
Service Call Triage And Dispatch Procedure

1.0 Objective & Scope

The objective of this procedure is to ensure that all incoming service calls are triaged consistently, prioritized based on urgency and contractual obligations, and dispatched to the most appropriate field resource. This SOP applies to all dispatchers, service coordinators, and field operations managers responsible for managing service requests across Canadian sites.

Scope includes initial call intake, verification of customer and site details, assessment of service urgency, resource matching, dispatch confirmation, and documentation in the SiteQueue system. This procedure does not cover emergency response protocols for life-safety incidents, which are governed by separate emergency action plans.

2.0 Required Equipment & Tools

- Desktop or mobile device with SiteQueue dispatch dashboard access
- Customer relationship management (CRM) system or database for account lookup
- Digital map or routing software (e.g., Google Maps, Waze, or fleet routing tool)
- Two-way communication device (phone, radio, or push-to-talk app) for contacting field technicians
- Service call intake form (digital or paper) with fields for caller name, site address, contact number, issue description, and urgency level
- Standardized urgency matrix (printed or digital) defining priority levels: Emergency, Urgent, Routine, and Scheduled Maintenance
- Technician availability schedule or resource calendar
- Fleet vehicle inventory list with current location and status (available, en route, on-site, out of service)

3.0 Site Safety & Hazard Assessment

- Dispatchers must confirm that the site location is safe for technician entry before dispatching. If the caller reports active hazards (e.g., fire, chemical spill, structural damage), escalate immediately to emergency services and do not dispatch a technician.
- Technicians must be informed of any known site-specific hazards (e.g., confined spaces, electrical risks, heavy equipment operation) during the dispatch briefing.
- All field technicians dispatched must have appropriate PPE for the site type (e.g., hard hat, safety glasses, steel-toed boots, high-visibility vest) and verify they have it before departure.
- Dispatchers must verify that the technician's driving hours comply with Transport Canada Hours of Service regulations if the site is beyond normal travel range.
- In the event of severe weather warnings (e.g., blizzard, ice storm, tornado watch) along the travel route, the dispatcher must assess whether travel is safe and may delay or reschedule the service call.

4.0 Step-by-Step Execution Procedure

1. Receive the incoming service call via phone, email, or digital intake form. Capture the caller's name, company, site address, contact number, and a detailed description of the issue.
2. Verify the caller's account and site information in the CRM or SiteQueue. Confirm the service contract is active and covers the reported issue. If not, inform the caller of any potential charges and obtain approval before proceeding.
3. Assess the urgency of the service call using the standardized urgency matrix. Classify the call as Emergency (immediate threat to safety or critical operations), Urgent (significant disruption but no immediate danger), Routine (non-critical issue), or Scheduled Maintenance (pre-planned visit).
4. Check the technician availability schedule and resource calendar. Identify the nearest available technician with the appropriate skills, certifications, and equipment for the reported issue.
5. Review the fleet vehicle inventory to confirm a suitable vehicle is available and fueled. If the technician is already on-site at another job, estimate their completion time and determine if they can be dispatched directly from that location.
6. Contact the selected technician via phone or push-to-talk to brief them on the service call details, including site address, issue description, urgency level, and any known hazards. Confirm their availability and willingness to accept the dispatch.
7. If the technician accepts, create the service order in SiteQueue with all relevant details: caller information, site address, issue description, urgency classification, technician name, and estimated time of arrival (ETA). Assign the service order to the technician.
8. Send a confirmation to the caller via their preferred method (phone, email, or SMS) with the technician's name, ETA, and a brief description of what to expect. If the call is urgent, advise the caller of any steps they can take to prepare the site.
9. Monitor the technician's progress using SiteQueue's real-time status updates or GPS tracking. If the technician encounters delays (traffic, parts shortage, etc.), proactively notify the caller and adjust the ETA.
10. If the technician cannot complete the service call due to missing parts, specialized tools, or scope creep, document the issue in SiteQueue and escalate to the service coordinator or field operations manager for follow-up scheduling.
11. After the service call is completed, close the service order in SiteQueue. Ensure the technician has uploaded all required documentation (photos, notes, parts used) and that the caller has signed off digitally if required.
12. Archive the service order and all associated communications in SiteQueue for record-keeping and future reference. Update the technician's availability and vehicle status in the system.

5.0 Verification, Sign-off & Reporting

1. Verify that the service order in SiteQueue contains all required fields: caller details, site address, issue description, urgency classification, technician assignment, ETA, and completion notes.
2. Confirm that the technician has uploaded at least one completion photo showing the resolved issue or completed work, along with any parts used or replaced.
3. Obtain the caller's digital signature in SiteQueue to confirm satisfaction with the service and acceptance of any charges. If the caller is unavailable, document the attempt and follow up within 24 hours.
4. Generate a service call summary report from SiteQueue for the field operations manager, including call volume, average response time, and any escalations or unresolved issues.
5. If the service call required a return visit or parts order, create a follow-up service order in SiteQueue with a priority level and assign it to the appropriate technician or scheduler.
6. Archive the completed service order and all related communications in SiteQueue. Ensure the record is searchable by site address, caller name, and service order number for future reference.

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