

STANDARD OPERATING PROCEDURE

How to schedule drivers by performance, week by week.

Seven steps that build next week from your needs and your Scorecard: the best drivers first, no fifth day by accident, a backup every day, a steady posting day and a payroll file nobody retypes.

PORTALS	Scheduling, Scorecard, General
ROLES	Manager, Dispatcher, Owner
HOW OFTEN	Weekly, As needed, Every pay period
PAGES USED	Auto Schedule, Schedule, Availability, Associates
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READ ONLINE	ultimatedsp.com/knowledge/scheduling

What this SOP fixes

- The week is built by hand, from memory.
- Anyone can get a shift, good driver or bad.
- Availability lives in text messages.
- A fifth day slips in and turns into overtime.
- Payroll gets a retyped copy of the schedule.

How to use it: read sections 1 to 6 once. Then run section 7 on the rhythm in section 6, and print the checklists in section 11 for the wall.

Contents

1. Purpose and scope	2
2. Why this matters	3
3. What good looks like	3
4. Roles and responsibilities	3
5. Before you start	4
6. The rhythm	4
7. The procedure, step by step	5
8. The three numbers to watch	12
9. Common mistakes	12
10. When to escalate	12
11. Printable checklists	13
12. Terms used in this SOP	14
13. Related SOPs	14

1. Purpose and scope

This SOP builds the weekly schedule by performance, inside the hours cap, with a backup for every day, and gets it to drivers and payroll without retyping. The best drivers get their shifts first, drivers with overdue coaching are skipped, and chronic callouts lose days only after coaching.

It is written for the manager and dispatcher who build the week and the owner who sets the rules. Ultimate DSP generates, edits and exports the schedule. It does not publish it or message drivers about shifts.

This SOP covers

- Drafting next week from your needs.
- Ranking drivers by Scorecard net score.
- The hours cap, and the fifth-day problem.
- A backup driver for every day.
- A fixed posting day.
- Cutting days for chronic callouts, after coaching.
- Exporting the week to payroll.

It does not cover

- Rostering drivers to Amazon's work blocks in Amazon's tools each day.
- Morning dispatch and callouts on the day. That is the SOP Daily dispatch.
- Punches, overtime pay and payroll itself.

2. Why this matters

Most DSP schedules are built by hand, from memory and text messages. The week that comes out gives shifts to whoever asks, slips in overtime and gets retyped for payroll. Five gaps cause it:

THE PROBLEM	WHAT IT COSTS YOU
The week is built by hand, from memory	Hours go into building instead of fixing, and gaps are found on the day.
Anyone can get a shift, good driver or bad	Weak drivers run as many routes as your best, and your best drivers leave.
Availability lives in text messages	Drivers are scheduled on days they cannot work, and the callouts follow.
A fifth day slips in	It is paid as overtime, and nobody decided to pay it.
Payroll gets a retyped copy	Typos change hours and pay, and fixing them costs time and trust.

3. What good looks like

- Next week is drafted as soon as Amazon's work blocks are out.
- The best-ranked drivers get their shifts first, and drivers with overdue coaching are skipped.
- No driver gets a fifth 10-hour day that nobody decided on.
- Every day has a backup driver planned.
- Drivers get the week on the same weekday, every week.
- Payroll gets the schedule as a file, not a retyped copy.
- The week is posted on time, every week.
- Overtime in the schedule is planned, never accidental.
- Payroll starts from the same week the drivers were given.

4. Roles and responsibilities

ROLE	WHAT THEY OWN IN THIS SOP
Manager	Builds the week in Auto Schedule, edits it on Schedule, plans backups, handles chronic callouts and exports to payroll.
Dispatcher (Operations)	Can run Auto Schedule, edit Schedule and export, and fills backup slots.
Owner	Sets the posting day and the ranking, and decides on any fifth day or planned overtime.
Sub Admin	Has the same rights as the Owner on these pages.
Finance	Has no access to Scheduling, and receives the payroll file.
Driver	Sees no schedule in Ultimate DA, and gets the week through your posting channel.

