APCO/NENA ANSI 1.107.1.2015 Standard for the Establishment of a Quality Assurance and Quality Improvement Program for Public Safety Answering Points
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Abstract: This standard defines the recommended minimum components of a Quality Assurance/Quality Improvement (QA/QI) program within a public safety communications center. It recommends effective procedures for implementing the components of the QA/QI program to evaluate the performance of public safety communications personnel.

Keywords: CTO, training, telecommunicator, dispatcher, communications officer, call-taker, training coordinator, telecommunicator instructor, communications operator, public safety communications, training, 9-1-1, quality assurance, quality improvement, and emergency services.

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**Executive Overview***

The duties and responsibilities of those who serve our communities by accepting and processing emergency calls from the public have grown exponentially over recent years. The industry, as a whole, is challenged by the type and nature of the calls received. Factors that affect the quality of service received are the heavy workload, constant changes within the PSAP, changes in technology, as well as customer expectations. Additionally, there is a lack of standardized methods to provide quality assurance and effective feedback to the telecommunicator. The heavy workload coupled in many cases with the constant change of the environment, technology and customer expectations and the lack of standardized methods to evaluate service delivery. Critical focus must be maintained to ensure a high standard of performance is delivered each and every time through phone calls and radio transmissions.

In January of 2008, Denise Amber Lee, a young wife and mother of two small boys, tragically lost her life after reaching out for help. During her abduction Denise was able to grab her killer’s cell phone and dial 9-1-1 without his knowledge. The call lasted 6 ½ minutes with Denise giving the call taker valuable information and answering the call taker’s questions while pretending to talk to her killer. Unfortunately, her location could not be determined. Denise was not the only one to call for help or report an unusual circumstance that day. A driver in a car next to the abduction called 9-1-1 to report a woman screaming and banging on the window of her abductor’s car. Even though this citizen hero’s call lasted for 9 minutes, describing cross streets as she drove on and the fact that there were at least 3 police cars within a mile of her location, no one ever dispatched the call.

This standard is an attempt to establish a long overdue quality assurance and improvement process to all of America’s 9-1-1 telecommunicators to ensure call taking and radio dispatch actions are delivered at the highest possible standard. A frantic mother’s plea for help should be handled the same in California as it is in Florida, Ohio, Colorado or New York. This Quality Assurance standard was developed to ensure continued telecommunicator excellence. All of the training in the world is useless if the professional telecommunicator isn’t being continuously monitored and reinforced for proper procedures.

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Standard for the Establishment of a Quality Assurance and Quality Improvement Program for Public Safety Answering Points

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**Acronyms and Abbreviations***

For the purposes of this ANS, the following definitions of acronyms apply:

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<tr>
<th>Acronym</th>
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<tbody>
<tr>
<td>ADA</td>
<td>Americans with Disabilities Act</td>
</tr>
<tr>
<td>AED</td>
<td>Automated External Defibrillator</td>
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<tr>
<td>AHJ</td>
<td>Authority Having Jurisdiction</td>
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<td>ANSI</td>
<td>American National Standard</td>
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<td>ANSI</td>
<td>American National Standard Institute</td>
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<tr>
<td>APCO</td>
<td>Association of Public-Safety Communications Officials</td>
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<tr>
<td>CALEA</td>
<td>Commission on Accreditation for Law Enforcement Agencies</td>
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<td>CISM</td>
<td>Critical Incident Stress Management</td>
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<tr>
<td>CTO</td>
<td>Public Safety Communications Training Officer</td>
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<td>EAP</td>
<td>Employee Assistance Program</td>
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<td>EMD</td>
<td>Emergency Medical Dispatch</td>
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<td>FLSA</td>
<td>Fair Labor Standards Act</td>
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<td>FMLA</td>
<td>Family Medical and Leave Act</td>
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<tr>
<td>HIPPA</td>
<td>Health Insurance Portability and Accountability Act</td>
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<tr>
<td>ICS</td>
<td>Incident Command System</td>
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<tr>
<td>NFPA</td>
<td>National Fire Protection Association</td>
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<tr>
<td>NIMS</td>
<td>National Incident Management System</td>
</tr>
<tr>
<td>OSHA</td>
<td>Occupational Health and Safety Administration</td>
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<td>PSAP</td>
<td>Public Safety Answering Point</td>
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<tr>
<td>QA/QI</td>
<td>Quality Assurance (QA) and Quality Improvement (QI) Program</td>
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<td>SDC</td>
<td>Standards Development Committee</td>
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<td>TTY/TDD</td>
<td>Teletypewriters / Telecommunications Device for the Deaf</td>
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*The Acronyms and Abbreviations are informative material and not a part of the ANS*
Chapter 1: Introduction

