Mobility Advisor – Dispatch Tickets

This job aid is intended for National Seating and Mobility employees to utilize when capturing all non-revenue generating activities completed by our technician and ATP teams.

Dispatch Tickets: A scaled-down Work Order intended to skip past any funding or system requirements for processing. Dispatch Tickets are used to ensure all non-revenue generated activities are captured while working to serve a client.

Examples of when to create a Dispatch Ticket:

- Assisting Client: Unlocking Joystick, verifying charging of the battery
- Aiding in the delivery of equipment from a clinic to a residence
- Follow-up on required paperwork
- Picking up or dropping off rental/loaner equipment
- Delivering Demos for ATP
- Reeducation of equipment operation
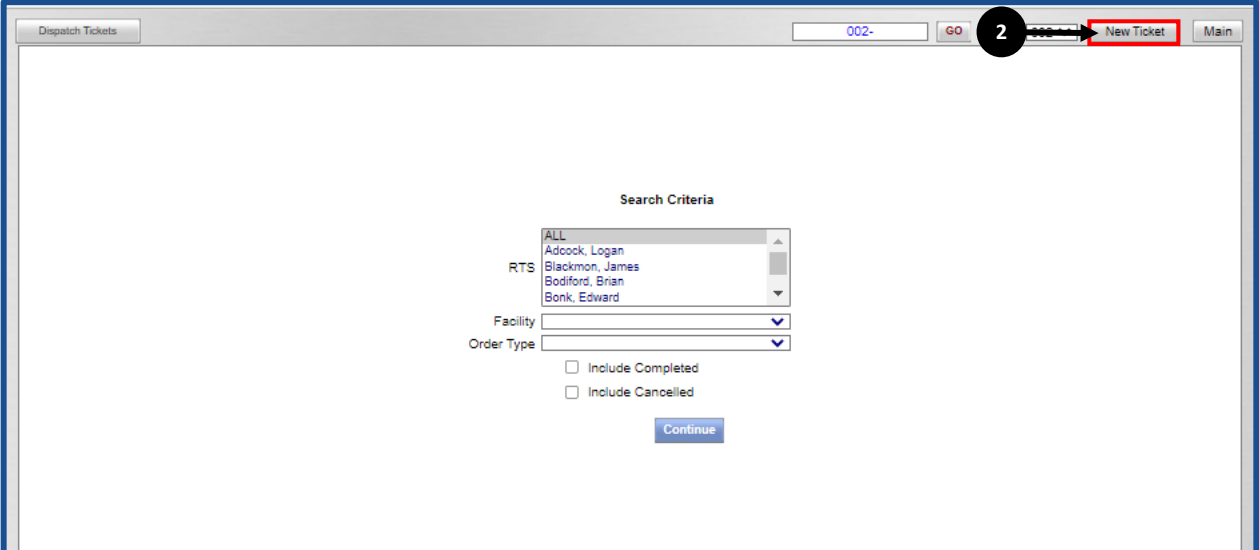- Adjustment for deployed equipment (headrest, armrest)

Opening A Dispatch Ticket via The Dispatch Ticket Queue:

