

Visual Scheduling: Escalating a Candidate Search

Job Aid

The Escalate Search feature in Visual Scheduling allows you to send a callout to employees with a request to work an open schedule. This feature is most often used when there is a critical need for employees to work an upcoming coverage schedule. This function is available for any schedule in the schedule template in any stage within one week from the current date. The call out sequence prompts a polling box in the template that allows you to track employee responses and access the Polling panel to assign employees to the schedule.

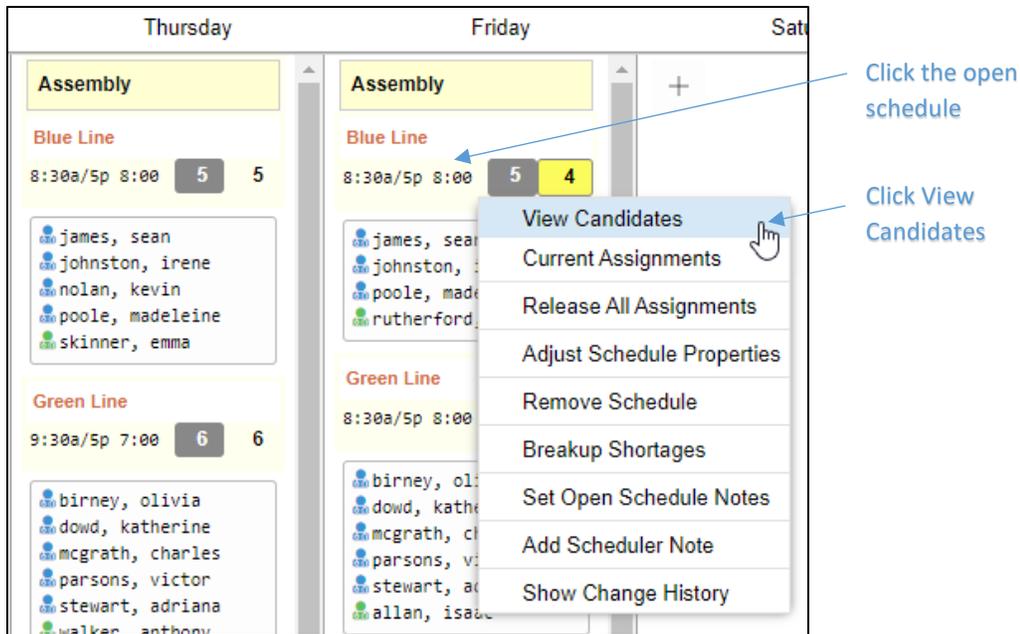
The image displays two screenshots from the Visual Scheduling software. The left screenshot shows a schedule for Friday, August 13, with an 'Assembly' schedule template. A 'POLLING' box is visible at the bottom, showing 3 candidates, 2 'Yes' responses, and 1 'No' response. A blue arrow points to this box with the label 'Polling box'. The right screenshot shows a detailed 'Polling' panel for the same date and schedule. It lists three candidates: Kevin Nolan (Full Time, Available), Anthony Walker (Part Time, Available), and Emma Skinner (Part Time, Unavailable). A blue arrow points to the 'Yes Available' response for Anthony Walker with the label 'Employee response to call out'. The panel also includes 'Assign' and 'Ignore' buttons for each candidate and a 'Save' button at the bottom.

Escalate search occurs in the following sequence:

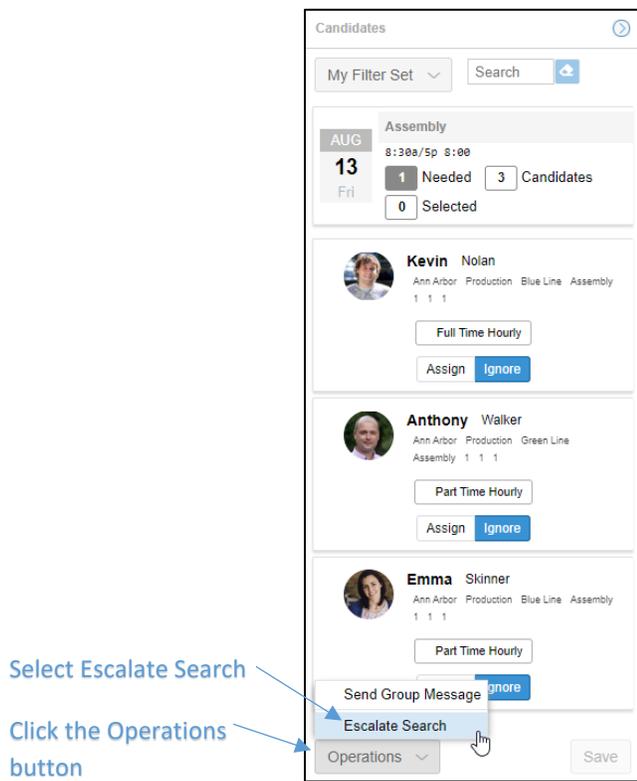
- A text message is sent to each employee in the schedule's candidates list describing the schedule and listing codes for yes and no responses.
- Employees respond with the code to either accept or reject the request.
- The scheduler selects a candidate or candidates from the yes responses and assigns the schedule.
- The assigned employee receives a confirmation text with assignment details.
- The remaining employees who responded with the yes code and employees who did not respond receive a text indicating that the position has been filled.

