

ROSS TIPS

ROSS TIP: PER-2004-1
Date: May 10, 2004
Subject: Moving a PERSON to a New Dispatch Organization

This ROSS TIP reviews the process to use when moving a PERSON record and the associated Overhead RESOURCE ITEM record to a new Dispatch Office.

STOP! DO NOT PERFORM ANY OF THESE STEPS IF THE PERSON/RESOURCE ITEM IS CURRENTLY ASSIGNED. To check to see if a resource is assigned, goto the Resource Status screen and make sure the current status of the resource is either “Available” or “Unavailable”.

NOTE: This function can only be performed by users that have the “Dispatch Manager” role. See your Account Manager to have this role applied”.

Only perform this action when: Moving a person/resource item record from one dispatch office to another.

Assumptions

For the purposes of this explanation it is assumed that **Dispatch Center “A”** is the current Dispatch Center that is managing the Person/Resource Item record and **Dispatch Center “B”** is the Dispatch Center that will manage the record after it has been moved.

<u>Step #</u>	<u>Dispatch Center “A” Actions</u>	<u>Dispatch Center “B” Actions</u>
#1	Dispatch Center “A” communicates with Dispatch Center “B” via telephone to coordinate the record transfer process.	Dispatch Center “B” communicates with Dispatch Center “A” via telephone to coordinate the record transfer process.
#2	Unlink the Person Record using the “Unlink” button on the PERSON SCREEN.	<ul style="list-style-type: none">• On the PERSON SCREEN, click on the “Search” button.• Enter the Last Name (or portion followed by the “*”).• Click the radio button that says “Search for UNLINKED Persons”• Click on the Search button.• When the results return, if there is more then one person listed, scroll and find the correct person, highlight the persons names, and click “OK”• Click the “LINK” button

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<u>Step #</u>	<u>Dispatch Center "A" Actions</u>	<u>Dispatch Center "B" Actions</u>
#3	<ul style="list-style-type: none"> • GO TO the RESOURCE ITEM SCREEN • Locate and Select the Persons Name on the Overhead Resource Item list. • On the "Organizations" tab, change the "Home Dispatch" office to the office where the record is being transferred to. • Refresh the screen to assure the record does not appear any longer. 	<ul style="list-style-type: none"> • NOTE: Start these steps once Dispatch Center "A" has completed their steps for #3). • GO TO the RESOURCE ITEM SCREEN (if already on the screen, refresh the screen). • Locate and Select the Persons Name on the Overhead Resource Item list. • On the "Organizations" tab, change / update the "Provider", "Home Unit", and "Owner" field to reflect the changes. NOTE: <u>DO NOT USE THE DISPATCH CENTER AS A PROVIDER OR OWNER</u> as the resource will not be accounted for in any reports as the reports are generated using Government Non –Dispatch organizations and their affiliations as the query base.

NEXT STEP: You will need to transfer the person in your qualification system or the next time you import qualification records that person will be imported back into your inventory.