

Avanti Self Service Portal

Employee Manual




What is Avanti Self Service?

- Avanti has a “self-service” portal online where you can:
 - View your schedule online
 - Pick up vacant shifts
 - Provide your availability
 - Book time off (vacation, LOA)
- To view a training video demonstrating how to use the portal visit www.thebsf.ca/scheduling

Logging in

- To login to Avanti Web Self Service, go to the following website:
www.myavanti.ca/theBSF
- Use Chrome as your internet browser, NOT Explorer

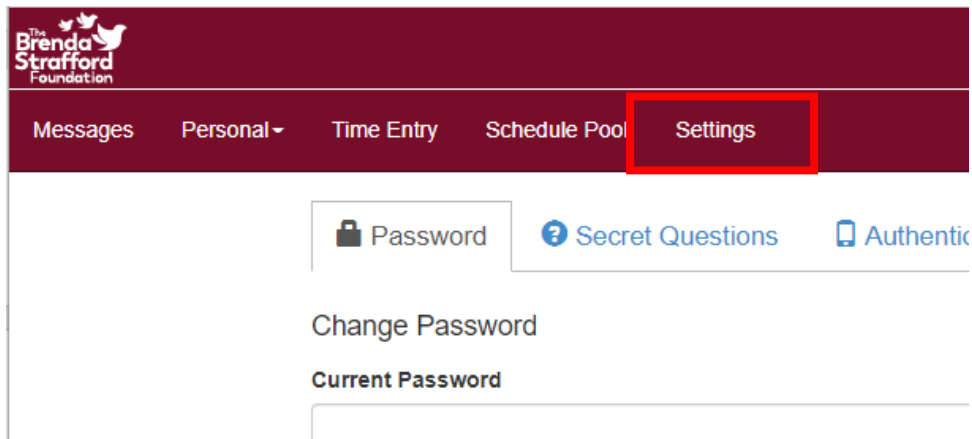
A screenshot of the Avanti Self Service Login page. On the left is the Avanti Software logo, which consists of four overlapping squares (blue, green, red, and orange) above the word "AVANTI" in a bold, black, sans-serif font, with "software" in a smaller, blue, lowercase font below it. On the right is a "Self Service Login" form. It features two input fields: "Username" with a person icon and "Password" with a lock icon. Below the fields is a blue "Login" button. Underneath the button are two links: "Cliquez ici pour en français" and "Don't have a Self Service account? Register Now".

If you have not received your log on information, please contact the HR specialist at your Manor for assistance

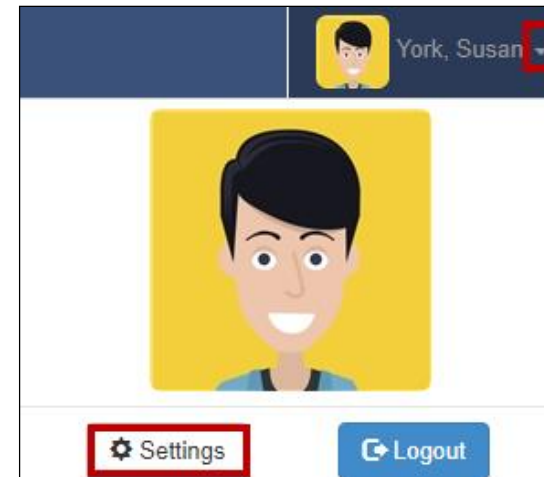
You can change your password once you log in.

Settings

- To access settings, choose the *'Settings'* menu item, or click on the arrow to the right of your name, and choose Settings:

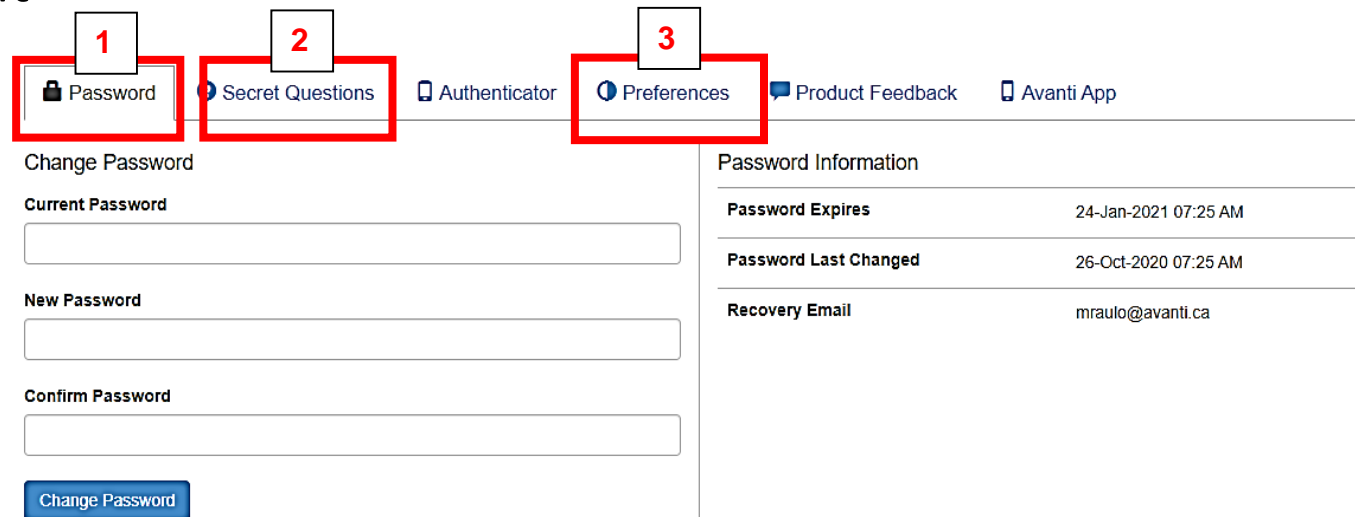


OR



Settings

- From the settings menu, you can:
 1. Change your password
 2. Set your secret questions
 3. Set your preferences for Date Format, Time Format, and Name Display Format



The screenshot shows a settings menu with several options. Three options are highlighted with red boxes and numbered 1, 2, and 3:

- 1. Password
- 2. Secret Questions
- 3. Preferences

Other options in the menu include Authenticator, Product Feedback, and Avanti App.

The Password section is expanded, showing the following fields:

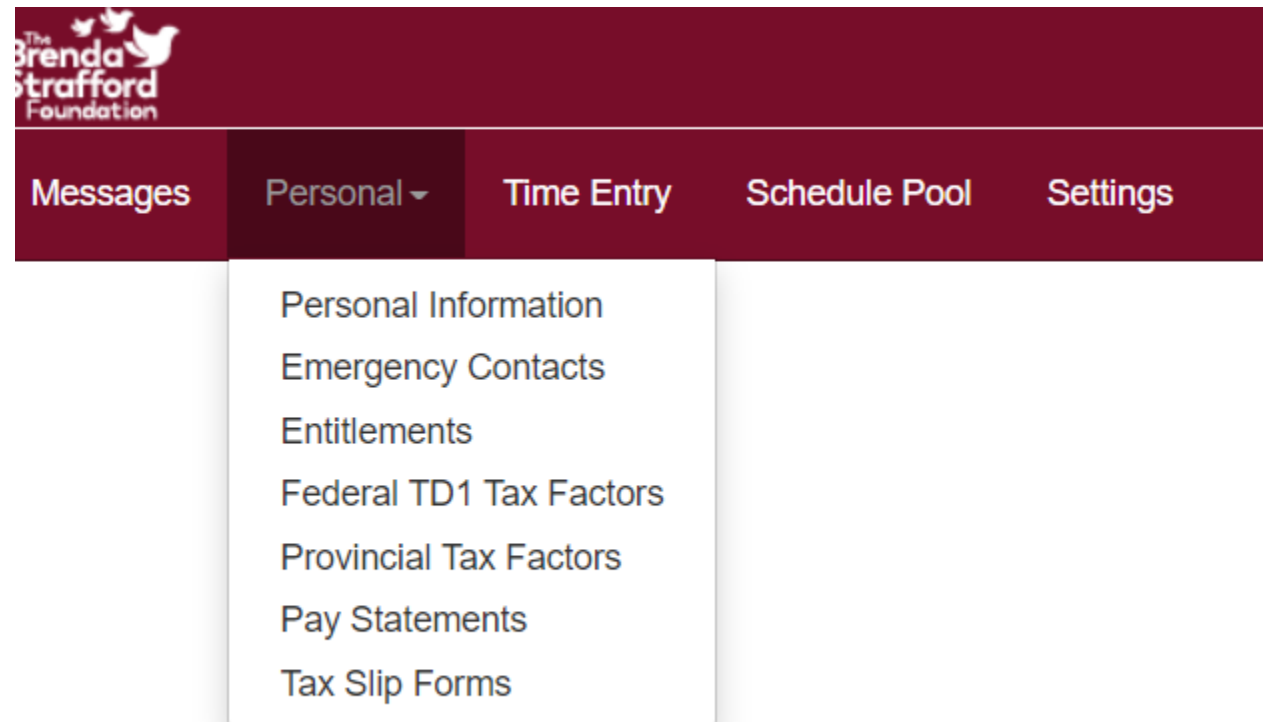
- Change Password
- Current Password
- New Password
- Confirm Password
- Change Password button

