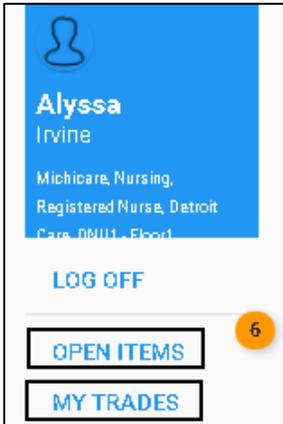


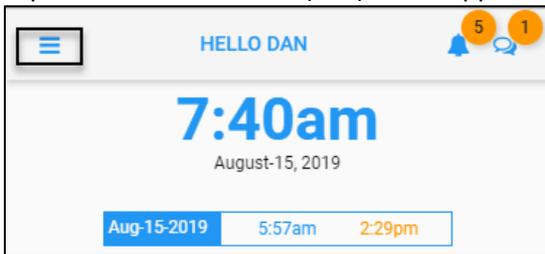
ESS Mobile 3.0: Understanding Trade Schedule Activities

Based on your company's policies, you may be allowed to trade your work schedules with your coworkers and manage your trade schedules by reviewing employees who offers to pick up your schedules or trade their work schedules with you, cancelling or declining the offers, setting your preferred offers and send them to your supervisor for review, receiving the supervisor review about the trade requests. If the trade schedule requests are declined, you may resubmit your request. You can manage your trades in the **MY TRADES** or **OPEN ITEMS** menu item.

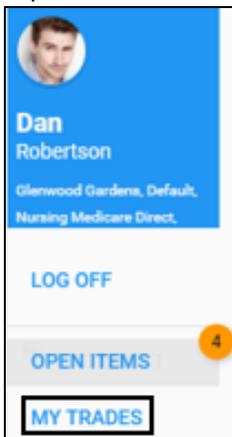


To access your trade schedules:

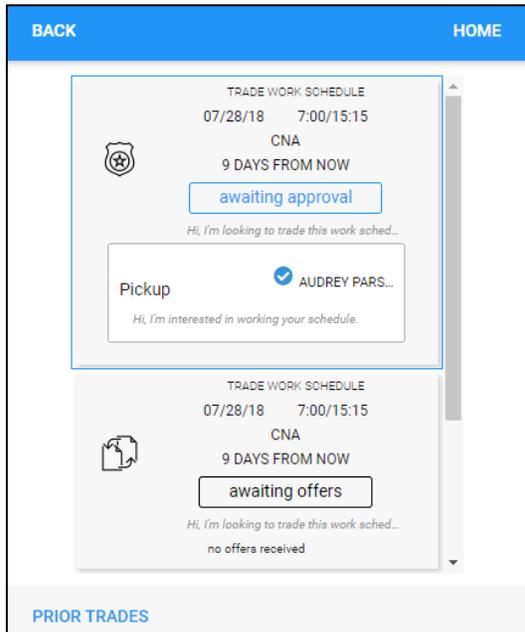
1. Tap the Three Line menu (☰) in the upper-left corner of the screen.



2. Tap **MY TRADE**. The **TRADE WORK SCHEDULE** tiles are displayed with all your trade schedules.



- Tap a trade schedule tile. You can manage your trade schedules using operations. See *Trade Schedule Operations* on page 7 for trade operations. When the employee’s trade requests are accepted or denied by supervisor, they are considered as closed trade. Tap **PRIOR TRADES** to view inactive trades, namely closed trades. See *Closed Trade* on page 5.



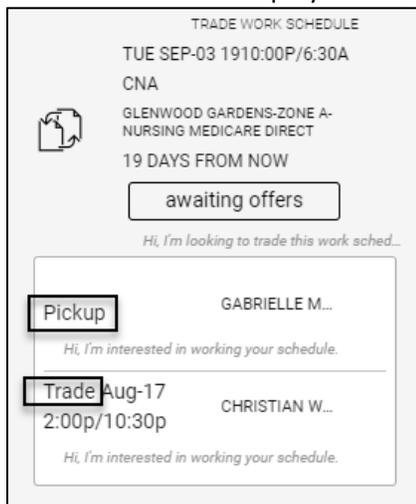
Active Trade Status

Active trade schedules are labeled with different status when employees trade their schedules. This section describes active trade status in the trade process.

