

Visual Scheduling: Managing Schedule Pickups and Drops

Job Aid

A schedule template that is configured to allow employees to drop schedules and pick up open schedules may also require manager approval of these actions. If your system requires approval of schedule pickups and drops, you can address these from the schedule template.

To respond to the pickup or drop request and view details about the request, you can select these options directly from the schedule template. The number box next to the pickup and drop request banners indicate the number of requests.

The screenshot shows a visual scheduling interface with three columns for Wednesday, Thursday, and Friday. Each column displays shift times, employee names, and request banners. Callouts point to specific elements:

- Drop request:** Points to the 'Drop Requests' banner in the Wednesday 8a/4:30p 8:00 shift.
- Number of requests:** Points to the number '1' in the 'Drop Requests' banner.
- Pickup request:** Points to the 'Pickup Requests' banner in the Friday 8a/4:30p 8:00 shift.

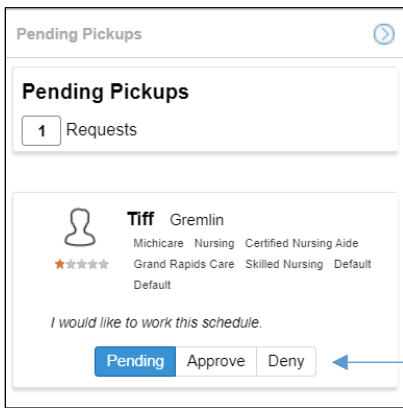
Managing Pickup Requests

To quickly approve all pickup requests, click the orange Pickup Requests banner in the schedule template and select **Approve All Pickups** to approve the pickups.

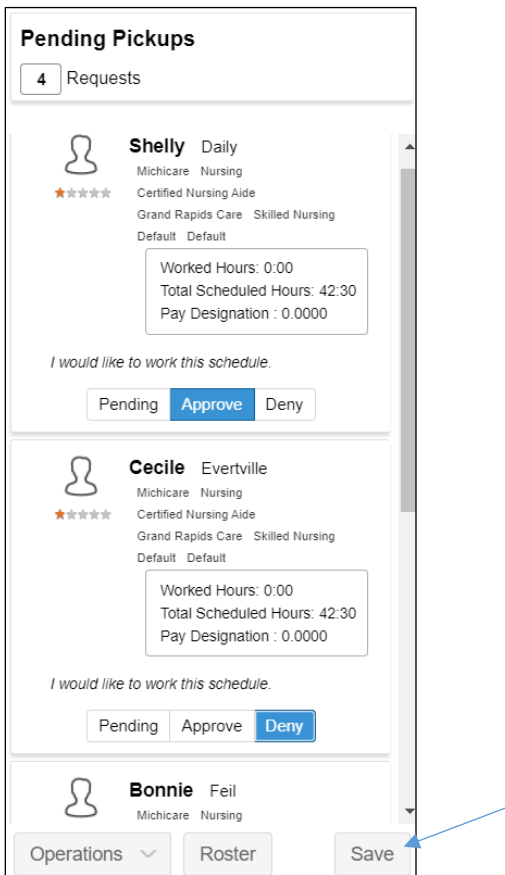
This close-up shows a pickup request banner for the 8a/4:30p 8:00 shift. The banner has a '1' in a box and the text 'Pickup Requests'. A dropdown menu is open, showing two options: 'Approve All Pickups' and 'Show Details'. A mouse cursor is pointing at the 'Show Details' option.

For a shift with multiple pickup requests, or if you want to get more information about the requests being made, select the **Show Details** option to see who is requesting to pick up the schedule. The Pending Pickups panel will expand listing the employees who have requested to pick up the schedule.

