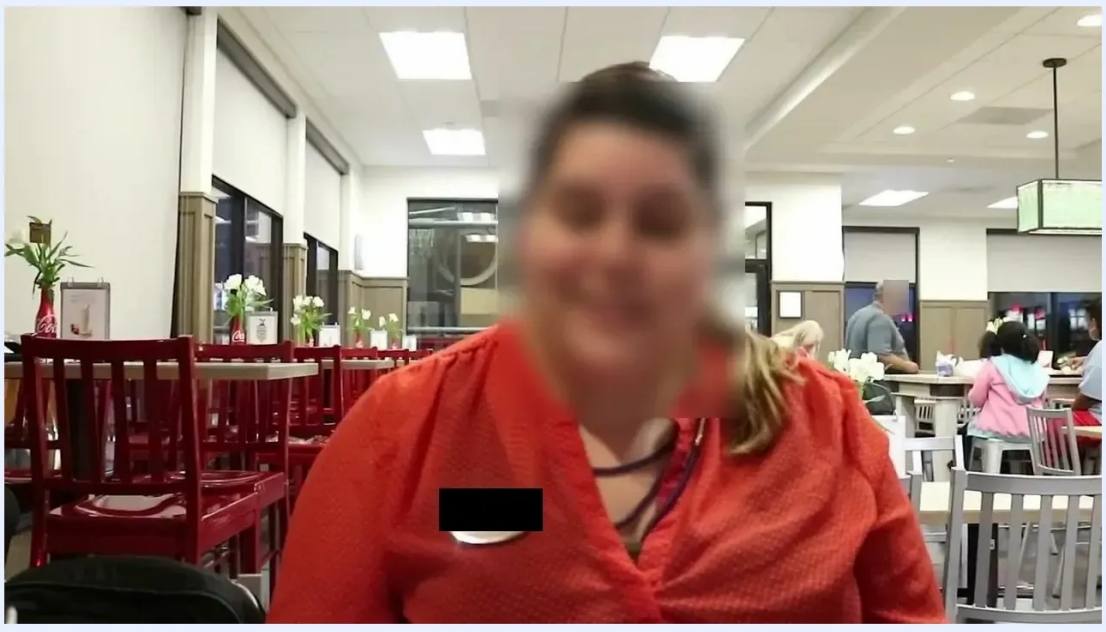
How to swap shifts in HotSchedules

Learning how to swap shifts in HotSchedules helps you trade a shift with a coworker while keeping every required approval in place. You start the swap in the HotSchedules app, the other employee accepts it, and a manager approves it. This guide walks you through each stage, using an example swap between a Shift Leader shift and a Cashier shift.

Prerequisites

Review these requirements before you start:

- Perform all shift trades or swaps through the HotSchedules app.
- Make sure Sabina or Ashley can approve your swap in HotSchedules. All swaps require their approval.
- Plan to swap an entire shift. HotSchedules only supports swapping whole shifts at this time. To switch only part of a shift, contact Ashley directly.
- Check that you and the other employee have the same job code, such as "Shift Leader." Only employees with matching job codes can swap shifts.