The Password Information section is also visible, showing the following details:

Password Information	
Password Expires	24-Jan-2021 07:25 AM
Password Last Changed	26-Oct-2020 07:25 AM
Recovery Email	mraulo@avanti.ca

Personal Information Menu

Personal Information Menu



Personal Information Menu: Personal Data

- View and change your contact information.
- To make changes, provide the new information and click “Update”.

The screenshot shows a web form titled "Personal Information" with a sub-section "Personal Data". At the top, there is a breadcrumb trail: "000000003 - York, Susan". The form contains several input fields and dropdown menus for personal data:

Employee Number	Preferred Name	Phone Number
000000003		Work 780-555-1234
Address Line 1: 123 100th Avenue	Address Line 2:	Home 780-555-4567
City: Edmonton	Province: Alberta	Cell:
Postal Code: T2T 2T2	Country: CAN	Pager:
Primary Email: email@email.ca		Pay Statements Email:
Alerts Email:		Home Email:
Work Email:		Tax Slips Email:

At the bottom right of the form, there are two buttons: "Update" and "Cancel".

Personal Information Menu: Entitlements

- This screen shows your vacation balance

Entitlements										
Code ^	Description ^	UOM ^	Carry Forward Units ^	Accrued Units ^	Taken Units ^	Previous Remaining Units ^	Pending Taken Units ^	Current Remaining Units ^		
849	Accrued Vacation Dollars	Hours	0	6.76	6.76	0	0	0		

The balances shown are current as of your last payment.

Vacation earned this year

Vacation balance *excluding* future time booked off

Vacation balance *including* future time booked off

Vacation carried over from prior year

Vacation taken this year

Vacation booked in the future

Personal Information Menu: Emergency Contact

- You can add, edit or delete any emergency contact(s) displayed using the icons next to the emergency contact or by selecting the 'Add Contact' button

Emergency Contacts

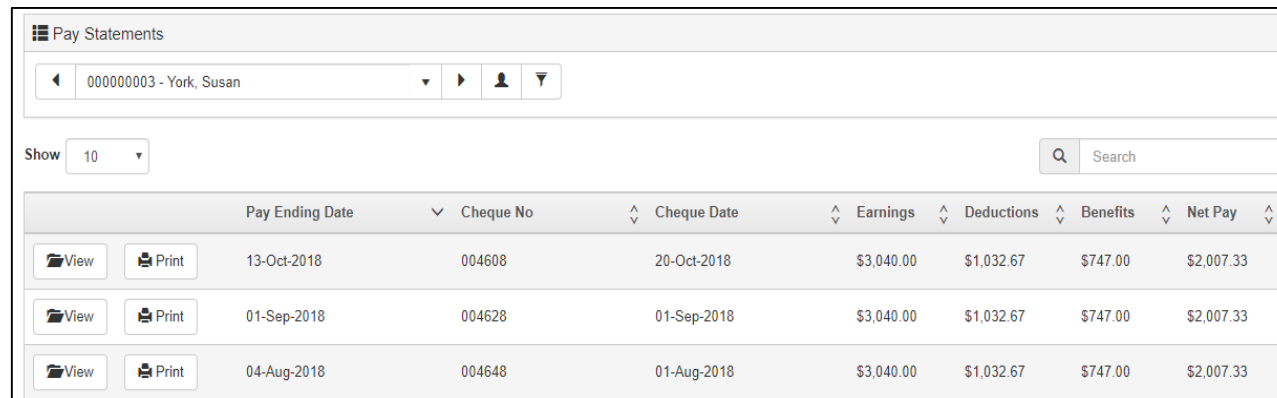
000000003 - York, Susan

+ Add Contact Export as Excel

	First Name ^	Initial ^	Last Name ^	Relationship ^	Address 1 ^	Address 2 ^	City ^	Province ^	Country ^	Postal Code ^	Home Phone ^	Work Phone ^	Comments ^
Edit Delete	Samuel		Railes	Brother							403-258-5589	403-659-9985	

Personal Information Menu: Other

- From the personal information menu you can also:
 - View your federal and provincial tax factors
 - View, save and print your pay statements
 - View and print your annual tax slips



The screenshot displays a web interface for 'Pay Statements'. At the top, there is a navigation bar with a left arrow, the text '000000003 - York, Susan', a right arrow, a user icon, and a dropdown arrow. Below this is a 'Show' dropdown menu set to '10' and a search bar with a magnifying glass icon and the text 'Search'. The main content is a table with columns for 'Pay Ending Date', 'Cheque No', 'Cheque Date', 'Earnings', 'Deductions', 'Benefits', and 'Net Pay'. Each row includes 'View' and 'Print' buttons to the left of the data.

	Pay Ending Date	Cheque No	Cheque Date	Earnings	Deductions	Benefits	Net Pay
View Print	13-Oct-2018	004608	20-Oct-2018	\$3,040.00	\$1,032.67	\$747.00	\$2,007.33
View Print	01-Sep-2018	004628	01-Sep-2018	\$3,040.00	\$1,032.67	\$747.00	\$2,007.33
View Print	04-Aug-2018	004648	01-Aug-2018	\$3,040.00	\$1,032.67	\$747.00	\$2,007.33

Time Entry Menu



Time Entry Menu: Overview

- Through the Time Entry menu, you can:
 - View your schedule
 - Provide your availability
 - Request time off (vacation or LOA)
 - View your time card (punches)
- There are views available in Time Entry
 - Calendar View
 - Pay Period View

Time Entry: Calendar View

Switch the month you are viewing

Select to view by month, week or day

Time Off Request ▼ Refresh

Today ◀ ▶ 📅 September, 2020 Month Week Day

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
30 Available - All Day	31 Available - All Day	01	02 Unavailable - All Day	03 Unavailable - All Day	04	05
06	07 Labour Day	08	09	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	01	02 Available - All Day	Feedback

Time Entry: Pay Period View

Switch the pay period
you are viewing

Calendar Pay Period

< 23-Aug-2020 - 05-Sep-2020 > Time Off Request

+ Add Delete Edit Entitlements Save Changes Refresh

<input type="checkbox"/>	Date	Availability Type	All Day	From Time	To Time	Comments	Status
<input type="checkbox"/>	03-Sep-2020	2 - Unavailable	<input checked="" type="checkbox"/>	12:00 AM	12:00 AM		Unapproved
<input type="checkbox"/>	02-Sep-2020	2 - Unavailable	<input checked="" type="checkbox"/>	12:00 AM	12:00 AM		Unapproved
<input type="checkbox"/>	31-Aug-2020	1 - Available	<input checked="" type="checkbox"/>	12:00 AM	12:00 AM		Unapproved
<input type="checkbox"/>	30-Aug-2020	1 - Available	<input checked="" type="checkbox"/>	12:00 AM	12:00 AM		Unapproved
Totals	Hours: 96.00						