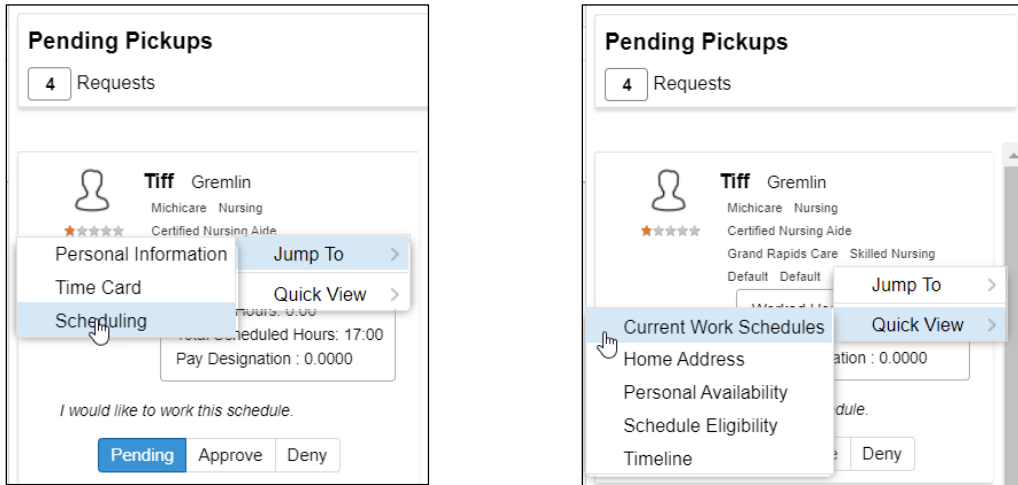
From the Pending Pickups panel, you can approve the employee you want to work the shift by clicking the **Approve** button in the employee's cell and deny the remaining employees by clicking the **Deny** button in the employee cells.



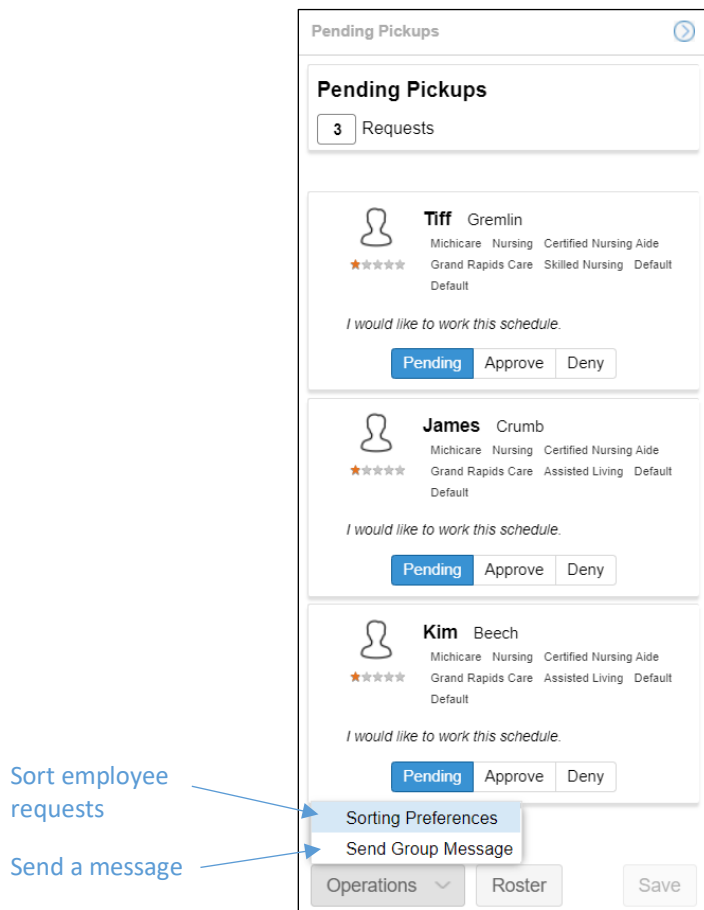
Approval and denial selections are highlighted in blue. Click the **Save** button after you made your selections.