1.1 Scope
This standard defines the recommended minimum components of a Quality Assurance/Quality Improvement (QA/QI) program within a public safety communications center. It recommends best practices for implementing the QA/QI program to evaluate the performance of public safety communications personnel.

1.2 Purpose
The purpose of this document is to assist public safety communications centers with the establishment, implementation and maintenance of a quality assurance and quality improvement program. Recommended minimum requirements for the evaluation and quality assurance of call processing are offered to ensure a consistent, effective, and efficient level of service.

1.3 Definitions*
Definitions of terms used throughout this document.

1.3.1 Agency: The hiring authority also referred to as the Authority Having Jurisdiction (AHJ). The Agency or body that defines the roles, responsibilities, policies, procedures and performance standards that direct the activity of the public safety telecommunicator. In multi-discipline centers, the Agency governs the operation providing call-taking/dispatch and related services to emergency response stakeholders. In single discipline centers, a single Agency may direct these services for one or more departments within a service area. Both have the duty to define training appropriateness, content, format, and continuing education requirements.

1.3.2 The Americans with Disabilities Act (ADA): An American federal law that requires all Public Safety Answering Points (PSAPs) to provide direct and equal access to emergency telephone services for individuals with disabilities who use teletypewriters (TTYs) and other communication devices or services.

1.3.3 Basic Competencies: The standard frequently refers to the need for the demonstration of basic evaluation competencies within various sections of the quality assurance program. Basic competency shall mean the unique, requisite knowledge, comprehension, and application of skills for an effective response to operational expectations, as locally defined.

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1.3.4 **Core Competency:** The unique traits, requisite knowledge, comprehension and application of skills, and situational analysis leading to the appropriate response to the caller, co-worker, other public safety stakeholder, or event(s) consistent with general practices and locally defined parameters.

1.3.5 **Calls for Service or Request for Service:** A request or contact from the public that results in the provision of a public safety service or response.

1.3.6 **Call taking:** The act of answering emergency (9-1-1 and 10 digit phone lines) and non-emergency calls for service from the public and obtaining the information necessary to dispatch a public safety unit, such as fire, police, medical and rescue, to the reported location of the emergency.

1.3.7 **Call-taker:** A telecommunicator who processes incoming calls for service through the analyzing, prioritizing, and disseminating of information to aid in the safety of the public and responders.

1.3.8 **Case:** The record and data utilized to base the QA/QI evaluation and subsequent criteria scoring.

1.3.9 **Catastrophic loss:** An exceptional loss of human life and/or significant dollar amount of property damage.

1.3.10 **Commendation:** The act of commending; praise, favorable representation in words; an award or recognition for performance.

1.3.11 **Compliance to Protocol:** The adherence to the adopted processes and procedures of the Agency.

1.3.12 **Continuing Education Units:** A recognized method of quantifying participation in an organized continuing education experience under responsible sponsorship, capable direction and qualified instruction.

1.3.13 **Day:** An actual 24-hour day, from midnight until 11:59 p.m. (i.e., not the “shift worked” period).

