

SOP 15 | Scheduling

Create edit or cancel a dated shift

Maintain a specific shift while preserving work already recorded.

For Web and mobile · Administrator / Supervisor

Before you start Confirm the property, local date, employees and whether a run has started.

Open Property Schedule or Schedule & requests

Step 1 Open the property schedule

Use the property schedule tools to create a shift or open the existing dated shift for editing.

Step 2 Enter permitted changes

Set Starts (property time), Ends, Property phase, Route notes and eligible employees. Locked fields remain unchanged when work has started.

Step 3 Review and save

Use Schedule shift or Save schedule change. Read the overlap confirmation and save only if the details are correct.

Step 4 Cancel only when appropriate

For an eligible shift, enter Cancellation reason and use Cancel shift. A started or protected shift may block cancellation.

Step 5 Check the saved outcome

Refresh and inspect assignments, status and change history. Workers receive schedule updates that they must review.

Check your result The dated shift reflects the saved change and retains its historical work.

If something goes wrong When a field is locked, read its on-screen guidance. Use a separate future shift instead of trying to rewrite active or historical work.

See the picture reference on the next page.

SOP 15 Picture reference

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LAKESIDE COMMONS SHOWCASE

Schedule a shift

Central Time (America/Chicago)

Starts (property time)

10/01/2026 02:02 PM

Ends (property time)

10/01/2026 06:02 PM

Property phase

No phase assigned

Route notes

Operational route notes; do not store access codes

ELIGIBLE PROPERTY EMPLOYEES

☐ Amelia Taylor

Eligible

☐ Harper Jackson

Eligible

☐ Henry White

Eligible

☐ Lucas Thomas

Eligible

Choose a future service time for a new shift.

Overlapping shifts show a warning; you can save anyway. Property access and training must cover the whole shift.

Schedule shift

Step 2 · Use property-local dates and eligible employees for a dated shift.

Application screenshot with training data.