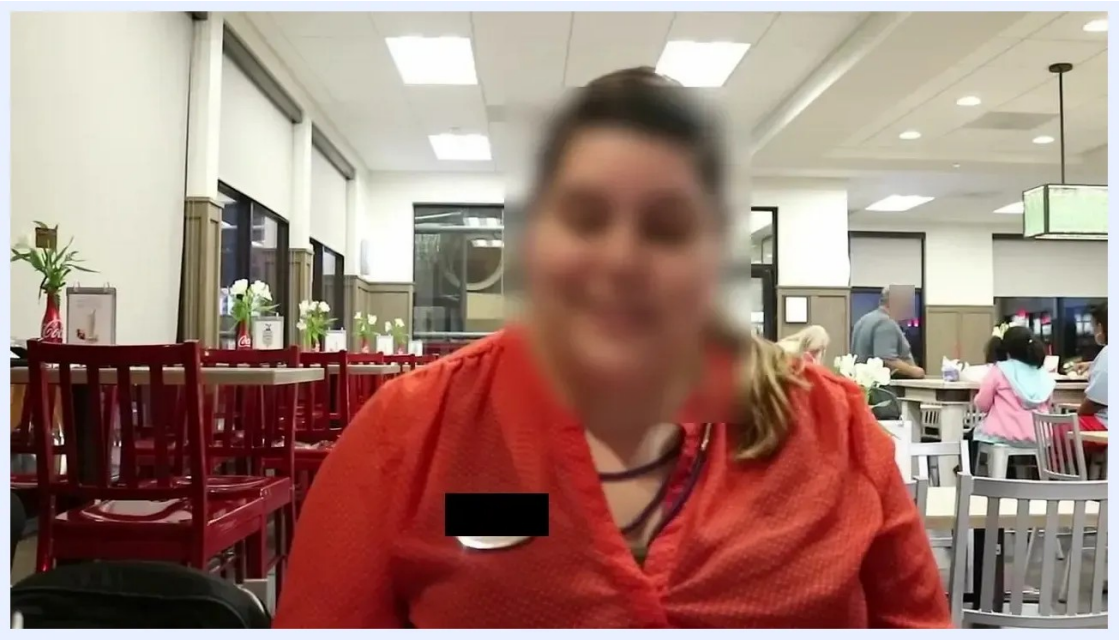


Ashley explaining the requirements for shift swaps in a restaurant setting, wearing a name tag and red shirt, with tables and people in the background

Steps

1. Open the HotSchedules app

1. Find the HotSchedules app on your phone.
2. Tap the app icon to open it.



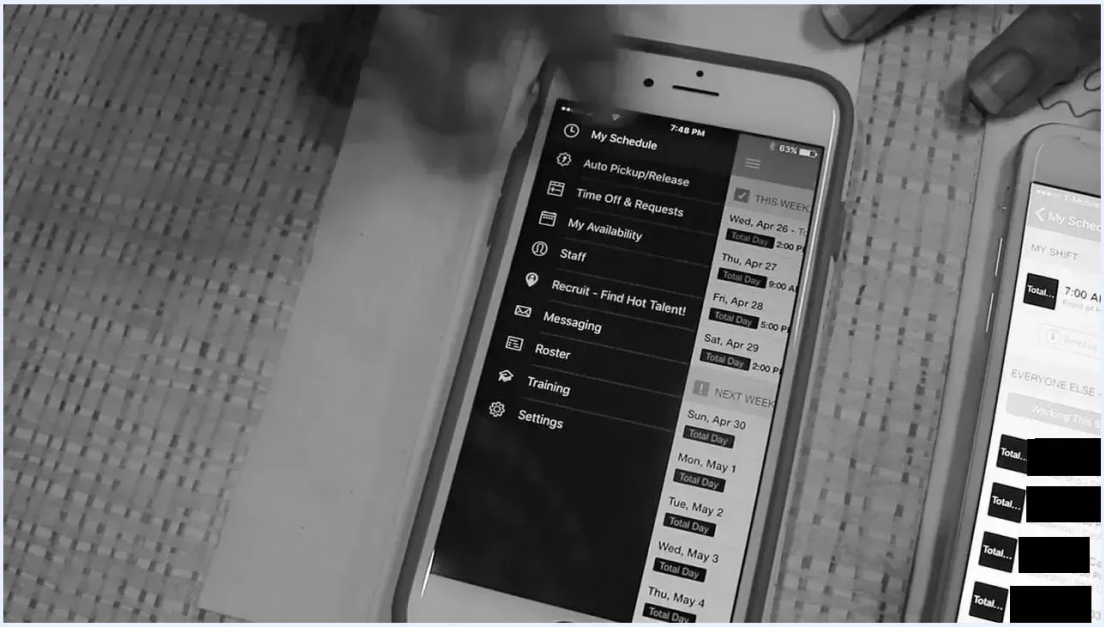
Ashley sitting at a table, explaining the process, with her name tag visible and restaurant environment in the background

The first screen should display your schedule.

