



Dispatch Manager & Algorithm Training Guide

Overview

The Dispatch Manager is an automated system designed to efficiently assign technicians to service requests. It uses a rules-based algorithm to prioritize assignments based on key qualifications and work conditions. This ensures the best-suited technician is selected for each job while promoting fairness and reducing burnout.

Pre-requisite Steps (Employee Setup)

Before using the Dispatch Manager effectively, ensure all employees are properly configured:

1. **Access Employee Section**
 - Under **Reports**, navigate to the **Employee** section on the **Admin Portal**.
 2. **Set Availability Schedule**
 - Select each employee's *availability* schedule for dispatching.
 3. **Assign Facilities**
 - Assign the facilities where each employee can be dispatched.
 4. **Mark Preferred Facilities**
 - Optionally, mark specific facilities as *preferred* for the employee to increase their priority in the algorithm.
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How the Dispatch Algorithm Works

Primary Assignment Criteria

When a service request comes in, the Dispatch Manager evaluates technicians based on:

1. **Schedule Status**
 - Only technicians who are *on schedule* are considered.
2. **Credential Verification**
 - The technician must be *credentialed* to perform the specific service.
3. **Preference Status**
 - Technicians *marked as preferred* for the facility or service are given higher priority.
4. **Employment Status**
 - *Full-time* technicians are given a higher score than *part-time* or *PRN*.

Assignment Process

- The algorithm calculates a score based on the above criteria.
 - For more details view: [Dispatch Algorithm Scoring - Breakdown.pdf](#)
- The technician with the highest score is selected and notified first.
- If the first technician does not accept the assignment, the algorithm loops to the next best-scoring technician and continues down the list.

Special Assignment Conditions

- **Auto-Assignment at Facility**
 - If a technician is *already at the requesting facility*, they are automatically assigned the new service request.



- **Burnout Prevention**
 - If a technician has completed *4 or more services within a 12-hour period* (unless they are shifted for a certain timeframe), they are temporarily removed from the queue to prevent burnout.

Escalation Process

- If no eligible technician accepts the request, the system enters **Escalation Mode**.
- In Escalation Mode, the **Market Manager** is directly notified.
- The Market Manager must then manually assign a technician using the Dispatch Manager.

Dispatch Manager Key Features

1. **Search and Filter Orders**
 - Within the **Dispatch Manager**, you can search and filter for specific service orders.
2. **Manual Assignment**
 - Select any order and manually assign an employee if needed.
3. **View Service Information**
 - Quickly access detailed service information for the specific request from the order page.
4. **View Log Button**
 - Click "**View Log**" to review a full log of triggers and events tied to the service request.
 - Inside the log, under the *Comments* tab, look for: "**Dispatch score table logged - click here to view**".



- Clicking this section shows:
 - All *available providers* in the order they are considered (top = first requested).
 - Provider-specific stats such as:
 - Distance to facility
 - Preferred facility status
 - Number of recent encounters
 - Etc.
 - This helps you understand and validate how the Dispatch Algorithm made its decision.
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Key Points to Remember

- Assignments prioritize availability, credentials, preferences, and full-time status.
- The system promotes fairness and prevents burnout.
- You have full visibility into how dispatch decisions are made via the logs.
- Manual assignment is always available as a backup option.