Time Entry: Viewing Your Schedule

- To view your schedule, go to **Time Entry** and use the drop down to select **Schedule**
- You can view your schedule from the calendar view or pay period view
- You will see your scheduled shifts plus any *approved* time off requests

Today < > December, 2020 Month Week Day

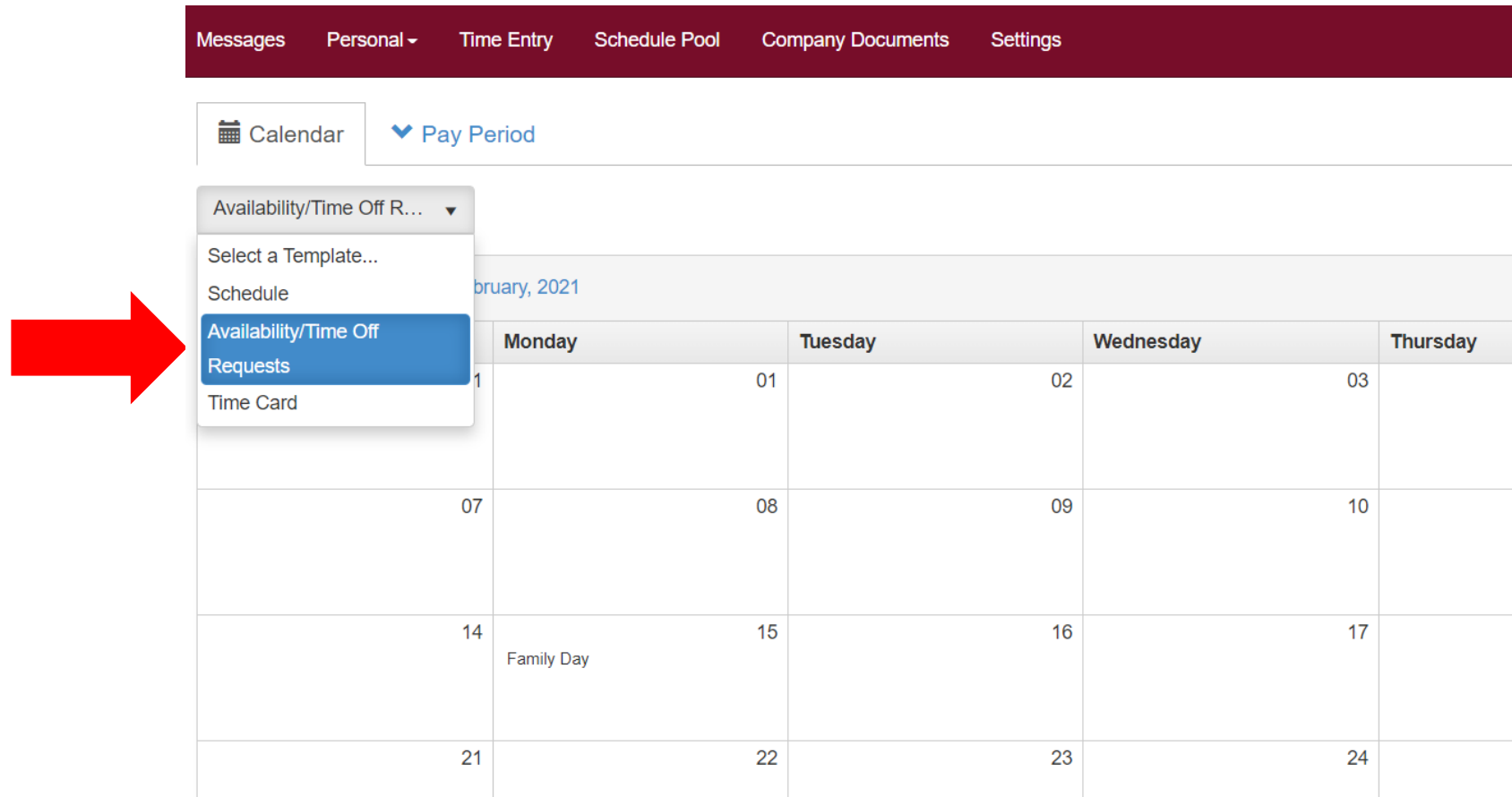
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
29 REGULAR - 07:00 AM - 03:00 PM	30	01 REGULAR - 07:00 AM - 03:00 PM	02	03 ✘ REGULAR - 07:00 AM - 03:00 PM	04 ✘ REGULAR - 07:00 AM - 03:00 PM	05
06	07 REGULAR - 07:00 AM - 03:00 PM	08 REGULAR - 07:00 AM - 03:00 PM	09 REGULAR - 07:00 AM - 03:00 PM	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25 Christmas Day	26 Boxing Day
27	28	29 VAC PD - -	30	31	01	02
03	04	05	06	07	08	Feedback

Time Entry: Providing Availability

- All casual employees are required to provide their availability by the 15th of the month for the following month (e.g by January 15 for the entire month of February).
- Part time employees who would like to pick up additional shifts should also provide their availability.
- The schedulers will use availability provided when calling out to fill vacant shifts.

Time Entry: Providing Availability

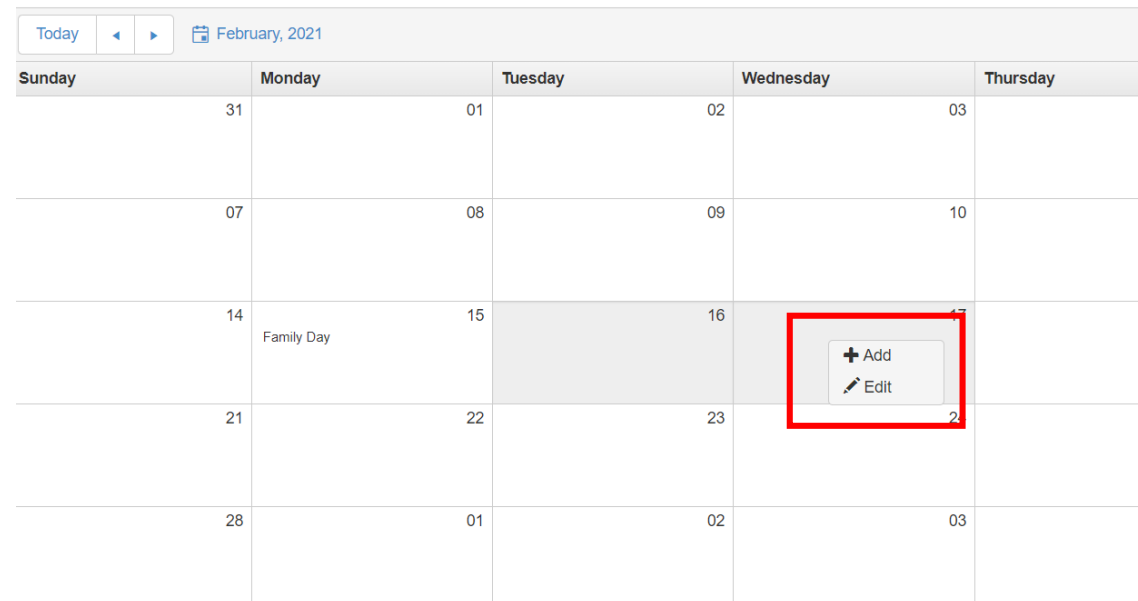
- From the time entry screen, use the drop down menu to select **“Availability/Time Off Requests”**



The screenshot displays a user interface for time entry. At the top is a dark red navigation bar with the following items: Messages, Personal (with a dropdown arrow), Time Entry, Schedule Pool, Company Documents, and Settings. Below this is a white header area containing a 'Calendar' button with a calendar icon and a 'Pay Period' dropdown menu. The main content area shows a calendar for February 2021. A dropdown menu is open over the calendar, listing the following options: 'Availability/Time Off R...' (with a dropdown arrow), 'Select a Template...', 'Schedule', 'Availability/Time Off Requests' (highlighted in blue), and 'Time Card'. A large red arrow points from the left towards the 'Availability/Time Off Requests' option in the dropdown menu. The calendar grid shows days of the week (Monday, Tuesday, Wednesday, Thursday) and dates (01, 02, 03, 07, 08, 09, 10, 14, 15, 16, 17, 21, 22, 23, 24). The date 14 is marked as 'Family Day'.

