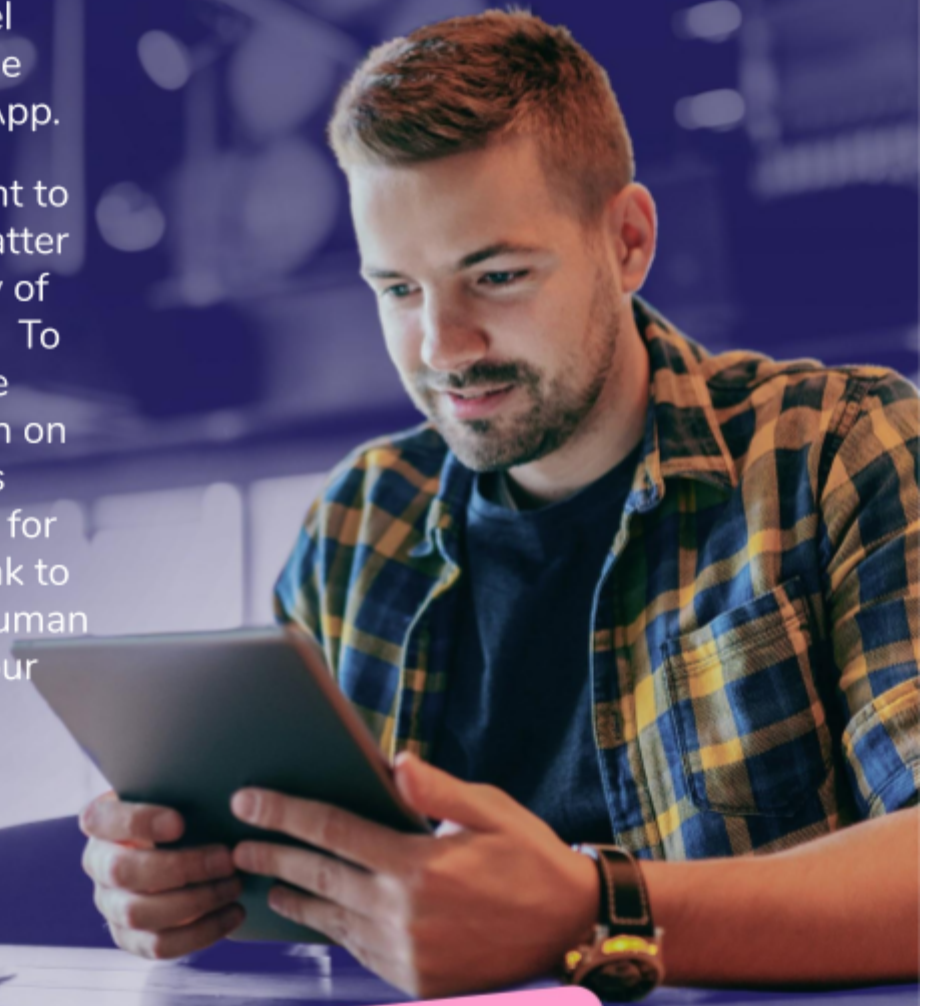


Manager User Guide

PeopleMatter Mobile App

This User Guide will provide you with a high level overview of using the PeopleMatter Mobile App.

It is extremely important to note that the PeopleMatter software has a variety of customizable features. To ensure you have the appropriate information on how the software is specifically configured for your organization, speak to the Administrators or Human Resources Staff at your organization.



Disclaimer: Only customers who log into PeopleMatter directly on the web can use the Mobile App. You cannot use the Mobile App if you access PeopleMatter from a single sign-on source.



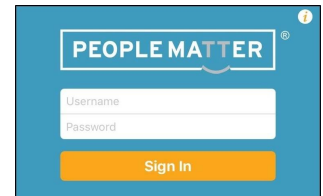
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Download the PeopleMatter Mobile App

- Download the PeopleMatter Mobile App from the App Store or Google Play. Search for “PeopleMatter.”
- Use the PeopleMatter Mobile App on a mobile phone or on a tablet.

Sign In

- To use the PeopleMatter Mobile App, you must have an active PeopleMatter account that you use on the web when working on a desktop computer.
- Open the PeopleMatter Mobile App.
- Enter your Username and Password. Click **Sign In**.
If you cannot log in, ensure you can log in at <https://my.peoplesmatter.com>



Overview of Features for Managers

- **General Settings:**
 - **Messages** - Send and view Messages to Team Member within your assigned units.
 - **Contacts** - View Contact Information of Team Members within your assigned units. This can include Name, Phone Number, Email Address, Birthday, Hire Date, Availability, Jobs, and Emergency Contact. Note that some settings depend on permissions granted by your organization’s Administrator.
 - **Milestones** - View Birthday, First Day, and Anniversary for Team Members within your units.
 - **Settings** - Configure settings to view Milestones, receive Notifications, and view when Form I-9s are due.
- **HIRE:**
 - **Applicants** - View new Applicants and their applications; create Filters to view Applicants efficiently.
 - **Alerts** - Set up Alerts to notify you of new Applicants based on position(s).
 - **I-9** - View when Form I-9s are due; upload copies of I-9 Documentation, if applicable.
- **LEARN:**
 - **Courses, Assignments, and Completed** - View outstanding and completed course assignments for Team Members at your assigned units.
- **SCHEDULE:**
 - **Roster** - View the Team Members scheduled for work at your assigned units.
 - **Working Now** - View the Team Members currently working at your assigned units.
 - **Shift Offers** - View, approve, and deny shift offer requests for Team Members at your assigned units.
 - **Time Off** - View, approve, and deny shift offer requests for Team Members at your assigned units.
- **Action Items** - View and complete Action Items assigned to you by the Administrator at your organization.

+ LIMITATIONS OF THE MOBILE APP

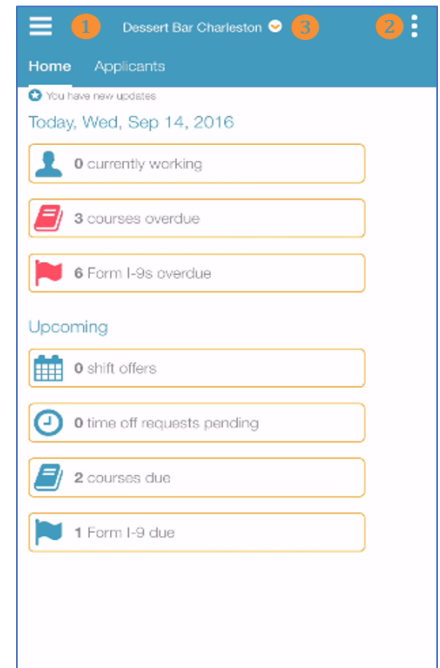
- **HIRE:** The Mobile App does not allow you to move an applicant through the hiring process.
- **HIRE:** The Mobile App does not allow you to complete onboarding tasks.
- **LEARN:** The Mobile App does not allow Team Members to complete a course.
- **SCHEDULE:** The Mobile App does not allow a Manager the ability to create or edit a schedule.

Please complete these workflows using PeopleMatter from the web using a desktop computer.

Recurring Features within the Mobile App

These buttons are readily accessible when using the Mobile App:

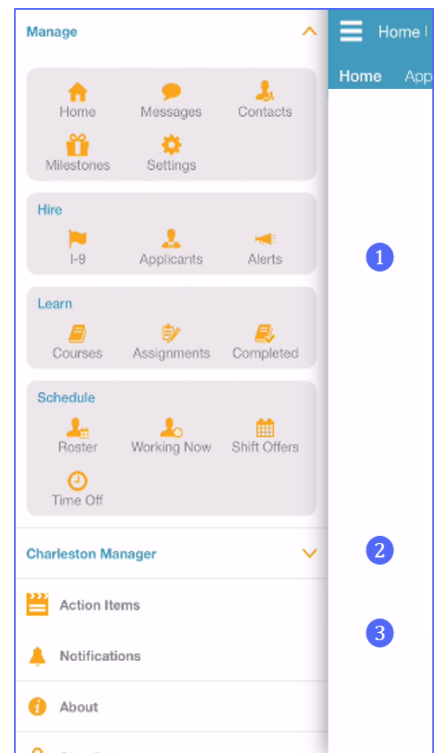
1. On the top left, you will see the button referred to as the **Navigation Menu**. This button will give you access to navigate to additional features within the Mobile App. This may be referred to as a “Left Drawer” or “Menu.”
2. On the top right, you will often see a button in this location referred to as the **Options Menu**. This button will give you access to set additional options within the particular feature of the Mobile App that you are currently viewing. This may be referred to as a “Right Drawer” or “Overflow Menu.”
3. If you have access to more than one unit within your organization, you will have access to this drop-down menu to change units. On the Mobile App, you will typically view information related to one specific unit at a time.



Navigation Menu

The Navigation Menu gives you access to all of the features within the Mobile App. You can click to view the **Navigation Menu** at any time; then you can click the icon for the **specific feature** you need.

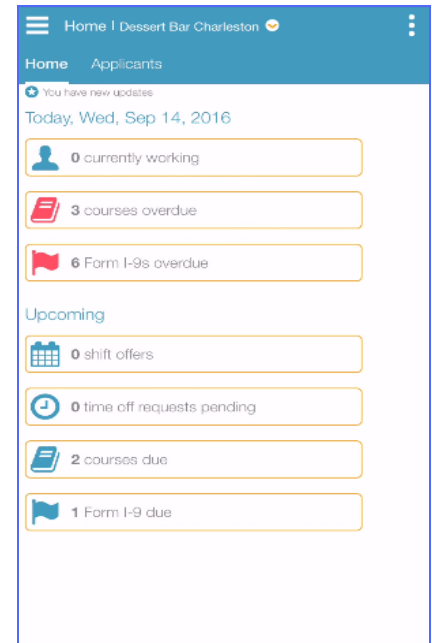
1. On the top, you will see **Manage**. This section is the list of items that fall under your access as a Manager, including settings for HIRE, LEARN, and SCHEDULE.
2. Toward the bottom, you will see **Your Name**. This section is the list of items that fall under your access as a Team Member. You can click the **arrow** to collapse or expand this section. These features are not discussed in detail in this User Guide, however, information is available in the PeopleMatter Knowledge Base.
3. At the bottom, you will also see the following features:
 - o **Action Items** - Click here to view and complete Action Items assigned to you by the Administrator at your organization.
 - o **Notifications** - Click here to access Notifications.
 - o **About** - Click here to access the Mobile App’s terms and conditions, send a diagnostic log for troubleshooting issues, or access additional items.
 - o **Sign Out** - Click here to sign out of the Mobile App.



