PBS: Review of Set Condition Minimum Credit

Following last month's use of a limit to the maximum number of bidders who were awarded their request for Minimum Credit and the unexpected negative consequences this had on some crew members' block awards, we would like to review specific PBS processing logic in conjunction with the *Set Condition Minimum Credit* and multiple bid groups using the *Clear Schedule Start Next Bid Group* (*CSSNBG*) instruction.

Negative block award consequences related to the limitation of the Minimum Credit bidders could only have occured for members using **both** *Set Condition Minimum Credit* and the *Clear Schedule Start Next Bid Group* (*CSSNBG*) instruction in the same Pairings bid group.

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Limit to the maximum number of Minimum Credit bids honored

There are times when in order to meet operational requirements, the number of Minimum Credit bidders must be limited. This would be done if the number of Minimum Credit bidders is such that there are not enough blocks awarded to sufficiently cover the flying at that base and/or the required reserve coverage is not met.

When the number of Minimum Credit bidders is limited, the most senior crew members will not be affected by the limit. Everyone junior to the limit who used *Set Condition Minimum Credit* will have "*Maximum Min Credit Bidders Reached*" displayed below their *Set Condition Minimum Credit* bid line in their Reasons Report. Once the limit for minimum credit bidders is reached, PBS can no longer honour the request for Minimum Credit for anyone affected by the limit.

> ⚠️ If PBS cannot honor a request for Minimum Credit, it will continue to read your bid and award you pairings as if the Minimum Credit request was not made, so long as you do NOT have *Clear Schedule Start Next Bid Group* in the same bid group.

> ⚠️ If PBS cannot honor a request for Minimum Credit and you are using BOTH *Set Condition Minimum Credit* AND the *Clear Schedule and Start Next Bid Group* instruction in the same bid group, PBS will honor the *CSSNBG* instruction and jump to the next bid group.

Conditions

Conditions are global parameters for PBS and apply to the entire bid group in which they are added. Conditions include *Maximum/Minimum Credit*, *Pattern*, *Minimum Days Off In A Row*, *Consecutive Days Off In A Row*, *Days Off With/Opposite Employee* and *No Same Day Pairings*. **Conditions** are always placed above the first Award Pairings bid line and **cannot be forgotten**.

Set Condition Minimum Credit

The Minimum Credit Window is set to five (5) hours from the minimum limit for the month, (71-76 in an 80-hour month or 76-81 in an 85-hour month). Therefore, if you bid Minimum Credit in your bid group, PBS will attempt to honour the window.

A Minimum Credit request will not supersede your bid preferences. It works more like a "switch" that stops PBS from reading your bid lines once the minimum limit has been passed. That is to say that while pairings are awarded to you, as PBS reads your bid lines and while you remain below the minimum credit window for the month, PBS will continue to read your bid lines in priority order and award you pairings according to your bid line requests. Once you approach the minimum credit window, PBS will NOT search for a pairing, or bid line that will just put you in the window. Bidding Minimum Credit does not guarantee that you will have less hours than those junior to you.

Ex: The minimum credit window for month X is 71-76 hours, maximum 80. So far, according to your bid lines, PBS has awarded you 65h40. Your next AWARD bid line asks for an overseas. A pairing matching your request is available in the pairings pool with a credit of 14h20. PBS may award you that pairing giving you a total of 80h00. The result is that PBS will have considered having honoured your Minimum Credit request (stopped reading bid lines once you pass the minimum credit limit).

 PBS will abandon the current bid group and move to the next bid group if **ANY** Set Condition (including Minimum Credit), Prefer Off or Avoid cannot be honored within a bid group which contains *Clear Schedule and Start Next Bid Group*. It will also abandon the bid group if a bid line with an *Else Start Next Bid Group* cannot be honored.

PBS Processing logic

PBS uses a set of automatic processes to complete your block. The goal of PBS is always to award you a block based on your bid sheet that matches your preferences. While doing so, the airline's requirements including pairing and language coverage must also be considered when necessary.

It is important to remember that PBS does not take an "overall" snapshot at your bid sheet and award pairings that it believes matches most of what you are requesting. PBS actually reads your bid sheet line by line executing the instructions one at a time continuing only if necessary.

When PBS is processing your bid it starts at the top of your bid sheet. PBS then reads and executes your bid groups and the bid lines within them one at a time. As PBS reads your bid, within a bid group it will remember all restrictions you specify. **PBS must honor all *Set Condition*, *Prefer Off* and *Avoid Pairings* bid lines 100%** unless you later instruct the PBS Scheduler to Forget a bid line, or PBS enters Denial Mode.

When PBS reaches an Award Pairings bid line, it searches the pool of available pairings (now restricted by the removal of pairings by any prior *Prefer Off* and *Avoid Pairings* bid lines) and begins awarding pairings that match this bid line. PBS will perform a check before and after a bid line that will ensure that the block is legal and all *Set Conditions* are met.

If PBS has awarded as many pairings that match this Award bid line as it is possible to award (given its awarding processes) and your block is not complete, it moves on to the next bid line. PBS continues to read your bid sheet line by line until it completes your block or reaches the last bid line you entered.

If your block is still not complete when PBS reaches the last bid line you entered, it reads the embedded system-generated bid line Award Pairings at the end of your Pairings Bid Group and begins to fill your block by awarding any available pairings that respect your Set Conditions, Prefer Off and Avoid Pairings bid lines.

If your block is still not complete, PBS will use substitution, swapping and shuffling to complete your block. If this still does not produce a legal block, PBS will enter Denial Mode. See PBS Bidder's Guide 14-7 for further details on these processes.