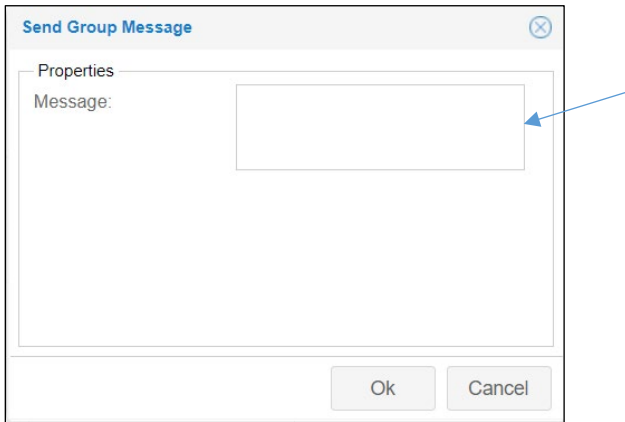
Drill down to the employee's schedule details by clicking the employee cell and clicking **Jump To** or **Quick View** menu groups in the Pending Pickups panel.



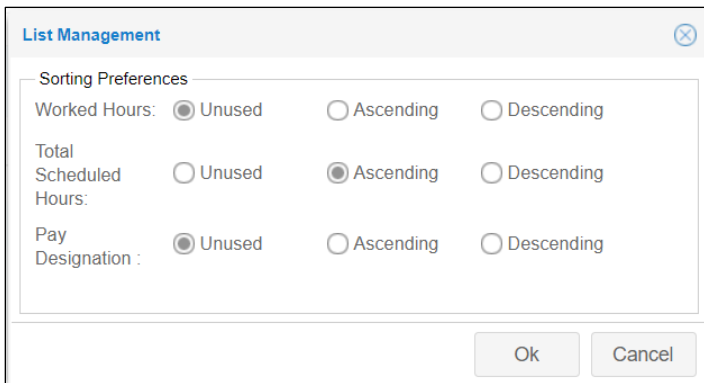
If you have multiple pickup requests, you can use the Operations drop-down list to sort the requests in the panel or send a group message.



Send a message, such as a status update to the trade, to the employees requesting to pick up the open shift by selecting **Send Group Message**. Type the message in the *Message* field of the *Send Group Message* window and click **OK**.

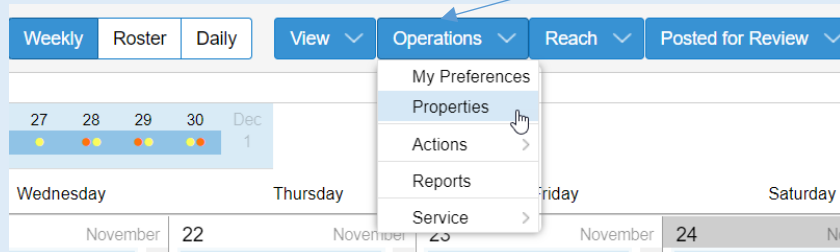


Sort employee requests by clicking the Operations drop-down list and selecting **Sorting Preferences**. Select the preferences to apply, indicating the order for sorting in the *List Management* window.