2. Go to My Schedule if your schedule does not appear

1. Tap the menu tab, usually shown as three lines or a menu icon.

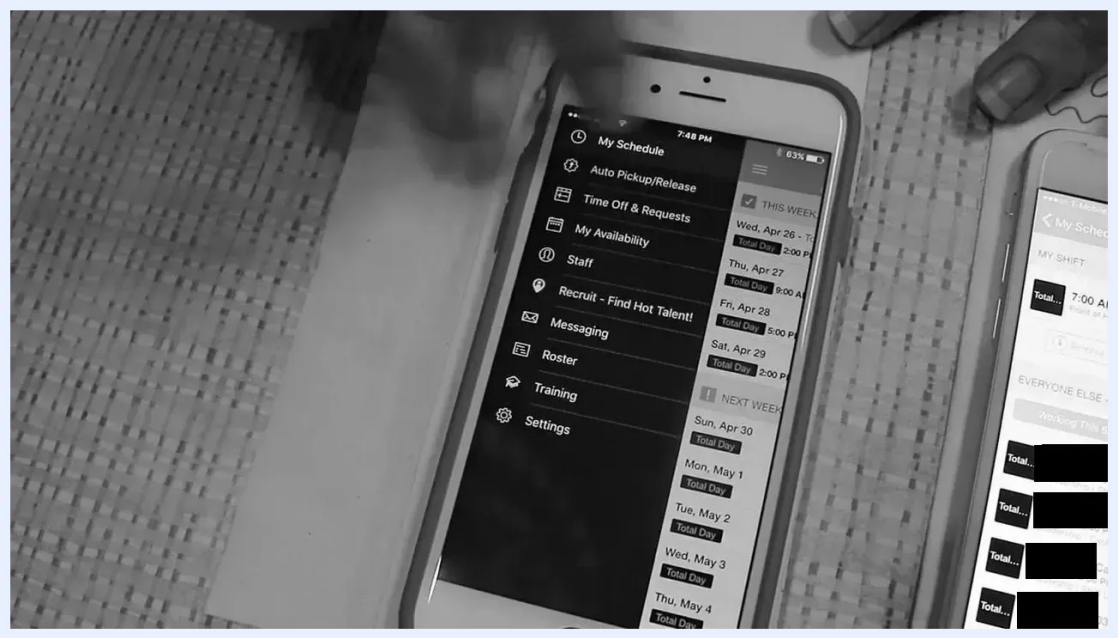
2. Select **My Schedule** from the menu options.



Ashley explaining that HotSchedules only allows whole shift swaps, seated in a restaurant environment

3. Select the shift you want to swap

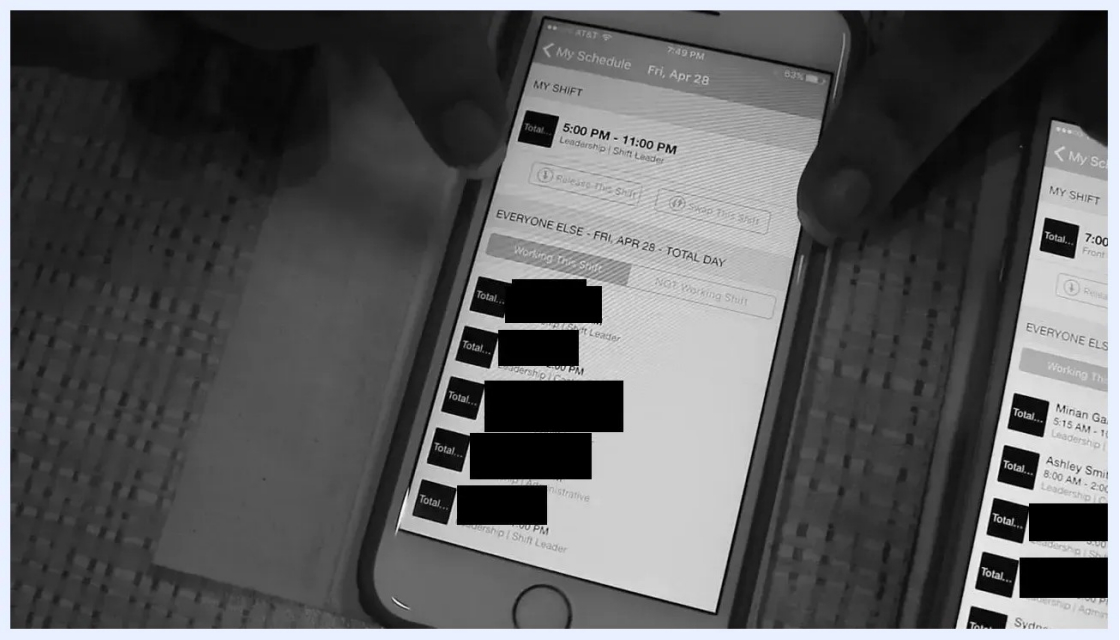
Tap the specific shift you want to swap. The app displays the details for that shift, including the time and role. Two options appear: **Swap This Shift** and **Release This Shift**.