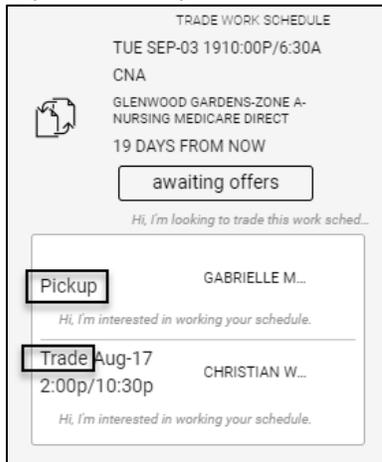
Awaiting Offers

Once you posted your trade request, this trade is in the “awaiting offers” status. If any offers from other employees are received, they are listed below this trade request. The offers received include:

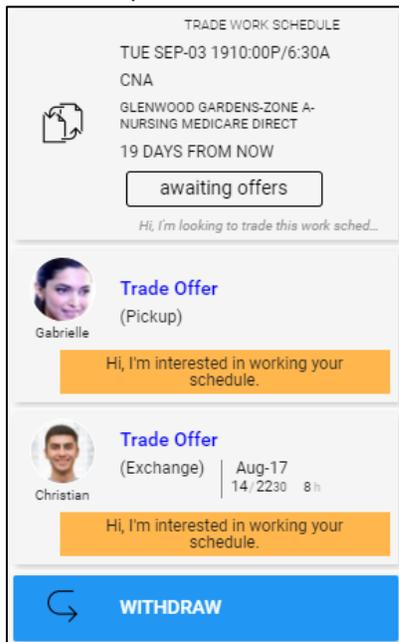
- Pickup. The employees who prefer to pick up your schedules without swapping their work schedules.
- Trade. The employees who prefer to swap their work schedules with you.



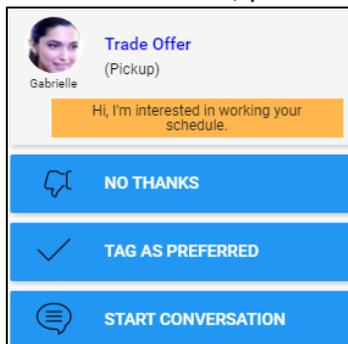
1. Tap a trade request.



2. Offers related to this trade request are displayed. You can withdraw your trade request or tap an offer for more operations.



3. For a selected offer, you can:



- Decline the offer by tapping NO THANKS. See the operation *No Thanks* on page 13.
- Tapping **TAG AS PREFERRED** to set this offer as your preference so that your supervisor knows your preference when your request is submitted for review. See the operation *Tag As Preferred* on page 14.
- Communicate with this employee who offers to trade by tapping START CONVERSATION. See the operation *Start Conversation* on page 10.

Evaluating Offers

When the employee is reviewing offers they received and tagging it as preferred, the trade is in the “evaluating offers” status. **Note:** Only one offer is allowed to be tagged as preferred.

The employee who is tagged as preferred receives the notification with the “(Pickup) Preferred” or “(Exchange) Preferred” status if access his/her **MY TRADES** menu item.

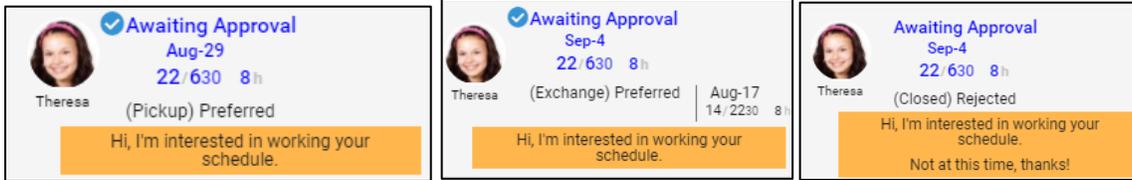
Awaiting Approval

When your trade request is sent to your supervisor for review, this trade is in the “awaiting approval” status.

Your supervisor may annotate this trade as acceptable (🟢) or unacceptable (🔴) with or without comments.