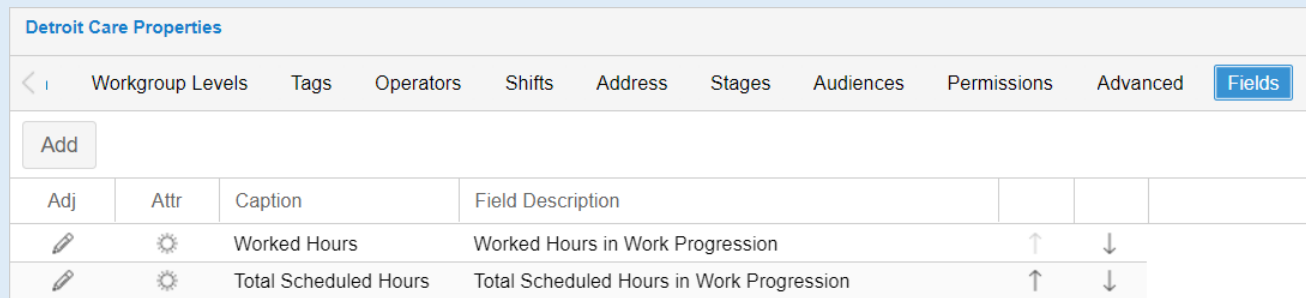


Sorting Preferences

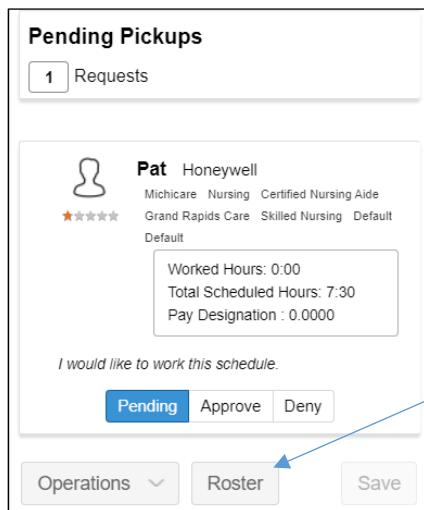
If you have access to the schedule template properties, you can add sorting preferences by clicking the **Operations** drop-down list in the schedule template page and selecting **Properties**.



Click the **Fields** tab in the template properties panel and click the **Add New** button. Select the type of information you want to base the employee sorting on in the detail panels of Pick Up Requests, Drop Requests, No Shows and Call Off Notices.



To view the personal schedules of the employees requesting the pickup, click the **Roster** button in the Pending Pickups panel. A page listing the schedules will be displayed.



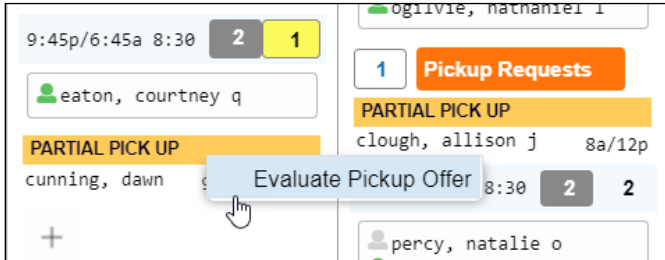
Click to view
personal schedules

The roster schedules page displays a list view of the week's personal schedules for employees requesting to pick up the shift.

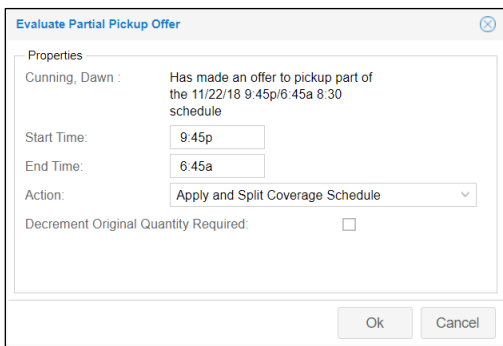
	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday
Shelly Daily Michicare Nursing Certified Nursing Aide Grand Rapids Care Skilled Nursing Default: Default Worked Hours: 0:00 Total Scheduled Hours: 42:30 Pay Designation: 0.0000	18 November +	19 November 8a/5p 8½h Michicare-Nursing-Certified Nursing Aide-Detroit Care-Skilled Nursing-Default-Default	20 November 530a/230p 8½h Michicare-Nursing-Certified Nursing Aide-Detroit Care-Skilled Nursing-Default-Default	21 November 530a/230p 8½h Michicare-Nursing-Certified Nursing Aide-Detroit Care-Skilled Nursing-Default-Default	22 November 530a/230p 8½h Michicare-Nursing-Certified Nursing Aide-Detroit Care-Skilled Nursing-Default-Default	23 November 8a/5p 8½h Michicare-Nursing-Certified Nursing Aide-Detroit Care-Skilled Nursing-Default-Default
Cecile Evertville Michicare Nursing Certified Nursing Aide Grand Rapids Care Skilled Nursing Default: Default Worked Hours: 0:00 Total Scheduled Hours: 42:30 Pay Designation: 0.0000	18 November +	19 November 8a/5p 8½h Michicare-Nursing-Certified Nursing Aide-Detroit Care-Skilled Nursing-Default-Default	20 November 10a/7p 8½h Michicare-Nursing-Certified Nursing Aide-Detroit Care-Skilled Nursing-Default-Default	21 November 8a/5p 8½h Michicare-Nursing-Certified Nursing Aide-Detroit Care-Skilled Nursing-Default-Default	22 November 10a/7p 8½h Michicare-Nursing-Certified Nursing Aide-Detroit Care-Skilled Nursing-Default-Default	23 November 8a/5p 8½h Michicare-Nursing-Certified Nursing Aide-Detroit Care-Skilled Nursing-Default-Default
Bonnie Fell Michicare Nursing Certified Nursing Aide Grand Rapids Care Skilled Nursing Default: Default Worked Hours: 0:00 Total Scheduled Hours: 29:30 Pay Designation: 0.0000	18 November +	19 November 945p/645a 8½h Michicare-Nursing-Certified Nursing Aide-Detroit Care-Skilled Nursing-Default-Default	20 November 10a/7p 8½h Michicare-Nursing-Certified Nursing Aide-Detroit Care-Skilled Nursing-Default-Default	21 November +	22 November 10a/7p 8½h Michicare-Nursing-Certified Nursing Aide-Detroit Care-Skilled Nursing-Default-Default	23 November 8a/12p 4h +
James Crumb Michicare Nursing	18 November	19 November	20 November	21 November	22 November	23 November

