Chapter 4
Driver Refusals, Passes, Skips and Makeups

Many times for many reasons your drivers refuse field trips that are assigned to them. This can be a headache because you must not only log that this driver is not going to drive the field trip but you must also find a new driver to replace the driver that refused his / her assignment. Many districts have strict limits of the number of times that a driver may refuse field trip assignments. If a driver exceeds that limit then he / she is dropped from the schedule of drivers available to be assigned to field trips.

T.O.M. makes the handling of driver refusals of field trip assignments a snap. T.O.M. will let you log in the driver refusal and automatically assign a new replacing driver **in one easy step!** T.O.M. also automatically logs each time a driver refused a field trip assignment. You can then easily monitor the number of times a driver has refused field trip assignments by either printing the Driver Refusal Report or the Driver Activity Report. These reports let you see in detail the number of times that a driver has refused a field trip assignment. You can then make the determination if a driver should be removed from a schedule of drivers available for field trips in an informed manner. **NOTE:** T.O.M. DOES NOT automatically drop drivers from a schedule of available drivers.

T.O.M. offers you three methods to indicate that a driver is refusing a field trip assignment:

- Driver Refusal
- Driver Pass
- Driver Pass that will have a Makeup

If you indicate that a driver has *Refused* a field trip T.O.M. will automatically log the driver refusal for later reporting purposes and then ask you if you wish to automatically assign another driver to replace the refused driver (all in one step)!

If you indicate that a driver has *Passed* a field trip then you are telling T.O.M. that while the driver will not be performing the field trip, you do not want T.O.M. to put on the driver's record that he / she had refused a field trip assignment. You might use this method if the driver, for example, was given a field trip assignment in a last minute manner. If the driver refuses the field trip assignment because of a scheduling conflict, you might not think it was right that the driver be marked with a refusal. Instead you instruct T.O.M. that the driver passed the field trip assignment. T.O.M. then knows that the driver will not be performing the field trip, but that he / she should not be marked with a refusal. **NOTE:** Passed field trip assignments do NOT show up on either the Driver Refusal Report or the Driver Activity Report.

If you indicate that a driver has *Passed-Makeup* then you are telling T.O.M.; that driver will not be performing the field trip, that you do not want T.O.M. to put on the driver's record that he / she has refused a field trip assignment AND that you want to replace this field trip assignment with another field trip assignment (or make it up).

You might use this option, for example, if the driver was forced to decline a field trip due to another driver refusing his / her assignment to the field trip at the last minute. The first driver had been somewhat unfairly forced to waste his / her place in the rotation due to the other driver refusing the field trip in an unacceptably late time frame. Rather than have the first driver in effect penalized due to the second drivers irresponsible refusal you can tell T.O.M. to pass the first driver for this field trip but to remember that driver for future field trips.

NOTE: If your district has a policy of NOT replacing certain driver passes then you should make sure that the Replace Auto Skips / Makeups option is turned off in your District Options. For more information see the *Chapter 4 – District Options* in the *T.O.M. Getting Started Manual*.

In this chapter you will learn:

- Logging a Driver Refusal and Replacing That Driver With a New Driver

- Logging a Driver Pass Instead of a Driver Refusal

    - How T.O.M. Tracks Skipped / Passed Drivers Who Need A Replacement Trip

- Why Automatic Assignment Skips Some Drivers.

- Using the Passed-Makeup Option.

Logging a Driver Refusal and Replacing That Driver With a New Driver

What a headache! It wasn't enough that you had to log and schedule the field trips, assign the drivers and vehicles to the field trips and notify the drivers that they were assigned to certain field trips. But now some of the drivers are refusing their field trip assignments! Which means that you have to record the driver refusals and find more drivers to replace the refusing drivers and notify the new drivers that they now are assigned to the field trips. Talk about your run around!

T.O.M. makes all of the hassle of driver refusals go away. To process a driver refusal you change a driver's status from Assigned to Refuse and T.O.M. does the rest! The driver's refusal will be logged, a new driver will automatically be assigned to the field trip and a Trip Ticket for the new driver will automatically print. It's that easy.