Sending a Callout

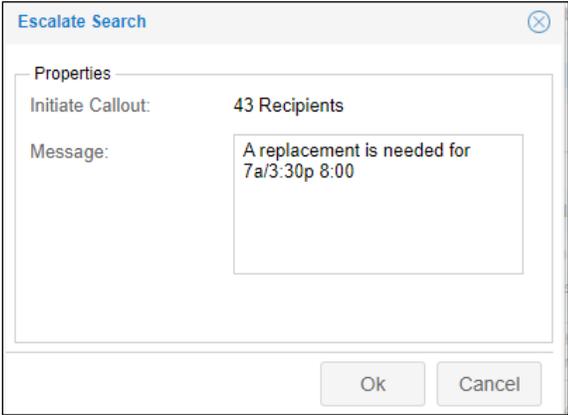
Locate the open schedule in your Visual Scheduling template and click the schedule to select **View Candidates** from the drop-down menu.



In the Candidates panel, Click the **Operations** button and select **Escalate Search**.



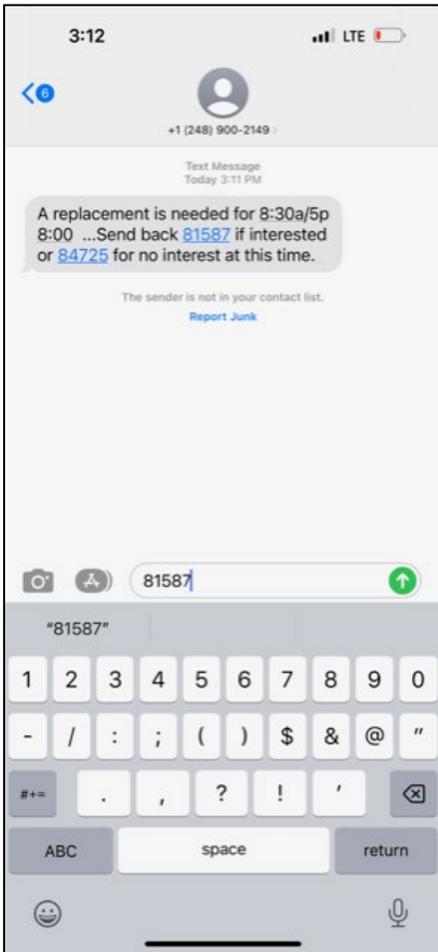
An *Escalate Search* window is presented displaying text details, including the number of employees who will receive the text and the contents of the message about the open shift.



The default text message can be edited or replaced. Click in the *Message* field and edit or type a new message to replace the default message.

Employee Responses

Employees receive a text with the message added in the *Escalate Search* window and two codes to respond back to the scheduler. A five digit code can be typed in the replying text field to indicate interest in picking up the shift. An alternate five digit code can be typed in the replying text field to indicate that the employee is not interested in working the shift.