1.3.14 **Dispatcher:** A person trained to provide emergency dispatch services and who meets required training requirements as determined by the Agency and/or pursuant to federal, state or local statutes, or meeting recognized specialized certifications within the emergency dispatch community.

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1.3.15 **Dispatching:** The act of alerting and directing the response of public safety responders to the desired location.

1.3.16 **Emergency Dispatch Agency (ED Agency):** Shall mean any company, organization, or government agency that provides emergency dispatch services.

1.3.17 **Extenuating Circumstances:** Unusual factors related to and/or contributing to the consummation of an act, but over which the person involved had little or no control. The circumstances may reduce the liability of the person involved and may serve to mitigate the punishment or the award of damages.

1.3.18 **Dispatch Protocol:** A system approved and/or recognized by the Agency that includes the protocol used by a public safety telecommunicator to effectively manage a response including, but not limited to, systematic caller interrogation questions; pre-arrival instructions; subsequent response incidents to ensure an effective response; and a continuous quality improvement program.

1.3.19 **High Acuity:** Emergency situations that require an elevated or atypical emergency response. Such calls for service may involve large scale events that result in significant loss of life, property damage, or are of such magnitude that they produce a high-stress reaction in both telecommunicators and emergency responders.

1.3.20 **Knowledge:** The fundamental understanding that one must have in order to perform a specific task.

1.3.21 **Operational Medical Director:** A licensed physician who provides EMD direction to the emergency medical dispatch agency, approves the Emergency Dispatch protocols, and works with the local EMS medical director, if not the same person.

1.3.22 **Oversight Committee:** A group of individuals established by the Agency, consisting of representatives of the multiple disciplines, for which call-taking and/or dispatch services are provided which, as individuals, providing insight and guidance of policies and/or procedures related to the Quality Assurance program.

1.3.23 **Performance appraisal:** A written evaluation of an employee’s job performance measured against established expectations.

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1.3.24 **Process analysis:** A process that incorporates the use of a focus group in a facilitated storyboarding process to capture the observations of high performing incumbent workers regarding the major steps and related activities included in a given process.

1.3.25 **Public Safety Answering Point (PSAP):** A facility equipped and staffed to receive emergency and non-emergency public safety calls for service via telephone and other communication devices. Emergency calls for service are answered, assessed, classified, and prioritized. The FCC further defines a primary PSAP as a facility to which 9-1-1 calls for service are routed directly from the telephone company’s central office. A secondary PSAP is defined as a facility to which 9-1-1 calls for service are transferred from a primary PSAP.

1.3.26 **Public Safety Communications Center (PSCC):** A public safety entity (which may include a PSAP, be referred to as an Emergency Communications Center or communications center) where 9-1-1 or other emergency calls for service are processed and public safety resources are dispatched.

1.3.27 **Public Safety Communications Supervisor (Supervisor):** The first-level public safety communications professional who provides leadership to employees through experience and training in order to achieve the Agency’s mission, standards, and goals.

1.3.28 **Public Safety Discipline:** The individual component(s) of the public safety system including, but not limited to, any law enforcement agency, fire department, rescue and/or ambulance authority for which a public safety communications center provides support and services.

1.3.29 **Public Safety Telecommunicator (Telecommunicator):** The individual employed by a public safety agency as the first of the first responders whose primary responsibility is to receive, process, transmit, and/or dispatch emergency and non-emergency calls for service for law enforcement, fire, emergency medical, and other public safety services via telephone, radio, and other communication devices.

1.3.30 **Quality Assurance (QA):** All actions taken to ensure that standards and procedures are adhered to and that delivered products or services meet performance requirements. *Informative material and not a part of this American National Standard (ANS)*

*Informative material and not a part of this American National Standard (ANS)*
1.3.31 **Quality Assurance Evaluator (QAE):** A qualified public safety professional who reviews telecommunicator work performance and documents an evaluation of the level of compliance with Agency directives and standards.