Time Entry: Providing Availability

- Select the day or days you would like to provide availability for:
 - To provide availability for a single day, right click on the day and then select “Add” or double click.
 - To provide availability for multiple days, click and drag your mouse over the group of days. They will show up in grey. Then right click and select “Add”



The screenshot shows a calendar for February 2021. The calendar is displayed in a grid format with columns for days of the week (Sunday through Thursday) and rows for dates. The date 17 is highlighted in grey, and a red box highlights a context menu with the options '+ Add' and 'Edit'.

Sunday	Monday	Tuesday	Wednesday	Thursday
31	01	02	03	
07	08	09	10	
14	Family Day	15	16	17
21	22	23	24	25
28	01	02	03	

Time Entry: Providing Availability

- Under Availability Type, use the drop down menu to select “Available” to indicate you are able to work. Select “Unavailable” to indicate you are not available to work.
- Either click and select “All Day” to indicate your availability for the day, or adjust “From Time” and “To Time”
- Click “Save Changes”. You will get a message that your entry was added successfully.
- Click “Close” to return to the calendar view.

+ Add Delete Edit Entitlements Save Changes Refresh

<input type="checkbox"/>	Date	Availability Type	All Day	From Time	To Time	Comments	Status
<input type="checkbox"/>	14-Sep-2020	1 - Available	<input checked="" type="checkbox"/>	12:00 AM	12:00 AM		Unapproved
Totals	Days: 1.00						

Close

Time Entry: Viewing Your Availability

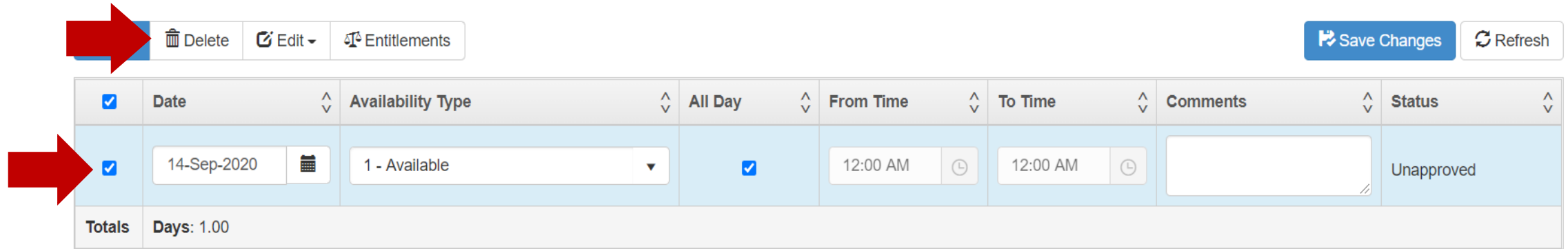
- To view your availability:
 - Go to Time Entry → Availability/Time Off Request
 - Any availability entered will appear on the calendar

The screenshot shows a navigation bar with 'Messages', 'Personal', 'Time Entry', 'Schedule Pool', and 'Settings'. Below the navigation bar, there are buttons for 'Calendar' and 'Pay Period'. A dropdown menu for 'Time Off Request' is visible. The calendar view shows the month of September 2020, with days of the week as columns and dates as rows. The status for each day is displayed in a blue bar: Sunday (30) is 'Available - All Day', Monday (31) is 'Available - All Day', Tuesday (01) is 'Available - All Day', Wednesday (02) is 'Unavailable - All Day', Thursday (03) is 'Unavailable - All Day', Friday (04) is 'Unavailable - All Day', Saturday (05) is 'Unavailable - All Day', Sunday (06) is 'Available - All Day', Monday (07) is 'Labour Day', Tuesday (08) is 'Unavailable - All Day', Wednesday (09) is 'Unavailable - All Day', and Thursday (10) is 'Unavailable - All Day'. A red arrow points to the 'Available - All Day' status for Sunday, September 30th.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday
30 Available - All Day	31 Available - All Day	01 Available - All Day	02 Unavailable - All Day	03 Unavailable - All Day	04 Unavailable - All Day
06 Available - All Day	07 Labour Day	08 Unavailable - All Day	09 Unavailable - All Day	10 Unavailable - All Day	

Time Entry: Deleting Availability

- From the calendar view, double click the entry you would like to delete.
- Click the square to the left of the entry. The square will turn blue with a checkmark. You can select multiple entries
- Click “Delete”



The screenshot shows a user interface for managing time entries. At the top, there is a toolbar with three buttons: 'Delete' (with a trash icon), 'Edit' (with a pencil icon), and 'Entitlements' (with a document icon). To the right of these buttons are two more buttons: 'Save Changes' (in blue) and 'Refresh' (with a circular arrow icon). Below the toolbar is a table with the following columns: a selection checkbox, 'Date', 'Availability Type', 'All Day', 'From Time', 'To Time', 'Comments', and 'Status'. The first row of the table is highlighted in light blue and contains the following data: a checked checkbox, '14-Sep-2020' (with a calendar icon), '1 - Available' (in a dropdown menu), a checked 'All Day' checkbox, '12:00 AM' (with a clock icon), '12:00 AM' (with a clock icon), an empty text box, and 'Unapproved'. Below the table, there is a 'Totals' row showing 'Days: 1.00'. A red arrow points to the 'Delete' button in the toolbar, and another red arrow points to the selection checkbox in the first row of the table.

<input type="checkbox"/>	Date	Availability Type	All Day	From Time	To Time	Comments	Status
<input checked="" type="checkbox"/>	14-Sep-2020	1 - Available	<input checked="" type="checkbox"/>	12:00 AM	12:00 AM		Unapproved
Totals		Days: 1.00					

Time Entry: Changing Availability

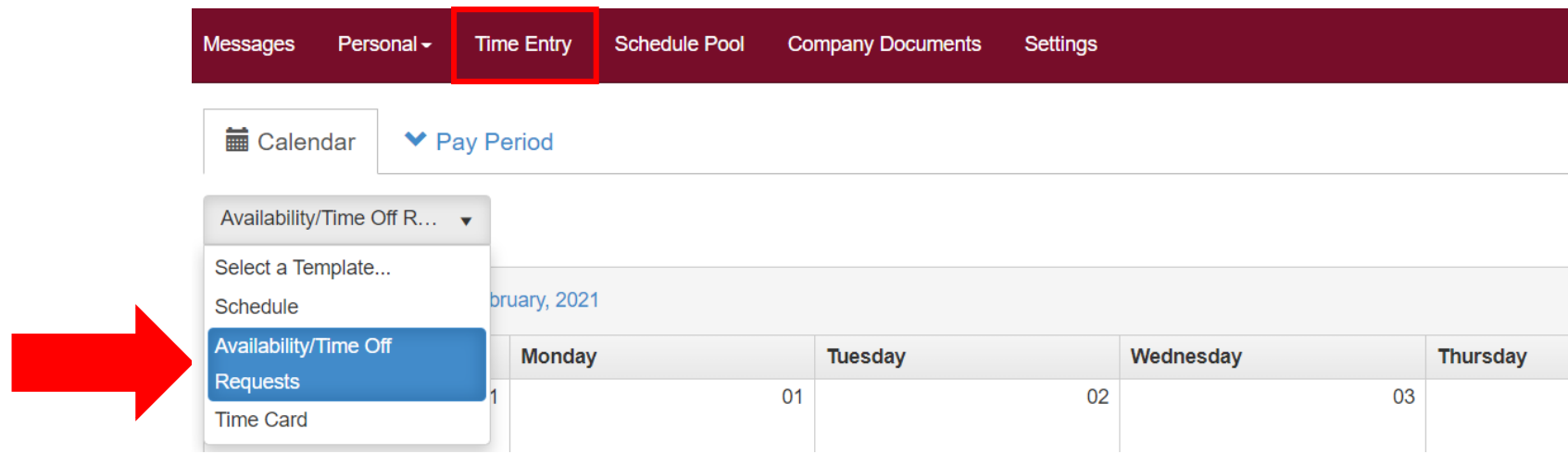
- From the calendar view, double click on the entry you would like to change
- Make any changes needed to update your availability
- Click “Save Changes”

