

Technician Insurance

The Technician Insurance option is only available with the Crew Planner module.

Contact Properties

An insurance option is available in the Contracting tab of the Contact Properties. When entering a new technician, the insurance option will be unchecked by default. Once you tick the Insurance option, an insurance reference number field and an insurance expiry date field display. The insurance reference number refers to a policy number of the insurance, usually available on an insurance slip. The insurance expiry date should also be available on the insurance slip.

The screenshot shows the 'Contact Properties' window with the 'Contracting' tab selected. The 'Insurance Required' checkbox is checked, and the 'Reference Number' field contains 'BBCR-12' and the 'Expiry Date' field contains '4/15/13'. A red box highlights the 'Insurance Required' checkbox and its associated fields.

	External Hourly Cost	External Half Day	External Full Day Cost	Internal Hourly Cost	Internal Half Day Cost	Internal Full Day Cost

Region: 0 - Western
Location: 0 - Main office
Group: -
Category:
Sub-category:
Hours in Standard Work Week: 0.00
 Driver
 Freelance
 Insurance Required
Reference Number: BBCR-12
Expiry Date: 4/15/13

Organisation:
Venue:
Contact: Cheryl Flowers
Dept: Programming
Position:
Source:
Drivers License:
Ask For:
Address: 810 Nipissing Dr
Suburb:
City: Milton State: ON
Country: Canada Postal Code:
Phone 1: 1 888 591 1964
Phone 2:
Mobile:
Fax:
Fax Options: Dial Area Code Local Send Faxes
Email: cheryl@rentp.com Send Email
Website:
Salesperson Code:
Assign Ends:
Salesperson Name:
Buttons: Save Tab, New, Delete, Save, Save & Close, Cancel

Assigning Technicians to Crew Entries

When assigning a technician to a crew entry, technicians with expired insurance are excluded from the list of available technicians. Technicians with no insurance or valid insurance are still included in the list. This will not affect current crew entries or activities, it will only prevent the user from assigning crew entries and activities to an expired technician from this point forward.

Report for Technician Insurance

An interactive report is available in the Reports --> Crew Reports main menu. This report lists technicians in a grid according to the scope options at the bottom of the window. You can use this report to quickly find technicians with expired insurance. Double click the technician in the grid to open the contact properties and edit the insurance information. Once the contact details are saved, the report is automatically refreshed.

Technician	Mobile	Email	Insurance Reference Number	Insurance Expiry Date
Cheryl Flowers		cheryl@rentp.com	BBCR-12	4/15/2013

1 record(s) displayed.

Insurance Options

No Insurance

Expired Insurance

Expires Within 4/15/13 and 4/16/13

Designation

Other Options

Drivers

Freelancers

Region / Location Scope

All

Select Region

0 - Western

Select Location

0 - Main office

Refresh Grid

Close