SOP: Using the Service Technician Skills Matrix

1.0 Purpose

This document outlines how to use the Service Technician Skills Matrix. The purpose of this tool is to provide a quick, visual overview of our technicians' skills to assist in making informed dispatching and scheduling decisions.

2.0 Visual Quick Reference Guide

The main interface contains several key features. A screenshot with the following items labeled is available for reference.

- **Search Skill Box:** For finding specific skills or equipment.

- **Filter Dropdowns:** For narrowing the view by Technician or Category.

- **Technician Photo:** Clickable to open the detailed "Baseball Card" profile.

- **Info Icon (ⓘ):** Clickable to see a detailed list of equipment for a category.

- **Proficiency Badge:** Shows a technician's skill level from 1 to 5.

3.0 Glossary of Proficiency Levels

The proficiency levels on the matrix are defined as follows:

- **Level 5 (Master):** Considered a subject matter expert. Can train others and handle the most complex and unusual problems independently.

- **Level 4 (Expert):** Can work independently on all complex and common tasks. Can diagnose difficult issues and is a resource for others.

- **Level 3 (Advanced):** Can work independently on most common tasks and repairs. May need occasional guidance on highly complex or unusual issues.

- **Level 2 (Intermediate):** Has foundational knowledge but requires supervision or assistance for anything beyond routine tasks.

- **Level 1 (Beginner):** Has exposure to the skill but requires direct instruction and supervision to perform tasks.

4.0 Accessing the Matrix

The matrix is a self-contained file.

1. Navigate to the shared drive folder: Service Documents > Skills Matrix.

2. Double-click the file named **Service Technician Skills Matrix.html**.

3. It will open in your default web browser (e.g., Chrome, Edge).

5.0 How to Use the Matrix for Dispatching

5.1 To Find Who is Skilled in a Specific Technology

Use this when you need to see who can work on a particular piece of equipment (e.g., a "boiler" or "MAU").

1. Go to the **Search Skill** box at the top.

2. Type the name of the skill or equipment.

3. The table will instantly filter to show only the relevant skill rows.

5.2 To View a Technician's Full Profile

Use this to see all details for a specific technician, like their supervisor, certifications, or training history.

1. Find the technician in the table header.

2. Click on their **photo**.

3. Their detailed "Baseball Card" will pop up.

4. Click the **'X'** or the dark background to close the card.

6.0 Troubleshooting

- **Problem:** The page is blank or the table with the technicians is missing.

- **Solution 1 (Browser Cache):** The first and most common fix is to perform a **Hard Refresh**. Press **Ctrl + Shift + R** on your keyboard to force the browser to load the latest version of the file.

7.0 Document Information

- **Point of Contact:** For any questions or issues with the matrix, please contact Jennine Israel (Service Operations Manager).

- **Update Frequency:** Skill proficiency data is formally reviewed and updated annually, following performance reviews.