The following is a detailed discussion of the steps you take when processing a driver refusal:

1. Retrieve the field trip you wish to assign by using the Field Trip Search / Selection screen (see Figure 1-2 in *Chapter 1 - Entering Field Trips, Printing Estimates and Using the Field Trip Inquiry* of this manual). Or you may enter a new field trip then press the Save button.

2. Click the Trip Driver Info button (Figure 4-1).

Click the Trip Driver Info button to change an assigned driver's status.

Figure 4-1. The Trip Driver Info Button

This will cause the Trip Driver Information screen (Figure 4-2) to display.

Driver status for field trip. Click arrow to list types of status options.

Figure 4-2. Trip Driver Information Screen

3. Change the selected driver's status from Assigned to Refused. To change a driver's status on a field trip click the down arrow of the Status drop down list box (Figure 4-3). This list box displays the many types of status options that you may assign to drivers of a field trip. Point to the word Refused and click it with your mouse. The system will automatically change the Status box from Assigned to Refused.

Point to the word Refused and click it. This will cause T.O.M. to automatically log the driver refusal

Figure 4-3. Changing a Driver's Status From Assigned to Refused

4. T.O.M. then asks you which vehicle type the new replacement driver will use (Figure 4-4).

Figure 4-4. T.O.M. Asking What Vehicle Type to Assign to the Replacement Driver

The Trip Leg drop-down list appears ONLY if the field trip is marked as a shuttle trip in the Assignment tab of the Detailed Field Trip screen. Click the drop-down arrow to select the leg of the trip for this driver. Leave it blank to assign one driver to each leg.

At this point, if you do not wish to assign a replacement driver then click the Exit button and T.O.M. will bypass the step of automatically assigning a replacement driver. If you do wish T.O.M. to assign a replacement driver then chose the vehicle type to assign to that driver and click the OK button. If your field trip did not have an alternate vehicle type assigned then T.O.M. will disable the alternate vehicle type when asking this question and you will only be allowed to indicate the normal vehicle type.

NOTE: The Trip Leg drop-down list appears ONLY if the field trip is marked as a shuttle trip in the Assignment tab of the Detailed Field Trip screen. Click the drop-down arrow to select the leg of the trip for this driver. Leave it blank to assign one driver to both legs.

T.O.M. then assigns a replacement driver and displays the new driver on the Driver Information screen.

NOTE: You can enter a note about the driver's refusal in the driver's notes section of the Driver Information screen (Figure 4-5). Take care to ensure that you are entering the notes for the driver that actually refused the field trip assignment. After T.O.M. has assigned a replacement driver automatically for the refusing driver you may find that the trip employee screen is positioned on the replacement driver rather than the driver refusing the field trip.

Figure 4-5. Adding Driver's Refusal Notes to the Driver Information Screen

This not appears on the Driver's Notes report as described in *Chapter 8 – Management Reports* later in this manual.

5. Click the Exit button to return to the Detailed Field Trip screen (Figure 4-1).

Logging a Driver Pass Instead of a Driver Refusal

Sometimes a driver can't accept his / her field trip assignment and it wouldn't be accurate to say that he / she refused the field trip. A sudden emergency at home, for example, causes the driver to refuse the field trip. Whatever the circumstances, there are times when a driver must refuse a trip and you don't want T.O.M. to record an official refusal that will show up on various management reports. On these occasions you would tell T.O.M. that the driver *Passed* the field trip.

A simple Passed doesn't show up on any refusal report. Nor does a Passed cause the driver to receive any special consideration in assigning any new field trips as Canceled or Passed-Makeup' does. A pass just causes the driver's field trip assignment to be ignored. Nothing more. T.O.M. does not assign a replacement driver when you change a driver's field trip assignment to pass. If you do wish to have the driver's Passed field trip assignment replaced then you should refer to the section titled *Using the Passed-Makeup Assignment Option* later in this chapter.

The following is a detailed discussion on the steps you must take to change a driver's field trip assignment to pass:

1. Retrieve the field trip you wish to assign by using the Field Trip Search / Selection screen (see Figure 1-2 in *Chapter 1 - Entering Field Trips, Printing Estimates and Using the Field Trip Inquiry* of this manual). Or you may enter a new field trip then press the Save button.