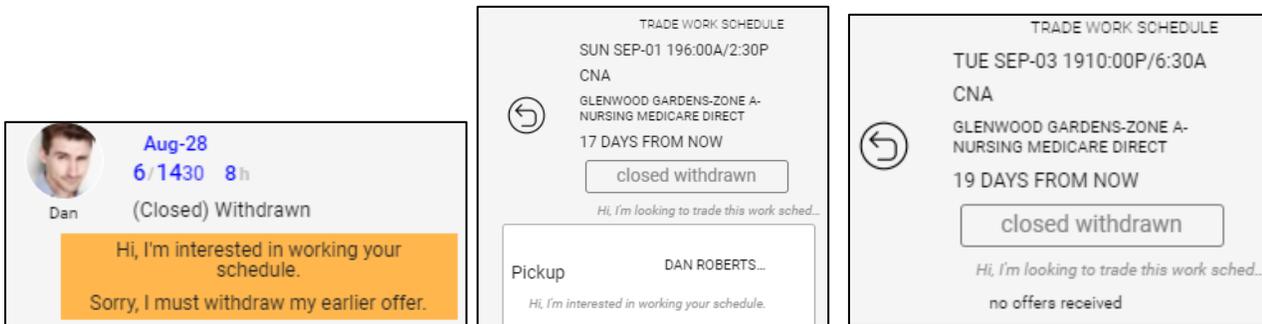
The employees who offer to trade receives the notification with the “Awaiting Approval” status with the following details when access his/her **MY TRADES** menu item:

- (Pickup) Preferred
- (Exchange) Preferred
- (Closed) Rejected

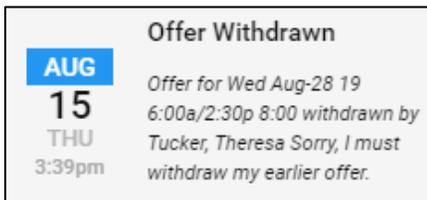


Closed Withdrawn

When the employee who initiates the trade request withdraw the request, this request is in the “closed withdrawn” status.

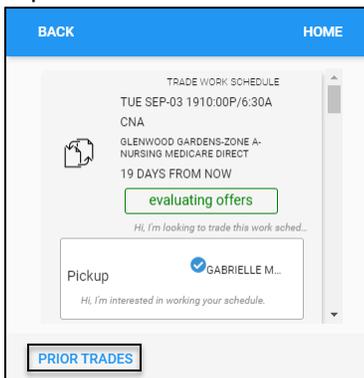


The employee who offers to trade receive the Offer Withdrawn notification.



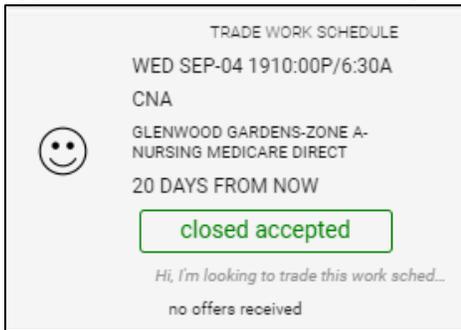
Closed Trade

When the employee’s trade requests are accepted or denied by supervisor, they are considered as closed trade. Tap **PRIOR TRADES** to check closed trade.

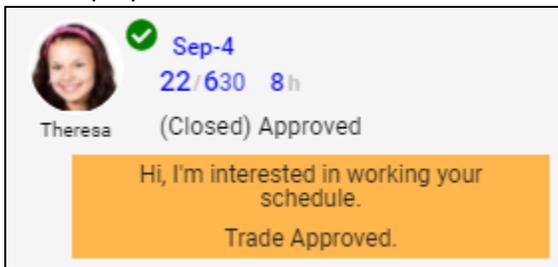


Closed Accepted

When the supervisor approves the trade request, the employee who requests a trade receives “Trade Approved” notification and the request is in the “closed accepted” status.

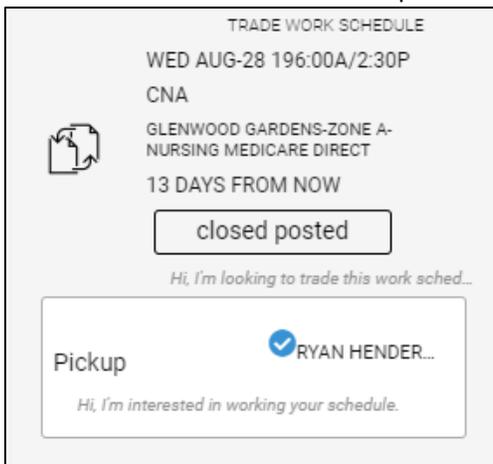


The employee who offers to trade receives the notification with the “(Closed) Approved” status.