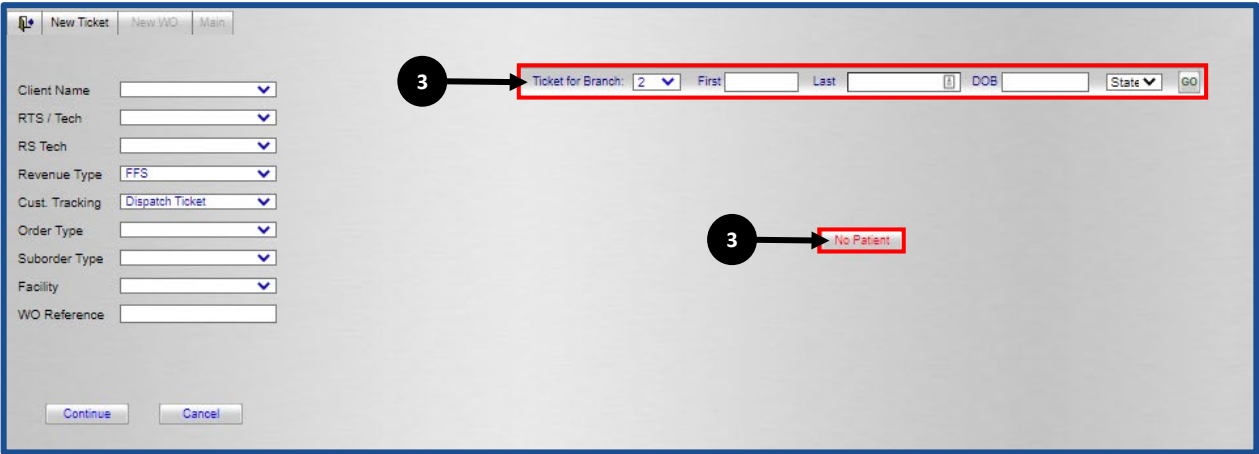1. Select **Dispatch Tickets Queue** from the Main Menu drop down.
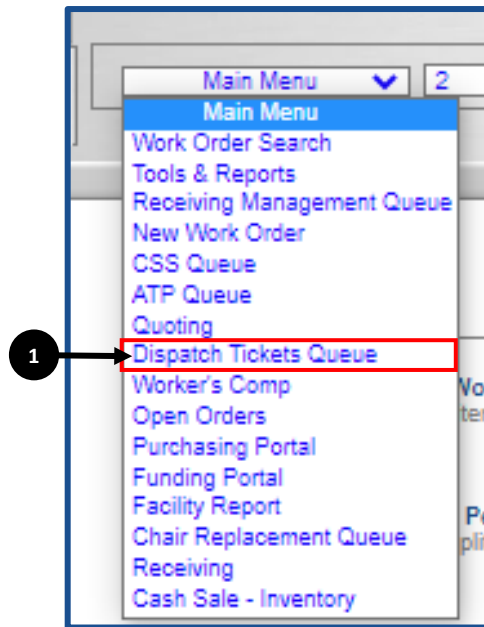
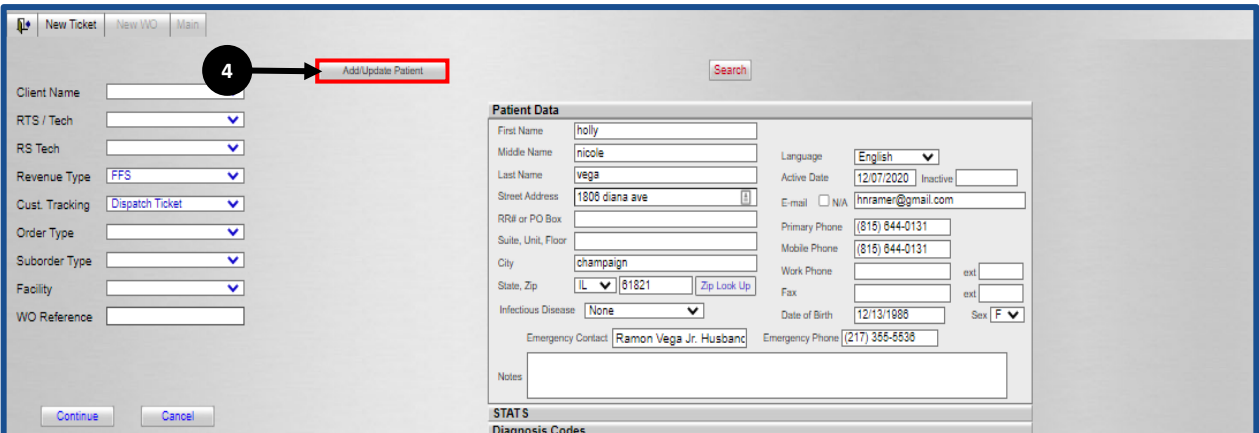# Mobility Advisor – Dispatch Tickets