2. Click the Trip Driver Info button (Figure 4-6).

Click the Trip Driver Info button to change an assigned driver's status.

Figure 4-6. The Trip Driver Info Button

This will cause the Trip Driver Information Screen (Figure 4-7) to display.

Figure 4-7. Trip Driver Information Screen

3.   Change the selected driver's status from Assigned to Passed. To change a driver's status on a field trip click the down arrow of the Status drop down list box (Figure 4-8). This list box displays the many types of status options that you may assign to drivers of a field trip. Point to the word Passed and click it with your mouse. The system will automatically change the Status box from Assigned to Passed.

Figure 4-8. Changing a Driver's Status From Assigned to Passed

4. Click the Exit button to return to the Detailed Field Trip screen (Figure 4-6).

Passed-Makeup / Skipped Drivers

How T.O.M. Tracks Skipped / Passed Drivers Who Need A Replacement Trip

T.O.M. Tracks those drivers who need makeup field trips in a separate list and remembers which of those makeup trips have been replaced and which have not. There are two ways that drivers can be placed on this Makeup Trip List:

- The driver is skipped by the T.O.M.'s Automatic Assignment Engine when they were selected from the schedule for assignment.
- The driver was originally assigned to a field trip and then that driver's assignment status for the field trip was manually changed from Assigned to Passed-Makeup.

This Makeup Field Trip list is a separate list from the Canceled Driver List and is considered lower in priority than the Canceled Driver List. T.O.M. will replace driver cancellations before it will replace Makeup Field Trips. However, T.O.M. will try and replace Makeup Field Trips before it turns to the next driver in the schedule assigned to the field trip. Figure 4-9 shows the order in which T.O.M. will select drivers for possible field trip assignment:

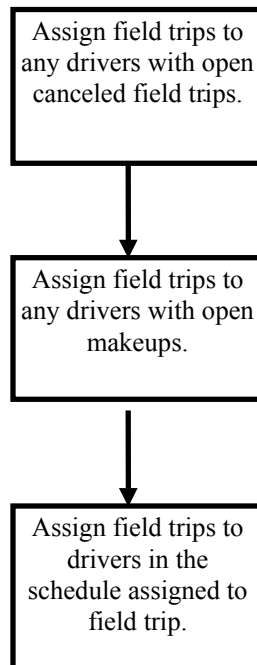### <u>Overall Priority of Drivers Used by Automatic Assignment Engine</u>

Figure 4-9. Overall Priority of Drivers Used by Automatic Assignment Engine

How T.O.M. Tracks Skipped / Passed-Makeup Drivers Who Need A Replacement Trip

A critical feature to driver automatic assignment is T.O.M.'s ability to first assign drivers who need a field trip assignment made up before assigning drivers from a schedule. To do this T.O.M. must keep track of both those drivers who were first selected to be assigned by the Automatic Assignment Engine but were then skipped and those drivers who were assigned to a field trip and then had that assignment changed manually to Passed-Makeup. The following is a detailed discussion of how T.O.M. keeps track of Makeup drivers and how those drivers are later assigned replacing field trips:

1. Either a driver was skipped during automatic assignment when he / she should have been assigned a field trip or a driver's assignment status to a field trip was manually changed to Passed-Makeup. T.O.M. automatically enters the driver, the field trip number and the date of the field trip into the Makeup Driver List. This list contains all makeups, both replaced and open. See Figure 4-10 for an illustrated example of this process.

Driver- **Sue Mell**
Was skipped during automatic assignment on:
Trip #**111** Schedule - **Mid Day**
Due to: Other conflicting field trip assignment.

Driver- **Vic Mix**
Assignment status manually changed to Passed-Makeup for:
Trip #**107** Schedule - **Mid Day**

T.O.M.