Closed Posted

When the supervisor declines the trade request, the employee who submits the trade request receives “Trade Declined” notification and the request is in the “closed posted” status.



Trade Schedule Operations

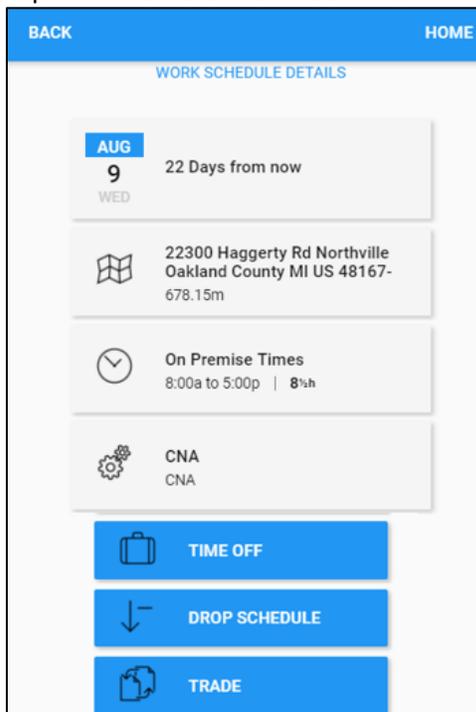
The following trade schedule operations are available.

Trade

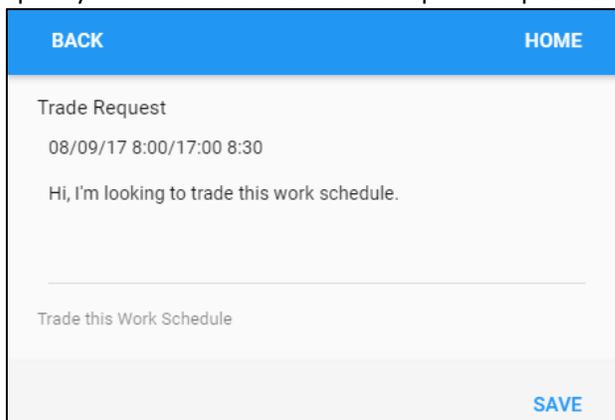
Employee who is assigned a work schedule on the Shift Board (Schedule Template) by supervisor can initiate a trade schedule request with other employees. The employee can pick up the trade schedule without swap or swap his/her schedule with the employee who sends the trade request.

To trade your work schedules with other employees:

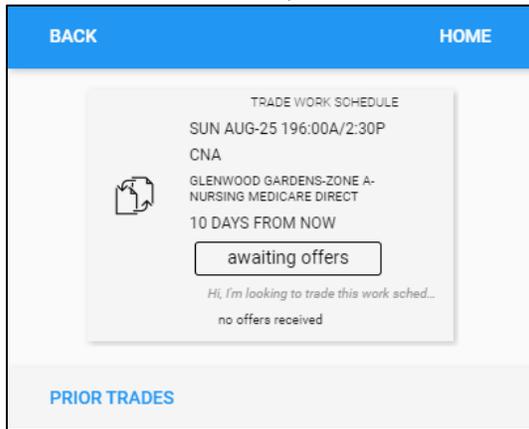
1. Tap **TRADE** on the **WORK SCHEDULE DETAILS** screen. The **Trade Request** screen is displayed.



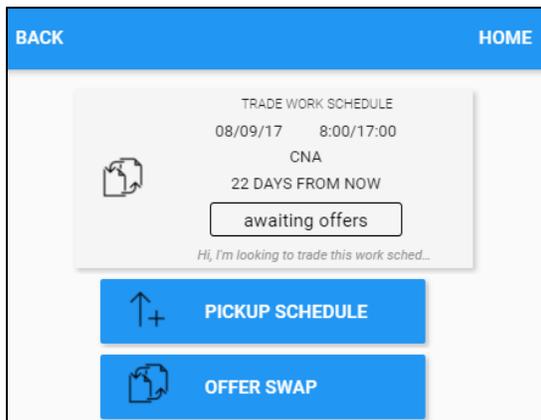
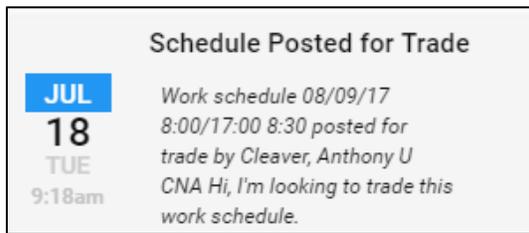
2. Specify comments for this trade request. Tap **SAVE**.