Partial Pickup Requests

Employees can request to pick up only part of a shift, selecting the start and end times for the part of the shift they want to work. A partial pick up is indicated by a gold Partial Pick Up banner in the schedule template. Click the banner and select **Evaluate Pickup Offer** to view details of the offer and respond to the request.

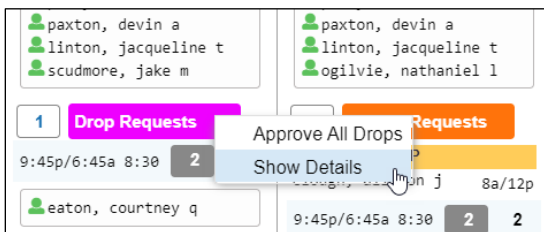


The *Evaluate Partial Pickup Offer* window displays the start and end times the employee has requested to work. Select **Apply and Split Coverage Schedule** to accept the partial pickup and separate the new partial schedule from the coverage schedule. Enable the **Decrement Original Quantity Required** checkbox to reduce the number of employees needed. If you do not want to split up the coverage schedule, select **Dismiss the Request** in the Action drop-down list.



Managing Drop Requests

Click the magenta Drop Requests banner and select **Approve All Drops** to approve the request and remove the employee schedule from the template.



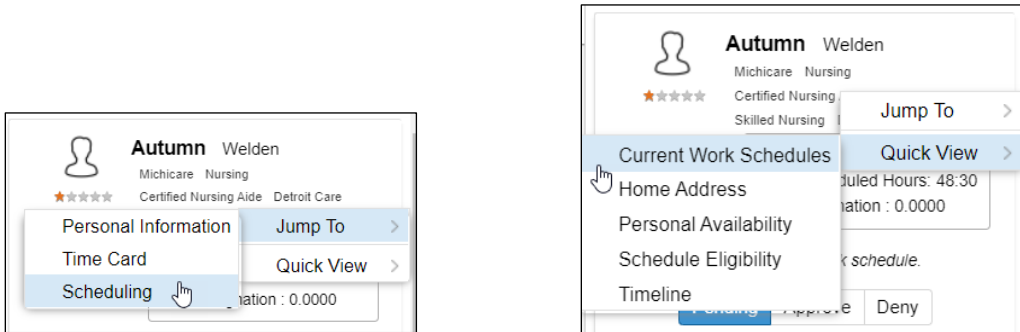
Select **Show Details** if you would like to see who is requesting to drop their schedule or deny the request. The Pending Drops panel will expand listing the employee who has requested to drop their schedule. Click the **Approve** button or **Deny** button in the panel.

The screenshot shows a 'Pending Drops' panel for November 21st (Wednesday) from 8a/4:30p to 8:00. It indicates there is 1 request. The request is from Autumn Welden, a Certified Nursing Aide at Detroit Care. The status is 'Pending', and the 'Approve' and 'Deny' buttons are highlighted in blue. A blue arrow points to the 'Deny' button.