Home - Manager's Home Screen

The Manager's Home Screen will appear when you log into the Mobile App for the first time. The Manager's Home Screen allows you to easily take action on some tasks.

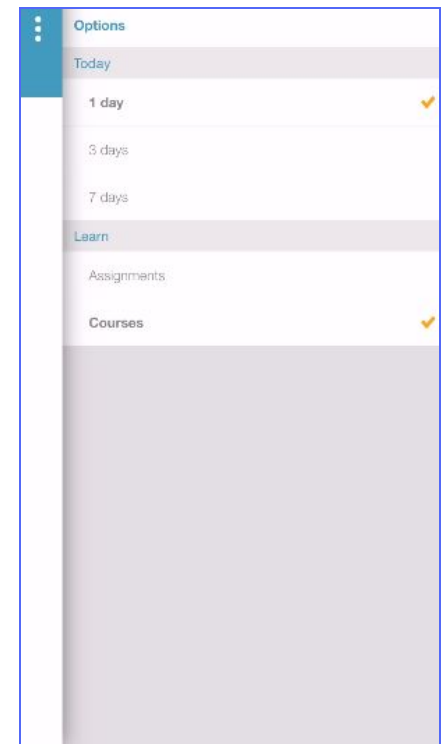
- To return to the Home Screen at any time, follow this path:
Navigation Menu → Manage/Home.
- Depending on your organization's setup, the Home Screen can display:
 - Applicants
 - Team Members Working Now
 - Team Members with Courses Due
 - Team Members with Form I-9s Overdue
 - Milestones
 - Pending Shift Offers
 - Pending Time Off Requests
- Items will appear here if the item shows a non-zero count, so these items will update on a regular basis to provide you with the most updated information. To access these items, you can click on the **name of the item**, which will take you to new screen with specific information related to that item.



+ HOME - OPTIONS MENU

From the Manager's Home Screen, you can configure options that change your display of the Home Screen.

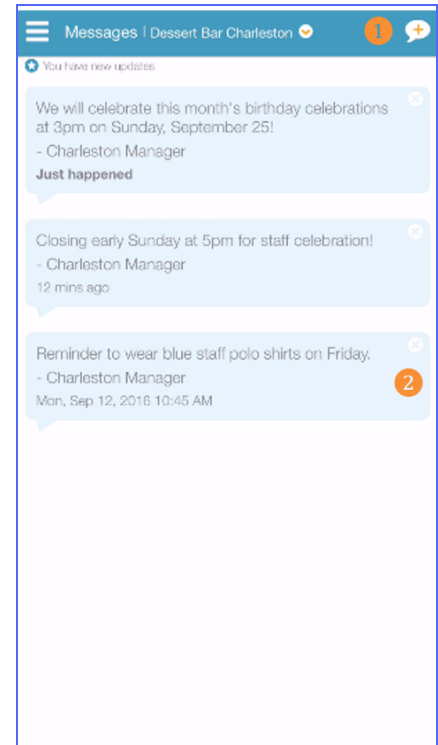
- From the Home Screen, click the **Options Menu**.
The Home Screen - Options Menu is displayed here.
- Select options to meet your needs.
Depending on your organization's setup, this can include:
 - **Time** - Click to select from **1 day**, **3 days**, or **7 days** as the default time period.
 - **Learn** - Click to select from **Assignments** or **Courses**.



Messages

The Messages feature allows you to view and send messages to Team Members within your units. You can send messages to one specific unit or to all units.

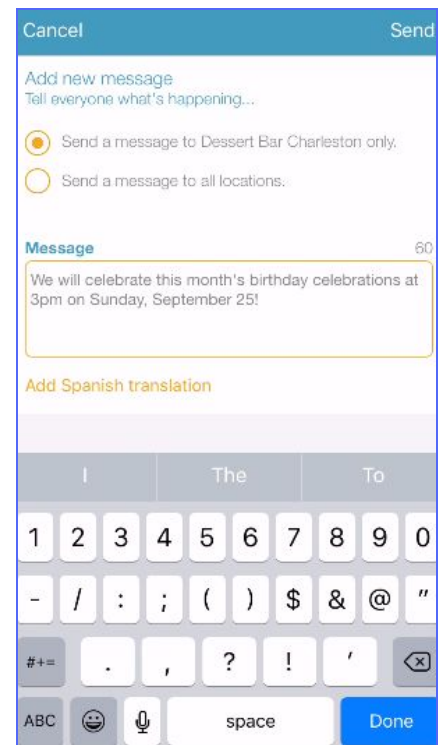
- To access Messages at any time, follow this path: Navigation Menu → Manage/Messages.
- The Messages screen is displayed here. Messages you have sent recently will appear.
- Use the drop-down arrow to change the unit if needed.
- The Messages screen allows you to take the following action:
 1. **Send** a new message. See below for details.
 2. Delete a message. Click the **X** to delete.
- Note that using the Messages feature on the Mobile App is the same as the What's Happening functionality available on the web using a desktop computer.



+ MESSAGES - SEND A NEW MESSAGE

Follow these steps to send a new message:

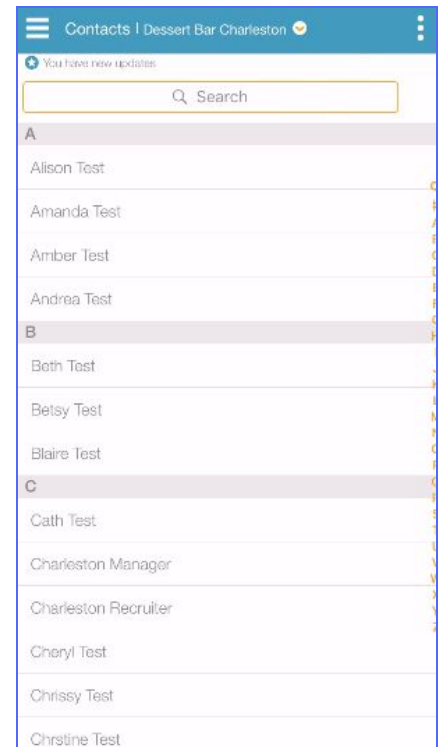
- From the Messages screen, click **Add Message** (as shown above).
- The Add New Message screen will display (as shown here.)
- **Determine who you receive the message**; choose from:
 - Send a message to specific location only.
 - Send a message to all locations.
- **Type your message** up to 144 characters.
- Click **Add Spanish translation**, if applicable, and enter the message in Spanish. Note that PeopleMatter will not provide this translation for you.
- Click **Send** in the top right corner.



Contacts

The Contacts feature allows you to access the contact information for all current Team Members who work within your units.

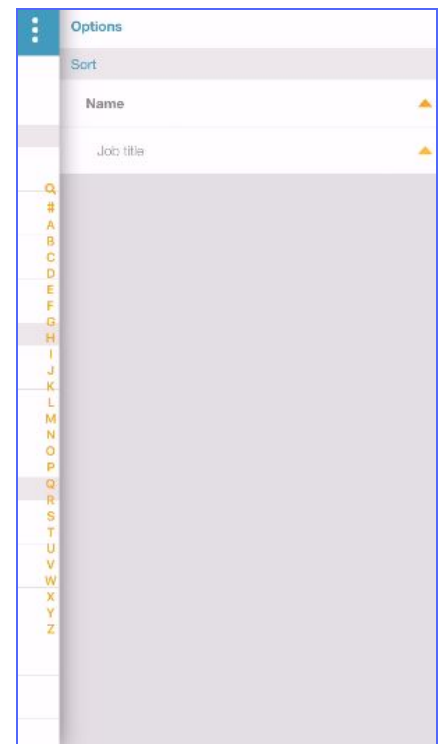
- To access Contacts at any time, follow this path:
Navigation Menu → Manage/Contacts.
- The Contacts screen is displayed here.
- Use the drop-down arrow to change the unit if needed.
- Use the Search field to search for a Team Member by name.
- The Contacts screen allows you to open an individual Team Member’s contact information, by clicking on their **name**.



+ CONTACTS - OPTIONS MENU

From the Contacts screen, you can configure options that change your display of the Contacts screen.

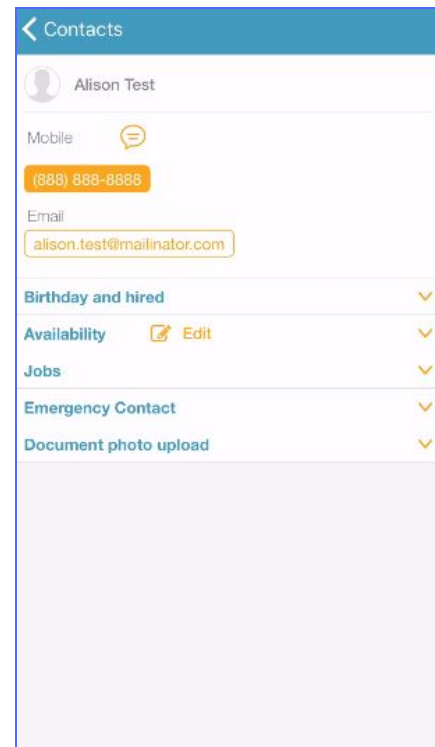
- From the Contacts screen, click the **Options Menu**.
The Contacts - Options Menu is displayed here.
- Select options to meet your needs.
Depending on your organization’s setup, this can include:
 - **Departments** - This is only available if your organization uses departments within PeopleMatter.
 - **Sort** - Click to select from **Name** or **Job Title**. Team Members will display based on your selection.



+ CONTACTS - INDIVIDUAL TEAM MEMBERS CONTACT INFORMATION

This is a view of an individual Team Member's Contact Information.

- The information available and the actions you can take include:
 - Name - View
 - Photo, if provided - View
 - Mobile Phone, if provided - Send text message or Call
 - Home Phone, if provided- Send text message or Call
 - Email Address, if provided - Send email message
 - Birthday - View
 - Hire Date - View
 - Availability - Edit availability (see below)
 - Jobs - View current position(s)
 - Emergency Contact - View and contact individual
 - Document Photo Upload - Upload documentation
- To open a section to access additional details, click on the **orange arrow**.

