Dynamic Dispatch Policy and Procedure

Scope

The Dynamic Dispatch Policy and Procedure provides direction for managing work orders (i.e., moving, pinning, and scheduling) in all FS Scheduler markets, and for utilizing the provisioning team's distribution list. This policy is designed to provide the highest level of service to our clients by placing the utmost focus on their customer, the end-user of the service.

Policy

Dynamic Dispatch will utilize FS Scheduler to provide optimal routing of work orders. FS Scheduler's Background Optimizer (BGO) will route Technicians. Dynamic Dispatch will monitor, manage, and assign unscheduled work.

Manual routing shall be minimized and limited to use only in approved situations. Site Managers may perform manual moves in extreme situations or when activities are bulk fed. Under no circumstances are Site Managers or Supervisors permitted to inform a Technician of a scheduled job (soft-booked work order) before the BGO dispatches the activity.

Routing an Idle Tech

When a Technician is idle and ready to be dispatched another job, the Technician will send a text message to Dynamic Dispatch that includes the word "IDLE" and their Tech ID. Dynamic Dispatch will have up to 15 minutes to locate and dispatch an available job within the Technician's radius. If the request is not assigned within 15 minutes, an escalation call will be sent to Dynamic Dispatch.

Technicians are typically provisioned with a 10-mile buffer between their "actual" radius and their "relaxed" radius. Dynamic Dispatch will utilize FS Scheduler's "Schedule Idle Technician" function to search for work in the Technician's relaxed radius (i.e., right click and select "Schedule Idle Technician"). Dynamic Dispatch must obtain the Supervisor's or Site Manager's approval before assigning a job that is outside of the technician's radius. Dynamic Dispatch should utilize a filter for viewing scheduled work, and refer to it when a tech is idle. If no more work is available within the Technician's radius, see the "Tech End of Day" procedure.

Pinning

Dynamic Dispatch is responsible for:

- Pinning and assigning work orders.
- Pinning jobs within the established time frame.
- Pinning jobs in accordance with the Technician's skill package.

Dynamic Dispatch Policy and Procedure

- Obtaining the Supervisor's or Site Manager's permission before pinning jobs outside of the established time frame or outside of the technician's skill package.

- Locating and pinning any unscheduled a.m. appointments

    o This process must begin at 11 a.m. local time.

    o Contact the Supervisor or Site Manager to obtain approval.

    o In cases of higher than normal UNSCHEDULED work orders, Dynamic Dispatch may contact the Supervisor or Site Manager and ask for permission to move up the start time.

- Locating and pinning any unscheduled 12-4 p.m. appointments

    o This process must begin at 3 p.m. local time

    o Contact the Supervisor or Site Manager to obtain approval.

    o In cases of higher than normal UNSCHEDULED work orders, Dynamic Dispatch may contact the Supervisor or Site Manager and ask for permission to move up the start time.

Dynamic Dispatch must avoid stacking multiple jobs on a Technician for the same time frame. An exception may be allowed when there is a clear opportunity for the Technician to arrive within the appointment window. In the event a job must be pushed to a new time slot, it must remain in the same day in order to avoid negatively impacting client-established metrics (i.e. Same Day Completion Rate).

Prior to performing an intra-day reschedule:

- Dynamic Dispatch must call the customer to confirm they will be available.

- Add a note on the account that the customer agreed to the reschedule.

    o If the customer is upset and needs a specific time, Dynamic Dispatch must call the Supervisor or Site Manager to see if a Technician can handle the special request.

- After pinning work to the Technician, Dynamic Dispatch **must call and notify the Technician**.

- All contractor work must be pinned by 7 a.m.

- Dynamic Dispatch must monitor each pinned work order, and continuously verify that jobs are pinned to the BEST available Technician (i.e., other Technicians may become available that are closer to the customer, have the required skill pack, etc.).

- Supervisors are responsible for pinning Commercial, Tier 3, Case Management, and VIP jobs.

    o Supervisors will pin the jobs the night before. Agents should NOT move any pinned job unless notified to do so by the Supervisor or Site manager.

    o Agents MUST get advice from the Supervisor or Site Manager for handling any unscheduled Commercial, Tier 3, Case Management, and VIP jobs.

Dynamic Dispatch Policy and Procedure

Pull Forwards

The Supervisor or Site Manager may submit requests to pull jobs forward. Dynamic Dispatch should work the same-day reschedules and cancels first to see if the customer may want another time frame in the same day.

Tech End of Day

If there is no additional work for the Technician, the Technician may call in or chat in. Dynamic Dispatch will attempt to find a job before calling the Supervisor or Site Manager for End of Day (EOD) permission.

- Agent should first look at Technician's route, unscheduled, and any jobs still available within that technician's radius. If no jobs are left to move and/or dispatch, then Dynamic Dispatch should contact the Supervisor or Site Manager for permission to add the EOD exception on the Technician.

    o Right click and select "Schedule Idle Technician".

    o Look at routed jobs for today in the same time frame.

    o Look at unscheduled jobs in the same time frame.

    o Look at dispatched p.m. work.

    o Look at p.m. scheduled and unscheduled work. Call the customer to see if the customer is available for current time frame.

- Dynamic Dispatch will contact the Supervisor and Site Manager using chat. If no response is received, Dynamic Dispatch will three-way call the Supervisor or Site Manager.

- An EOD **until 8 p.m.** must be placed on a Technician that finishes early. This will prevent any other jobs from being assigned to that Technician via a same-day booking or BGO.

Morning Verification

At 8 a.m. local time, Dynamic Dispatch must verify that all Technicians have acknowledged their first job of the day. This process is necessary to prevent missed exceptions and report Technician no call–no shows.

- If a job on an in-house Technician has not been acknowledged, then Dynamic Dispatch must notify the Supervisor and Site Manager via a chat message.
- If a job on a Contractor Technician has not been acknowledged, then Dynamic Dispatch must notify the Contractor Supervisor, or Contractor Principal.

Communication Process

- Dynamic Dispatch will follow this communication hierarchy when contacting the site:

Dynamic Dispatch Policy and Procedure

1. Supervisor (or backup Supervisor) via chat.

2. Supervisor (or backup Supervisor) via phone.

3. Site Manager (or Operations Manager, if the site has one) via chat.

4. Site Manager (or Operations manager, if the site has one) via phone.

5. General Manager (if the site has one) via chat.

6. General Manager (if the site has one) via phone.

- In accordance with this policy, Dynamic Dispatch will contact the Supervisor or Site Manager to approve all:
  - Holds
  - Reschedules
  - Cancels
- Supervisors and Site Managers are responsible for resolving all field-driven holds.