Makeup Driver List

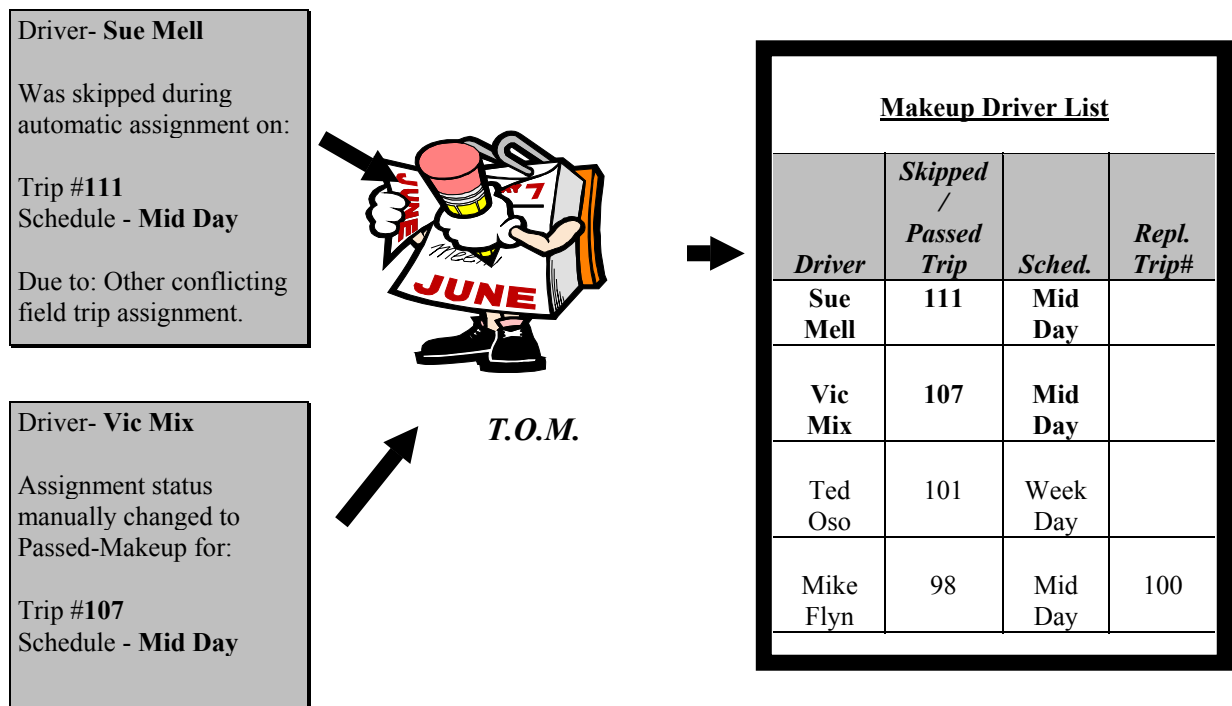| Driver	*Skipped / Passed Trip*	*Sched.*	*Repl. Trip#*
Sue Mell	**111**	**Mid Day**	
Vic Mix	**107**	**Mid Day**	
Ted Oso	101	Week Day	
Mike Flyn	98	Mid Day	100

Figure 4-10. Example of T.O.M. Tracking Canceled Driver Assignments

2. Later when T.O.M. attempts to automatically assign drivers to a field trip before selecting drivers from the schedule T.O.M. first inspects the Canceled Driver List to see if there are any canceled drivers who:

    - Have not had their canceled assignment replaced by another Field Trip.

    - Had an original assignment with the same schedule (for example Mid Day) as the new field trip that T.O.M. is attempting to automatically assign.

    If both of the conditions above are FALSE then T.O.M. turns to the Makeup Driver List. T.O.M. inspects the Makeup Driver List for drivers who:

    - Have not had their makeup assignment replaced by another field trip.

    - Had an original assignment with the same schedule (for example Mid Day) as the new field trip that T.O.M. is attempting to automatically assign.