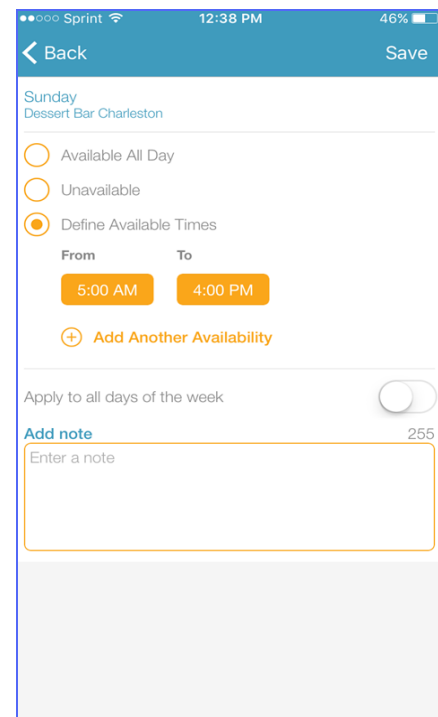


+ CONTACTS - EDIT AVAILABILITY

The Availability feature allows you to easily update availabilities for your Team Members. This is necessary in particular when using SCHEDULE to create schedules for your units. Note that you can also update a Team Member's availability on the web using a desktop computer and the Team Member can also update their own availability using the Mobile App, if the Administrator grants permission to do so.

Follow these steps to update a Team Member's availability:

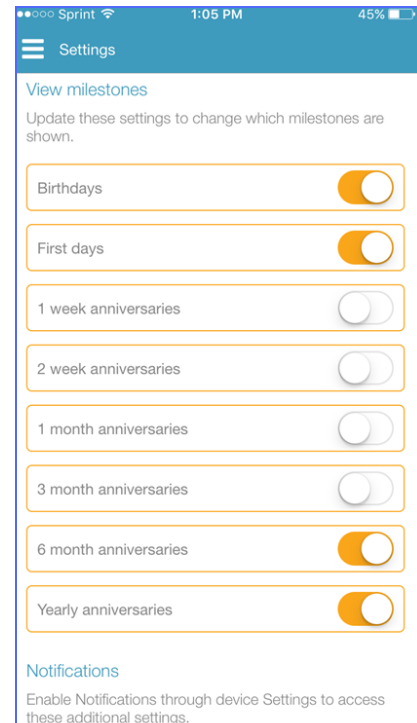
- From the Contacts screen, click **Edit** next to Availability.
- A screen will display that lists every day of the week. Click to select the **day** you wish to edit.
- You will see the screen as shown here. Select **Available All Day**, **Unavailable**, or **Define Available Times**.
 - If you select Define Available Times, you will be prompted to enter the Start and End Times.
 - You can also **Add Another Availability** if needed.
- Select to apply this availability to all days of the week, if needed.
- You can add a note if applicable.
- When finished, click **Save** in the top right.



Settings

The Settings features allows you configure settings to view Milestones, receive Notifications, and view when Form I-9s are due.

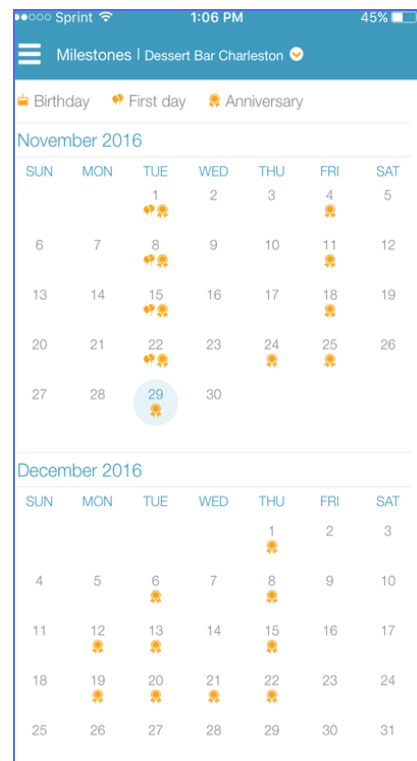
- To access Settings at any time, follow this path:
Navigation Menu → Manage/Settings.
- The Settings screen is displayed here.
 - **View Milestones** - Turn On or Off the Milestones you wish to appear in your view; choose from Birthdays, First Days, and various Anniversaries.
 - **Notifications** - Use your mobile device's Settings to turn on Notifications. This allows Managers to receive push notifications when an application is submitted to their unit(s). On your mobile device, click **Settings** and then select **Notifications**. Locate the Mobile App and set notifications to your preferences.
 - **Form I-9 - Hide Overdue** - Use this to select the number of days that overdue Form I-9s will appear; choose from Never, After 30 days, After 60 days, or After 90 days.



Milestones

The Milestones feature allows you to view Team Member's milestones in a single calendar view. This includes Birthdays, First Days, and Anniversaries.

- To access Milestones at any time, follow this path:
Navigation Menu → Manage/Milestones.
- The Milestones screen is displayed here. Remember that you decide which Milestones appear based on your choices in Settings (see above).
- When viewing Milestones, note the following:
 - The Cake icon represents a Team Member's birthday.
 - The Balloon icon represents a Team Member's first day.
 - The Medal icon represents a Team Member's anniversary.
- Use the drop-down arrow to change the unit if needed.
- Simply click on the **calendar's day** to view the Milestones.



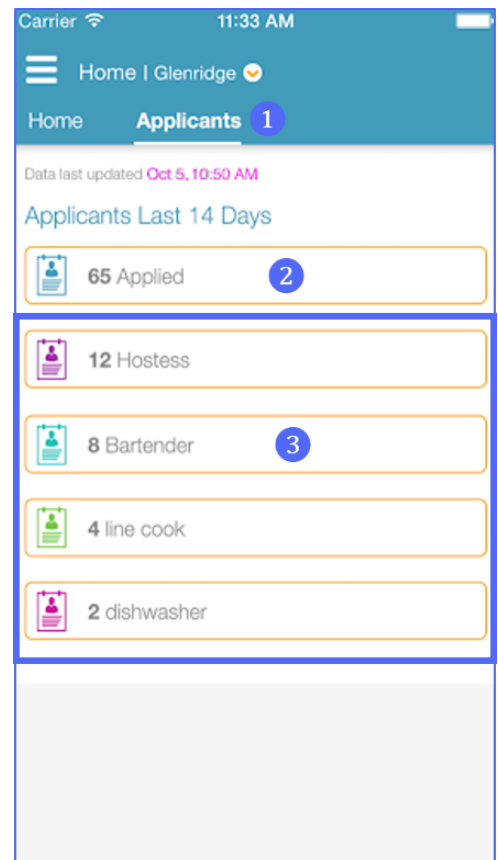
PeopleMatter Recruiting

- One of the main functions of PeopleMatter is Recruiting.
- Applicants will apply to work at your organization using PeopleMatter's software.
- You can use the Mobile App to access some items within HIRE, including:
 - Applicants - View new Applicants and their applications; create Filters to view Applicants efficiently.
 - Alerts - Set up Alerts to notify you of new Applicants.
 - I-9 - View when Form I-9s are due; upload copies of I-9 Documentation, if applicable.

+ APPLICANTS

The Applicants feature allows you to view new applicants who have applied to your units within the last 14 days.

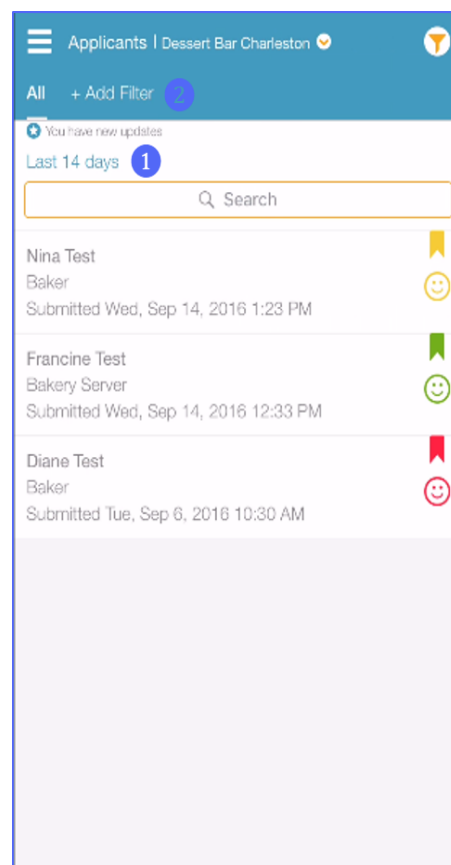
1. This screen shows the first way you can access Applicants, which is from the Manager's Home Screen, by clicking **Applicants**.
2. This screen shows the applicants who have applied in the last 14 days.
3. This view of Applicants also has the addition of [Alerts](#).
 - Use the drop-down arrow to change the unit if needed.
 - This screen allows you to open a list of new applicants based on the default criteria or the criteria you set in your Alerts.



+ APPLICANT'S - OVERVIEW

You can also access Applicants at any time by following this path: Navigation Menu → HIRE/Applicants.

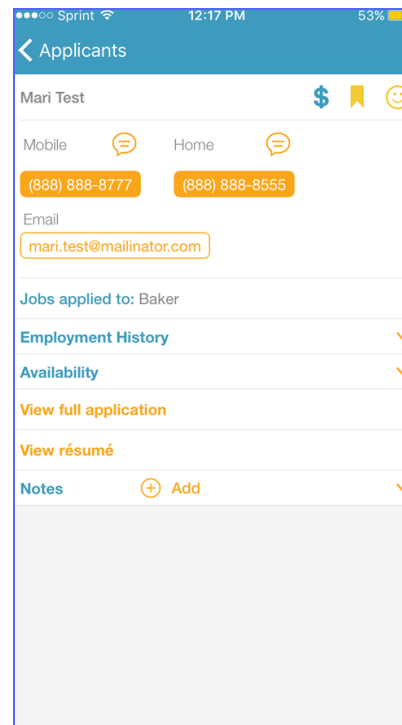
1. The Applicants screen is displayed here. By default, this feature will show new applications who have applied to your units within the last 14 days.
2. The Applicants screen will allow you to create [filters](#), which you can apply to narrow down your applicant pool more efficiently.
 - Use the drop-down arrow to change the unit if needed.
 - Use the Search field to search for an Applicant by name.
 - The Applicants screen allows you to open an individual Applicant's contact information, by clicking on their **name**.
3. On the Applicants screen, you may see some of the following features depending on your organization's use of PeopleMatter:
 - **Applicant's Name**
 - **Position**
 - **Date and Time of Application**
 - **Ribbon Symbol - Job Fit Assessment Results:**
Job Fit examines how the individual's personality characteristics fit the job they are applying for by comparing their traits to those of successful performers.
 - Green - Recommend
 - Yellow - Caution
 - Red - Discontinue
 - Multiple Colors - multiple results
 - **Smiley Face Symbol - Attitude Assessment Results:**
Attitude examines the individual's attitudes toward work and work-related issues by measuring for counterproductive behaviors.
 - Green - Low Concern
 - Yellow - Some Concern
 - Red - Serious Concern
4. From this list, you can view the individual Applicant's job application in detail by clicking on the **Applicant's name**.