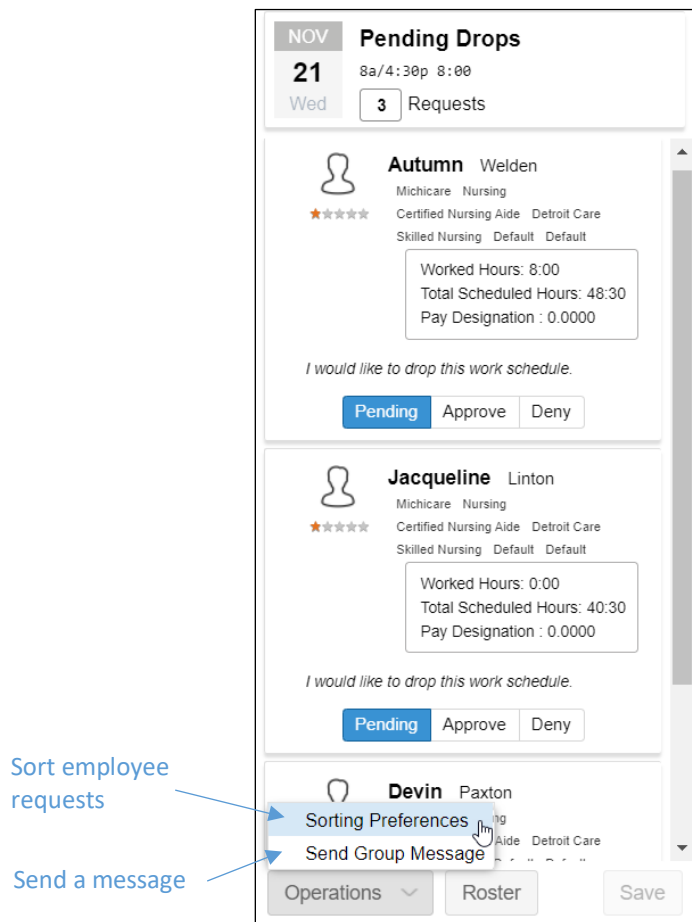
Approval and denial selections are highlighted in blue. Click the **Save** button after you made your selections.

The screenshot shows the 'Pending Drops' panel with 2 requests. The first request is from Devin Paxton, a Certified Nursing Aide at Detroit Care, with worked hours of 17:00 and total scheduled hours of 57:00. The second request is from Richard Wibert, also a Certified Nursing Aide at Detroit Care, with worked hours of 0:00 and total scheduled hours of 16:30. In both cases, the 'Approve' and 'Deny' buttons are highlighted in blue. A blue arrow points to the 'Save' button at the bottom of the panel.

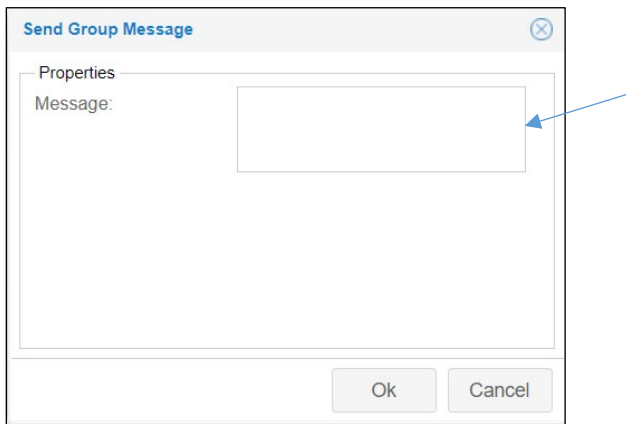
Drill down to the employee's schedule details by clicking the employee cell and selecting from the **Jump To** or **Quick View** menu groups in the Pending Drops panel.