    If both of the conditions above are TRUE then T.O.M. will assign the makeup driver(s). Then if there are no more makeup drivers who meet the previous two conditions T.O.M. will turn to the schedule list of drivers. See Figure 4-11 for an illustrated example of this process.
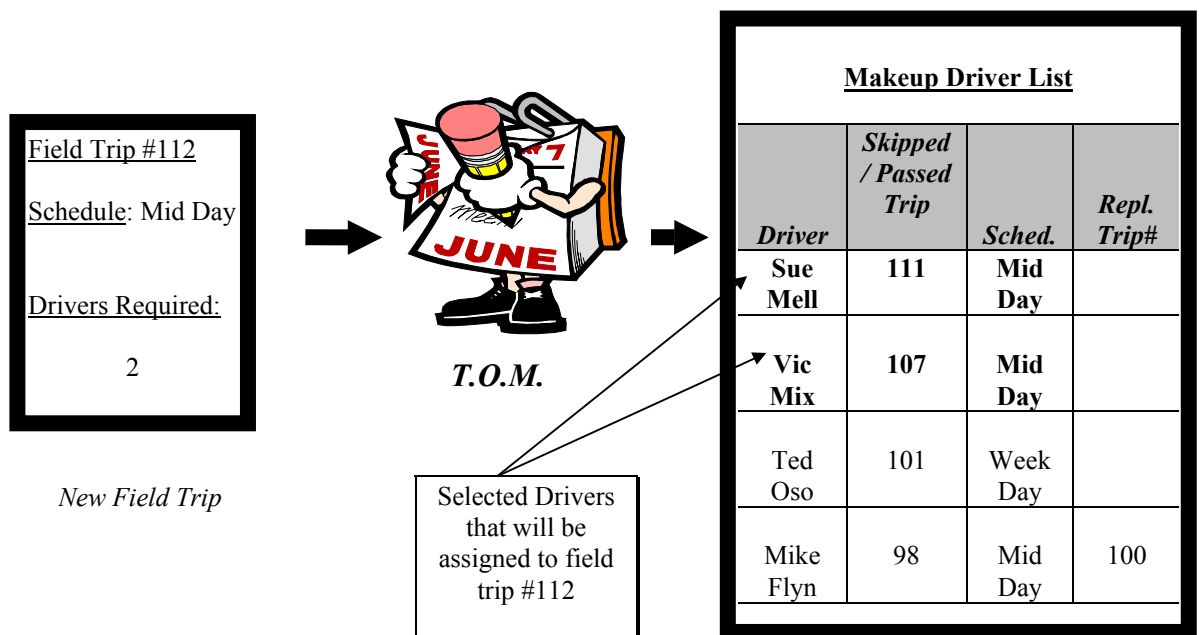

Figure 4-11. T.O.M. Checking Makeup Driver List First Possible Drivers to Assign to New Field Trip

3. T.O.M. then records the number of the new field trip as the replacement field trip number on the Makeup Driver record. This information is kept on record to allow your district to later report to the driver that in fact all of his / her makeup field trip assignments were replaced and which field trips replaced the makeup assignments. Figure 4-12 gives an illustrated example of this process.
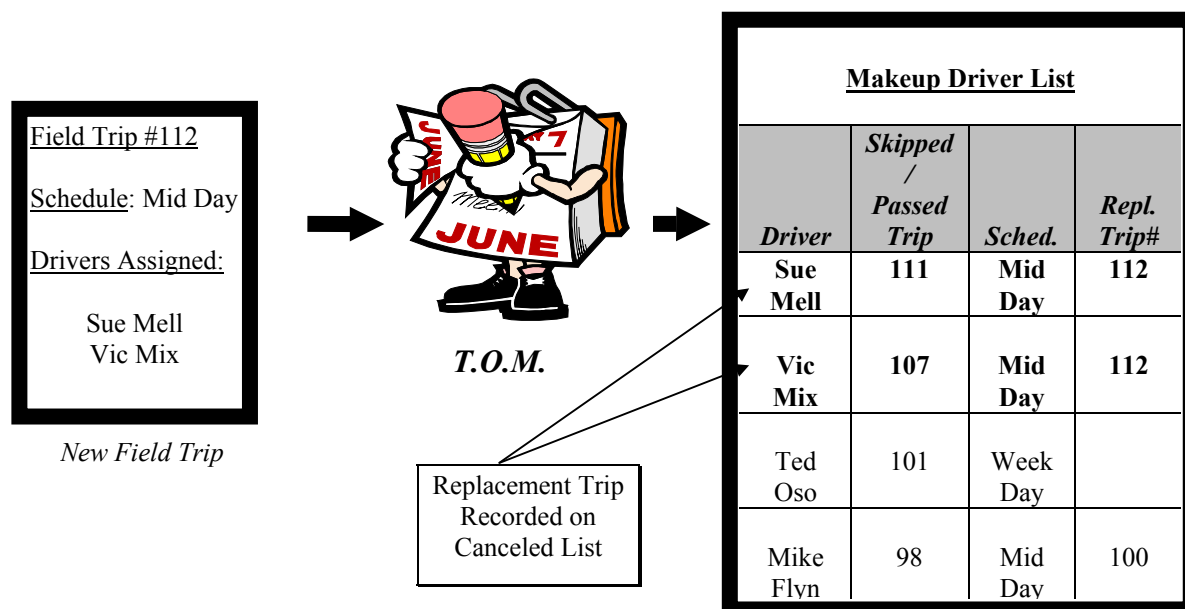