2. Select **New Ticket**

3. Search for appropriate client using **Client Search** or create a new client record using the **New Patient** option

4. Once correct patient identified or entered, select **Add/Update Patient**

Mobility Advisor – Dispatch Tickets

5. Select the correct **RTS/Tech** from the drop down

6. Select the appropriate **Order Type** from the drop down

7. Select the appropriate **Suborder Type** from the drop down

8. Click **Continue**

Mobility Advisor – Dispatch Tickets

9. Complete all **Scheduled** information and **Location**

10. Click **Calendar** to add the appointment to the tech or ATPs calendar

11. Click **Update**
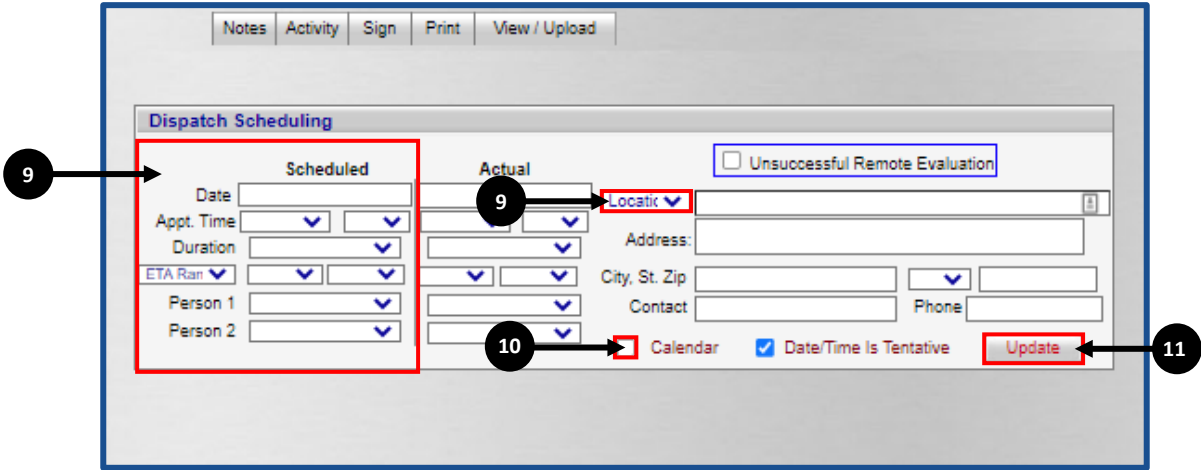
**Note:* Our Remote Service Specialist (RSS) are utilizing Dispatch Tickets to track successful remote evaluations for non-revenue generating activities. If RSS has been unsuccessful in completing a remote evaluation, but we do not know if an in person evaluation will result in revenue generation, RSS will select click the box for **Unsuccessful Remote Evaluation**. This will populate the Dispatch Ticket on the CSS Evaluation Scheduling queue. The CSS will then be responsible to schedule an in person visit with the client.

*Note: Per compliance, we will now be required to complete a Dispatch Delivery Ticket for each in person Dispatch Ticket appointment.

12. The technician or ATP will be responsible for clicking **Print** to physically print the Dispatch Delivery Ticket prior to the appointment or clicking **Sign** at the appointment to capture signature electronically