+ APPLICANT'S RECORD

This is a view on an individual Applicant's Record.

- On this screen, you may see some of the following features depending on your organization's use of PeopleMatter:
 - **Applicant's Name**
 - **Phone Number(s)** - Call or text the applicant from here.
 - **Email Address** - Email the applicant from here.
 - **Dollar Sign Symbol - Tax Credit Status:**
Click on the **Dollar Sign** to see the Tax Credit Status.
 - Not Pre-Screened
 - Pre-Qualified
 - Not Pre-Qualified
 - **Ribbon Symbol - Job Fit Assessment Results:**
Click on the **Ribbon Symbol** to see the Job Fit Results. Job Fit examines how the individual's personality characteristics fit the job they are applying for by comparing their traits to those of successful performers.
 - Green - Recommend
 - Yellow - Caution
 - Red - Discontinue
 - **Smiley Face Symbol - Attitude Assessment Results:**
Click on the **Smiley Face Symbol** to see the Attitude Results. Attitude examines the individual's attitudes toward work and work-related issues by measuring for counterproductive behaviors.
 - Green - Low Concern
 - Yellow - Some Concern
 - Red - Serious Concern
 - **Jobs Applied To** - View the list of positions.
 - **Employment History** - View the history, if provided.
 - **Availability** - View the availability, if provided.
 - **View Full Application** - Click here to view the full job application. Some Managers may have to click "**Download full job application**" first.
 - **Resume** - Click to **view resume**, if provided.
 - **Notes** - Click to **add notes**, if applicable.

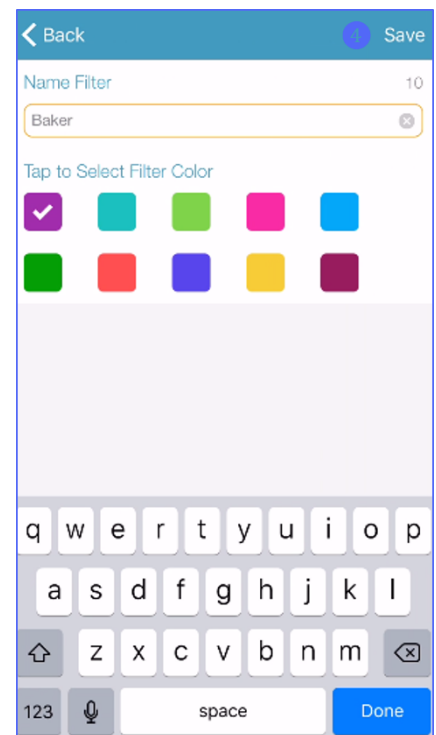
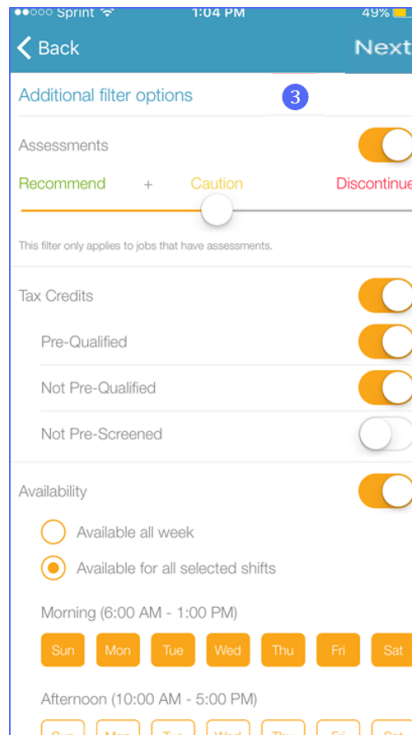
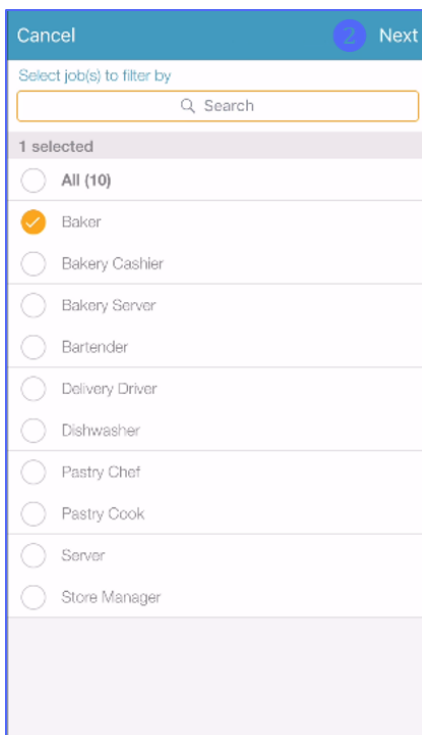
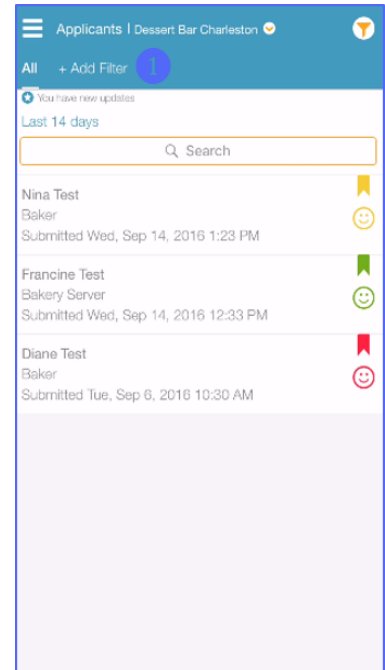


+ APPLICANTS - CREATE FILTERS

You can create up to 10 filters to help streamline reviewing applicants. Filters are created based on unit and position, with the options for assessments, tax credits, and availability.

Follow these steps to create a filter:

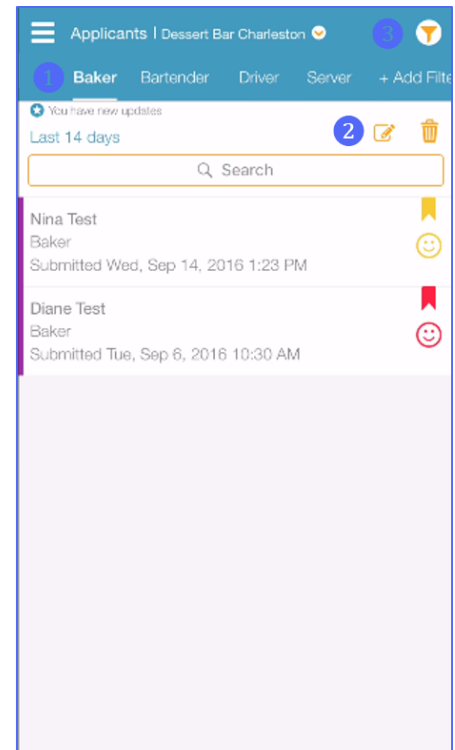
1. Open the Applicants screen. Use the drop-down arrow to change the unit if needed. Click **+Add Filter**.
2. Select the **job(s)** you want to include. Click **Next**.
3. If applicable, select filter options for **Assessments, Tax Credits, or Availability**. Click **Next**.
4. Enter a **Filter Name**. Select a **Filter Color**. Click **Save**.



+ APPLICANTS - EDIT & DELETE FILTERS

This screen shows how Applicants display when one of the filters is selected. The filter color that you assigned displays along the left side of the screen.

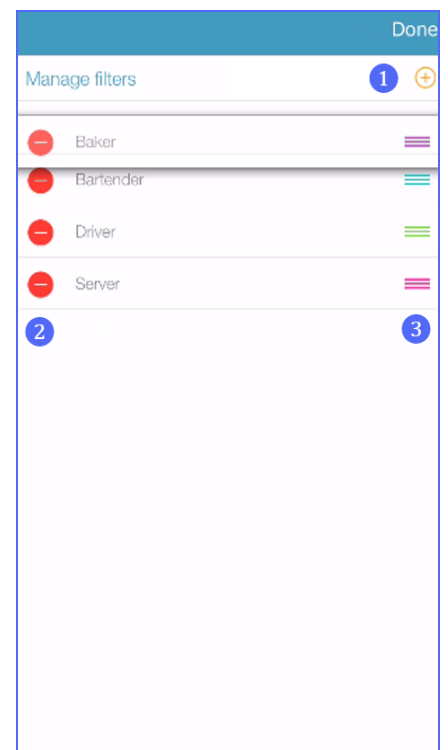
1. The filters you create will display across the top of the Applicants screen. You can click on the **name of the filter** to view the Applicants that meet the criteria.
2. From this view, you can edit or delete the filter you are viewing:
 - o Click the **Pencil** icon to edit a filter.
 - o Click the **Trash** icon to delete a filter.
3. From this view, you can click here to **manage filters**, which is discussed in more detail below.



+ APPLICANTS - MANAGE FILTERS

From the Manage Filters screen, you can add new filters, edit existing filters, delete existing filters, and rearrange the order.

- To edit an existing filter, click on the **name of the filter**. Additional actions include:
 1. Click **+** to add a new filter.
 2. Click **-** to delete an existing filter.
 3. To rearrange the order of the existing filters, press and hold the filter over the **three-bars symbol** on the right. The filter will become active for you to drag and drop where you'd like the filter to appear on the list.
- When finished managing, filters, click **Done** in the top right.