After responding with to the text message with a code, the employee receives a response from the system:

Employee Response

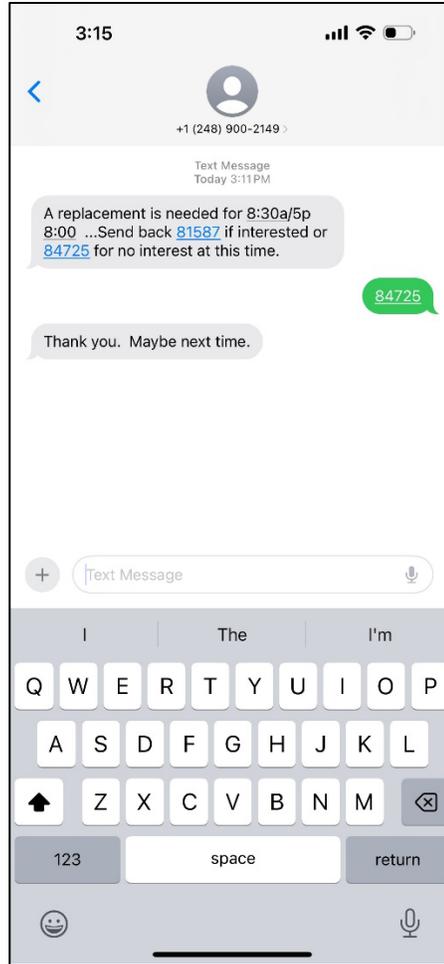
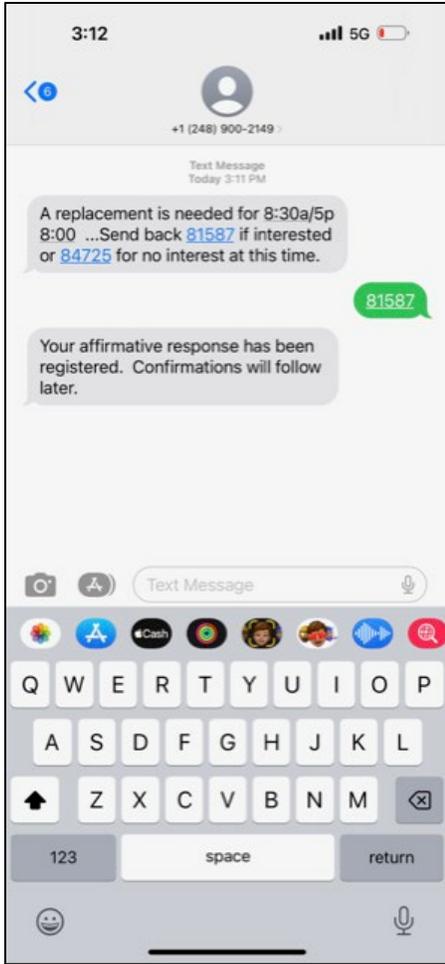
System Response

Yes

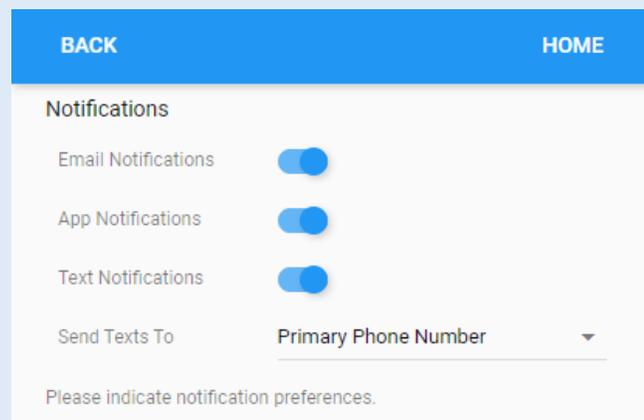
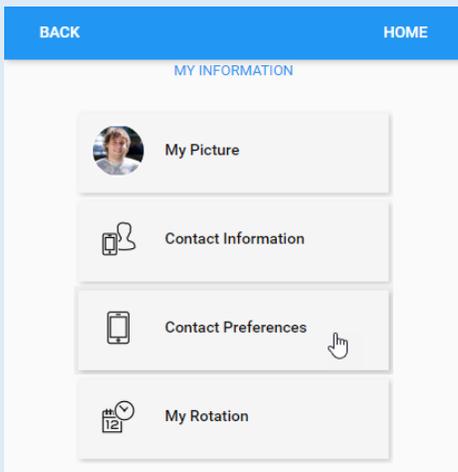
Your affirmative response has been registered. Confirmation will follow later.

No

Thank you. Maybe next time.