- The submitted trade request is saved in **MY TRADES** menu item and **OPEN ITEMS** menu item.



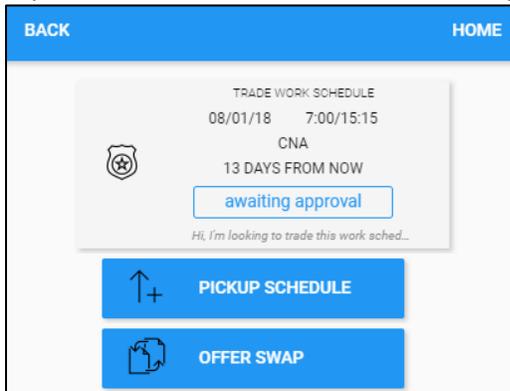
- The other employees who meet the trade requirement can receive the notification so they can pick up or swap.



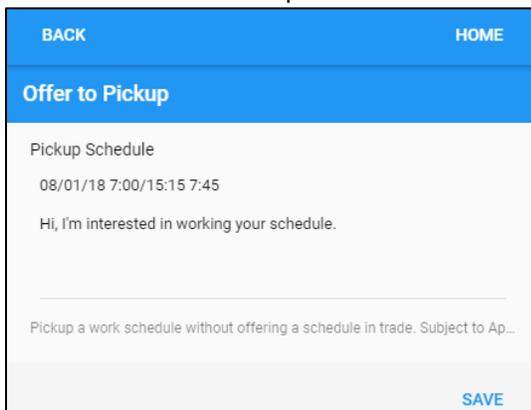
Pick Up a Trade Schedule

When an employee receives from other employees to request to trade their schedules, the employee can pick up posted schedule from another employee without offering his/her schedule to exchange.

1. Tap **PICKUP SCHEDULE**. The **Offer to Pickup** screen is displayed.



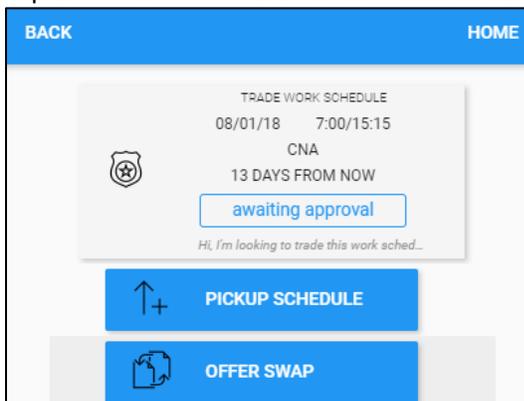
2. Enter comments and Tap **SAVE**.



Offer Swap

When an employee receives from other employees to request to trade their schedules, the employee can exchange his/her schedule with the trade schedule.

1. Tap **OFFER SWAP**. The **Offer to Trade** screen is displayed.



2. Select a schedule from the Schedule to Offer field and enter comments for this exchange. Tap **SAVE**.

BACK HOME

Offer to Trade

Offer to Exchange Work Schedules

Schedule to Offer

07/28/18 7:00/15:15 8:00

Hi, I'm interested in working your schedule.

Exchange a work schedule. Subject to Approval. You will be notified if your...

SAVE

Start Conversation

The employees who received the trade request can start the conversion with the employee who initiated the trade request to know more information about this trade.

To start a conversation:

1. Tap **START CONVERSATION**. The conversation screen is displayed.

BACK HOME

Alexandria

Trade Offer
(Exchange) | Aug-2 7/15:30 8h

Hi, I'm interested in working your schedule.

START CONVERSATION

2. Messages can be sent between employees who want to trade schedules. See **Error! Reference source not found.** on page **Error! Bookmark not defined.** for details.