1.3.32 **Quality Assurance Process:** A formal assessment process by which actual performance, behavior and outcomes are compared against established standards to ensure compliance, consistency, and accuracy in the delivery of service.

1.3.33 **Quality Assurance Case Review:** An audit that is used to assess the performance of the telecommunicator’s processes in receiving and handling calls for service or dispatched events.

1.3.34 **Quality Assurance and Improvement Program:** An on-going program providing, at a minimum, the random case review evaluating emergency call-taking and dispatch performance, feedback on protocol compliance, commendation, retraining and remediation as appropriate, and submission of compliance data to the Agency.

1.3.35 **Quality Improvement:** An organized system that assesses and evaluates the process to improve the quality of services provided.

1.3.36 **Quality Improvement Process:** Actions taken to improve or correct areas of concern.

1.3.37 **Random:** Having no specific pattern.

1.3.38 **Real-time:** Occurring at the same time as the event is taking place (i.e., created live).

1.3.39 **Remediation:** The process by which a deficient skill is improved (i.e. remedial training, to remediate).

1.3.40 **Shall:** Within the context of this standard indicates a mandatory requirement.

1.3.41 **Should:** Within the context of this standard indicates a recommendation.

1.3.42 **Skill sets:** The essential knowledge, skills and/or abilities necessary to perform assigned functions.

1.3.43 **Specific:** Explicitly set forth; definite.

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1.3.44 **Trend Analysis:** The concept of collecting information and attempting to spot a pattern or trend in the information.

1.3.45 **Written Directives:** A set of Agency or department specific policies, procedures, rules, regulations, and guidelines.

### Chapter 2: General Agency Responsibilities

#### 2.1 Scope

This chapter provides direction to the Agency outlining its responsibility in the establishment and maintenance of a Quality Assurance/Quality Improvement program.

#### 2.2 General Agency Responsibilities

2.2.1 The Agency shall formally establish and implement a Quality Assurance/Quality Improvement program.

2.2.1.1 The focus of the Agency shall be in evaluating telecommunicator strengths as well as identifying areas for improvement. The result should be a standardized operation that provides an environment of consistent and ongoing improvement in the delivery of call taking and dispatch services.

2.2.1.2 The Agency shall ensure integrity of its QA/QI program through a clearly defined process for quality assurance case reviews that include call-taking and dispatching activities for public safety disciplines.

2.2.2 The Agency shall establish a set of written performance standards to include base-line review requirements for all public safety telecommunicators to be evaluated as part of the QA/QI process.

2.2.2.1 The Agency shall implement the necessary policies and procedures to maintain a Quality Assurance and Improvement (QA/QI) program and ensure regular case reviews are conducted.

2.2.2.2 The Agency shall ensure case reviews are performed on a regular basis with feedback provided to the telecommunicator as soon as possible.

2.2.2.3 Expectations shall be clearly defined within Agency policies and procedures, inclusive of a case evaluation scoring system.
2.2.3 The Agency shall assign individual(s) qualified in the performance of case evaluations.

2.2.3.1 The Agency shall provide comprehensive training on the QA/QI process appropriate to the employee’s position.

2.2.3.2 The Agency shall ensure all staff members responsible for performing quality assurance reviews meet the minimum qualifications identified for the Quality Assurance Evaluator¹.

2.2.4 The Agency shall be thoroughly familiar with quality assurance training and systems available to enhance the performance of its program and in the performance of case evaluations.

2.2.5 The Agency shall establish and/or adopt performance-scoring criteria to ensure consistency in case evaluations.

2.2.6 The Agency shall provide guidance, additional training, and/or corrective action for employees (i.e., performing below Agency defined or adopted standards and expectations).

2.2.7 The Agency shall provide telecommunicators with appropriate and effective feedback in the review of calls for service.

2.2.7.1 The Agency shall identify areas of strengths and deficiencies to the telecommunicator through the review process.

2.2.7.2 The Agency shall provide formal training and remediation assistance, as needed, such as utilizing a performance improvement plan.