| Field Trip #112 | | | T.O.M. | | | Makeup Driver List | | | |
| *New Field Trip* | | | | | | | | | |

Makeup Driver List

Driver	Skipped / Passed Trip	Sched.	Repl. Trip#
Sue Mell	111	Mid Day	112
Vic Mix	107	Mid Day	112
Ted Oso	101	Week Day	
Mike Flyn	98	Mid Day	100

Field Trip #112

Schedule: Mid Day

Drivers Assigned:

Sue Mell
Vic Mix

New Field Trip

T.O.M.

Replacement Trip Recorded on Canceled List

Figure 4-12. T.O.M. Selects Two Makeup Drivers to Assign to New Field Trip and Logs the New Field Trip Number Into Makeup Driver List

? Why Does Automatic Assignment Skip Some Drivers?

There are only five reasons why a driver who was selected by T.O.M.'s Automatic Assignment Engine to be assigned to a field trip would then subsequently be skipped. All drivers that are skipped by T.O.M. for automatic assignment are logged in T.O.M.'s Assignment Activity Log (*see Chapter 11 later in this book for more information*).

Reason 1:
The field trip that T.O.M.'s Automatic Assignment Engine is trying to assign the driver to is in conflict with another field trip that the driver is ALREADY assigned to. There are two situations that will cause T.O.M. to consider a potential field trip assignment in conflict with another previous field trip assignment:

- The potential field trip assignment is for the same day, same driver and same SCHEDULE as another previous field trip assignment.

- The potential field trip is for the same day and same driver, different schedule as another field trip assignment AND the potential field trip's departure and return times overlap with the potential field trip assignments.

NOTE: You must specifically instruct T.O.M. to check for this kind of conflict in the Assignment Section of your District Options Screen. You may also specify an amount of time that you consider to be to close between when one field trip ends and another field trip begins. For example, you may tell T.O.M. in the

Assignment Section of your District Options Screen to check for conflicts with other field trip with other schedules and that if two field trips on the same day for the same driver start / end within an hour of each other then that is too close for comfort. So for example, if the driver Ima Driver already has one field trip assignment on 2/23/98 from 8:00 AM - 11:30 AM in the morning schedule and is being considered for another field trip on 2/23/98 from 12:00 PM - 3:00 PM in the afternoon schedule using the previously discussed assignment options these two assignments would be considered too close and the employee would be skipped for the later field trip assignment.

Reason 2:
You have instructed T.O.M. in the District Options Screen to preclude weekly overtime when assigning field trips and if the driver was assigned to this field trip he / she would have more than the number of hours for the week that you specified either in the driver's employee type or in the Assignment Section of your District Options Screen.

NOTE: You can instruct T.O.M. to consider any overlaps between a potential field trip assignment and the employee routes when calculating the weekly hours. For example, Ima Driver normally, has 37 hours a week in regular routes and is being considered for a 5-hour field trip. You have told T.O.M. to preclude weekly overtime and you defined any hours over 41 hours a week as overtime hours. In this situation Ima Driver would be skipped from the field trip assignment. However, you may instruct T.O.M. to consider any overlapping hours between Ima Driver's field trips and routes. This is because if Ima Driver is assigned a field trip during his route you will find a replacement for Ima Driver's route so Ima Driver is free to take the field trip. In this example the field trip is from 8:00 AM - 1:00 PM. Ima driver has a route from 8:30 AM - 10:00 AM. Therefore, while the field trip assignment would add 5 hours to Ima Driver's weekly hours the overlapping route time of 1.5 hours would be subtracted leaving a net total weekly hours of 40.5. Ima Driver would, therefore, receive the field trip assignment.