BACK HOME

Hi Kevin

JUL-18 4:39P

Type Message Here

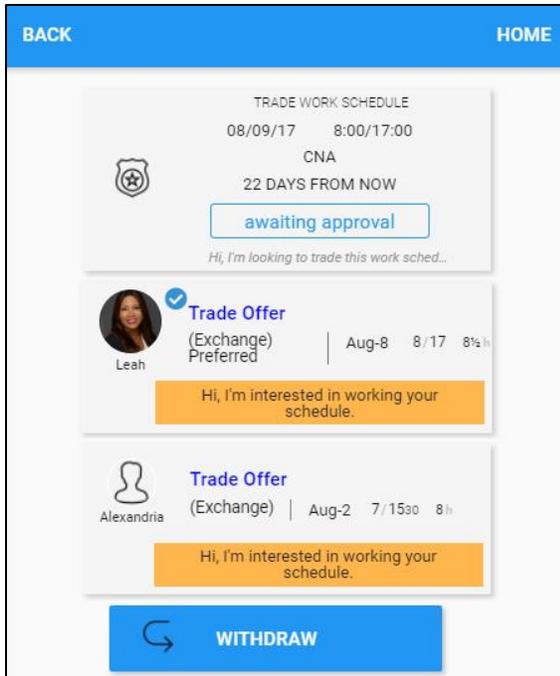
Alexandria Onslow Evergreen Acres-CNA-Skilled Nursing

SEND MESSAGE

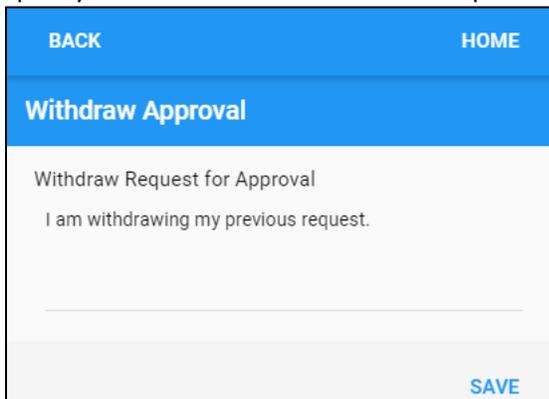
Withdraw

Employee can send a request to supervisor to withdraw the approval of trade schedule requested previously. To withdraw the approval:

1. Tap **WITHDRAW**. The **Withdraw Approval** screen is displayed.



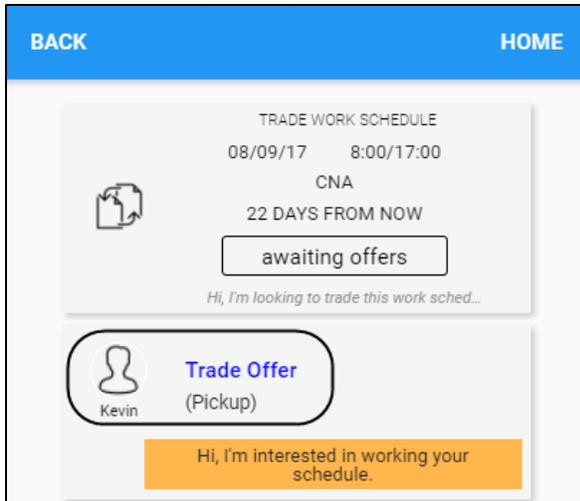
2. Specify comments for this withdraw. Tap **SAVE**.



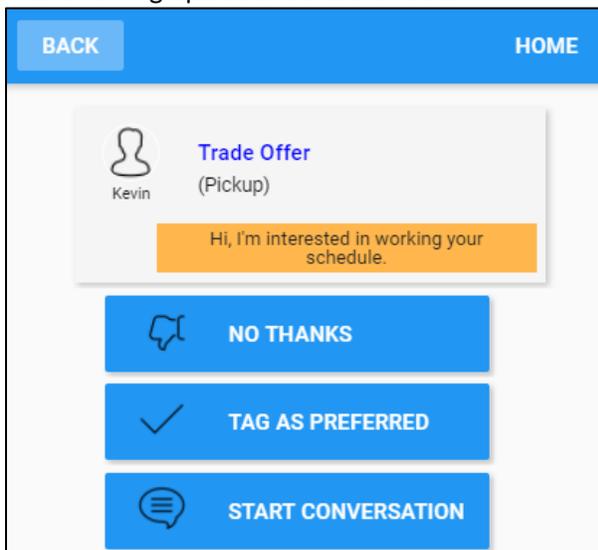
Operations related to Offer Received

When an employee picks up a trade schedule, the employee who posts the trade schedule can receive the notification for offer received.