13. The technician or ATP will be responsible for Scan completed Dispatch Delivery Ticket into the **View/Upload Tab.**

*Note: Capturing the signature electronically will automatically save the signed document in the View/Upload tab as **"Signed Ticket"**
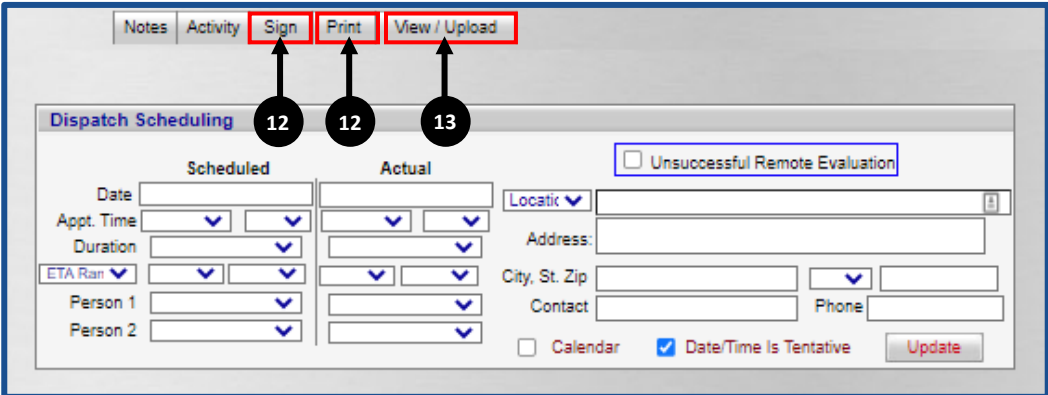
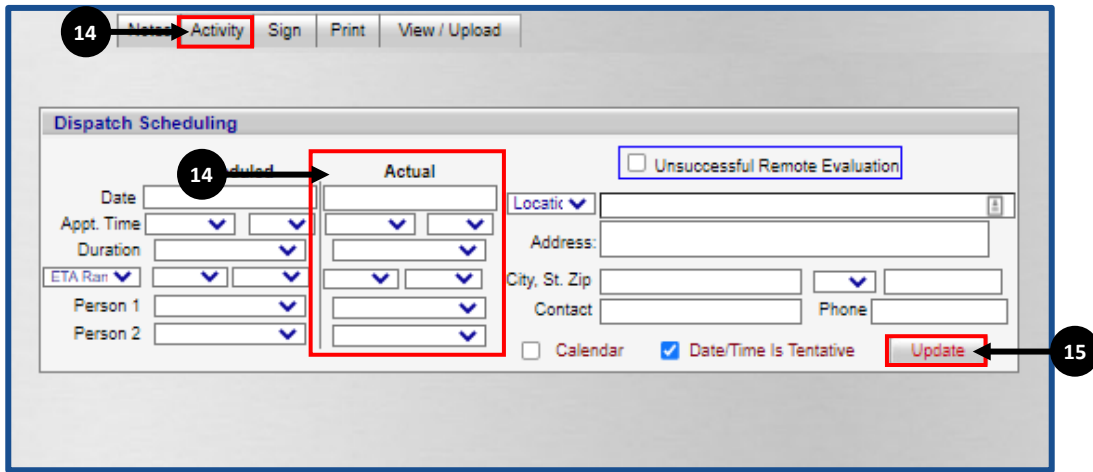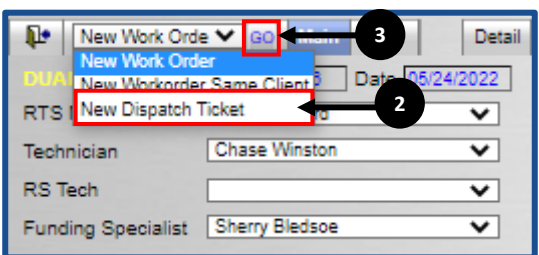# Mobility Advisor – Dispatch Tickets
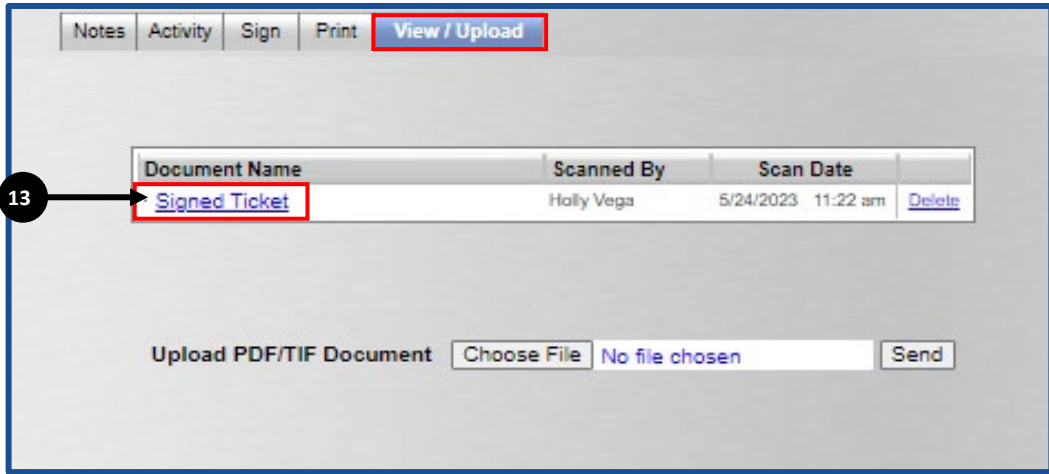
Note: Once the scheduled dispatch appointment date is one day or greater in the past, the Dispatch Ticket will fall into the CSS Delivery Scheduling Queue