Phone screen showing shift details for Fri, Apr 28, 5:00 PM - 11:00 PM, with the Release This Shift and Swap This Shift options and a list of other employees' shifts below

4. Understand the Release This Shift option

If you tap **Release This Shift**, the shift becomes available for other employees to pick up. You remain responsible for the shift until someone else picks it up and the swap is approved.



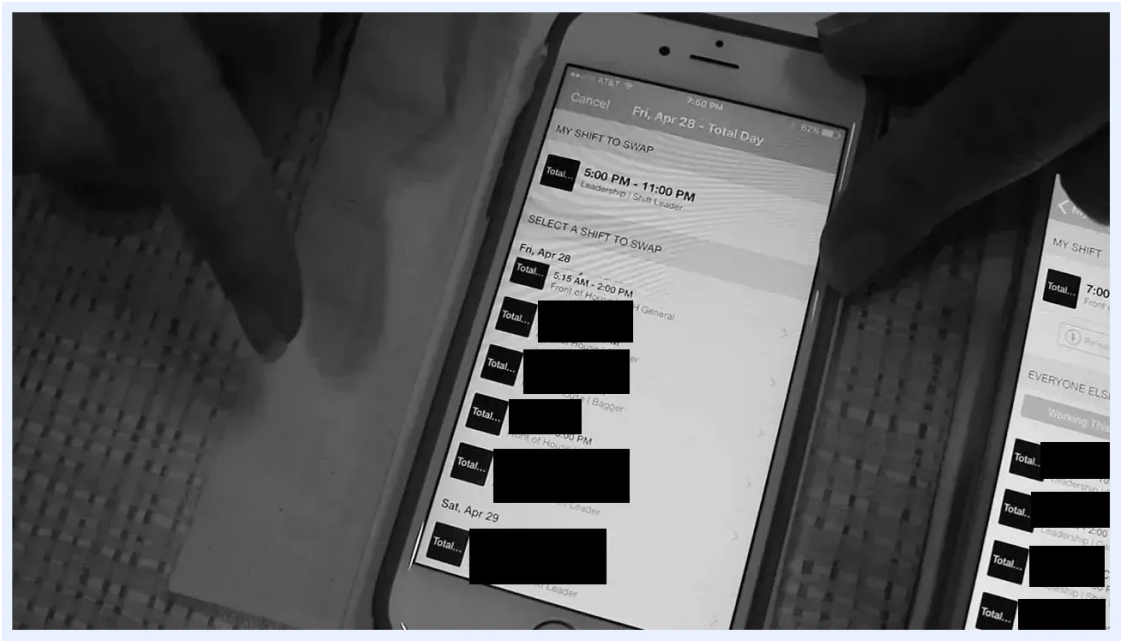
Phone screen showing the Release This Shift and Swap This Shift buttons, with a list of other employees and their shifts for the same day

To trade your shift directly with a coworker, continue with the next step instead.

5. Start the shift swap

1. Tap **Swap This Shift** for the shift you want to trade.
2. Review the list of eligible employees and their shifts for the same day.

Only employees with the same job code can swap with you. For example, Sydney can only swap her "Shift Leader" shift with another "Shift Leader" shift. If you are a new hire or do not have the required job code, you cannot swap with certain shifts.



Phone screen showing "MY SHIFT TO SWAP" as 5:00 PM - 11:00 PM (Leadership | Shift Leader) and a list of eligible shifts and employees, with a finger pointing at the options

6. Select the employee to swap with

Tap the name of the employee whose shift you want to take. In this example, Sydney selects Sabina Domingo, who is working a "Cashier" shift from 7:00 AM - 2:00 PM. Remember that the job codes must match for the swap to be allowed.