Reason 3:
You have instructed T.O.M. in the District Options Screen to preclude daily overtime when assigning field trips and if the driver was assigned to this particular field trip he would have more than the number of hours for the day that you specified either in the driver's employee type or in the Assignment Section of your District Options Screen.

NOTE: You can instruct T.O.M. to consider any overlaps between a potential field trip assignment and the employee routes when calculating the daily hours. For example, Ima Driver normally, has 7 hours on Monday in regular routes and is being considered for a 4-hour field trip for that day. You have told T.O.M. to preclude weekly daily overtime and you defined any hours over 10 hours a day as overtime hours. In this situation Ima Driver would be skipped from the field trip assignment. However, you may instruct T.O.M. to consider any overlapping hours between Ima Driver's field trips and routes. This is because if Ima Driver is assigned a field trip during his route you will find a replacement for Ima Driver's route so Ima Driver is free to take the field trip. In this example the field trip is from 8:00 AM - 12:00 PM. Ima driver has a route from 8:30 AM - 10:00 AM. Therefore, while the field trip assignment would add 4 hours to Ima Driver's daily hours for Monday the overlapping route time of 1.5 hours would be subtracted leaving a net total daily hours for Monday of 9.5. Ima Driver would, therefore, receive the field trip assignment.

Reason 4:
You have instructed T.O.M. in the District Options Screen to preclude assigning field trips that will be in conflict with a driver's route hours and if the driver was assigned to this field trip he / she would conflict with one or more of the his / her routes.

Reason 5:
You have specified certain driver characteristics for a field trip and the prospective driver to be assigned to the trip does not have those characteristics.

Using the Passed-Makeup Assignment Option

Sometimes when a driver refuses a trip you might feel that the circumstances are such that the driver should not only avoid being penalized for a refusal but also that driver should have the field trip assignment replaced. It might be a refusal due to a last minute field trip assignment handed to the driver or the driver must refuse the field trip because he / she is performing another assignment that you requested. Whatever the circumstances, there are times when a driver must refuse a trip and you don't want T.O.M. to record an official refusal that will show up on various management reports and you want the field trip assignment that the driver refused to be replaced by another field trip assignment.   On these occasions you would tell T.O.M. that the driver *Passed-Makeup* the field trip.

A Passed-Makeup doesn't show up on any refusal report. A Passed-Makeup does cause the driver to receive a special consideration in assigning new field trips in a way similar as cancellation does. For more information on how a Passed-Makeup field trip is replaced see the section titled *How T.O.M. Tracks Skipped / Passed Drivers Who Need A Replacement Trip* found earlier in this chapter.

The following is a detailed discussion on the steps you must take to change a driver's field trip assignment to Passed-Makeup':

1. Retrieve the field trip you wish to assign by using the Field Trip Search / Selection screen (see Figure 1-2 in *Chapter 1 - Entering Field Trips, Printing Estimates and Using the Field Trip Inquiry* of this manual). Or you may enter a new field trip then press the Save button.

2. Click the Trip Driver Info button (Figure 4-13).

Figure 4-13. The Trip Driver Info Button

Click the Trip Driver Info button to change an assigned driver's status.

This will cause the Trip Driver Information Screen (Figure 4-14) to display.

Driver status for field trip. Click arrow to list various status options.

Figure 4-14. Trip Driver Information Screen

3. Change the selected driver's status from Assigned to Passed-Makeup. To change a driver's status on a field trip click the down arrow of the Status drop down list box (Figure 4-15). This list box displays the many types of status options that you may assign to drivers of a field trip. Point to the word Passed-Makeup and click it with your mouse. The system will automatically change the Status box from Assigned to Passed-Makeup.

Figure 4-15. Changing a Driver's Status From Assigned to Passed-Makeup

4.   Click the Exit button to return to the Detailed Field Trip screen (Figure 4-13).