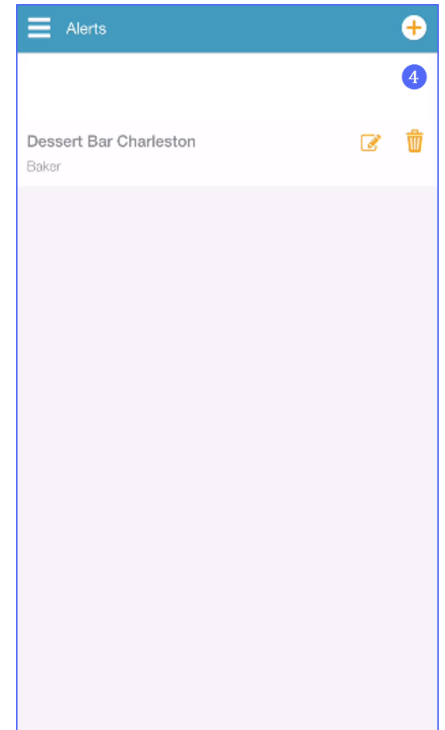
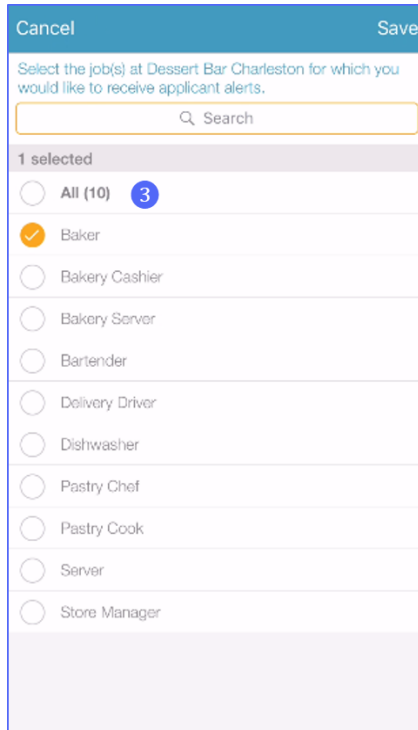
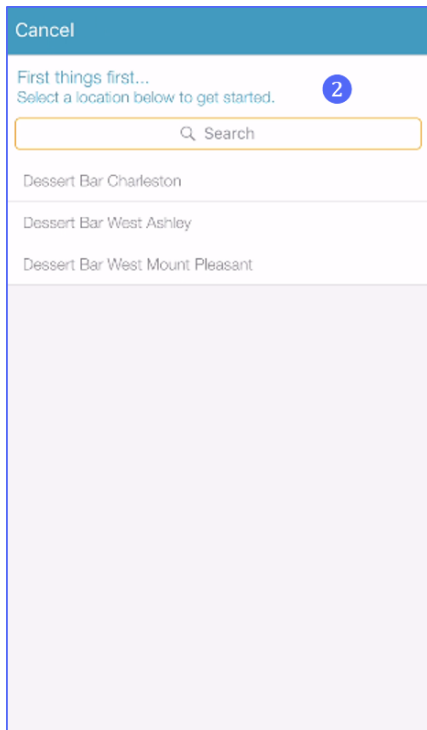
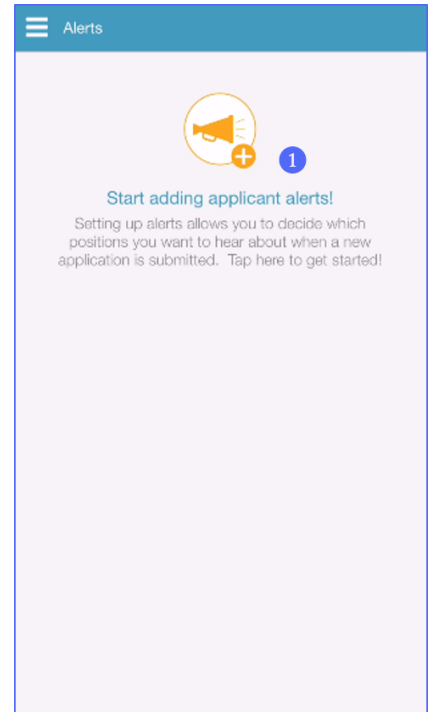
+ ALERTS

The Alerts feature allows you to customize alerts for specific jobs when new applicants apply. Alerts help ensure you are notified of new applicants immediately, so you can contact the applicants as soon as possible.

- Alerts are created based on unit and position(s).
- You can access Alerts at any time by following this path: Navigation Menu → HIRE/Alerts.

Follow these steps to create an alert:

1. Open the Alerts screen. Click **+**.
2. Select the **unit**.
3. Select the **job(s)**. Click **Save**.
4. The Alerts you create will display. From here you can:
 - Click the **Pencil** icon to edit a filter.
 - Click the **Trash** icon to delete a filter.
 - Click **+** to add a new filter.



+ UPLOAD DOCUMENTATION - OVERVIEW

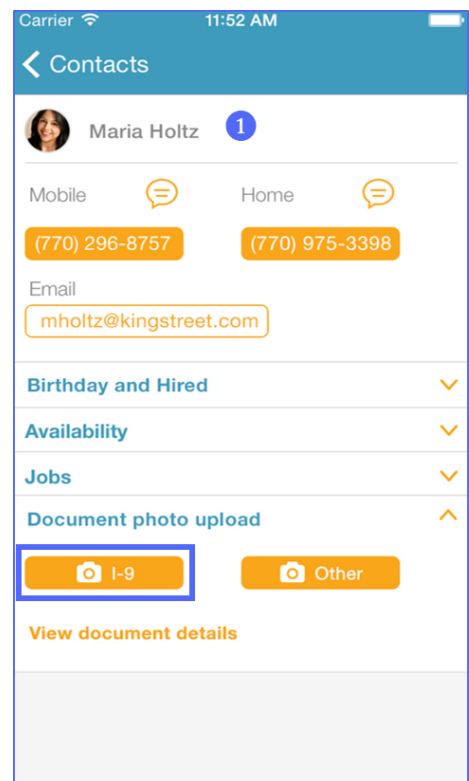
The Mobile App allows you to upload copies of documentation into the Team Member's record. The Mobile App Document Fast Capture makes this process easy and efficient for you. **Check with your Human Resources Staff to ensure expectations of using this feature.**

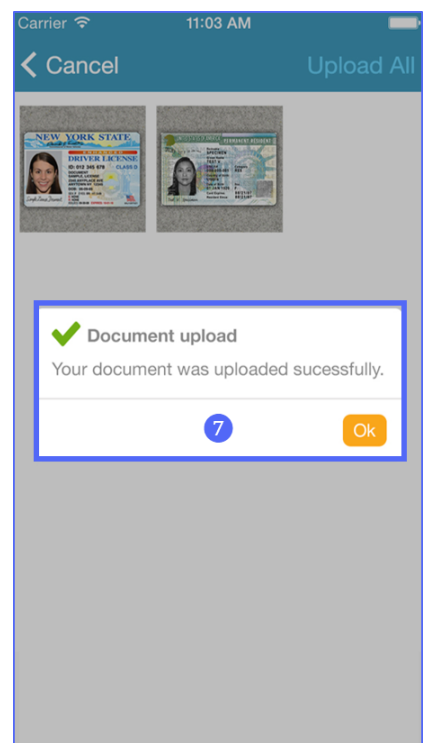
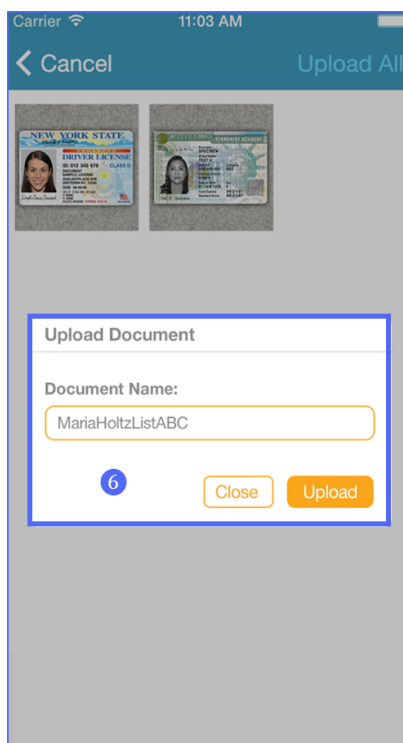
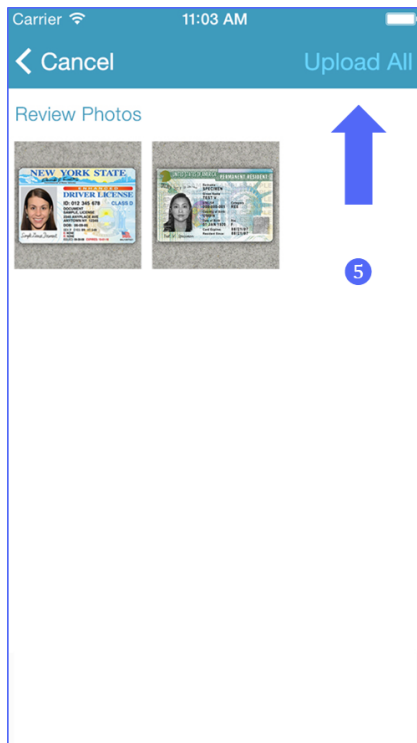
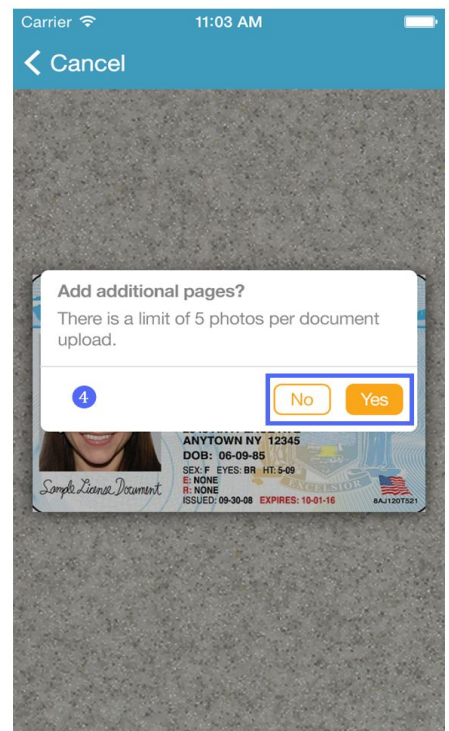
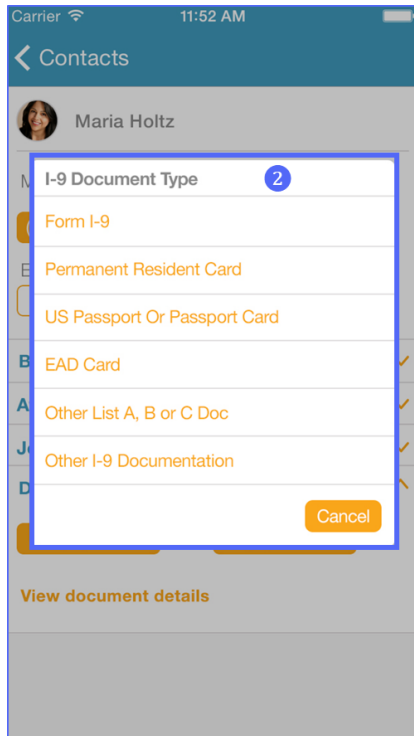
- The Mobile App Document Fast Capture feature works like mobile banking check-deposit features, where the Mobile App will use your device's camera to take a picture.
- The picture will upload securely to the Team Member's record; the picture will not be saved on the Manager's mobile device.
- Uploaded files cannot be accessed via the Mobile App. A summary of uploaded documents can be viewed, but the document or image can only be viewed within the Team Member's record from the web using a desktop computer.
- You can access Document Photo Upload at any time by following this path: Navigation Menu → HIRE/Contacts.
- You can also access Document Photo Upload for I-9 specifically by following this path: Navigation Menu → HIRE/I-9.
- The steps outlined will specifically address I-9, but the feature works similarly for additional documentation using Other.