Time Entry: Requesting Time Off

- You can request time off including:
 - Vacation
 - LOA Unpaid
- Time off requests made via Avanti must be done 4 weeks in advance and are subject to manager approval
- For time off requests with less than 4 weeks notice, please call your scheduler or manager
- **For all other types of leave (e.g. sick, bereavement) you MUST contact your scheduler or manager using existing processes**

Time Entry: Requesting Time Off

- From the **Time Entry** screen, use the drop down menu to select **“Availability/Time Off Requests”**
- Select the day or days you would like to request off :
 - To make a request for a single day, right click on the day and then select “Add” or double click.
 - To make a request for multiple days, click and drag your mouse over the group of days. They will show up in grey. Then right click and select “Add”



The screenshot shows the 'Time Entry' screen with a navigation bar at the top containing 'Messages', 'Personal', 'Time Entry', 'Schedule Pool', 'Company Documents', and 'Settings'. Below the navigation bar, there is a 'Calendar' button and a 'Pay Period' dropdown. A dropdown menu is open under 'Availability/Time Off R...', with the option 'Availability/Time Off Requests' highlighted in blue. A red arrow points to this option. The calendar grid below shows the days of the week: Monday, Tuesday, Wednesday, and Thursday, with dates 01, 02, and 03 visible.

Time Entry: Requesting Time Off

- Under Availability Type, use the drop down menu to select the type of time off request
 - Vacation
 - LOA Unpaid (Leave of Absence)
- **UNCHECK** the box that says “All Day” and adjust the “From Time” and “To Time” to match the times of your scheduled shift for that day.
- Click “Save Changes”. You will get a message that your entry was added successfully.
- Click “Close” to return to the calendar view.

16-Feb-2021 ✕

[+ Add](#) [Delete](#) [Edit](#) [Entitlements](#) [Save Changes](#) [Refresh](#)

<input type="checkbox"/>	Date	Availability Type	All Day	From Time	To Time	Comments	Status
<input type="checkbox"/>	16-Feb-2021	10 - Vacation	<input type="checkbox"/>	07:00 AM	03:00 PM		Unapproved
Totals	Days: 8.00						

10 - Vacation

1 - Available
2 - Unavailable
11 - Bereavement
13 - LOA Unpaid

[Close](#)

Time Entry: Requesting Time Off

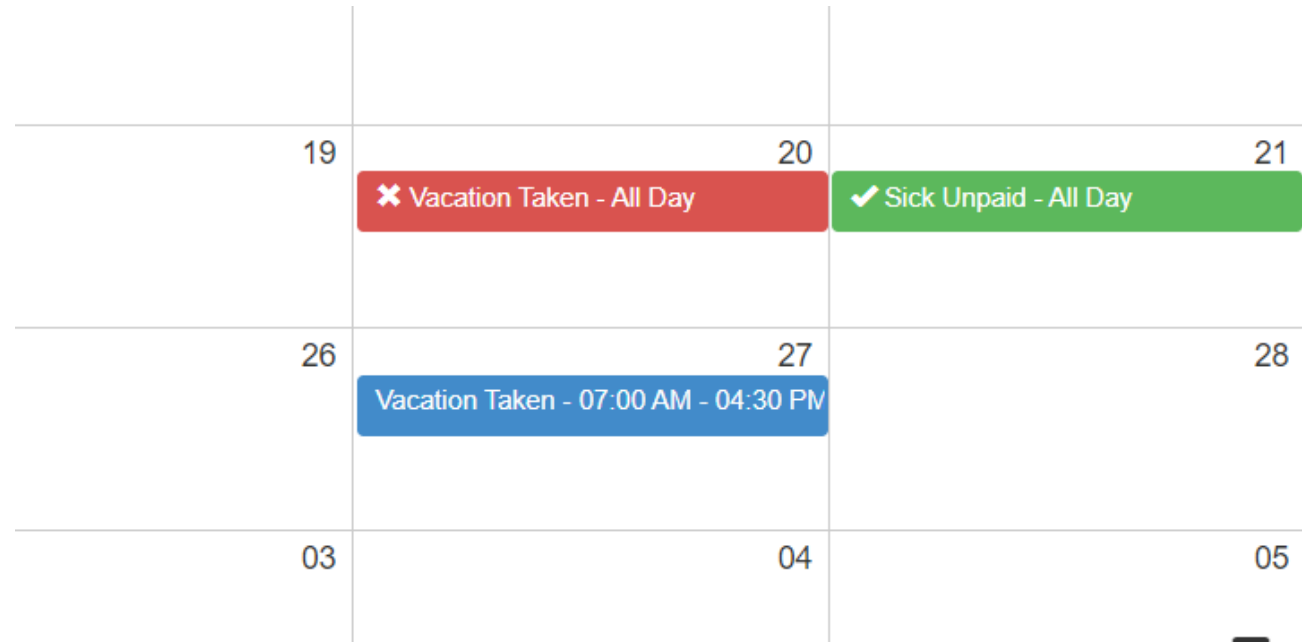
- All time off requests must be approved
- Once you have made a time off request, the scheduler will be notified and your manager will review your request
- You will receive an email notification when the request has been approved/denied



Your time off request has been reviewed:
Vacation Taken 29-Dec-2020 from 12:00 to 12:00 - Approved

Time Entry: Requesting Time Off

- From the calendar view, you can see which requests are pending approval or have been accepted/denied
 - Blue – Request is Pending Approval
 - Green – Request is Approved
 - Red – Request is Denied



Time Entry: Time Card

- To view your time card to go Time Entry → Time Card
- The time card shows the time you have actually worked based on your punches at the time clock
- Punches that have been approved for payroll will have a checkmark beside them
- Punches may not appear as approved until close to the payroll date.

Schedule Pool



Schedule Pool

- Through the Schedule Pool, you can:
 - Pick up shifts that are vacant
 - Request to swap shifts with a co-worker
- All requests made through the Schedule Pool are subject to approval by your manager
- You can NOT drop (post) a shift via schedule pool. These requests will be denied by the scheduler

Schedule Pool: Picking Up Additional Shifts

- To view shifts that are available to be picked up go to Schedule Pool → Available Shifts
- You will only see postings that you are eligible to work

The screenshot shows the user interface for the Schedule Pool. At the top, a dark red navigation bar contains several menu items: Messages, Personal, Time Entry, Schedule Pool (highlighted with a red box), Company Documents, and Settings. Below this is a light gray header with a search icon and the text 'Schedule Pool'. Underneath, there are two tabs: 'My Requests' and 'Available Shifts' (highlighted with a red arrow). The main content area features a circular indicator with the number '1', a dropdown menu set to 'All Available Shifts', and a search box labeled 'Search available shifts'. A teal header indicates the month 'February 2021'. Below this is a table with columns for Date, Shift & Posted By, Pickup Option, and Details. A single shift is listed for Tuesday, February 23rd, from 7:00 AM to 3:00 PM, for a Health Care Aide (Certified) position with a 'Pickup' option. This shift row is highlighted with a red box.