Phone screen showing "MY SHIFT TO SWAP" and "SELECT A SHIFT TO SWAP" with Sabina Domingo's shift highlighted and a finger pointing at the selection

7. Choose a reason for the swap

After you select the shift, a new screen prompts you to choose a reason. Select the reason that applies to you. In this example, Sydney selects **Family Obligation**.



Phone screen showing "MY SHIFT TO RELEASE" and "Swap With" Sabina Domingo, with the Family Obligation reason selected and a finger pointing at the options

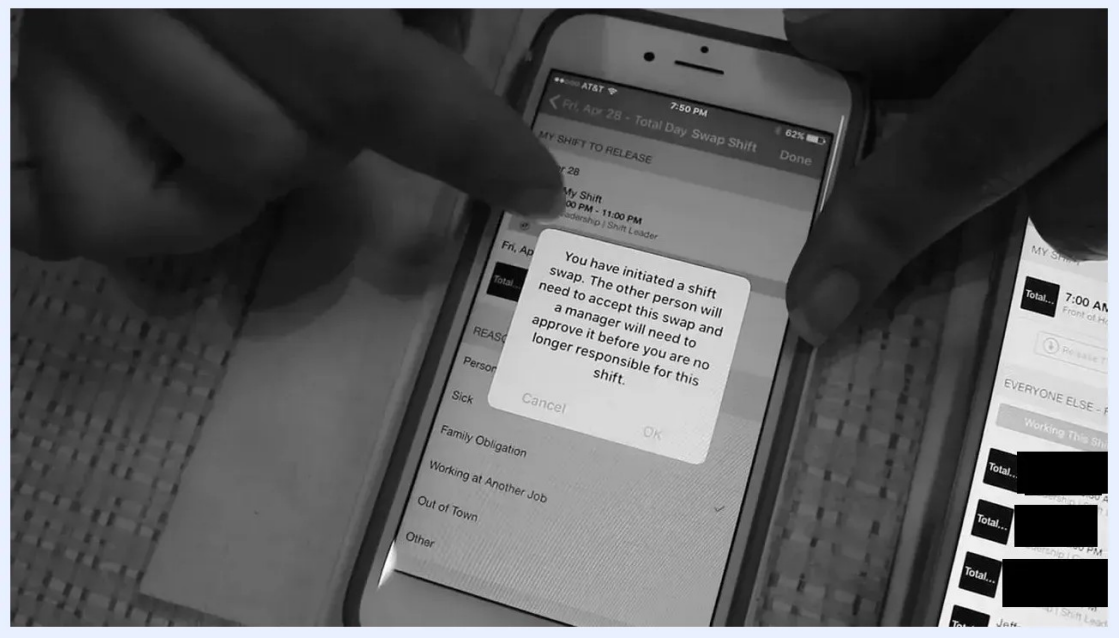
The available reasons are:

- Personal
- Sick
- Family Obligation
- Working at Another Job
- Out of Town
- Other

8. Confirm and send the swap request

1. Tap **Done** in the top right corner after you select your reason.
2. Read the confirmation message: "You have initiated a shift swap. The other person will need to accept this swap and a manager will need to approve it before you are no longer responsible for this shift."

3. Tap **OK** to send the swap request.



Phone screen displaying a confirmation message about the initiated shift swap, with Cancel and OK buttons

9. Ask the other employee to refresh the app

The swap request is now sent to the other employee, Sabina in this example. She must refresh her HotSchedules app to see the pending swap.

10. Have the other employee accept the swap

The other employee opens her schedule for the relevant day and sees a notification that Sydney has initiated a swap with her. The screen displays both shifts, each marked **Shift Swap (Pending Accept)**:



Phone screen showing Sabina's schedule for Fri, Apr 28, with both shifts marked "Shift Swap (Pending Accept)" and the options to accept or deny the swap

- Her own shift: 7:00 AM - 2:00 PM, Cashier
- Sydney's shift: 5:00 PM - 11:00 PM, Shift Leader

