Schedule Blocks - Days Off, Sick Days, Holidays)

A schedule block to a day off outside of the servicer's normally scheduled days off. For example, if a servicer generally works Tuesday through Saturday, with Sunday and Monday as his normal days off, and decides to take a vacation day on Thursday, January 12, then Thursday, January 12 will require a schedule block.

When servicers need to take days off in addition to their regularly scheduled days off (e.g., vacation days), DOLI **must** be updated to ensure that jobs are not assigned to them while they are off. Blocks should be entered into DOLI with as much advance notice as possible.

If a service company will have limited or no servicer coverage due to a holiday observance, the company **must** communicate company/servicer availability/unavailability to CRST Home Solutions as early as possible to ensure that jobs are not assigned to their servicers during the day(s) off. **This is especially critical during the months of November and December and for service companies that are store primaries.**

Service companies can set blocks in DOLI using their administrative username and password, but they also may request that CRST Home Solutions make the updates.

Placing a Block in DOLI

1. Log in to DOLI with the service company's administrative username and password.
2. On the DOLI homepage, click the **Dispatch Board** button.
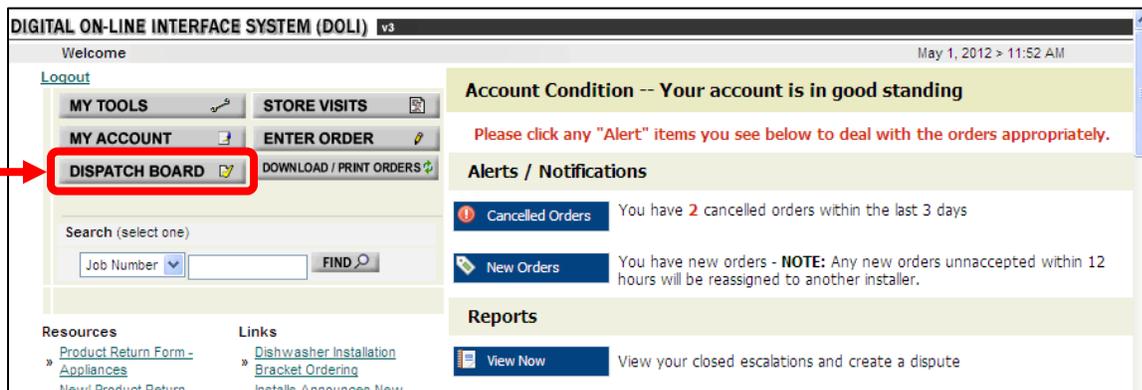
This loads the Dispatch Board view for the current date.

3. Use the **Date Controls** to navigate to the date the servicer is requesting to have blocked.
4. Take note of any jobs scheduled for that date. These jobs will need to be reassigned to another servicer in the company or rejected in DOLI.

Selected:	**Tuesday, 06/13/2017** (15 Orders displayed)
Date Controls:	<< Previous Day | **Select** | Next Day >>
Print orders:	Print all dispatched **INSTALLS inc. orders.** Or **custom orders.**
Jump menus:	Filter For Store ▾ Find a tech ▾ Find a last name ▾ Find a Job Number ▾

Up | Unassigned

Up | Jensen, Tyson

8:00-11:59 AM	12:00-5:00 PM	5:00-9:00 PM

Up | Killian, Steve

8:00-11:59 AM	12:00-5:00 PM	5:00-9:00 PM

Up | Loya, Josh

8:00-11:59 AM	12:00-5:00 PM	5:00-9:00 PM

	Last Name	Dur/ Add Job	Status
Whole Room Setup 46In and Larger	ASSAD	3.25 hrs /Yes	Completed-Pending Verification
City, State	**Zip**	**ETA**	**Campaign Store**
BOTHELL, WA	98012	08:00 AM	Geek Squad 566
SP ID	**ID**	**CLIENT ID**	**Date- Start/End Time**
3122-544-01	**3122-544**	20873856	06/13/2017 08:30AM/11:59AM

	Last Name	Dur/ Add Job	Status
Whole Room Setup 46In and Larger	KING	3.25 hrs /Yes	Scheduled-
City, State	**Zip**	**ETA**	**Campaign Store**
SEATTLE, WA	98133	12:00 PM	Geek Squad 470
SP ID	**ID**	**CLIENT ID**	**Date- Start/End Time**
3123-645-01	**3123-645**	20885076	06/13/2017 08:30AM/03:59PM

	Last Name	Dur/ Add Job	Status
Whole Room Setup 46In and Larger	BERHE	2.75 hrs /Yes	Scheduled-
City, State	**Zip**	**ETA**	**Campaign Store**
BOTHELL, WA	98011	08:00 AM	Geek Squad 477
SP ID	**ID**	**CLIENT ID**	**Date- Start/End Time**
3189-096-01	**3189-096**	21395068	06/13/2017 08:30AM/11:59AM

	Last Name	Dur/ Add Job	Status
Silver Total Assurance	BENDER	3.00 hrs /Yes	Scheduled-
City, State	**Zip**	**ETA**	**Campaign Store**
MUKILTEO, WA	98275	12:00 PM	Geek Squad 566
SP ID	**ID**	**CLIENT ID**	**Date- Start/End Time**
3200-473-01	**3200-473**	21568497	06/13/2017 08:30AM/03:59PM

5. On the Main Navigation Bar on the DOLI homepage, click the **MY TOOLS** button.
6. On the *My Information* screen, click the **TECHNICIANS** button.

Note: This displays the *Create New Technician* screen.

7. On the *Create New Technician* screen, click the **Shifts** link next to the servicer's name.

8. Enter the date(s) and shift(s) the servicer will be off under **Schedule Future Unavailability:**
   a. Select the **Date, Shift Period, and Reason** from the drop-down lists provided.
   b. Click the **Submit** button to save the Future Unavailability.

      Note: If the servicer will be off for more than one day/shift, repeat the two previous steps for each date/shift the servicer will be off.

   c. Click the **Back** link to return to the *Create New Technician* screen.

Note: The servicer's schedule is now blocked for the dates/shifts you specified. The system will only route work to the servicer for the shifts indicated as available.

9. Pull up each job scheduled for the affected date(s) in the agent version of DOLI.
   a. If the job is scheduled **2+ days in the future,** update the order to "**Prescheduled – Rejected**" and notate the order accordingly.
   b. If the job is **scheduled for today or tomorrow,** we will need to immediately reassign or reschedule the order.
      i. If the assigned service company asks you to move the job to another servicer in their company:
         1. Click on **Book Order**
         2. Choose the new servicer from the **Technician** drop down
         3. Click **Update Search Criteria Now**
         4. Schedule the job for the original date and time.
      ii. If the service company does not have an alternate servicer:
         1. Click **Book Order** after scheduling the time off in DOLI. If the original date and time is still available, you may book the order with no customer contact.
         2. If no other provider is available for the original date and time is available, customer should be rescheduled per the rescheduling process.
10. All orders must be notated in DOLI, regardless of whether the date and time was changed.