+ UPLOAD DOCUMENTATION - I-9

Follow these steps to upload I-9 documentation:

1. Open the Team Member's record. Open the section called Document Photo Upload. You will see I-9 or Other. Click **I-9**.
2. The I-9 Document Type selections will appear. The options that appear are based on the settings set for your organization for I-9 and e-Verify if applicable. Click to select the **document type**.
3. Use your camera to **take a photo** of the document. If satisfied with the photo, click **Proceed**. If not, click **Retake**.
4. You will be asked to add additional pages. Say **Yes** or **No**. There is a limit of five photos per document upload.
 - If you add one image, the file will save as a jpeg.
 - If you add more than one image, up to five, the images will save as a pdf.
5. After adding the photos, you will be prompted to **review** the photos. If necessary, you can retake any of the photos by tapping on the photo for a retake option. Click **Upload All**.
6. You will be prompted to add a **Document Name**. Click **Upload**.
7. You will receive confirmation that the document was uploaded successfully. Click **OK**.





Learn

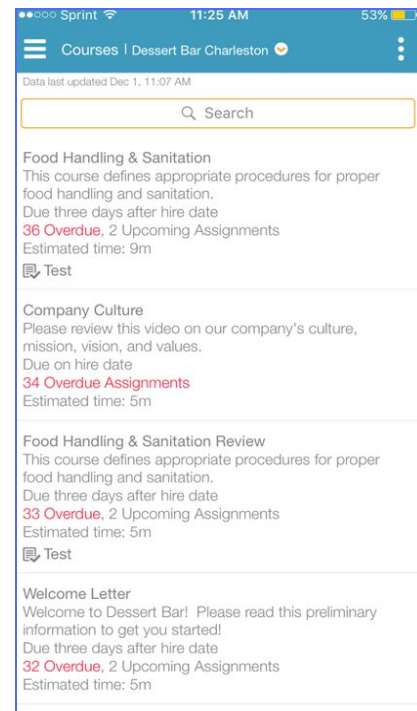
You can use the Mobile App to access some items within LEARN, including:

- Courses - View a list of courses assigned by unit and how many course are overdue.
- Assignments - View a list of assignments for each Team Member, including how many courses are overdue.
- Completed - View a list of courses completed for Team Members within your units.

+ COURSES

The Courses feature allows you to view outstanding courses based on course title for the Team Members within your units.

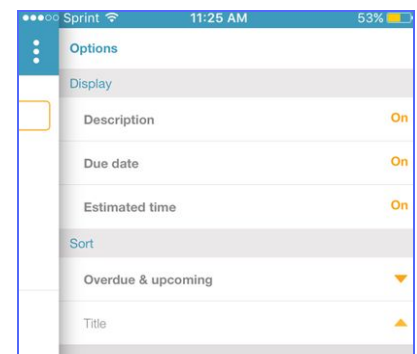
- You can access Courses at any time by following this path: Navigation Menu → LEARN/Courses.
- Depending on your settings, you may also be able to access Courses from the Manager's Home Screen.
- The Courses screen is displayed here. Use the drop-down arrow to change the unit if needed. Use the Search field to search for a Course by name.
- On this screen, you may see:
 - **Course Name**
 - **Description**
 - **Due Date**
 - **Current Number of Overdue Assignments**
 - **Estimated Time to Complete**
 - **Test Requirements, if applicable**
- From this view, you can click the **Course** to see the list of Team Members who need to complete the course as well as the due date for each Team Member.



+ COURSES - OPTIONS MENU

From the Courses screen, you can configure options that change your display of the Courses screen.

- From the Courses screen, click the **Options Menu**. The Courses - Options Menu is displayed here.
- Select options to meet your needs. Depending on your organization's setup, this can include:
 - **Display** - Click to turn the feature **On** or **Off**:
 - Description
 - Due Date
 - Estimated Time.
 - **Sort** - Click to select from **Overdue & Upcoming** or **Title**.
- Courses will display based on your selection.



+ ASSIGNMENTS

The Assignments feature allows you to view a list of assignments required of each Team Member within your units, including how many courses are overdue.

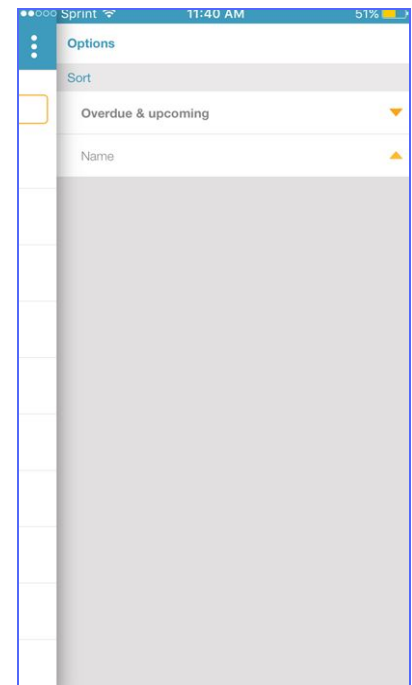
- You can access Assignments at any time by following this path: Navigation Menu → LEARN/Assignments. Some users may need to access Assignments by selecting Courses first; see the previous page to access Courses.
- Depending on your settings, you may also be able to access Courses from the Manager's Home Screen.
- The Assignments screen is displayed here.
- Use the drop-down arrow to change the unit if needed.
- Use the Search field to search for a Team Member by name.
- On this screen, you will see:
 - **Team Member Name**
 - **Number of Overdue Courses**
- From the list of Team Members, you can click to view the **list of courses** that need to be completed as well as the due date for each course.



+ ASSIGNMENTS - OPTIONS MENU

From the Assignments screen, you can configure options that change your display of the Assignments screen.

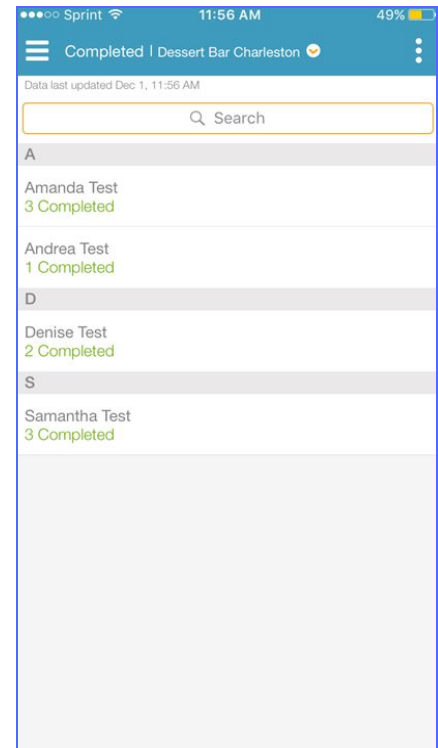
- From the Assignments screen, click the **Options Menu**. The Assignments - Options Menu is displayed here.
- Select options to meet your needs. Depending on your organization's setup, this can include:
 - **Sort** - Click to select from **Overdue & Upcoming** or **Name**. Assignments will display based on your selection.



+ COMPLETED

The Completed feature allows you to view a list of completed courses for each Team Member within your units.

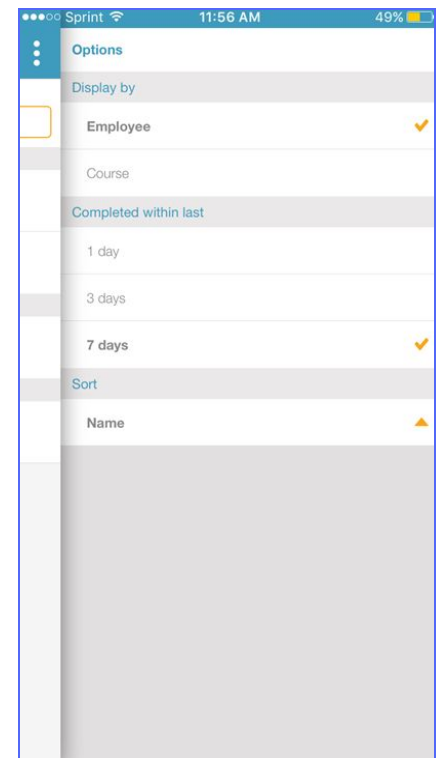
- You can access Completed at any time by following this path: Navigation Menu → LEARN/Completed.
Some users may need to access Completed by selecting Courses first; see the previous page to access Courses.
- The Completed screen is displayed here.
- Use the drop-down arrow to change the unit if needed.
- Use the Search field to search for a Team Member by name.
- On this screen, you will see:
 - **Team Member Name**
 - **Number of Completed Courses**
- From the list of Team Members, you can click the **Team Member's name** to view the list of completed courses.



+ COMPLETED - OPTIONS MENU

From the Completed screen, you can configure options that change your display of the Completed screen.

- From the Completed screen, click the **Options Menu**.
The Completed - Options Menu is displayed here.
- Select options to meet your needs.
Depending on your organization's setup, this can include:
 - **Display** - Click to display by **Employee** or **Course**.
 - **Completed Within Last** - Click to display by **1 day**, **3 days**, or **7 days**,
 - **Sort** - Click to select **Name by Ascending** or **Descending**. Team Members will display based on your selection.



Schedule

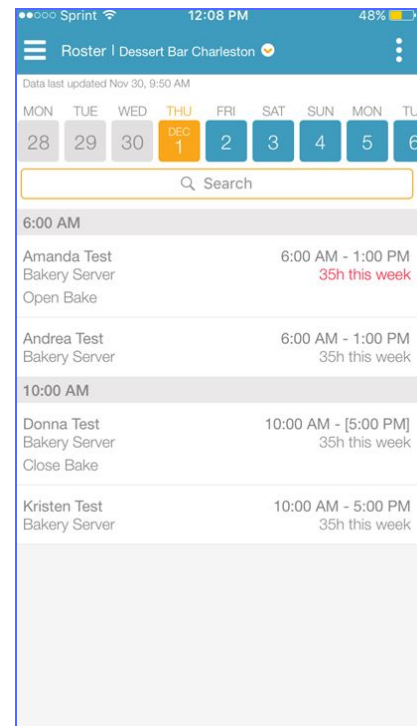
You can use the Mobile App to access some items within SCHEDULE, including:

- Roster - View the Team Members scheduled for work at your units.
- Working Now - View the Team Members currently working at your units.
- Shift Offers - View, approve, and deny shift offer requests for Team Members at your units.
- Time Off - View, approve, and deny shift offer requests for Team Members at your units.