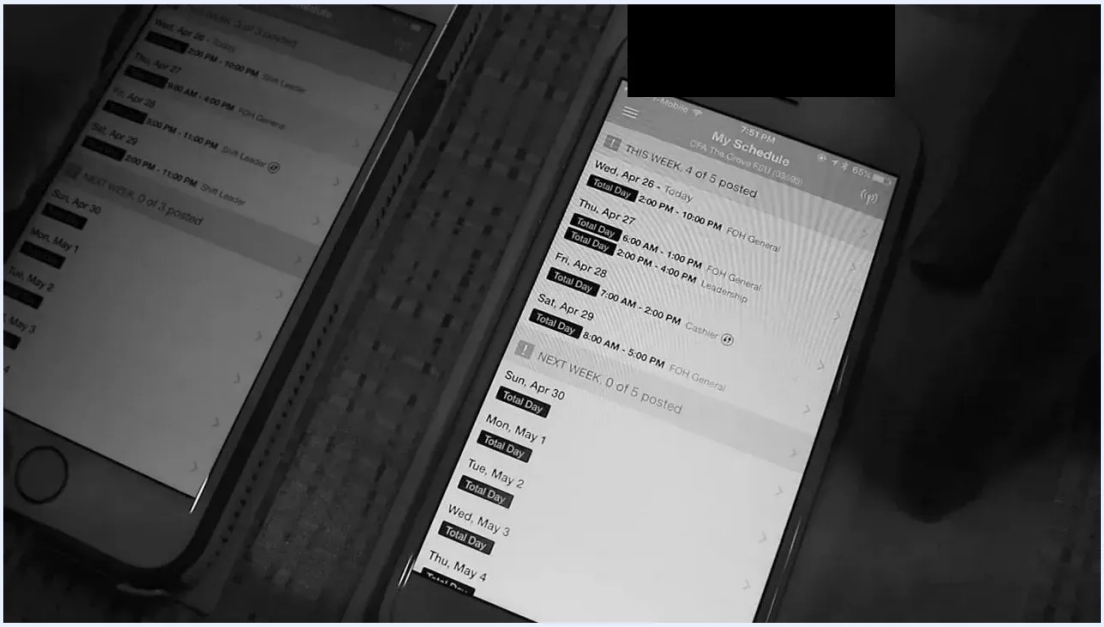
Sabina can then choose **Accept Swap** or **Deny Swap**.

11. Get manager approval for the swap

After the other employee accepts, a manager or authorized approver must approve the swap in HotSchedules:

1. Open the HotSchedules app on your device.
2. Go to the pending shift swap requests.
3. Review the swap details. In this example, a 7:00 AM – 2:00 PM Cashier shift is swapped for a 5:00 PM – 11:00 PM Shift Leader shift.

