After the balancing period has closed, staff will have the ability to interact with Shift Alerts, Opportunities, and Shift Alerts. Shift Alerts are awarded to the first person to claim the shift. Managers will choose an employee from the pool of "Consider Me" notifications to fill the Opportunity.

Shift Alerts

The Manager will place the **Shift Alert** in Schedule Editor or Daily Editor, which sends notification to employees.

➢ **When the email is received by the employee:**

STEP 1:   Open email and follow **Click Here** link or paste the URL into the browser.

STEP 2:   Click **Claim** or **Cancel**.

- The first employee to **Claim** will receive notice on the screen of being awarded the shift.

- A follow-up email will be sent acknowledging the shift has been added to the schedule.

- Subsequent employees will receive a pending message on the screen and a follow-up email that the opening is no longer available.
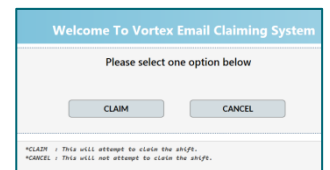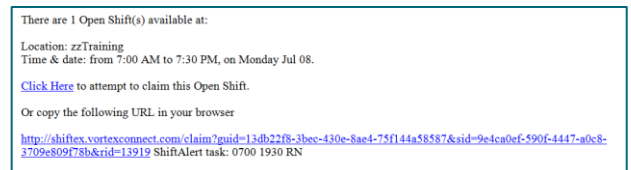
NOTE: Please click this link to set up **Notification Preferences** for above messages to be received.

Opportunities

Multiple employees will have the ability to be considered for Opportunities when created by the manager. Each available employee will see the Opportunity in Clairvia Web.
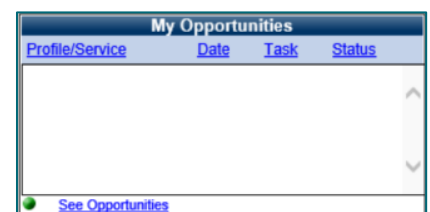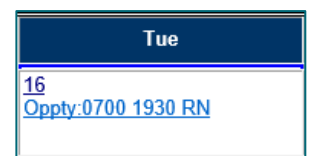
STEP 1:   Click the hyperlink for the shift.

STEP 2:   Click **Remove From List**, if not interested.

STEP 3:   Enter **Notes**, if applicable.

STEP 4:   Click **Consider Me**.

- The manager will be notifed of the pending request and will respond via Clairvia Web.

- Approved Opportunities will be seen under **My Opportunities** on the dashboard in Clairvia Web.

NOTE: Once all openings for an opportunity have been filled, the remaining requests are denied automatically.

Requesting a Shift Swap

STEP 1: From the toolbar, click **My Schedule** and then **Weekly Schedule**.
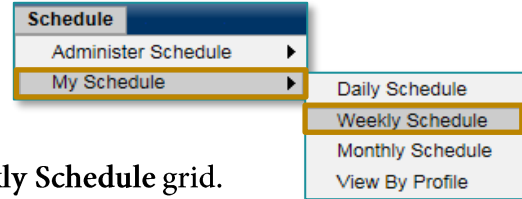
STEP 2: Right-click the desired shift to swap from the **Weekly Schedule** grid.

- Click the **Request Shift Swap** option.
- The **Shift Swap** window opens, displaying the employees eligible to swap the selected shift highlighted with a light blue background.

NOTE: If a swap has already been initiated for the selected shift but has not yet been accepted, the names of the invitees will display at the top of the pane.

STEP 3: Select **Show All Schedule** checkbox in the lower left to view all scheduled staff.

STEP 4: Click one or more eligible employees.

- The blue background turns to grey to show the employees selected.

**STEP 5:** Click the **Swap Selected Shifts** button.

- This sends the invitations and closes the **Shift Swap** window.
- The **Weekly Schedule** page refreshes to show:
  - **(RS)**: Requested Shift Swap
  - **(CS)**: Completed Swap
  - **(S)**: Swap Invitee
- Employees receive the **Shift Swap** requests through the **Message Center**.

Canceling a Shift Swap

STEP 1: From the **Schedule** menu, click **My Schedule**, and then **Weekly Schedule**.

- This opens the **Weekly Schedule** page.

STEP 2: Right-click the cell containing the **(RS)** code and select **Cancel Swap Request** option.
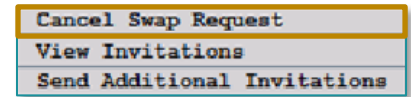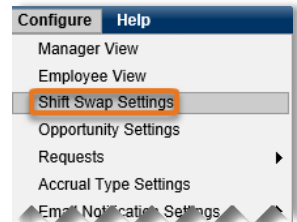
Shift Swap Settings

➢ Shift Swap settings can be accessed in **Clairvia Web**. Navigate to the **Configure** menu, then select **Shift Swap Settings**.

➢ The following settings are recommended to be selected:

- Option 2: Notify Managers of Shift Swaps.

- Option 3: Shift Swaps Require Manager Approval.

NOTE: Caution should be used if selecting option 6: Allow Swaps with employees already scheduled on the same day. This option allows for staff to swap shift types for days they are already scheduled, such as a CHG employee swapping to a regular RN shift, which can result in misleading staffing assignments.

NOTE: Once a manager has approved a swap, the swap can no longer be canceled; however, a new shift swap can be created to "undo" the previous swap.

If an invited user does not accept/decline the swap before a specified period, the invitation automatically expires. Invitations expire 10 minutes before midnight the day before the first swapped shift was supposed to take place.

Swap Considerations for Managers

➢ Prior to approving a swap, check the schedule to ensure the employee is not already scheduled for the accepting shift swap.

➢ In the swap approval screen in Clairvia Web, select the name of the employee to display a comparison of the assignments included in the swap.