

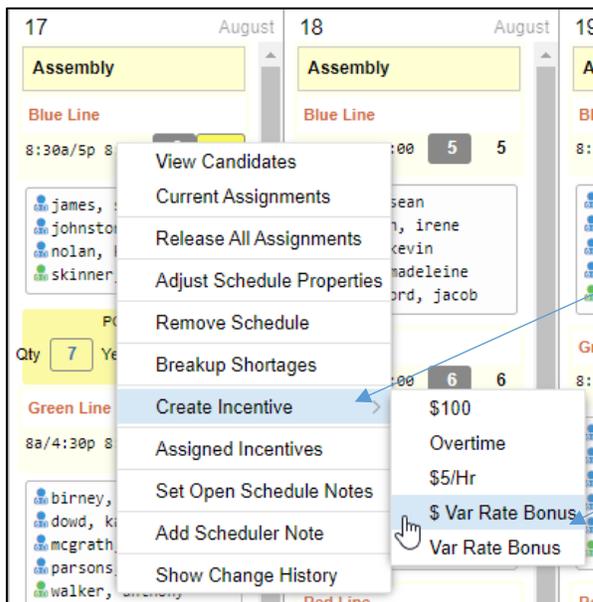
Visual Scheduling: Applying Variable Incentives to Open Schedules

Job Aid

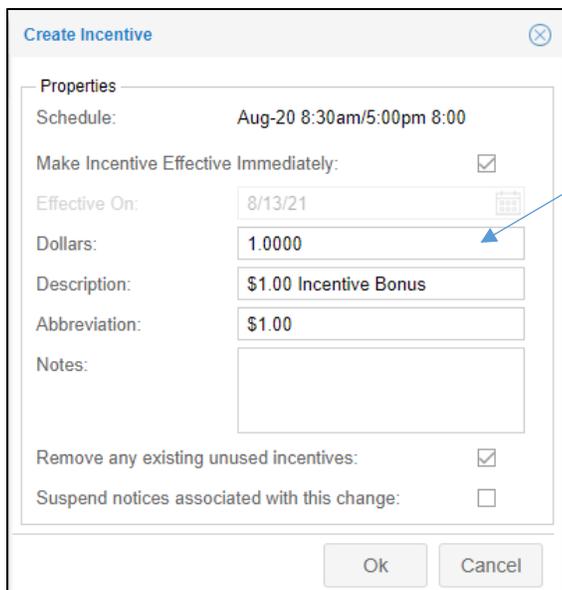
Incentives that provide a variable rate of pay or variable dollar bonus, allow schedulers to change the pay rate or the dollar amount when the incentive is applied to an open schedule within the schedule template. Variable incentives are typically set up with a \$1/HR pay rate and a \$1 bonus amount to allow the scheduler to enter different values to change the variable of the incentive.

To apply a variable incentive:

1. Click an open schedule, then select the Create Incentive option.



2. Select the variable rate bonus for dollar amount or rate of pay, depending on the options available to you.
3. Adjust the dollar amount in the Dollars field of the *Create Incentive* window or the rate in the Rate field if adjusting the pay rate for the open schedule.



Create Incentive

Properties

Schedule: Aug-20 8:30am/5:00pm 8:00

Make Incentive Effective Immediately:

Effective On: 8/13/21

Dollars: 1.0000

Description: \$1.00 Incentive Bonus

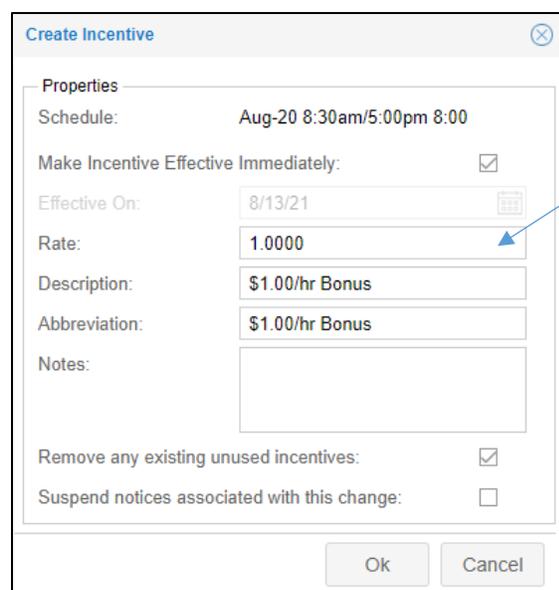
Abbreviation: \$1.00

Notes:

Remove any existing unused incentives:

Suspend notices associated with this change:

Ok Cancel



Create Incentive

Properties

Schedule: Aug-20 8:30am/5:00pm 8:00

Make Incentive Effective Immediately:

Effective On: 8/13/21

Rate: 1.0000

Description: \$1.00/hr Bonus

Abbreviation: \$1.00/hr Bonus

Notes:

Remove any existing unused incentives:

Suspend notices associated with this change:

Ok Cancel

The Description and Abbreviation fields update automatically when you change the dollar or rate of pay.