5. Before you start

Set these up once. Every step below assumes they are in place.

TASK
☐ Create your shift templates with their start times and lengths, including a Standby template.
☐ Import the roster with names, Transporter IDs, Paycom EE codes and start dates, and add ADP file numbers and qualifications on each driver's record.
☐ Set each driver's weekly availability pattern, and record approved time off.
☐ The first time, import last week's schedule in Availability, so rolling hours are right on the first run.
☐ Check the hours cap and ranking rules in Auto Schedule.
☐ Lock the payroll calendar in Payroll Setup.
☐ Fix your posting day and your cut-off for day-off requests.

6. The rhythm

When each part of the procedure happens, who does it and on which page.

WHEN	WHAT	WHO	WHERE
When Amazon's blocks are out	Type the needs, run Auto Schedule, send the draft	Manager or Dispatcher	Auto Schedule

WHEN	WHAT	WHO	WHERE
Every week	Check the rank order and the skip reasons	Manager	Auto Schedule
Every week	Check week hours, fill standby slots, clear hard issues	Manager or Dispatcher	Schedule
Fixed posting day	Share the week with drivers	Owner or Manager	Your channel
As needed	Coach chronic callouts, then cut days and exclude with a reason	Manager	Associates, Schedule, Auto Schedule
Every pay period	Export the week to payroll	Manager	Schedule

7. The procedure, step by step

Seven steps: five every week, one as needed and one every pay period. Ultimate DSP builds, edits and exports the schedule. Sharing it with drivers happens through your own channel.

1 Build next week as soon as Amazon's work blocks are out

Weekly

Where Scheduling · Auto Schedule **Who** Manager or Dispatcher

WHY THIS STEP MATTERS

The earlier the week is drafted, the more time there is to fix gaps, line up backups and post it. A draft built from the real needs replaces an afternoon of building from memory.

HOW TO DO IT

1. Open Scheduling, then **Auto Schedule**, and pick the week in **Target week**. Each week shows Has a draft or Empty.
2. In Needs, type the headcount for each shift template and day, from the work blocks you accepted. Untick a day to skip it.
3. Open Coverage review and compare needed, eligible and available for each day.
4. Click **Run Auto Schedule**. If a draft already exists, keep manual shifts and swaps ticked, then click **Run and replace**.
5. On Result, read the coverage grid for missing slots.
6. Click **Send to Schedule**, then **Send**.

WHAT TO CHECK

- Needed total matches the work you accepted.
- Every day is filled, or you know which slots are missing.

- The draft is live on Schedule.

Done when: The run shows the week filled against your needs, and the draft is on Schedule.

IF SOMETHING IS WRONG

- The toast says the matrix is all zero: type the needs first.
- A Needs cell is amber: fewer drivers are eligible than needed. Check availability and exclusions, or plan to fill it by hand.
- Coverage grid cells are red or amber: those slots stayed open, and they show in Schedule's Unassigned pool.
- The needs do not come from Amazon: type them from the blocks you accepted, and keep your capacity in Amazon's tools current.

KEEP A RECORD

Every run logs each pick, and each skip with its reason. The needs save per week, and next week's cells start from the last run's values.

2

Give the best-ranked drivers their shifts first

Weekly

Where Scheduling · Auto Schedule **Who** Manager or Owner

WHY THIS STEP MATTERS

When anyone can get a shift, good driver or bad, the weak drivers run as many routes as the strong ones. Ranking by score gives the most work to the drivers who earn it, and good drivers who never get enough shifts leave.

HOW TO DO IT

1. In Auto Schedule's Rules card, open Ranking.
2. Check that **Ranking source** is **Scorecard net score**.
3. Read the coaching gate row. It names the drivers the run will skip for overdue coaching.
4. Run, then read Rank, Score and Tier in the assignment log, and the reasons in Skipped DAs.