February 2021			
Date	Shift & Posted By	Pickup Option	Details
Tue 23	7:00 AM - 3:00 PM Health Care Aide (Certified)	Pickup	Details

Schedule Pool: Picking Up Additional Shifts

- Under available shifts you will see shifts that are:
 - Available to be picked up – posted by scheduler to fill vacancies, vacation coverage, sick calls, etc.
 - Available to be exchanged – posted by another employee for a shift swap
- Click the checkbox to select an available shift that you would like to work and click “Pick Up”
- Note that you are making the request to pick up the shift – it must still be approved by your scheduler/manager

February 2021			
Date	Shift & Posted By	Pickup Option	Details
<input checked="" type="checkbox"/>	Tue 7:00 AM - 3:00 PM 23 Health Care Aide (Certified)	Pickup	Details

Showing 1 Post

Selected Shifts: 1 [Pick Up](#) [Exchange](#)

Schedule Pool: Picking Up Additional Shifts

- Once you select a shift, a new window will open where you can:
 1. Review the shift details such as start and end times
 2. Leave comments on the request to pick up the shift that the scheduler/manager will see
 3. Check if the selected shift conflicts with one of your existing shifts
- Click “Submit” when you are ready to send the pick-up request for the shift
- The pick-up request will appear on the *My Requests* tab where you can track the status of the request.

	Date	From	To	Units	UOM	Shift Name	Conflicts	
1	<input checked="" type="checkbox"/>	16-May-2019	02:00 pm	06:00 pm	4.00	H	2:00 pm - 6:00 pm	3

Displaying 1 Schedule Entry

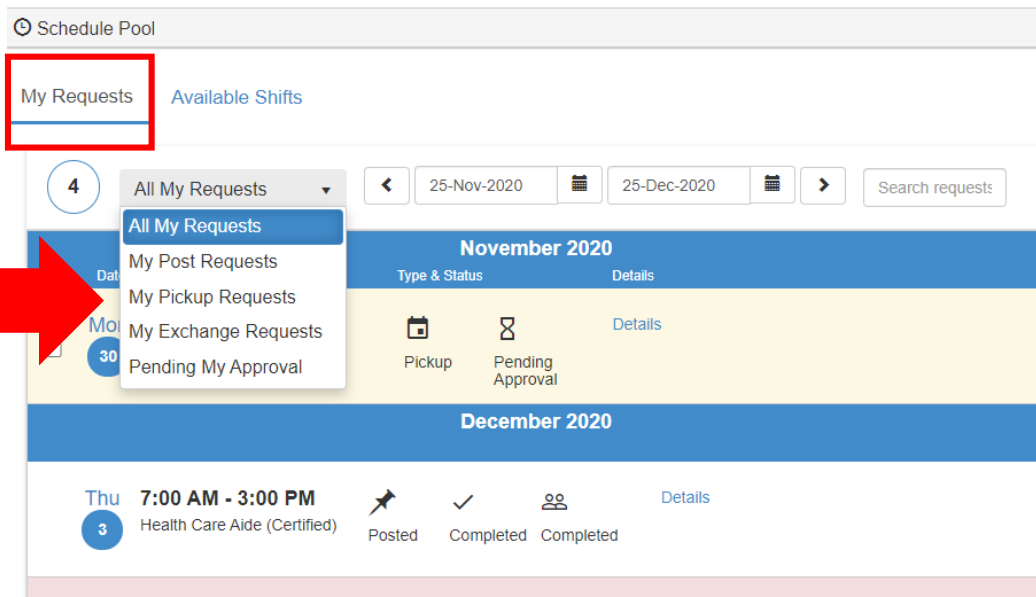
Pickup Request Comments

2

Submit Cancel

Schedule Pool: Picking Up Additional Shifts

- You will receive a phone call or email when your request has been approved/denied by your scheduler
- You can also view the status of your pick-up request by going to **Schedule Pool** → **My Requests**
 - From the drop down, you can view All Requests or only Pick Up Requests



The screenshot displays the 'Schedule Pool' interface. At the top, there are two tabs: 'My Requests' (highlighted with a red box) and 'Available Shifts'. Below the tabs, there is a navigation bar with a '4' icon, a dropdown menu for 'All My Requests', and a search bar. The main content area shows a calendar view for November 2020 and December 2020. A red arrow points to the 'My Pickup Requests' option in the dropdown menu. The calendar shows a 'Pickup' request for November 25th and a 'Pending My Approval' request for November 30th. The bottom of the calendar shows a shift for Thursday, November 3rd, from 7:00 AM to 3:00 PM, with a status of 'Completed'.

Schedule Pool: Request Status

- Pending Approval: Your request is waiting for the scheduler to approve
- Approved: Your request has been approved and will be added to your work schedule automatically
- Cancelled: The request has been cancelled by a manager/scheduler. You can submit a new request for the same shift
- Rejected: The request has been rejected by a manager/scheduler. You will not be able to submit a new request for the same shift

IMPORTANT!!

- If you indicate you would like to pick up a shift, YOU are responsible for checking back to see if you have been approved for that shift.
- You will receive an email or phone call from the scheduler if you have been approved – you must check your email/voicemail.
- You can also check the status under “my requests” and the shift will appear on your schedule.

Schedule Pool: Exchanging Shifts

- Through the Schedule Pool, you can also request to *exchange* or *swap* a shift with a co-worker
- All exchange requests must be approved by your manager
- Exchange requests need to be made at least 7 days in advance
- There are 2 employees involved in an exchange
 - One employee will initiate the exchange in Avanti by posting a shift for exchange
 - The second employee will pick up that shift and exchange another shift in return

Schedule Pool: Exchanging Shifts (First employee)

- To initiate an exchange:
 - Go to **Schedule Pool** . Your scheduled shifts will appear on the right half of the screen.
 - Select the shift you would like to exchange and click *Post*

🕒 Schedule Pool

My Requests Available Shifts

6 All My Requests 26-Nov-2020 26-Dec-2020 Search requests

Date	Shift	Type & Status	Details
4	PM Health Care Aide (Certified)	Posted Approved	Details
Mon 7 7:00 AM - 3:00 PM Health Care Aide (Certified)	Posted Pending Approval	Details	
Wed 9 7:00 AM - 3:00 PM Health Care Aide (Certified)	Posted Approved	Details	

Showing schedule for: 000500038 - Janine Galamay

Today December, 2020 Post

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
29 REGULAR - 07:00 AM - 3:00 PM	30	01 REGULAR - 07:00 AM - 3:00 PM	02	03	04 REGULAR - 07:00 AM - 3:00 PM	05
06	07 REGULAR - 07:00 AM - 3:00 PM	08 REGULAR - 07:00 AM - 3:00 PM	09 REGULAR - 07:00 AM - 3:00 PM	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25 Christmas Day	26 Boxing Day

Schedule Pool: Exchanging Shifts (First employee)

- A new window will pop up
- Use the drop down menu and select *Exchange*. Then click *Post*.
- You may not post shifts for others to pick up without an exchange

Shifts to Post



	Employee	Employee Name	Date	Pay Code	From	To	Units	UOM	Position	Position Name	Location	Location Name	Shift	Shift Name
<input checked="" type="checkbox"/>	000500038	Galamay, Janine	09-Nov-2020	REGULAR	07:00 am	03:00 pm	8.00	H	HCA	Health Care Aide (Certified)	15	HCA	GEN BRK	General Shift - 30 min break/premiums

Displaying 1 Schedule Entry

Require shifts to be Picked-up/Exchanged together

Post Option

Pickup or Exchange

Pickup or Exchange

Pickup

Exchange



Post

Cancel

Schedule Pool: Exchanging Shifts (First employee)