The 'Create Incentive' dialog box shows the following fields and values:

- Schedule: Aug-20 8:30am/5:00pm 8:00
- Make Incentive Effective Immediately:
- Effective On: 8/13/21
- Dollars: 20.0000
- Description: \$20.00 Incentive Bonus
- Abbreviation: \$20.00
- Remove any existing unused incentives:
- Suspend notices associated with this change:

The 'Create Incentive' dialog box shows the following fields and values:

- Schedule: Aug-20 8:30am/5:00pm 8:00
- Make Incentive Effective Immediately:
- Effective On: 8/13/21
- Rate: 5.0000
- Description: \$5.00/hr Bonus
- Abbreviation: \$5.00/hr Bonus
- Remove any existing unused incentives:
- Suspend notices associated with this change:

The incentive abbreviation will display below the open schedule in the template.

The schedule template for 'Assembly' (Blue Line) shows the following details:

- Schedule: 8:30a/5p 8:00
- Days: 6 (grey), 5 (yellow)
- Incentive: \$20.00
- Members: james, sean; johnston, irene; nolan, kevin; poole, madeleine; rutherford, jacob

The schedule template for 'Green Line' shows the following details:

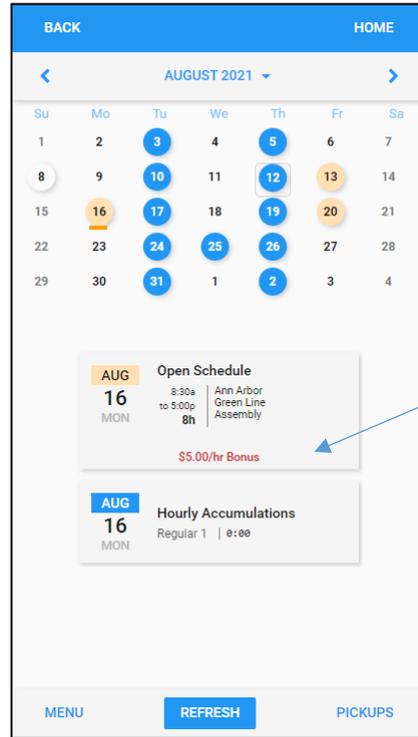
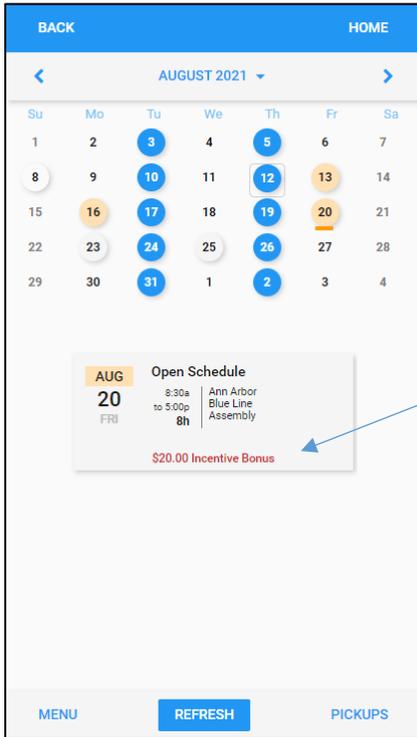
- Schedule: 8:30a/5p 8:00
- Days: 9 (grey), 6 (yellow)
- Incentive: \$5.00/hr Bonus
- Members: birney, olivia; dowd, katherine; mcgrath, charles; parsons, victor; stewart, adriana; allan, isaac

Incentives displayed in the schedule template can be hidden by removing the Show Incentives check mark in the Show context menu located in the template View drop-down list.

