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Revised By:	Joshua Graves	Review Cycle/Date:	Annual
Reviewed By:	Enterprise Technical Services Managers	Reviewing Unit:	Service Desk
Title:	Service Owner Case Assignment SOP		
Description:	This document is the operating standard for assigning cases to technicians once they have been assigned to a service team.		

Service Owner Case Assignment

Standard Operating Procedure

1. General Statement of Purpose

- 1.1 This standard follows **05.2.1 Service Owner Pre-Assignment Case Analysis** and shows the steps of assigning a case for service teams. Each service team will identify a Dispatcher that will be responsible for following this operating standard while assigning service cases within their team.

2. Scope

- 2.1 This standard is for the benefit of Dispatchers, whose job it is to assign cases. It can also be used as a training device to illustrate the steps of case assignment.

3. Discipline

- 3.1 Service Management

4. Terms and Definitions

- 4.1 Dispatcher – The role of an employee who analyzes and assigns a pending case.

5. Instructions

- 5.1. Dispatchers are responsible for monitoring cases assigned to a particular service team and assuring all cases are assigned within the set timeframe.
- 5.2. As cases are assigned to the service team, they should be assigned to a technician within the following timeframes:
- 5.2.1. Incident 1 – within 15 minutes (via warm handoff)
 - 5.2.2. Incident 2 – within 2 hours (via warm handoff)
 - 5.2.3. Incident 3 – within 8 hours
 - 5.2.4. Incident 4 – within 8 hours
 - 5.2.5. Service Requests – within 8 hours
- 5.3. Determine if the case can be worked using remote access tools.
- 5.3.1. If the case cannot be worked using remote access tools, determine if a technician is on-site, if a regional technician is available nearby or if a dispatch team needs to be engaged.
- 5.4. Determine if a specific technician was requested. If a specific technician was requested, look at their number of cases already assigned and the amount of work to be done on the unassigned case. If they can take another case, assign the case to the technician requested.

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- 5.5. Determine if specific technical skills are required. If so, look for a technician within the team with the specific technical skills. Refer to the Service Provider Skills Sheet, if provided by your supervisor.
- 5.6. Check cases related to the unassigned case. If there are multiple cases related by location, type of service or by person requesting service, assign it to the same technician as the other related cases, if the technician is available.
- 5.7. Assign the case to the technician based on the following:
 - 5.7.1. Technician's workload and capacity, by looking at the number of cases already assigned to each technician.
 - 5.7.2. Amount of work to be done on technician's uncompleted cases.
 - 5.7.3. Technician's calendar. Does the technician have any scheduled time off coming up? Will they be out of the office within the timeframe they can get their open cases completed?
6. Roles and Responsibilities
 - 6.1. Dispatcher – Responsible to progress through the necessary steps to assign the case to a technician.
7. Limitation or Implementation Notes
 - 7.1. To assign a case, the Dispatcher needs access to CRM.
8. References
 - 8.1. Dispatcher User Guide - located at: **J: Drive < Function < ISD Operating Standards** and on the OMES IS Process Library in Eclipse.
 - 8.2. Case Assignment Flow Chart - located at: **J: Drive < Function < ISD Operating Standards** and on the OMES IS Process Library in Eclipse.