1. Tap Trade Offer (Pickup).



2. The following operations are available:

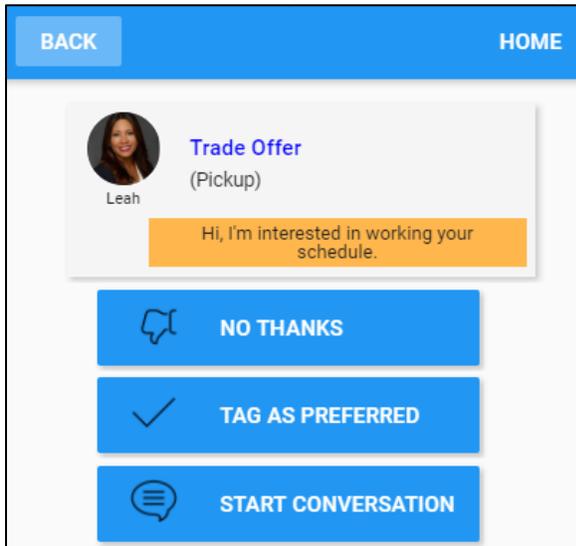


- No Thanks. The employee can deny the employee who sends the offer. See *No Thanks* on page 13.
- Tag as Preferred. When the offer is tagged as preferred, this offer can be sent to supervisor for approval. The employee who posted this trade schedule can also withdraw the trade schedule. See *Tag As Preferred* on page 14 for details.
- Start Conversation. The employee can start a conversation with the employee who sends the offer. See *Start Conversation* on page 10 for details.

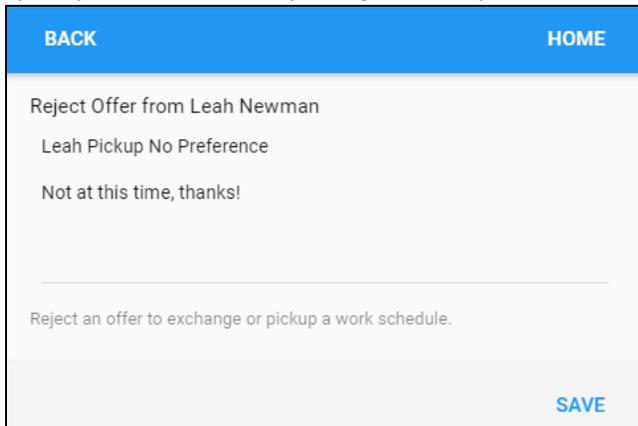
No Thanks

The employee can deny the employee who sends the offer.

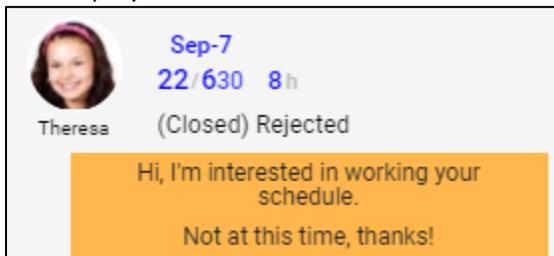
1. Tap **NO THANKS**. The Reject Offer screen is displayed.



2. Specify comments for rejecting offer. Tap **SAVE**.



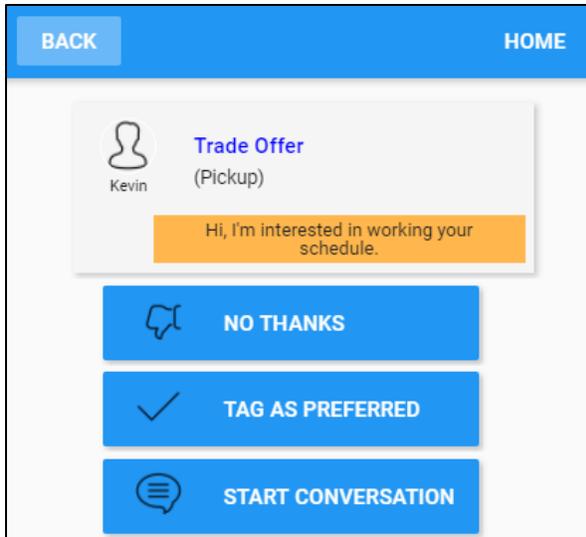
3. The employees who are declined receives the notification with the “(Closed) Rejected” status.