The 'View' context menu is open, showing the following options:

- Show > Show Schedules
- Masters > Show Schedule Notes
- Overlay > Show Open Schedule Notes
- Positions > Show Scheduler Notes >
- Members > Show Incentives
- Trade Activity
- Show All
- Hide All Except Schedules

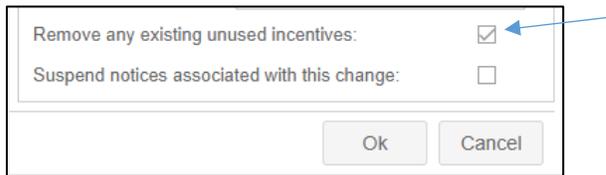
The Description of the pay enhancement package is sent in the notification to candidates and displayed in the Open Schedule tile.



Employees must pick up the entire shift to receive the bonus. If employees only pick up a portion of an open schedule with an incentive, they will not receive the incentive.

- Information about the incentive can be added in the Notes field. Notes are recorded in the Change History log for the coverage schedule.

5. Enabling the Remove any existing unused incentives setting removes unassigned incentives when a new incentive is added. If disabled, multiple incentives will continue to display as options for the coverage schedule when assigning incentives to employees.

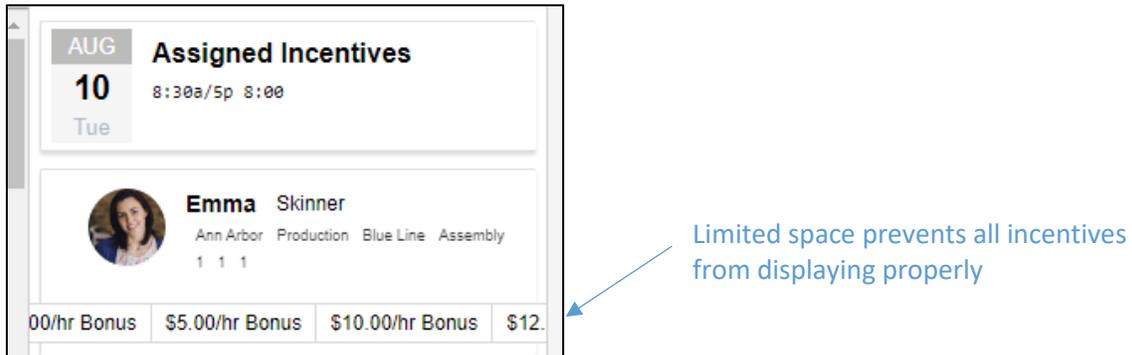


Remove any existing unused incentives:

Suspend notices associated with this change:

Ok Cancel

Space limitations in the Assigned Incentives panel may prevent all of the incentives from displaying in the template when multiple incentives are applied. It is recommended that unused incentives be removed when adding new incentives.



AUG **Assigned Incentives**

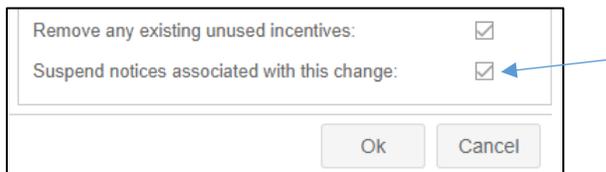
10 8:30a/5p 8:00
Tue

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

\$00/hr Bonus \$5.00/hr Bonus \$10.00/hr Bonus \$12.00/hr Bonus

Limited space prevents all incentives from displaying properly

6. Enable the Suspend notices checkbox if you do not want employees to receive a notification about the incentive suspension.



Remove any existing unused incentives:

Suspend notices associated with this change:

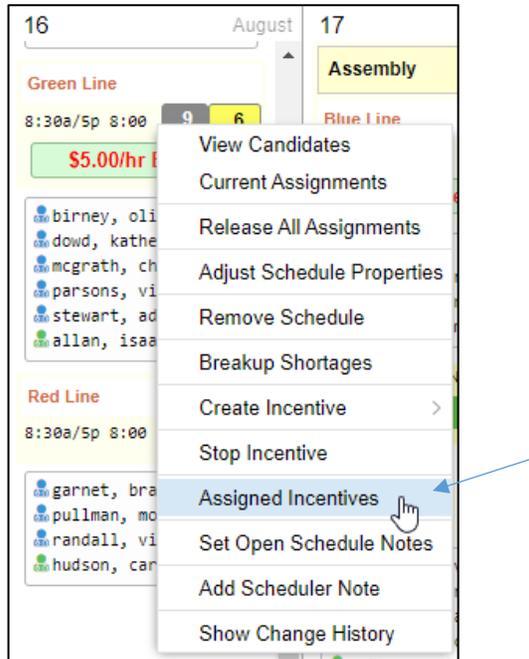
Ok Cancel

Giving Incentives to Assigned Employees

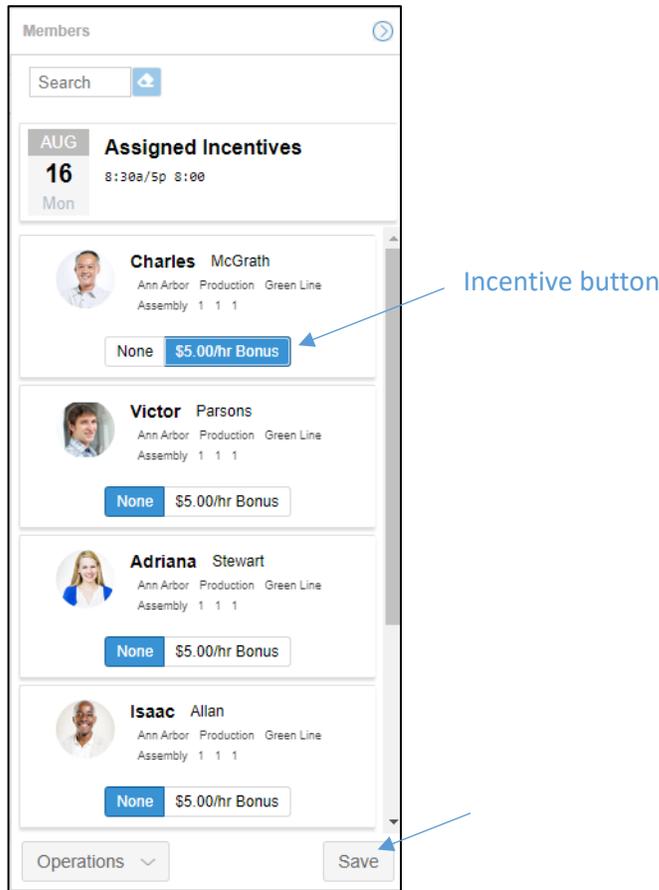
In addition to candidates, employees who have been previously assigned to the coverage schedule can receive incentives. This allows a scheduler to give the incentive to employees who have been assigned to, or have already picked up, the shift before the incentive is offered.

To assign incentives to other employees:

1. Click the open schedule and select Assigned Incentives from the menu.



- In the Assigned Incentives panel, click the incentive button for each employee you want to have the incentive. If more than one incentive has been added to the open, each incentive will have its own button in the employee tiles (see the *Applying Multiple Incentives to an Open Schedule* job aid for more information).



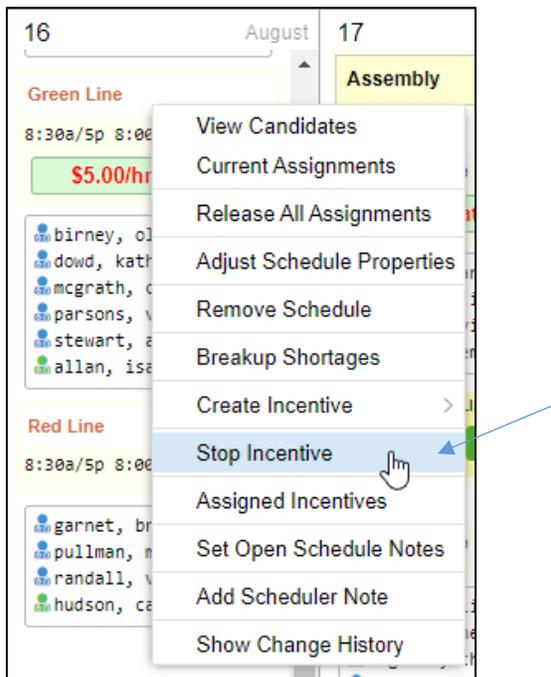
- Click the Save button.