- Once you have posted the shift, it will appear under *My Requests*
- Here you can monitor the status of the request (pending approval, approved, rejected)

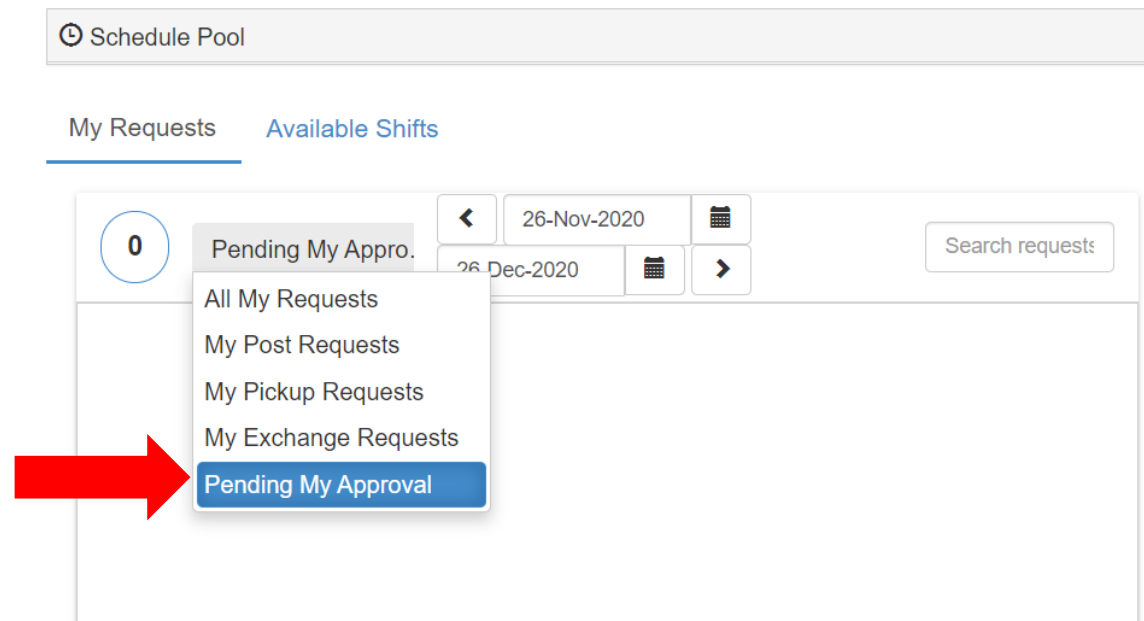
The screenshot displays the 'My Requests' section of a scheduling system. At the top, there are two tabs: 'My Requests' (highlighted with a red box) and 'Available Shifts'. Below the tabs, the interface shows a calendar view for December 2020. A table lists the requests with columns for Date, Shift, Type & Status, and Details.

Date	Shift	Type & Status	Details
4	PM Health Care Aide (Certified)	Posted Approved	Details
Mon 7	7:00 AM - 3:00 PM Health Care Aide (Certified)	Posted Pending Approval	Details
Wed 9	7:00 AM - 3:00 PM Health Care Aide (Certified)	Posted Approved	Details

At the bottom of the interface, there is a pagination control showing 'Showing 1 to 6 of 6 Requests' and a 'Selected Requests: 0' indicator with 'Undo Cancel' and 'Cancel' buttons.

Schedule Pool: Exchanging Shifts

- Multiple employees may respond to your exchange request
- You will need to review all exchange requests and approve the exchange you would like to execute.
- To review & approve the exchange request go to *Schedule Pool* → *My Requests* and use the drop down to select *Pending My Approval*



Schedule Pool: Exchanging Shifts

- The exchanges for your review will show in yellow and state “Pending Acceptance”
- Check the tick box and click “review”

My Requests Available Shifts

6 All My Requests 16-Feb-2021 16-Mar-2021 Search requests

March 2021

Date	Shift	Type & Status	Details
<input type="checkbox"/> 2	Health Care Aide (Certified)	Posted Cancelled	
<input type="checkbox"/> Wed 3	7:00 AM - 3:00 PM Health Care Aide (Certified)	Posted Approved	Details
<input type="checkbox"/> Sat 6	7:00 AM - 3:00 PM Health Care Aide (Certified)	Posted Approved	Details
<input checked="" type="checkbox"/> Sat 6	7:00 AM - 3:00 PM Health Care Aide (Certified)	Exchange Pending Acceptance	Details

Showing 1 to 6 of 6 Requests

Selected Requests: 1 Undo Cancel Cancel **Review**



Schedule Pool: Exchanging Shifts

- A new screen will pop up where you can review the shift(s) you are offering and the shift(s) offered to you in exchange.
- You can choose to accept or reject the exchange.

Do you want to approve this exchange? ✕

Shifts you are offering

Employee	Employee Name	Date	Pay Code	From	To	Units	UOM	Position	Position Name	Location	Location Name	Shift	Shift Name	Comment
000500038	Janine Galamay	06-Mar-2021	REGULAR	07:00 am	03:00 pm	8.00	H	HCA	Health Care Aide (Certified)	S-06	Willingham	GEN BRK	General Shift - 30 min break/premiums	

Displaying 1 Schedule Entry

Shifts offered to you

Employee	Employee Name	Date	Pay Code	From	To	Units	UOM	Position	Position Name	Location	Location Name	Shift	Shift Name	Comment
		08-Mar-2021	REGULAR	11:00 pm	07:00 am	8.00	H	HCA	Health Care Aide (Certified)	S-03	Foxton	GEN BRK	General Shift - 30 min break/premiums	

Displaying 1 Schedule Entry

[Close](#) [Reject](#) [Accept](#)

Schedule Pool: Exchanging Shifts

- One you accept the exchange, the request will go to your manager/scheduler for final approval.
- Once approved, the shifts will show up on your schedule.
- The shift you dropped will show as SWAPNWORK (for not worked)
- The shift you picked up will show as SWAPWORK

The screenshot shows a calendar interface for February 2021. The calendar is organized by days of the week. A red box highlights a swap of shifts between Monday, February 8th and Tuesday, February 9th. On Monday, the shift is labeled 'SWAPNWORK - 03:00 PM - 11:00 PM'. On Tuesday, the shift is labeled 'SWAPWORK - 03:00 PM - 11:00 PM'. Other days show regular shifts: Sunday 31 (REGULAR - 03:00 PM - 11:00 PM), Monday 01 (REGULAR - 03:00 PM - 11:00 PM), Tuesday 02 (REGULAR - 03:00 PM - 11:00 PM), Wednesday 03 (REGULAR - 03:00 PM - 10:00 PM), Thursday 04 (REGULAR - 03:00 PM - 11:00 PM), Friday 05 (REGULAR - 03:00 PM - 11:00 PM), Saturday 06 (REGULAR - 03:00 PM - 11:00 PM), Sunday 07 (REGULAR - 03:00 PM - 11:00 PM), Monday 08 (SWAPNWORK - 03:00 PM - 11:00 PM), Tuesday 09 (SWAPWORK - 03:00 PM - 11:00 PM), Wednesday 10 (REGULAR - 03:00 PM - 11:00 PM), Thursday 11 (REGULAR - 03:00 PM - 11:00 PM), Friday 12 (REGULAR - 03:00 PM - 11:00 PM), Saturday 13 (REGULAR - 03:00 PM - 11:00 PM), Sunday 14 (REGULAR - 03:00 PM - 11:00 PM), Monday 15 (Family Day), Tuesday 16 (REGULAR - 03:00 PM - 11:00 PM), Wednesday 17 (REGULAR - 03:00 PM - 10:00 PM), Thursday 18 (REGULAR - 03:00 PM - 11:00 PM), Friday 19 (REGULAR - 03:00 PM - 11:00 PM), Saturday 20 (REGULAR - 03:00 PM - 11:00 PM), Sunday 21 (REGULAR - 03:00 PM - 11:00 PM), Monday 22 (REGULAR - 03:00 PM - 10:00 PM), Tuesday 23 (REGULAR - 03:00 PM - 11:00 PM), Wednesday 24 (REGULAR - 03:00 PM - 11:00 PM), Thursday 25 (REGULAR - 03:00 PM - 11:00 PM), Friday 26 (REGULAR - 03:00 PM - 11:00 PM), Saturday 27 (REGULAR - 03:00 PM - 11:00 PM), Sunday 28 (REGULAR - 03:00 PM - 11:00 PM), Monday 29 (REGULAR - 03:00 PM - 11:00 PM), Tuesday 30 (REGULAR - 03:00 PM - 11:00 PM), Wednesday 01 (REGULAR - 03:00 PM - 10:00 PM), Thursday 02 (REGULAR - 03:00 PM - 11:00 PM), Friday 03 (REGULAR - 03:00 PM - 11:00 PM), Saturday 04 (REGULAR - 03:00 PM - 11:00 PM), Sunday 05 (REGULAR - 03:00 PM - 11:00 PM).