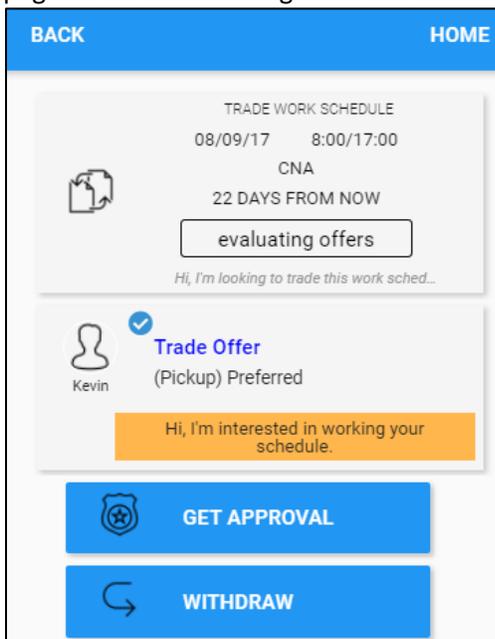
Tag As Preferred

When an employee picks up a trade schedule, the employee who posts the trade schedule can receive the notification for offer received. The received offer can be tagged as preferred.

1. Tap **TAG AS PREFERRED**. The offer is tagged as Preferred.



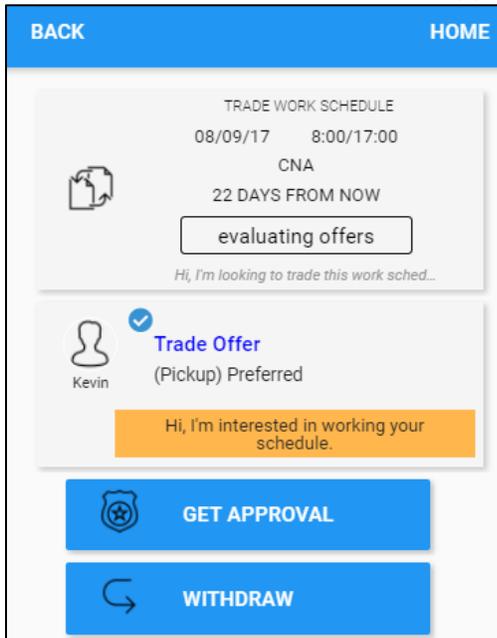
2. The offer tagged as preferred can be sent to supervisor for approval by tapping **GET APPROVAL** or withdraw by tapping **WITHDRAW**. See *Get Approval* on page 15 for sending a request for approval. See *Withdraw* on page 11 for withdrawing the trade schedule.



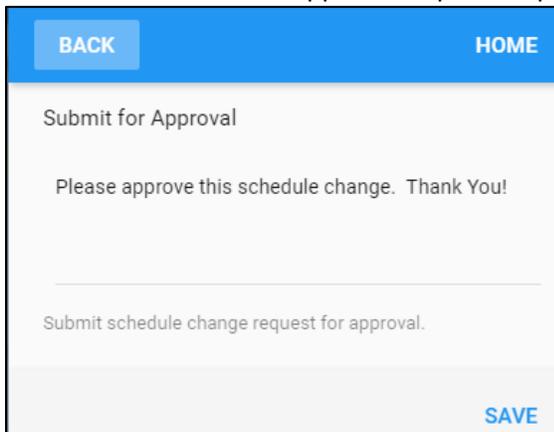
Get Approval

The offer tagged as Preferred can be sent to supervisor for approval.

1. Tap **GET APPROVAL**. The **Submit for Approval** screen is displayed.



2. Enter comments for the approval request. Tap **SAVE**.



3. The supervisor can receive the **Schedule Change Request** in their To Do List.



The employee also receives a notification for the trade submitted for approval.



JUL
18
TUE
3:28pm

Trade Submitted for Approval

*Trade of 08/09/17 8:00/17:00
8:30 now awaiting approval.
Please approve this schedule
change. Thank You!*

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