Removing an Incentive from the Schedule

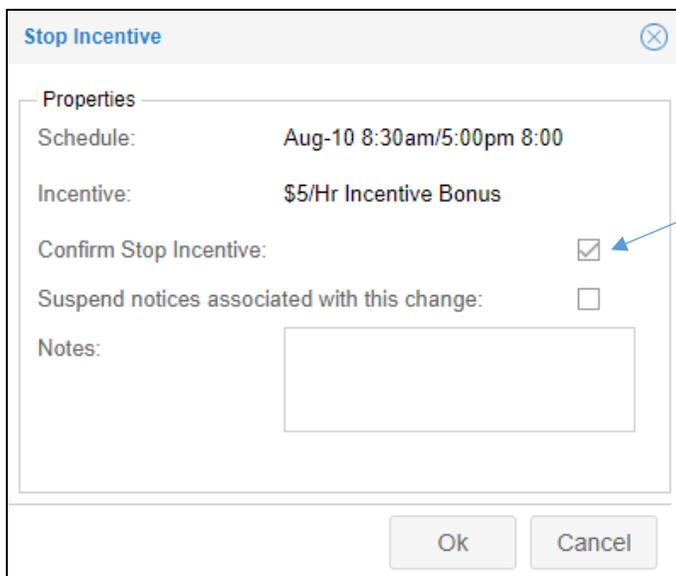
If an open schedule incentive is no longer needed, the incentive can be removed or stopped. An incentive can only be removed if it is not in use. If an employee is assigned to an incentive, then it is considered in use and the incentive cannot be removed, however, it is inactive and will not be applied when a schedule is later picked up or assigned. Incentives can be removed from assigned employees in the Assigned Incentives panel.

To remove an incentive from a schedule:

1. Click the open schedule in the template and select Stop Incentive from the context menu.



2. Enable the Confirm Stop Incentive checkbox in the *Stop Incentive* window.



3. Enable the Suspend notices checkbox if you do not want employees to receive a notification about the incentive suspension.

Stop Incentive

Properties

Schedule: Aug-10 8:30am/5:00pm 8:00

Incentive: \$5/Hr Incentive Bonus

Confirm Stop Incentive:

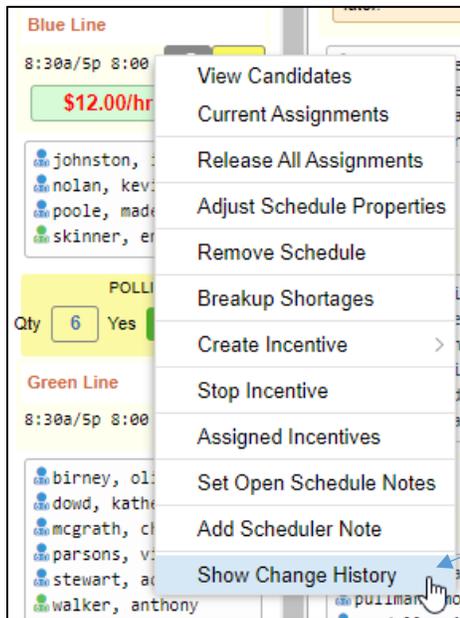
Suspend notices associated with this change:

Notes:

Ok Cancel

4. Enter information in the Notes field if needed. Notes are recorded in the Change Log for the coverage schedule.

To view the change history for a coverage schedule, click the schedule in the template and select Show Change History.



Click Show Change History to view the Change Log for the coverage schedule

The Change Log panel will be displayed beneath the template. The Change Log includes details about the adjustment and the associated schedule.

Aug-10 8:30am/5:00pm 8:00 Change Log

Adjustment						Schedule		
Timestamp	Operator	Category	Change Type	Description	Notes	Pos	Date	From
8/12/21 12:30pm	AoD Techni...	Incentive Management	Incentive Changed	From \$10.00/hr Bonus to \$12.00/hr Bonus		Asse...	8/10/21	8/10/21 8:30am
8/12/21 12:29pm	AoD Techni...	Incentive Management	Incentive Changed	From \$5.00/hr Bonus to \$10.00/hr Bonus		Asse...	8/10/21	8/10/21 8:30am
8/12/21 12:28pm	AoD Techni...	Incentive Management	Incentive Changed	From \$1.00/hr Bonus to \$5.00/hr Bonus		Asse...	8/10/21	8/10/21 8:30am
8/12/21 12:28pm	AoD Techni...	Incentive Management	Unused Incentive Deleted	\$100 Incentive Bonus		Asse...	8/10/21	8/10/21 8:30am
8/12/21 12:28pm	AoD Techni...	Incentive Management	Unused Incentive Deleted	\$1.00/hr Bonus		Asse...	8/10/21	8/10/21 8:30am

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