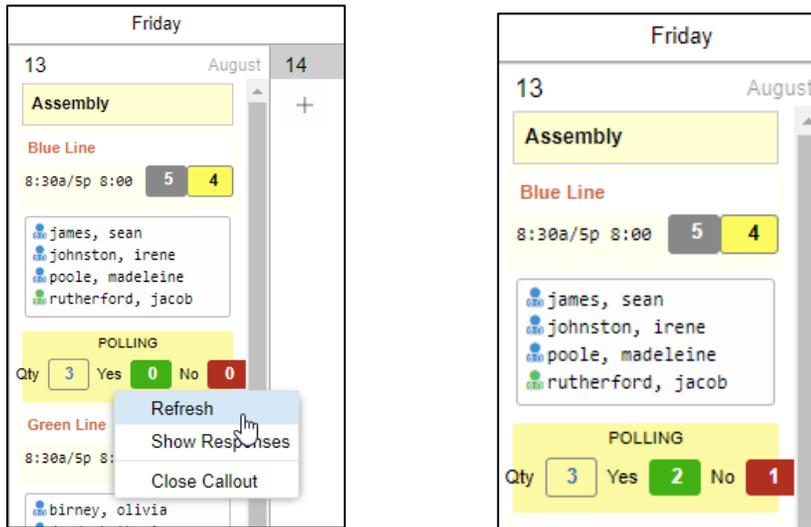


ESS Mobile Contact Preferences for receiving text notifications must be enabled (indicated by blue highlight) and the appropriate phone number (primary or secondary phone number) selected.



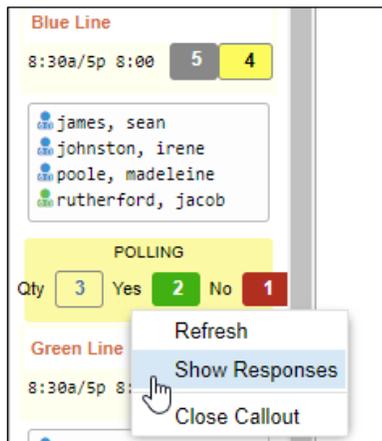
Tracking Responses in the Template

Click the Polling box in the Visual Scheduling template and click **Refresh** to update the polling response numbers.



Assigning an Employee to the Coverage Schedule

To review the employee responses in the Polling panel, click the Polling box and select **Show Responses**.



The Polling panel lists all of the candidate responses to the call out. Employees who have not responded are listed as Pending. Click the **Assign** button for the employee or employees you want to add to the schedule. Click the **Save** button after making your selections.