WHAT TO CHECK

- Rank 1 is your strongest driver by Scorecard net score.
- Every skipped driver shows a reason: Blocked, Not qualified, Excluded, At cap, Dept cap, Unavailable or Below cut.
- On Schedule, the rows open in rank order.

Done when: The assignment log starts with your best-ranked drivers, and drivers below the cut are listed with that reason.

IF SOMETHING IS WRONG

- A strong driver shows Below cut: the needs were filled before the run reached them. Add a need, or give them a shift by hand.
- A driver shows Blocked: they have overdue coaching, and they are back in the pool once they acknowledge it.
- A driver's tier chip looks wrong for their rank: the tier is a label only, and it never changes the ranking or blocks a shift.

KEEP A RECORD

The run's assignment log keeps each pick with its rank and score.

3**Keep full-time drivers to four 10-hour days**

Weekly

Where Scheduling · Schedule **Who** Manager or Dispatcher

WHY THIS STEP MATTERS

More than four 10-hour days in a week means overtime, and some states also pay daily overtime. The fifth day usually arrives by accident: an extra shift, an on-call pickup or a swap. Reading the week hours before placing a shift catches it before it is paid.

HOW TO DO IT

1. In Auto Schedule's Rules, keep the hours cap rule under Work Hour Compliance ticked, so runs skip drivers at the cap.
2. Count days as well as hours: a driver on four 10-hour days is already at 40 hours.
3. On Schedule, read the week hours on each driver's row before adding a shift. Dragging a shift shows the new total.
4. When you add a shift by hand, read the rule check in the dialog. A shift over the cap is refused.
5. Before an on-call pickup or a swap gives someone a fifth day, decide whether you accept the overtime.

WHAT TO CHECK

- No row's week hours are red.
- Amber rows get no extra shifts without a decision.
- Drivers who regularly finish early are considered for a shorter fifth day instead of a full one.

Done when: No driver's week hours are red, and no one has a fifth 10-hour day you did not plan.

IF SOMETHING IS WRONG

- A drop is refused with a reason about the cap: that shift would put the driver over. Pick another driver.
- Week hours are amber: the driver is near the cap. Add only short work, or none.

- The hours here are scheduled hours, not worked hours: worked hours and overtime come from payroll.

KEEP A RECORD

A shift placed with a warning keeps the reason you gave, with your name.

4

Set a backup driver for every day

Weekly

Where Scheduling · Schedule **Who** Manager or Dispatcher

WHY THIS STEP MATTERS

Callouts happen every week. A backup planned with the schedule turns a callout into a swap instead of a dropped route. A backup found on the morning itself is a phone call that may not be answered.

HOW TO DO IT

1. In Auto Schedule's Needs, set the **Standby** row to at least one for every day.
2. On Schedule, open the **UNASSIGNED** pool and find the open standby chips.
3. Drag a chip onto a driver's day, or click an empty cell's **+** and pick the standby slot.
4. Or click **+ Add shift**, pick the driver, the Standby template and the days, and click **Add shift**.
5. Avoid backups who already have four days: being called in gives them a fifth.

WHAT TO CHECK

- Every day header shows scheduled equal to needed.
- Every standby chip in the pool is filled.
- No backup would be on their fifth long day if called in.

Done when: Every day shows its standby slot filled, and no day header is amber.

IF SOMETHING IS WRONG

- A day header is amber: that day is short of what you planned. Fill the slot.
- The rule check warns about the Standby weekly cap: the driver already has a standby shift this week. Give a reason, or pick someone else.
- Needed will not go below filled: remove shifts first.

KEEP A RECORD

Each assignment confirms in a toast with Undo, and the day's roster, standby included, flows to Load Out.

5

Post the schedule on the same day every week

Weekly

Where Scheduling · Schedule **Who** Owner or Manager

WHY THIS STEP MATTERS

Drivers plan their lives around the schedule. A week posted late, or on a different day each time, is one of the reasons drivers quit. A fixed posting day costs nothing, and it keeps good drivers.