> Using the Instruction *Clear Schedule and Start Next Bid Group* prevents PBS from going into the embedded Award Pairings bid line and subsequently Denial Mode if necessary to complete your block because of its forced placement directly above the embedded Award Pairings bid line.

Using multiple bid groups with Instruction *Clear Schedule and Start Next Bid Group (CSSNBG)*

Both of the following 2 criteria must be met in order for PBS to award a legal block from a bid group containing the *CSSNBG* instruction:

1. **ALL** Set Conditions (*Maximum/Minimum Credit*, *Pattern*, *Minimum Days Off In A Row*, *Consecutive Days Off In A Row*, *Days Off With/Opposite Employee* and *No Same Day Pairings)*, Prefer Offs and Avoids must be honored; **and**
2. PBS must be able to award enough flying from a bidder's Award bid lines to create a legal block <u>before</u> encountering *Clear Schedule and Start Next Bid Group* (CSSNBG).

As soon as one of the above criteria is not met, PBS will honor the *CSSNBG* request, remove all pairings awarded up to that point and begin processing the next bid group**.**

CSSNBG is an "all or nothing" approach to bidding. PBS must be able to honour all of your restrictions (Set Conditions, Prefer Offs and Avoids) and at the same time create a legal block from your Award Pairing bid lines. If any of your restrictions cannot be honored, PBS will honour the *CSSNBG* instruction and jump to the next bid group. If you do not ask for enough flying available at your seniority to create a legal block, PBS will honour the *CSSNBG* instruction and jump to the next bid group.

Using *CSSNBG* can be an effective tool if you want PBS to attempt to create you your "perfect" pre-designed block or you want to request multiple distinct scenarios first. However, both of these strategies require planning and forethought. In either case, it is <u>strongly recommended</u> that your final Pairings Bid Group should **NOT** contain *CSSNBG*. Your last Pairings Bid Group should be your back-up plan in case a legal block is not possible from a higher bid group. This last Pairings Bid Group should contain all of your preferences in order. This will allow PBS a last chance to create you a block to the best of its abilities while following its automated processes, including Denial Mode if necessary. Getting as much of what you want as possible is a better outcome than PBS awarding your entire block from the blank embedded Pairing Bid Group.

> You are NOT required to use multiple bid groups. Using multiple bid groups is optional and requires planning and forethought to be used to their full potential.

> It is **not** advisable to use the *Clear Schedule and Start Next Bid Group* instruction in a bid group just above the embedded *Pairing Bid Group + Award Pairings* bid lines. If used this way and triggered, your block will be awarded from the embedded *Pairing Bid Group*. This is the same as a blank Pairings bid.

> It is **not** advisable to use the *Clear Schedule and Start Next Bid Group* instruction in a bid group just above a numbered *Award Reserve* bidline. If used this way and triggered, you will be awarded Reserve (unless forced on a block for language). You will not be giving PBS the chance to create you a legal block with as many of your preferences as possible.

> If you are, or plan on buddy bidding then it is recommended that you **not** use Clear Schedule and Start Next Bid Group.

Bidding Strategies:

If you are currently using both *Set Condition Minimum Credit* and the *Clear Schedule Start Next Bid Group* instruction in the same bid group, you may want to critically evaluate the need for one or both.

I want to keep using both *Set Condition Minimum Credit* and the *Clear Schedule Start Next Bid Group* instruction in the same bid group. How can I protect myself from being negatively affected by a possible limit to the amount of Minimum Credit bids PBS will honour?
Structure your bid so that if your first Pairings Bid Group contains both *Min. Credit* and *CSSNBG*, the next bid group entered is identical except **without** the *Set Condition Minimum Credit*. Your 3rd Pairings bid group can then contain both *Min Credit* and *CSSNBG* again as long as it's followed by another identical bid group without the *Set Condition Minimum Credit.* This pattern of one bid group with *Min. Credit* followed by an identical bid group without *Min. Credit* can be continued as necessary or until you reach the maximum 150 bid lines. Regardless of how many Pairings bid groups you create, although you may have the *Set Condition Minimum Credit* in the last one, make sure it does NOT also contain the *CSSNBG* instruction.

What if I prefer to be awarded Reserve if I can't get the days off I want on a block? I believe I should be able to get them off on Reserve.
In your last Pairings Bid Group, do NOT use CSSNBG. Instead, attach Else Start Next Bid Group to your #1 Prefer Off bid line. Ensure your next bid group is a numbered bid line with Award Reserve. You will also need to create a Reserve Bid Group and add bid lines with your Prefer Offs, etc. If PBS cannot build you a block without having you work on this/these date(s), PBS will honor the request to go to the next bid group, Award Reserve, which will force PBS to jump over the embedded Pairing Bid Group/Award Pairings bid group and go straight to your Reserve Bid Group.

What if I prefer to be awarded Reserve and bypass the embedded bid lines?
You may keep the same format with the Set Condition Minimum Credit and the Clear Schedule Start Next Bid Group in the same bid group. You may then enter the Award Reserve bid line (sandwiched between the last Pairings bid group and before the embedded Pairing bid group). This way PBS will award you a block with only what is specified from the bid group or will send you to the Reserve section of your bid.

 PBS may not honour an Award Reserve request if required on a Pairings block for route language.

Bidding Support:

Your Local PBS Committee offers bidding assistance and support. Please reach out to them directly.

YUL: spp.pbs4091@gmail.com

YYZ: pbsyyz@gmail.com

YYC: pbs@local4095.ca

YVR: pbs@local4094.ca