14. The CSS is responsible for reviewing the Signed Ticket to ensure it is complete and will then enter the **Actual** information in the **Activity Tab**

15. Once the Actual information in entered, the CSS will click **Update** to post/close the Dispatch Ticket


Opening A Dispatch Ticket From An Existing Work Order:

1. Open any existing work order

2. Select **New Dispatch Ticket** from the top left hand drop down

3. Click **Go**

Mobility Advisor – Dispatch Tickets

*Note: Opening a Dispatch Ticket via the work order will automatically enter that clients record and WO number reference into the Dispatch Ticket

4. Complete **steps 5-15** from section **Opening A Dispatch Ticket via The Dispatch Ticket Queue**
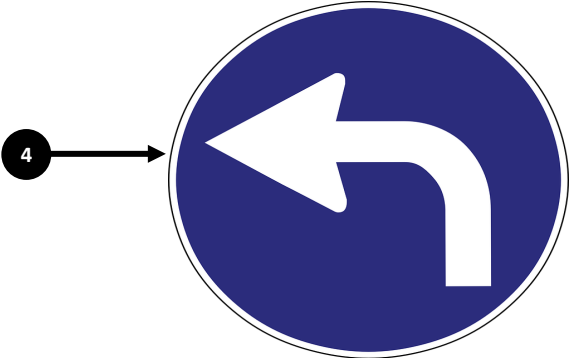
FAQ:

Q. Will I get KPI points for Dispatch Tickets

A. Yes, CSSs will receive points for scheduling and posting, which TS will receive points for the activity itself. Points will be assigned to RSS depending on their activity within the Dispatch Ticket as well.

Q. Will I see the clients Dispatch Ticket records in the client history?

A. Yes, you can see the clients work order and dispatch ticket history by utilizing the binoculars on either the work order or the dispatch ticket.
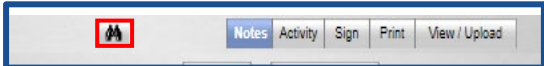
Q. If opening a Dispatch Ticket from a Work Order, will notes and documents carry over from the work order to the dispatch ticket?

A. No, but there will be a reference link to the work order on the left side of the dispatch ticket.

Mobility Advisor–Dispatch Tickets FAQ

Q. If opening a Work Order from a Dispatch Ticket, will notes and documents carry over from the dispatch ticket to the work order?

A. No, you would need to reference the dispatch ticket via the binoculars to see the notes or documents associated with the originating dispatch ticket.

Q. Is there a way to see all Dispatch Tickets for my branch at once?

A. Yes, by accessing the Dispatch Ticket Queue from your main menu drop down, you can view all dispatch tickets by hitting continue. You have the option to apply filters to refine your results as well. You can use column headers to sort your results.

NATIONAL SEATING & MOBILITY