4. Approve the swap request to finalize the process.

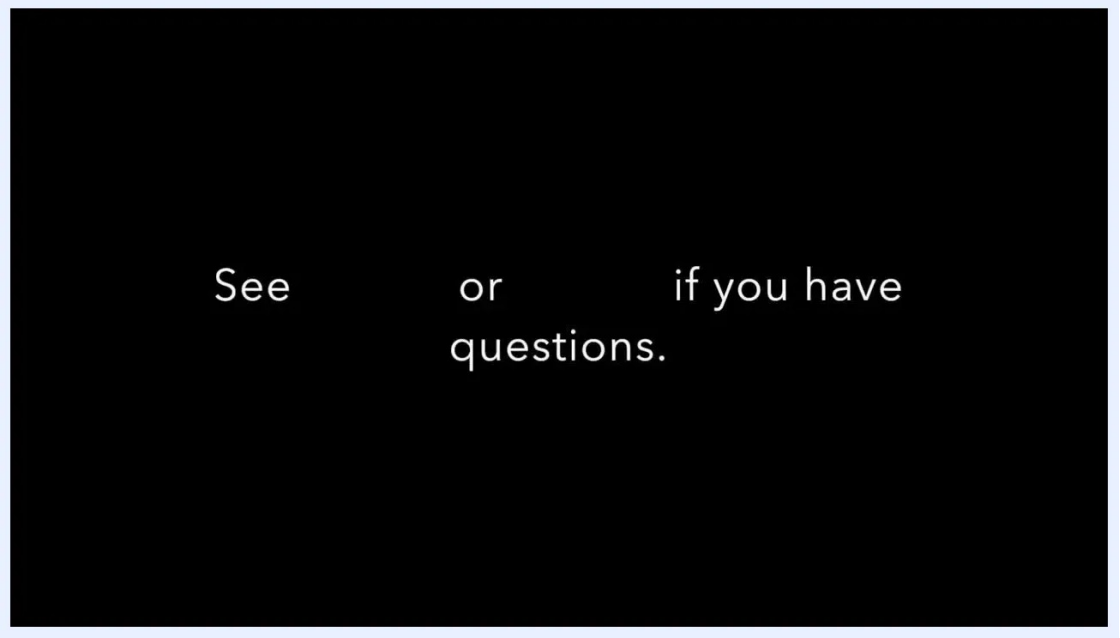


Two phones on a table, both showing the My Schedule screen in the HotSchedules app with shifts listed by date and job code, including FOH General, Shift Leader, and Cashier

12. Refresh schedules to confirm the swap

1. After the swap is approved, refresh the schedules in both employees' HotSchedules apps.
2. Confirm that the shifts have been exchanged. In this example, the employee who had the Friday 5:00 PM – 11:00 PM Shift Leader shift now sees a 7:00 AM – 2:00 PM Cashier shift, and the other employee sees the reverse.

3. If the changes do not appear right away, refresh or restart the app.



Close-up of a phone screen showing the updated My Schedule in the HotSchedules app, with the swapped shifts listed and a finger pointing at the relevant entry

Summary

When you swap shifts in HotSchedules, keep these points in mind:

- The swap is not complete until the other employee accepts it and a manager approves it.
- You remain responsible for your original shift until both steps are done.
- Only employees with matching job codes can swap certain shifts.

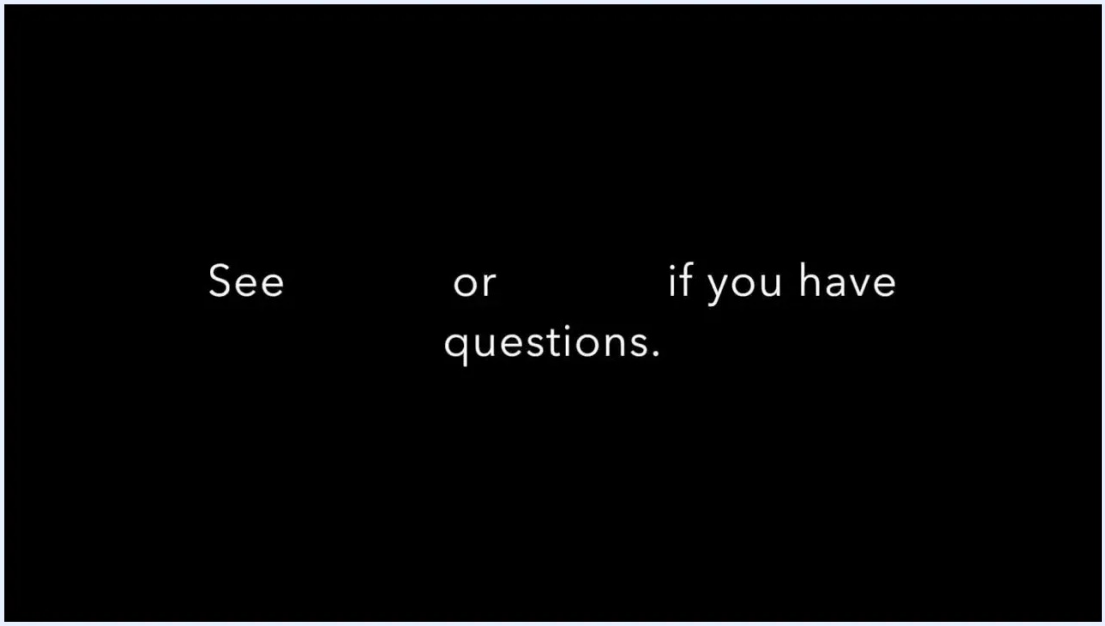
- Always check the app for confirmation, and refresh your schedule, before you assume the swap went through.



Two phones on a table, one showing the updated schedule with the shift swap initiated and a finger pointing at the relevant shift

What's next

If you have questions or run into issues with the shift swap process, see Ashley or Sabina for assistance. To switch only part of a shift, contact Ashley directly.



Black screen with white text: "See Ashley or Sabina if you have questions."