

## **Pre-Assignments and Scheduling**

1. Pre-assignments need to be made each day for a period of two weeks (10 Pre-assigns).
2. Pre-Assignment name should be your 3 letter Provider designation and the date (i.e. ABC 8/28/23). To/From on the Pre-Assign should be 00:00 – 23:59 (24 hr. period for each Pre-Assignment).
3. Save your scheduled Pre-Assignment to get the "Green Checkmark " the day before it goes into effect. The Pre-assignment must be saved after every edit and/or review of your Pre-Assignment. All trips should be pre-assigned (PA) and brown before hitting the green checkmark.
4. Failure to save  a Pre-Assignment will lead to a Driver (s) not being able to see their trips.
5. Re-ordering the Driver's route when necessary will help avoid violations (Vios) and predictions that your driver will be late for a scheduled pickup/drop off. Violations (Vios) in red need immediate attention. Green or orange require no further action.
6. Creating templates for your Pre-Assigns may help expedite your daily Pre-Assign task when your routes have been established.

## **Pre-Assign Modes steps/checklist**

1. Go to Scheduling
2. Click on Pre-Assign Modes
3. Click on Create New Pre-Assign
  - a. Name the Pre-Assign using your 3 letter designation and the date (e.g. ABC 7/12/23)
  - b. Select the Date Range (e.g. From: 7/12/23 00:00 To: 7/12/23 23:59) \* Each pre-assignment can only be set for a 24 hr. period
  - c. Click on Create
4. Click on Add Vehicles
  - a. Add Vehicles and Drivers
  - b. "X" out of Screen
5. Scroll down to Individual trips
  - a. Click on vehicle blank box to add vehicles
6. Re-order the trips to the correct order you would like the trips completed in. \*If you do not re-order you may end up with trips out of place on the driver app and will not be able to click through. You will also see violations (vios) in red explaining how late the trip will be in that particular order.
7. Click on Pre-Assign (blue button)
8. Save template (this step is optional)
9. Click on green check mark button
  - a. Click yes to optimize and close pre-assign
  - b. Click "Ok" on the box that states "Well Done"
10. Skip to send Pre-assign notification to driver
11. Repeat steps 1-10 to build up and maintain (at all times) a bank of (10) future transport days (e.g. 7/12, 7/13, 7/14, 7/17, 7/18, 7/19, 7/20, 7/21, 7/24,7/25)