



# Staffing & Shift Management

Customer Experience / Stores

2-18-2025

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## Revision History

<b>Effective Date of SOP:</b> 2/18/2025	<b>SOP Number:</b> I.03
<b>Functional Area Name:</b> Customer Experience / Stores	<b>Division Name:</b> Stores
<b>Last Review Date:</b> 1/27/2025	<b>Last Reviewer:</b> Jack Day, Store Scheduler
<b>Next Review Date:</b> 1/27/2026	<b>Next Reviewer:</b> Store Scheduler
<b>Executive Approval Date:</b> 2/18/2025	<b>Approved By:</b> Caitlin Owen, Chief Development & Support Officer

## Overview

*These standard operating procedures (SOPs) outline the process for addressing absences, both planned and unplanned, across Service Oklahoma (SOK). The SOP document explains how unplanned absence notifications, time off requests, and shift swaps should be communicated and escalated.*

## Purpose

*The purpose of this document is to empower SOK employees to make the most of their time off while ensuring operational efficiency in their absence.*

## Policy Statement

*These SOPs apply to all SOK employees who work in customer-facing stores. Most aspects of the procedures also apply to central office and field staff, but those employees should confirm policies with their supervisors.*

## Compliance

*SOKs staffing procedures have been developed internally and are not dictated by state or federal regulations. However, many policies govern HR broadly, such as the Family and Medical Leave Act (FMLA) at the federal level and the Oklahoma Personnel Act (74 O.S. § 840) at the state level. For more details on these regulations see the references section of this SOP document.*

## Systems

*The key system behind these procedures is the Microsoft Teams app Shifts. A basic Excel spreadsheet is used to internally track absences, and time off requests are documented in Workday.*

## Roles

*List the roles and functions of anyone involved in the operations described within this document.*

Role	Responsibilities
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Employee	Notifies Store Lead and Regional Manager of unplanned absence, submits time off and shift swap requests in Shifts
Store Lead	Communicates with employees being moved to another location, approves time off requests in Workday
Regional Manager	Assesses impact of unplanned absence and determines whether it warrants deployment of staff from other locations, notifies Store Leads and affected employees of location change
Performance and Scheduling Manager	Assesses impact of unplanned absence and determines whether it warrants deployment of staff from other locations, reviews time of request and determines whether to approve or deny, handles concerns from employees, supports Scheduling Assistant as needed
Scheduling Assistant	Makes scheduling adjustments in Shifts, records absences in Excel spreadsheet, manages time off approvals/denials and swift swaps in Shifts

## Procedures

### Unplanned Absences

1. When an employee is unable to come to work due to an unexpected situation such as illness, personal emergency, lack of childcare, or lack of transportation, the employee is expected to send a text or Teams message to both their Store Lead/direct supervisor and their Regional Manager. **This message should be sent at least one hour before the store opens and must include the reason for absence and estimated duration of absence.**
2. When the Regional Manager receives this message, they work with the Performance and Scheduling Manager to assess the impact of the absence on store operations. Together, they decide whether the absence requires the deployment of staff from other locations. To make this decision, they consider estimated customer volume and the skillsets of available staff. **Every store should have at least one commercial driver license (CDL) certified employee and two employees of each skillset present at all times.**
3. If staff need to be pulled from other locations, the Regional Manager sends a Teams message to the Store Lead (and supervisor, as applicable) at the store(s) from which employees will be pulled. The Store Lead then notifies the employees, who confirm the change and head to the correct store. At the same time, the Scheduling Assistant (or the Performance and Scheduling Manager if the Scheduling Assistant is not available) adjusts the schedule in the Microsoft Teams app Shifts.
4. Regardless of whether the absence requires the deployment of staff from other locations, the Scheduling Assistant completes the process by recording the absence in an Absence Tracker Excel Document. This ensures employees' absences are documented over time, enabling compliance checks and fostering accountability.