+ ROSTER

The Roster feature allows you to view the roster of Team Members scheduled to work within your units.

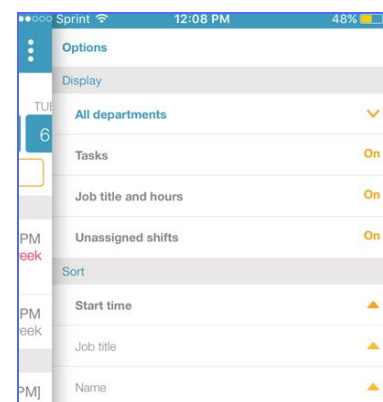
- You can access Roster at any time by following this path:
Navigation Menu → SCHEDULE/Roster.
- The Roster screen is displayed here.
- Use the drop-down arrow to change the unit if needed.
- Use the Search field to search for a Team Member by name.
- View the Roster over the current 14-day period.
- On this screen, you may see the following features:
 - **Team Member's Name**
 - **Position & Tasks**
 - **Shift Start & End Times**
 - A shift that displays the end time in brackets indicates the shift does not have a definitive scheduled end time because the assigned tasks indicates an open-ended shift.
 - **Team Member's Scheduled Hours for the Week**
 - A Team Member with a threshold violation for Overtime or Affordable Care Act displays in red.
- From the Roster, you can click on the **Team Member's name** to view details of the individual's shift.



+ ROSTER - OPTIONS MENU

From here, you can configure options that change the display of Roster.

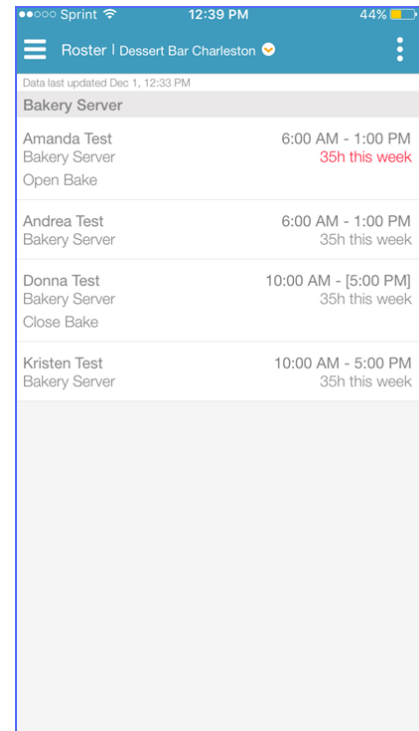
- From the Roster screen, click the **Options Menu**.
The Roster - Options Menu is displayed here.
- Select options to meet your needs.
Depending on your organization's setup, this can include:
 - **Departments** - This will only display if your organization uses Departments within PeopleMatter.
 - **Display** - Click to turn the feature **On** or **Off**. Choose from Tasks, Job Title & Hours, and Unassigned Shifts.
 - **Sort** - Click to select from **Start Time**, **Job Title**, or **Name**.
Team Members will display based on your selection.



+ WORKING NOW

The Working Now feature allows you to view the roster of Team Members currently working.

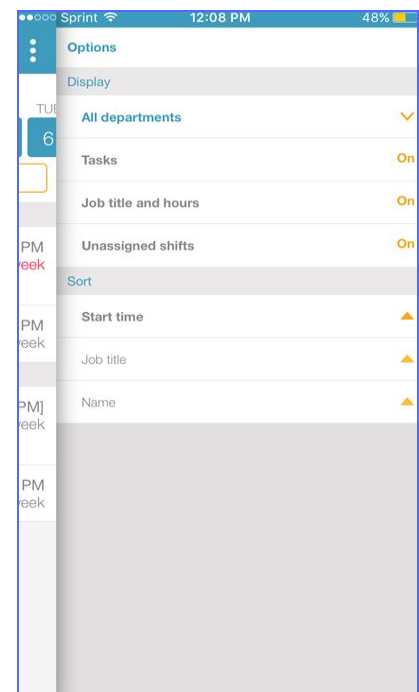
- You can access Working Now at any time by following this path: Navigation Menu → SCHEDULE/Working Now.
- Depending on your settings, you may also be able to access Working Now from the Manager’s Home Screen.
- The Working Now screen is displayed here.
- Use the drop-down arrow to change the unit if needed.
- On this screen, you may see the following features:
 - **Team Member’s Name**
 - **Position**
 - **Tasks**
 - **Shift Start & End Times**
 - A shift that displays the end time in brackets indicates the shift does not have a definitive scheduled end time because the assigned tasks indicates an open-ended shift.
 - **Team Member’s Scheduled Hours for the Week**
 - A Team Member with a threshold violation for Overtime or Affordable Care Act displays in red.
- From Working Now, you can click on the **Team Member’s name** to view details of the individual’s shift.



+ WORKING NOW - OPTIONS MENU

From the Working Now screen, you can configure options that change your display of Working Now.

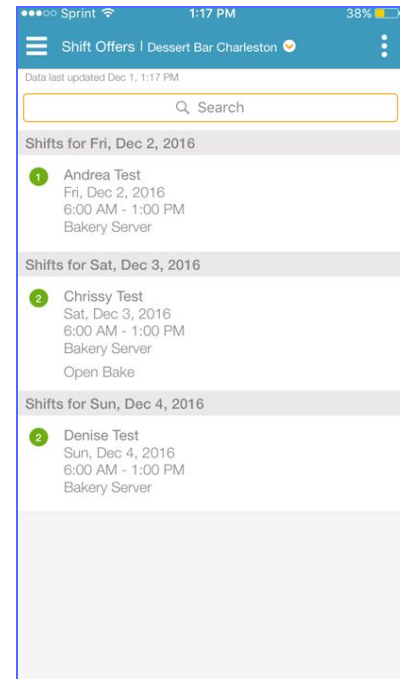
- From the Working Now screen, click the **Options Menu**. The Working Now - Options Menu is displayed here.
- Select options to meet your needs. Depending on your organization’s setup, this can include:
 - **Departments** - This will only display if your organization uses Departments within PeopleMatter.
 - **Display** - Click to turn the feature **On** or **Off**. Choose from Tasks, Job Title & Hours, and Unassigned Shifts.
 - **Sort** - Click to select from **Start Time**, **Job Title**, or **Name**. Team Members will display based on your selection.



+ SHIFT OFFER REQUESTS

The Shift Offer feature allows you to view, approve, and deny shift offer requests for Team Members within your units.

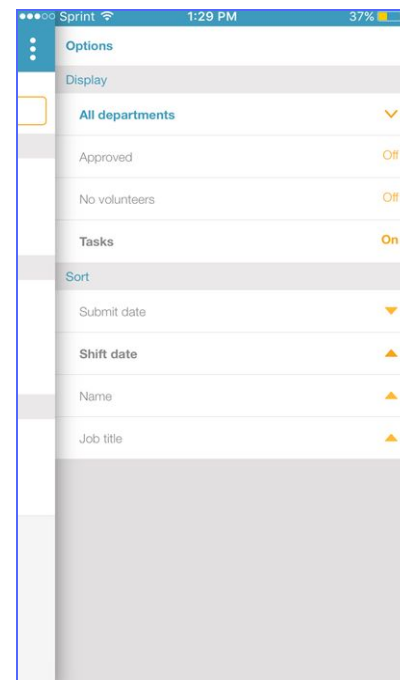
- You can access Shift Offers at any time by following this path: Navigation Menu → SCHEDULE/Shift Offers.
- Depending on your settings, you may also be able to access Shift Offers from the Manager's Home Screen.
- The Shift Offers screen is displayed here.
- Use the Search field to search for a Team Member by name.
- Use the drop-down arrow to change the unit if needed.
- On this screen, you may see the following features:
 - **Team Member's Name**
 - **Shift Date**
 - **Shift Start & End Times**
 - **Position**
 - **Tasks**
 - **Number of Volunteers**
- From Shift Offers, you can click on the **Team Member's name** to view details of the shift offer and take action to approve or deny the request.



+ SHIFT OFFER REQUESTS - OPTIONS MENU

From the Shift Offers screen, you can configure options that change your display of Shift Offer Requests.

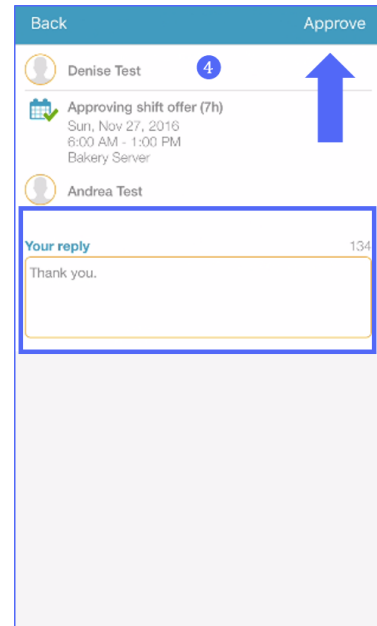
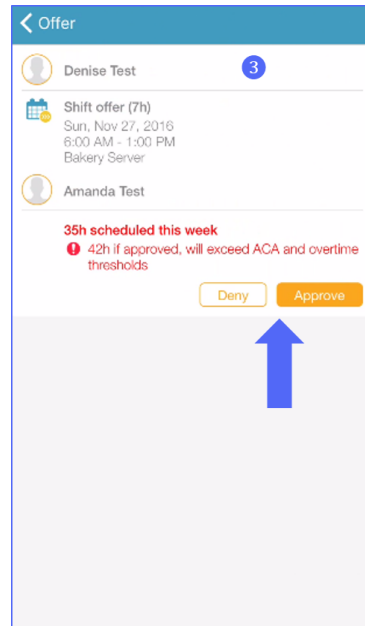
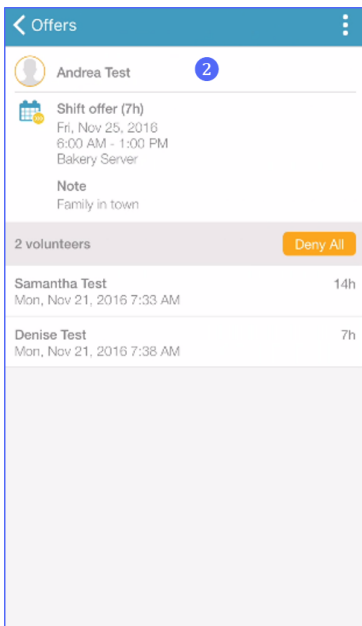
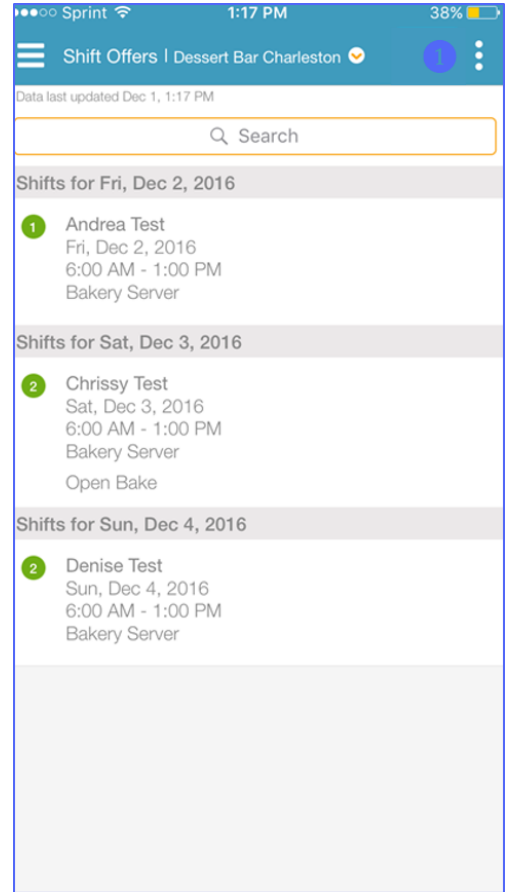
- From the Shift Offers screen, click the **Options Menu**. The Shift Offers - Options Menu is displayed here.
- Select options to meet your needs. Depending on your organization's setup, this can include:
 - **Departments** - This will only display if your organization uses Departments within PeopleMatter.
 - **Display** - Click to turn the feature **On** or **Off**. Choose from
 - Approved
 - No Volunteers
 - Tasks
 - **Sort** - Click to select from
 - **Submit Date**
 - **Shift Date**
 - **Name**
 - **Job Title**
- Team Members will display based on your selection.