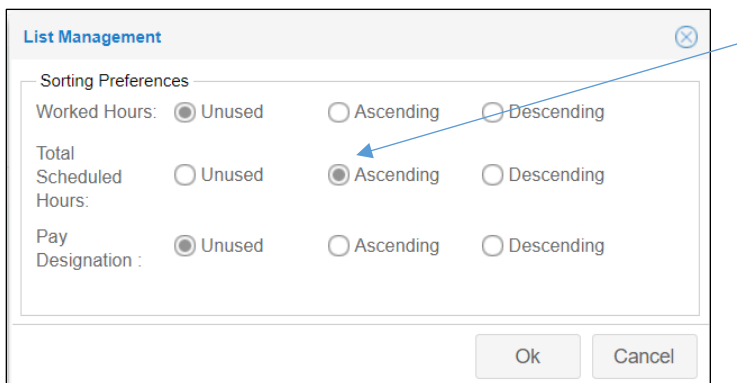
If you have multiple drop requests, you can use the Operations drop-down list to sort the requests in the panel or send a group message.



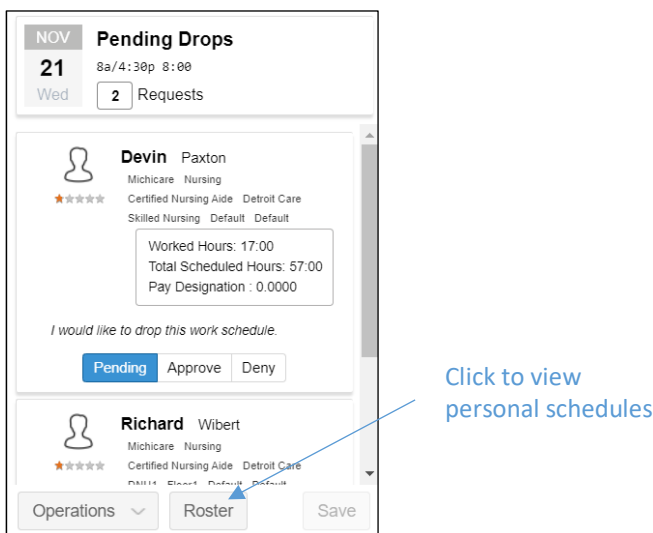
Send a message to the employees requesting to drop the shift, such as status update on the drop request, by selecting **Send Group Message**. Type the message in the *Message* field of the *Send Group Message* window and click **OK**.



Sort employee requests by clicking the Operations drop-down list and selecting **Sorting Preferences**. Select the preferences to apply, indicating the order for sorting in the *List Management* window.



To view the personal schedules of the employees requesting to drop the shift, click the **Roster** button in the Pending Drops panel.



The roster schedules page displays the week’s personal schedules for employees requesting to drop the shift, indicated by a red banner.

	Sunday	Monday	Tuesday	Wednesday	Thursday
Richard Wibert Michicare Nursing ★★★★★ Certified Nursing Aide - Detroit Care DNU1 - Floor1 Default Default Full Time Worked Hours: 0:00 Total Scheduled Hours: 18:30 Pay Designation : 0.0000	18 November +	19 November +	20 November ● 530a/230p 8½h Schedule Style 1 +	21 November + 8a/430p 8h	22 November +
Jacqueline Linton Michicare Nursing ★★★★★ Certified Nursing Aide - Detroit Care Skilled Nursing - Default Default Full Time Worked Hours: 0:00 Total Scheduled Hours: 40:30 Pay Designation : 0.0000	18 November + 945p/645a 8½h	19 November + 945p/645a 8½h	20 November ● 8a/430p 8h Schedule Style 1 +	21 November + 8a/430p 8h	22 November + 8a/430p 8h
Autumn Welden Michicare Nursing ★★★★★ Certified Nursing Aide - Detroit Care Skilled Nursing - Default Default Full Time Worked Hours: 8:00 Total Scheduled Hours: 48:30 Pay Designation : 0.0000	18 November + 945p/645a 8½h	19 November + 8a/430p 8h 10p/6a 7½h	20 November ● 10a/7p 8½h Schedule Style 1 +	21 November + 8a/430p 8h 945p/645a 8½h	22 November +

©2021 Attendance on Demand, Inc. All rights reserved. Attendance on Demand is a registered trademark of Attendance on Demand, Inc. (AOD). Nothing contained here supersedes your obligations under applicable contracts or federal, state and local laws in using AOD’s services. All content is provided for illustration purposes only.