Schedule Pool: Exchanging Shifts (Second employee)

- To view and pick up shifts that have been posted for exchange, go to *Available Shifts*
- Here you will see shifts that are available to be exchanged (you will work the shift identified in exchange for one of your scheduled shifts)
- Select the shift you would like to pick up and click *Exchange*
- You will then be required to identify the shift you are exchanging for

The screenshot shows the 'Available Shifts' interface. At the top, there are two tabs: 'My Requests' and 'Available Shifts', with the latter being selected and highlighted with a red box. Below the tabs, there is a search bar and a dropdown menu showing '2 All Available Shifts'. The main content area is titled 'December 2020' and contains a table of shifts. The first shift is highlighted with a red box and has a blue checkmark in a circle next to it. The second shift is not selected. At the bottom right, there are two buttons: 'Pick Up' and 'Exchange', with the 'Exchange' button highlighted by a red box.

Date	Shift & Posted By	Pickup Option	Details
Wed	3:00 PM - 11:00 PM 2 Health Care Aide (Certified)	<input checked="" type="checkbox"/> Pickup or exchange	Details
Wed	3:00 PM - 11:00 PM 9 Health Care Aide (Certified)	<input type="checkbox"/> Pickup or exchange	Details

Showing 1 to 2 of 2 Posts

Selected Shifts: 1 [Pick Up](#) [Exchange](#)

Schedule Pool: Exchanging Shifts (Second employee)

- A new window will pop up and you will then be required to identify the shift you are exchanging for
- Under *Shifts to Exchange* you will see the shift posted for exchange
- Review the details and click *Next*

☰ Shifts to Exchange ☰ Exchange with Shift

	Date	Pay Code	From	To	Units	UOM	Position	Position Name	Location	Location Name	Shift	Shift Name	Conflicts	
<input checked="" type="checkbox"/>	02-Dec-2020	REGULAR	03:00 pm	11:00 pm	8	H	HCA	Health Care Aide (Certified)	15	HCA	GEN BRK	General Shift - 30 min break/premiums		

Displaying 1 Schedule Entry

Next Cancel

Schedule Pool: Exchanging Shifts (Second employee)

- Under *Exchange with Shift* you will see your own scheduled shifts available to offer in exchange for the posted shift.
- Under *Conflicts* you will see if any of your shifts conflict with the person you are exchanging with (they are already working or not otherwise able to work the shift)
- Select the shift you would like to exchange with your co-worker and click *Submit*

☰ Shifts to Exchange ☰ Exchange with Shift

	Employee	Employee Name	Date	Pay Code	From	To	Units	UOM	Position	Position Name	Location	Location Name	Shift	Shift Name	Conflicts
<input type="checkbox"/>	000500038	Galamay, Janine	10-Nov-2020	PRSEMERG			8	H	HCA	Health Care Aide (Certified)					
<input type="checkbox"/>	000500038	Galamay, Janine	10-Nov-2020	REGULAR	07:00 am	03:00 pm	8	H	HCA	Health Care Aide (Certified)	15	HCA	GEN BRK	General Shift - 30 min break/premiums	Existing schedule entries for posting employee.
<input type="checkbox"/>	000500038	Galamay, Janine	11-Nov-2020	SELFISO			8	H	HCA	Health Care Aide (Certified)					
<input type="checkbox"/>	000500038	Galamay, Janine	11-Nov-2020	REGULAR	07:00 am	03:00 pm	8	H	HCA	Health Care Aide (Certified)	15	HCA	GEN BRK	General Shift - 30 min break/premiums	Existing schedule entries for posting employee.



Schedule Pool: Exchanging Shifts

- You can view the status of your exchange request under *My Requests*
 - *Pending Acceptance*: request is waiting for the other employee to respond to your request
 - *Employee Accepted*: request has been approved by the other employee.
 - *Pending Approval*: request is waiting for manager approval
 - *Approved*: request has been approved by your manager.
 - *Cancelled*: the request has been cancelled by your manager. You may make a new request for the same shift
 - *Rejected*: the request has been rejected by your manager. You may not make a new request for the same shift

Schedule Pool: Exchanging Shifts

- The shift you have picked up will show on your schedule as SWAP-ON
- The shift you have dropped (not working) will show on your schedule as SWAP-OFF and will be purple

Today			February, 2021		
Sunday	Monday	Tuesday			
31	01 REGULAR - 03:00 PM - 11:00 PM	02 REGULAR - 03:00 PM - 11:00 PM			
07 SWAP-OFF - 03:00 PM - 11:00 PM	08 SWAP-ON - 03:00 PM - 11:00 PM	09 REGULAR - 03:00 PM - 11:00 PM			
14 COVER - 03:00 PM - 11:00 PM	15 Family Day REGULAR - 03:00 PM - 11:00 PM	16 REGULAR - 03:00 PM - 11:00 PM			

Schedule Pool: Exchanging Shifts Summary



Avanti: Quick Guide

I Want To...	Go to...
View my schedule	Time Entry → Schedule
Provide my availability	Time Entry → Availability/Time off request
Book time off (Vacation or LOA)	Time Entry → Availability/Time off request
Pick up extra shifts	Schedule Pool → Available shifts
Post a shift to be exchanged with a co-worker	Schedule Pool → choose shift to be posted from calendar and select <i>Post</i>
Pick up/exchange a shift a co-worker has posted for exchange	Schedule Pool → Available Shifts
View the shifts I have worked	Time Entry → Time Card
See my pay stub	Personal → Pay statements
Update my contact information	Personal → Personal Data
View my tax slips	Personal → Tax Slip Forms
Change my password	Settings → Password

Mobile App: Avanti Go

- An Avanti app ('Avanti Go') is available for download on your mobile phone to help you view and manage your schedule
- The app is in *beta test* phase only
- For instructions on how to download the app go to "*Settings*" → "*Avanti App*"
 - Android users can download from the Google Play store
 - Apple users first need to download "Test Flight" then visit the Test Flight website to access Avanti Go
- Watch this video to learn how to swap or pick up shifts using Avanti Go <https://share.vidyard.com/watch/DVPdiUFpebSfmHEMY1GK7v?>

Mobile App: Avanti Go

- The app can only be used to pick up vacant shifts (shift pooling) or to view your schedule
- To provide your availability, request vacation time, view your pay statements, etc. you will need to log into the website at www.myavanti.ca/thebsf from your phone or computer

Using your phone or tablet – Tips & Tricks

- You can log into www.myavanti.ca/theBSF from your phone or tablet
- When requesting vacation or providing your availability, it may be easier to do using “Pay Period View” (see slide 15)
- Currently, you can not pick up a shift from the schedule pool using a phone or tablet. You will need to use the app or access the website from a computer.