+SHIFT OFFER REQUESTS - APPROVE OR DENY

Follow these steps to approve or deny a Shift Offer request:

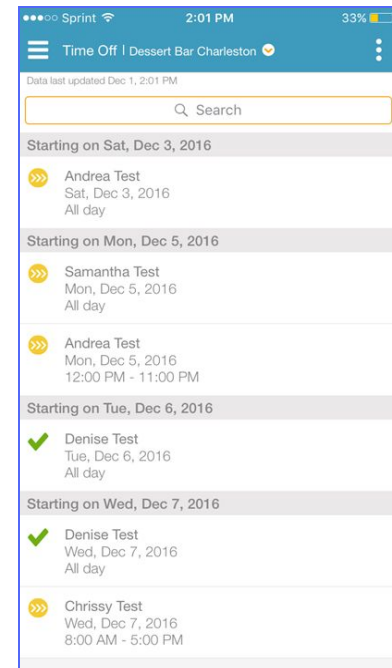
1. Click on the **Team Member's name**.
2. The details of the shift offer will display. You will see the following items:
 - Requestor's Name
 - Shift Offer Date, Start & End Times, Position
 - Tasks and Note, if applicable
 - Number of Volunteers
 - Volunteer's Name, Total Number of Hours Scheduled
 - A Team Member with a threshold violation for Overtime or Affordable Care Act displays in red.
 - From here, you can click **Deny All** or you can click the **Volunteer's Name** to take action for the individual.
3. This screen shows an individual Volunteer's detail. This includes the total number of hours scheduled for the week and the number of total hours scheduled for the week if approve. Click **Approve** or **Deny**.
4. A new screen will appear depending on your selection. You can enter a reply up to 144 characters. When finished, click **Approve** or **Deny** in the top right. You will see a summary of the approval or denial. Click **Done** to take further action or return to other Shift Offers.



+ TIME OFF REQUEST

The Time Off feature allows you to view, approve, and deny time off requests for Team Members within your units.

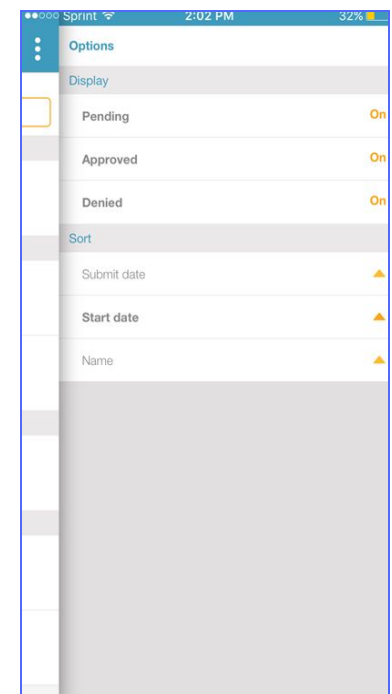
- You can access Time Off Requests at any time by following this path: Navigation Menu → SCHEDULE/Time Off.
- Depending on your settings, you may also be able to access Time Off Requests from the Manager's Home Screen.
- The Time Off screen is displayed here.
- Use the Search field to search for a Team Member by name.
- Use the drop-down arrow to change the unit if needed.
- On this screen, you may see the following features:
 - **Team Member's Name**
 - **Date and Time of Request**
 - **Shift Start & End Times** or **All Day**
- From Time Off, you can click on the Team Member's **name** to view details of the time off request and take action to approve or deny the request.



+ TIME OFF REQUESTS - OPTIONS MENU

From the Time Off screen, you can configure options that change your display of Time Off Requests.

- From the Time Off screen, click the **Options Menu**. The Time Off - Options Menu is displayed here.
- Select options to meet your needs. Depending on your organization's setup, this can include:
 - **Display** - Click to turn the feature **On** or **Off**. Choose from
 - Pending
 - Approved
 - Denied
 - **Sort** - Click to select from
 - **Submit Date**
 - **Start Date**
 - **Name**
- Team Members will display based on your selection.



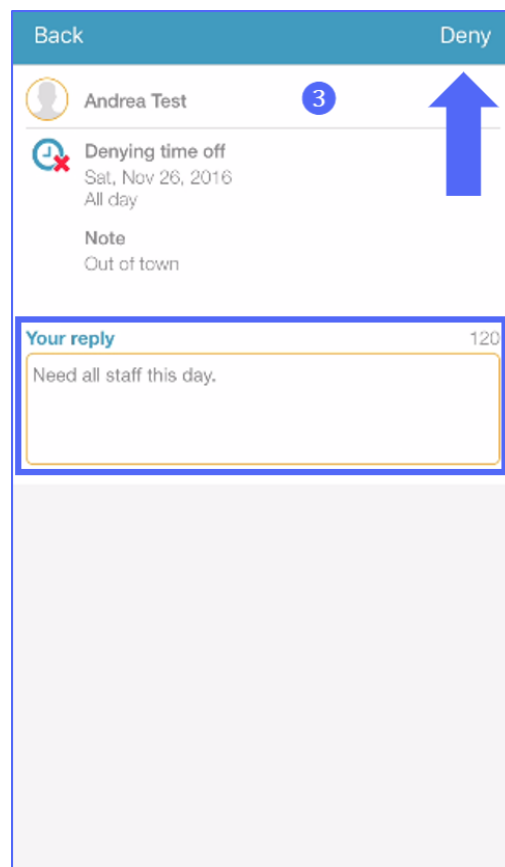
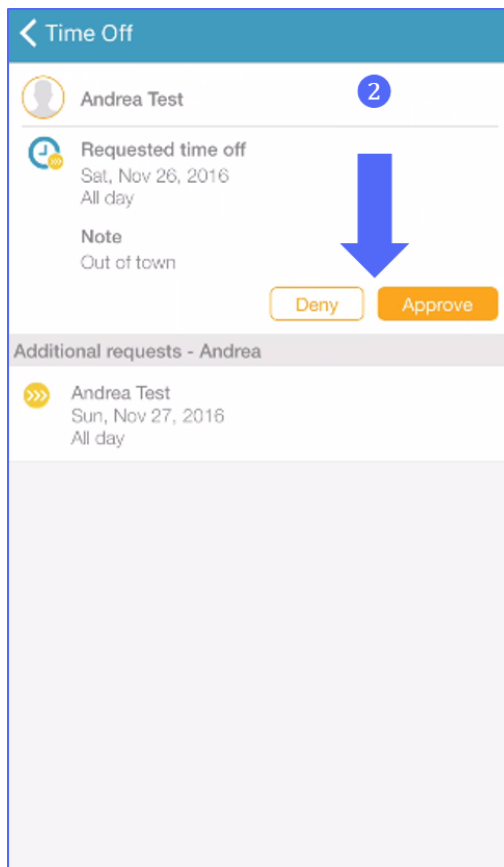
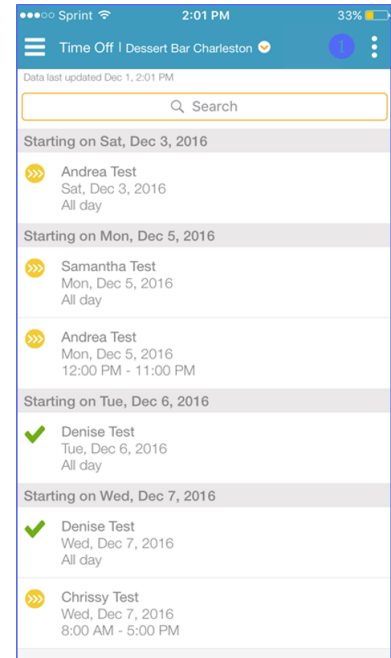
+ TIME OFF REQUESTS - APPROVE OR DENY

Follow these steps to approve or deny a Shift Offer request:

1. Click on the **Team Member's name**.
2. The details of the time off request will display. You will see the following items:
 - o Requestor's Name, Time Off Date, Start & End Times or All Day, Position
 - o Tasks and Note, if applicable
 - o Additional Time Off Requests for the individual
 - o From here, you can click **Approve** or **Deny**.

Click **Approve** or **Deny**.

3. A new screen will appear depending on your selection. You can enter a reply up to 144 characters. When finished, click **Approve** or **Deny** in the top right. You will see a summary of the approval or denial. Click **Done** to take further action or return to other Time Off Requests.



Support Resources

- PeopleMatter's Support Team is available to assist you in a variety of ways.

Knowledge Base	The Knowledge Base is available at help.fourth.com access How To Articles.
Support Team	See how to get in touch here: Contact Us: Customer Support