Polling

AUG Assembly
13 8:30a/5p 8:00
Fri 3 Candidates 1 Selected

 **Kevin Nolan**
Ann Arbor Production Blue Line Assembly
1 1 1

 Full Time

Yes
Available (81587)
Aug-12 03:12pm

Assign Ignore

 **Anthony Walker**
Ann Arbor Production Green Line
Assembly 1 1 1

 Part Time

Yes
Available (81587)
Aug-12 03:14pm

Assign Ignore

 **Emma Skinner**
Ann Arbor Production Blue Line Assembly
1 1 1

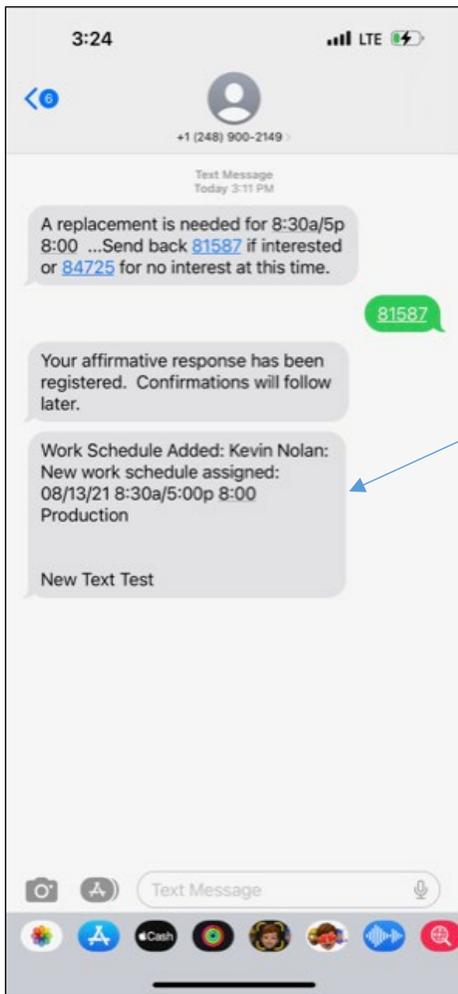
 Part Time

No
Unavailable (84725)
Aug-12 03:15pm

Assign Ignore

Operations

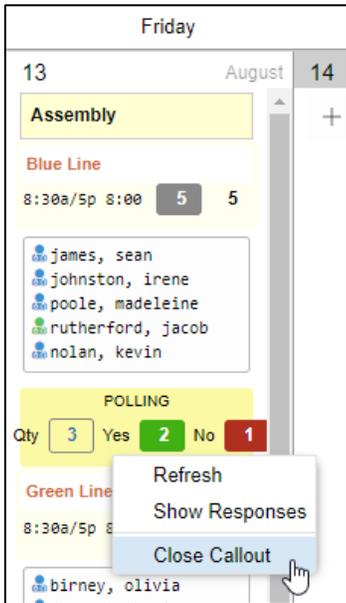
The system sends a text to the employee indicating the employee has been assigned to the schedule with the date and time of the schedule.



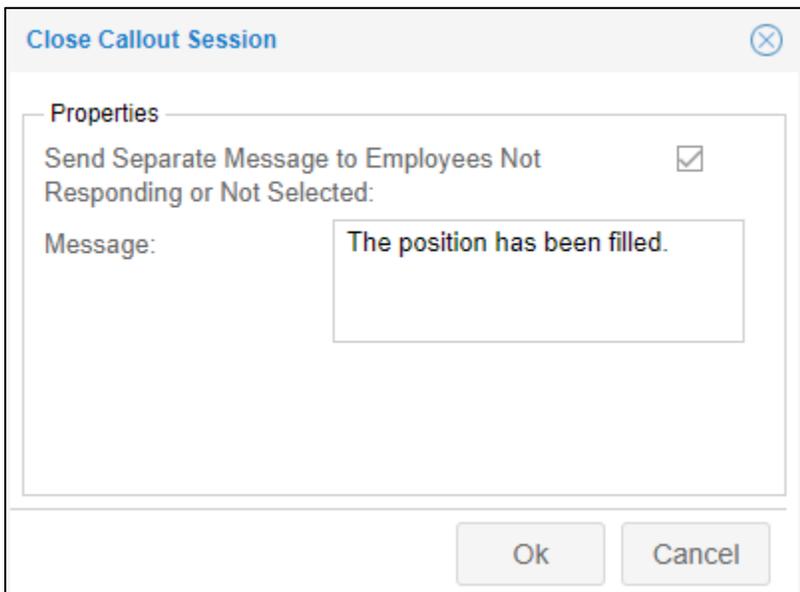
Schedule added automated text

Closing the Callout Session

When the coverage schedule is fulfilled, you can close the callout session by clicking the polling box and selecting **Close Callout** to send a message to the candidates.

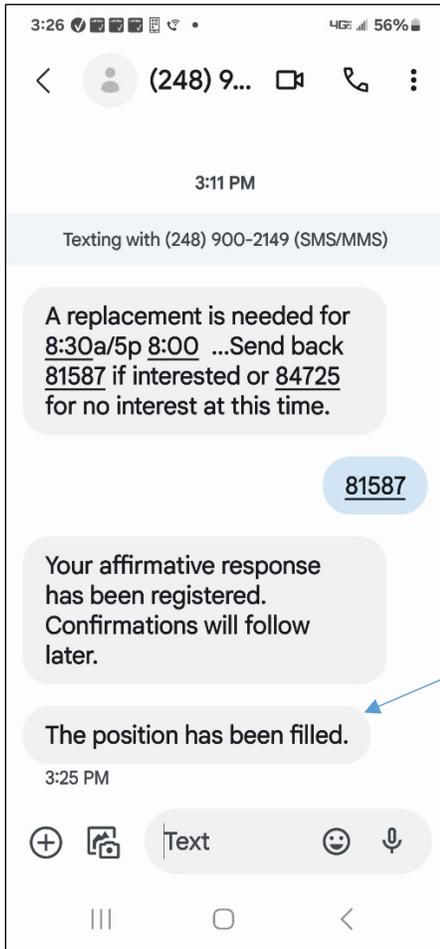


Enable the checkbox to send the closeout text to employees who responded, but were not selected, and employees who have not responded yet to the callout text.



Send the default message displayed in the Message field or edit the default message with a new message.

Employees will receive a text that the position is filled. Replies to the callout will no longer be received for the position.



Closing callout text

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