HOW TO DO IT

1. Fix your posting day, and tell every driver what it is.
2. Before that day, finish the edits on Schedule: needs filled and no hard issues left.
3. Share the week with drivers through your usual channel.
4. Set a cut-off for day-off requests before the posting day.
5. After posting, let a driver find their own cover only if the covering driver agrees in writing.
6. When you change a posted week, tell the drivers affected yourself. Changes send no message.

WHAT TO CHECK

- The week was posted on the fixed day.
- Day-off requests after the cut-off were handled by your rule.
- Every driver affected by a change was told.

Done when: Drivers have next week's schedule on your fixed posting day.

IF SOMETHING IS WRONG

- The week still has hard issues on Schedule: fix them before posting.
- A shift changed after posting and nobody told the driver: Ultimate DSP sends no schedule messages, so call or text them.
- The Export button shows a red badge: hard violations remain in the week.

KEEP A RECORD

Nothing in Ultimate DSP records the posting, so note the date you posted. The export log records each file sent to payroll.

6

Cut days for drivers who keep calling out, after coaching

As needed

Where Scheduling · Schedule **Who** Manager

WHY THIS STEP MATTERS

Chronic callouts cost routes, standby pay and your best drivers' patience. Coaching first keeps it fair and on record. Cutting days after that is the consequence, and giving the days to reliable drivers is the reward.

HOW TO DO IT

1. Open General, then **Associates**, and the driver's record. Click **+ Log Event** and record the callout against your attendance standard.
2. Click **Assign Coaching**, pick the module, set the days to finish it and keep **Blocks Shift When Overdue** on.
3. If the callouts continue after the coaching, open Schedule and remove shifts with the remove button on the shift, or right-click it and choose **Remove shift**.
4. To stop future runs from scheduling the driver, add them to Excluded DAs in Auto Schedule, with a reason.
5. Give the freed days to your most reliable drivers.

WHAT TO CHECK

- Each callout has an event on the driver's record.
- Coaching was assigned, and finished, before days were cut.
- Every exclusion has a reason.

Done when: The driver has events and coaching on record, and their reduced days are on the schedule with a reason.

IF SOMETHING IS WRONG

- The exclusion warns that the driver still holds shifts: exclusion does not remove existing shifts. Remove them on Schedule.
- Adding an excluded driver by hand gives a soft warning: give a reason, or pick someone else.
- The driver shows Blocked: their overdue coaching already keeps them off the schedule until they acknowledge it.

KEEP A RECORD

The events and the coaching stay on the driver's record, and the exclusion shows its reason on Auto Schedule and on the driver's Schedule row.

7

Send the schedule to payroll without retyping it

Every pay period

Where Scheduling · Schedule **Who** Manager or Dispatcher

WHY THIS STEP MATTERS

A schedule retyped into payroll is a schedule with typos in it: wrong days, wrong hours, wrong people. Exporting the file means payroll starts from the same week the drivers were given.

HOW TO DO IT

1. On Schedule, click **Export**.
2. Pick the preset, **Paycom**, **ADP** or **Generic**, and the format, CSV or XLSX.
3. Set the range, and choose whether to include approved time off and unfilled slots. Keep scores and ranks off for payroll.
4. Read the preview and the warnings: hard violations, drivers with no payroll code, and days that export as both a shift and time off.
5. Click **Download**, and import the file into Paycom or ADP.
6. The first time, check the file's columns against your payroll system's import template.

WHAT TO CHECK

- No driver in the warnings is missing a payroll code.
- No day exports as both a shift and time off.
- The file's range matches the pay period.

Done when: The file is downloaded and imported into payroll, and a new row is in the export log.

IF SOMETHING IS WRONG

- Some rows have no Paycom or ADP code: set the code on the driver's record, then export again.
- A day exports as both a shift and time off: fix it on Schedule or in Availability, or payroll pays both.
- Hard violations are listed: fix them first. Exporting anyway needs a tick, and payroll gets the week as it is.
- The export carries scheduled hours: worked hours come from punches in payroll.

