

Shift swap policy

Adapt the bracketed parts to your own organisation, then put it where staff will actually read it.

ORGANISATION

APPLIES TO

EFFECTIVE FROM

REVIEWED BY

1. Who may swap

Staff may swap shifts with colleagues who are trained for the role on that shift, are not on approved leave, and would not exceed [48] hours that week or break rest-break rules by taking it.

2. How to request a swap

Both people must agree before the request is made. Requests go through [the rota app / the duty manager] no later than [24 hours] before the earlier of the two shifts. A request made after the cutoff is treated as a request for cover, not a swap.

3. Approval

A swap is not effective until it is approved by [the rota owner]. Approval is normally quick, and a refusal comes with a reason: most commonly a skills gap, an overtime cost or a rest-rule breach.

4. Responsibility once approved

Once a swap is approved, the incoming person owns the shift completely. A no-show on a swapped shift counts against the person who accepted it, not the person who gave it away.

5. Fairness

Managers keep an eye on swap patterns. Persistent one-way swapping that reshapes somebody's contracted pattern gets a conversation, not a quiet drift.

6. Records

All approved swaps are recorded on the published rota, so the rota always shows who is actually expected. No swap is agreed by text message alone.

Signed

Approved by [name and role], [date]. Next review [date].

Notes

- Replace every bracketed value before you publish this. A policy with [24 hours] still in it will not be enforced.
- Clause 4 is the one that ends most disputes before they start, so do not soften it.
- Put it where staff already look, not in a handbook nobody has opened since induction.
- Give it a review date. A swap policy written for twelve people does not fit forty.