

SOP: Daily Scheduling and Shift Management

This SOP details the process of **daily scheduling and shift management**, covering staff allocation, shift planning, attendance tracking, shift handover protocols, and ensuring adequate coverage for operational efficiency. The objective is to optimize workforce utilization, maintain smooth operations, and improve employee satisfaction by implementing clear scheduling practices and effective communication of shift changes.

1. Scope

This SOP applies to all employees and managers involved in daily scheduling and shift operations.

2. Responsibilities

- **Managers/Supervisors:** Create schedules, manage shift changes, monitor attendance, and ensure adequate coverage.
- **Employees:** Review schedules, communicate availability, adhere to assigned shifts, and follow handover protocols.
- **HR/Administrator:** Maintain scheduling system, manage employee records, and assist with staffing needs.

3. Procedure

3.1 Staff Allocation & Shift Planning

1. Assess daily staffing requirements based on operational needs and workload forecasts.
2. Review employee availability, skill sets, and preferences (when possible).
3. Create and publish daily/weekly shift schedules using the designated scheduling platform or tool (e.g., scheduling software, spreadsheet).
4. Ensure compliance with labor laws, organizational policies on working hours, overtime, and breaks.

3.2 Schedule Communication

1. Distribute the finalized schedule at least 3 days in advance, or as defined by policy, via email or scheduling portal.
2. Highlight any open shifts or understaffed periods and invite volunteers or temporary staff if necessary.

3.3 Attendance Tracking

1. Require staff to clock in/out using the approved timekeeping system at the start and end of each shift.
2. Monitor attendance in real time and address any discrepancies or absenteeism.
3. Escalate recurring attendance issues as per HR policies.

3.4 Shift Changes & Coverage

1. Employees must notify supervisors at least [define notice period, e.g., 24 hours] in advance for shift swaps or absences.
2. All shift swaps require managerial approval before being finalized in the schedule.
3. Supervisors to arrange coverage for any uncovered shifts to guarantee operational continuity.

3.5 Shift Handover Protocol

1. Outgoing staff provide a handover report outlining unfinished tasks, key updates, and ongoing issues.

- 2. Handover reports are shared verbally and/or via email, as appropriate for the role.
- 3. Incoming staff confirm receipt and understanding of handover before assuming shift duties.

4. Documentation & Records

- Maintain copies of all published schedules for a minimum of [define retention period, e.g., 1 year].
- Store attendance logs and handover reports as per data management policies.

5. Review & Continuous Improvement

- Review scheduling efficiency monthly and gather employee feedback.
- Adjust scheduling practices as needed to improve coverage and employee satisfaction.

6. Key Contacts

Role	Name	Contact
Scheduling Manager	[Insert Name]	[Insert Email/Phone]
HR Representative	[Insert Name]	[Insert Email/Phone]

Version: [Insert Version Number] | Effective Date: [Insert Date] | Next Review: [Insert ReviewDate]