KEEP A RECORD

The export log keeps every file with its date, preset and range, and **Download again** returns the same file.

8. The three numbers to watch

Read these numbers on the cadence in the rhythm table. Each one tells you whether the procedure is working.

NUMBER	WHAT IT TELLS YOU	ACT WHEN
Coverage	Filled slots against needed slots, for each day of the week.	A day is short: fill the Unassigned chips before posting.
Week hours	Each driver's scheduled hours, amber near the cap and red over it.	A driver is amber: add no long shifts without a decision.
Export warnings	Hard violations, missing payroll codes and days booked as both a shift and time off.	Any warning shows: fix it on Schedule or the roster before downloading.

9. Common mistakes

MISTAKE	WHY IT HURTS	DO THIS INSTEAD
Building the week from memory.	Good drivers are missed, and gaps are found on the day.	Draft it in Auto Schedule from your needs.
Ranking by seniority, or by who asks first.	Weak drivers get as much work as your best.	Rank by Scorecard net score.
Adding a fifth day to cover a gap.	It becomes overtime at payroll.	Check week hours, and use a backup instead.
Planning no backup.	A callout becomes a dropped route or a scramble.	Plan a standby shift for every day.
Posting on a different day every week.	Drivers cannot plan, and good ones leave.	Post on the same weekday, every week.
Retyping the schedule into payroll.	Typos change what people are paid.	Export the file from Schedule.

10. When to escalate

- The week cannot be filled without going over the hours cap: the owner decides between hiring, accepting the overtime or declining work with Amazon.
- Good drivers keep landing below the cut: the owner reviews the needs, and whether to add shifts for them.
- A driver's callouts continue after days are cut: the manager takes it to the owner for a decision.

- Payroll flags differences with the export: the manager checks the roster codes and the week before the next export.

11. Printable checklists

Print this page and pin it where the work happens. Tick each line and initial it. Keep the sheet with the day's records.

Every week

Date or week of: _____ Checked by: _____

TASK	DONE BY
☐ Needs typed for every template and day	
☐ Auto Schedule run and draft sent	
☐ Rank order and skip reasons checked	
☐ No week hours red	
☐ A standby slot filled for every day	
☐ No hard issues left	
☐ Week posted on the fixed day	

Every pay period

Date or week of: _____ Checked by: _____

TASK	DONE BY
☐ Export preset and range checked	
☐ No missing payroll codes	
☐ No day exported as both a shift and time off	
☐ File downloaded and imported into payroll	

12. Terms used in this SOP

TERM	MEANING
Work blocks	The units of Amazon route work you accept for the coming period.
Shift template	A named shift with a code, a start time and a paid length, such as Standby.
Needs	How many drivers each shift template needs on each day.
Draft	The week a run writes into Schedule. It stays editable.
Ranking source	What Auto Schedule ranks drivers by, such as Scorecard net score.
Below cut	Skipped because higher-ranked drivers filled the need.
Hours cap	The most hours a driver can be scheduled inside the rolling window.
Hard, Soft	A hard rule refuses the shift. A soft rule allows it with a reason.
Excluded DAs	Drivers held out of Auto Schedule runs, each with a reason.
Export log	The record of every schedule file sent to payroll.

13. Related SOPs

- Stop overtime early: ultimatedsp.com/knowledge/stop-overtime-early
- Daily dispatch: ultimatedsp.com/knowledge/daily-dispatch
- Get Fantastic+: ultimatedsp.com/knowledge/get-fantastic-plus

About this SOP

Written by an Amazon DSP that runs these procedures every day, using the pages of Ultimate DSP. Amazon's program policies, your DSP agreement and the law come first: where they differ from this SOP, follow them. Page names and on-screen labels match Ultimate DSP as of September 2026. The latest version is online at ultimatedsp.com/knowledge/scheduling.