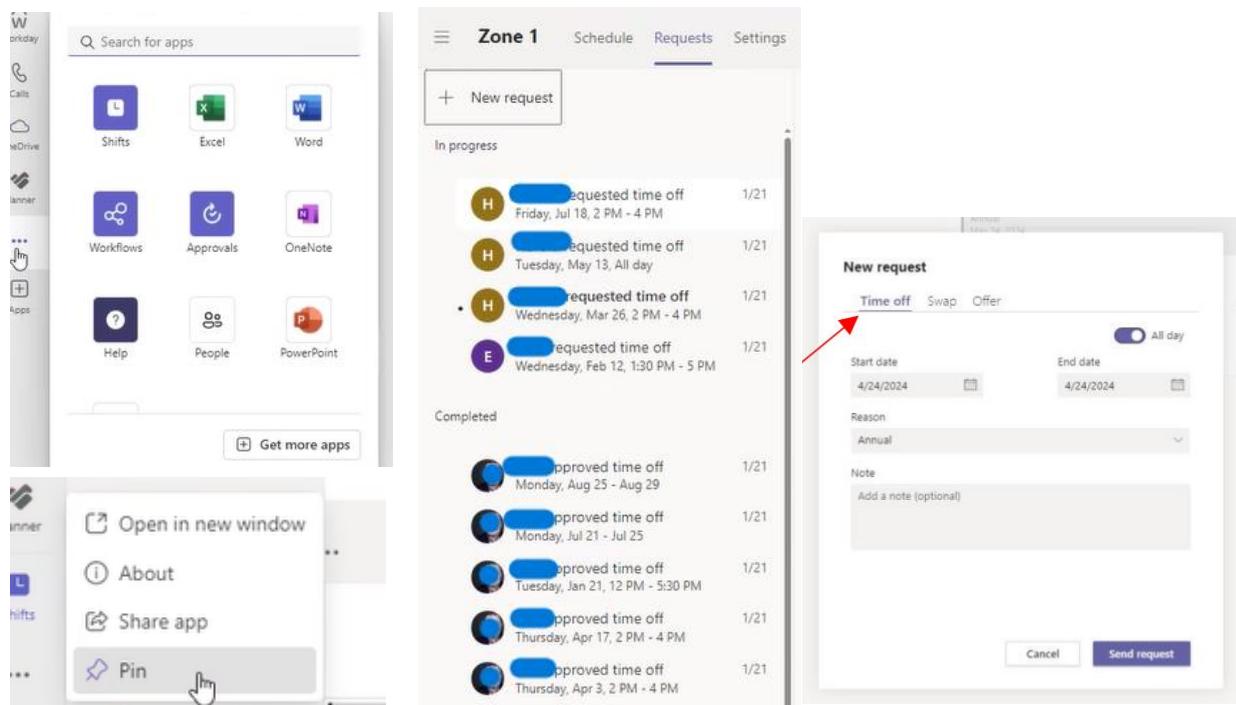
First Name	Last Name	Date	Absence Type	Duration	Notes
██████████	██████████	12-Aug	Sick	8	Scheduled for Norman.
██████████	██████████	12-Aug	Sick	8	
██████████	██████████	12-Aug	Sick	8	
██████████	██████████	12-Aug	Enforced	8	Death of Family member.
██████████	██████████	12-Aug	Sick	8	
██████████	██████████	12-Aug	Sick	8	
██████████	██████████	12-Aug	Sick	8	
██████████	██████████	12-Aug	Sick	8	No-call/no-show
██████████	██████████	12-Aug	Sick	8	
██████████	██████████	12-Aug	Sick	8	

### Time Off Requests

1. When an employee plans to take time off work, the employee should submit a time off request in the Microsoft Teams app Shifts at least **two weeks in advance**. For ease of access, employees should pin Shifts on the left-hand side of their Teams page. To submit the request in Shifts, click 'Requests', then '+ New Request' to trigger the pop-up window. See the following screenshots for instructions.
  - a. When filling in the time off request, employees must enter the following information:
    - i. Dates and times of absence (may not be full day)
    - ii. Reason for leave

1. Annual Leave: Period of approved absence with pay intended for vacation, rest, and recreation
2. Sick Leave: Granted for employee absences due to illness or medical appointments (must provide appropriate documentation if requested by management for 3 or more consecutive sick days)
3. Enforced Leave: Granted for situations such as caring for an ill or injured family member, dealing with a personal disaster, or in the event of a death in the immediate family or household (must provide appropriate documentation if requested by management)
4. Compensatory Leave: Granted as compensation for hours of overtime worked (requests must be submitted in accordance with established procedures and guidelines)

iii. Any relevant contextual information (general, do not include medical details)



2. Once the request is submitted, the Scheduling Assistant and Performance and Scheduling Manager review the request and decide whether to approve or deny it. To make this decision, they consider compliance with leave policies, operational needs, and staffing levels, aiming to have at least 75% of staff present at all times. Time off approvals may be limited around the holidays.
3. The Scheduling Assistant approves or denies the request in Shifts, which triggers an automatic notification to the employee. Any concerns may be escalated to the Performance and Scheduling Manager.
  - a. If a request is denied, the notification will include one of the following justifications:
    - i. Operational constraints prohibit approval at this time.
    - ii. Conflicts with existing approved time-off requests.

- iii. Peak business demands necessitate full team availability.
- iv. Your requested dates coincide with company-wide obligations.
- v. Time-off blackout periods are currently in effect.
- vi. Available leave balance insufficient for requested duration.
- vii. Essential training sessions overlap with your requested time off.
- viii. Anticipated high workload prohibits approval at this time.
- ix. Insufficient notice provided, unable to arrange staff coverage to accommodate leave request.

4. If the time off request is approved, the employee enters it in Workday for the Store Lead to approve. If the Store Lead notices a conflict that the Performance and Scheduling Manager did not catch, they deny the request in Workday. In this rare case, the Performance and Scheduling Manager must change the decision in Shifts and notify the employee. Otherwise, the process is complete.

## Shift Swaps

- 1. Customer-facing employees have the option to swap shifts with other team members in the same store. The process for submitting a shift swap request in the Microsoft Teams app Shifts is similar to the process for submitting a time off request, but employees should communicate directly with the person they're interested in swapping with to confirm the swap before submitting a request.
- 2. For ease of access, employees should pin Shifts on the left-hand side of their Teams page. To submit a shift swap request in Shifts, click 'Requests', then '+ New Request' to trigger the pop-up window. At the top of the pop-up, ensure 'Swap' is selected and not 'Time off,' which is the default. See screenshots below for instructions.
  - a. When filling in the time off request, employees must enter the following information:
    - i. Current shift (looking to swap out of)
    - ii. Team member's shift (looking to swap into)
    - iii. Any relevant contextual information (reason not required but may be helpful)

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- Once the request is submitted, it is sent directly to the team member that the employee is looking to swap with. When that person approves the request, it is automatically sent to the Scheduling Assistant. The Scheduling Assistant approves or denies the request in Shifts, which triggers an automatic notification to both employees. Any concerns may be escalated to the Performance and Scheduling Manager.

## References

### Compliance

1. [Oklahoma Personnel Act](#)
2. [Procedures for Time/Leave Sheets and Payroll Processing](#)
3. Service Oklahoma Leave Plans Policy

### Shifts

1. Navigating Shifts in Microsoft Teams