2.2.8 QA/QI program, processes, and requests for release of information shall comply with all applicable federal, tribal, state/provincial and local laws, rules and regulations.

2.2.9 The Agency should regularly review, calibrate, and revise as necessary the Quality Assurance/Quality Improvement process to maintain the highest possible level of reliability and integrity.

¹ APCO ANS 3.106.1-2013 Core Competencies and Minimum Training for Public Safety Communications Quality
2.2.9.1 The Agency should identify and analyze industry trends and solicit employee input to revise the Quality Assurance/Quality Improvement process.

2.2.9.2 The Quality Assurance Evaluator (QAE) shall be periodically assessed to ensure that they are being fair and equitable in their evaluation techniques. Periodic review of their evaluations is necessary to ensure fairness and consistency.

2.2.10 The Agency should provide resources and/or technologies necessary to conduct the quality assurance process.

2.2.11 The Agency shall ensure all individuals, whether in a part-time, full-time, temporary capacity or as a volunteer performing the functions of a telecommunicator are subject to the quality assurance review process.

Chapter 3: Duties and Responsibilities

3.1 Scope
This chapter outlines the duties and responsibilities of the public safety professional that reviews telecommunicator performance documenting compliance with Agency directives and standards.

3.2 Duties and Responsibilities

3.2.1 The Quality AssuranceEvaluator (QAE) shall consistently evaluate calls for service processed by the Telecommunicator in a manner that is objective, fair and accurate.

3.2.2 The QAE shall gather the available records (i.e. CAD incidents, call notes, recordings, etc.) needed to evaluate all pertinent information and data related to the random sampling of calls for service being reviewed.

3.2.3 The QAE shall objectively evaluate the information and data, measuring it against the policies and procedures adopted or defined by the Agency.

3.2.4 As directed by the Agency, the QAE shall provide timely, accurate, and objective feedback.

3.2.5 The QAE shall be responsible to generate and disseminate reports as defined by the Agency.
3.2.6 The QAE shall complete documentation for each review in accordance with the Agency record-keeping and/or record retention policies

Chapter 4: Components of a QA/QI Program

4.1 Scope
This chapter identifies the recommended best practices of a Quality Assurance/Quality Improvement program. Agencies may implement other elements as necessary to meet local, state/provincial, federal, or tribal requirements and Agency specific needs.

4.2 The following practices shall be included in the agencies QA/QI program
4.2.1 Case Review Criteria;
4.2.2 Evaluation Guidelines;
4.2.3 Oversight Committee as per protocol and/or agency guidelines;
4.2.4 Program Monitoring;
4.2.5 Record Keeping;
4.2.6 Reporting and Feedback; and
4.2.7 Written Directives

4.3 The Agency shall establish written directives defining agency performance expectations, case review criteria, data evaluation, performance measurement criteria, documentation procedures and requirements, reporting procedures and requirements, and confidentiality rules of the QA/QI process.

4.4 The Agency shall establish written directives defining a means to monitor the QA/QI program.

4.4.1 All components of the incident shall be evaluated, including but not limited to, call-taking, data entry, dispatching, status keeping, etc.

4.4.1.1 A face-to-face feedback session with the telecommunicator on a regular basis will have the greatest impact for performance improvement.

4.5 The Agency shall establish standard evaluation guidelines defining minimum performance expectations for each rating category to ensure compliance with agency expectations and industry recognized protocols.

4.5.1 Categories to be included, as applicable, in defining minimum performance expectations should include:

4.5.1.1 Callback telephone number;
4.5.1.2 Caller’s name;
4.5.1.3 Chief complaint and/or incident type selection;
4.5.1.4 Location/Address Verification;
4.5.1.5 Post Dispatch Instructions;
4.5.1.6 Pre-Arrival Instructions; and
4.5.1.7 Protocol/Systemized interrogation questions

4.6 The Agency shall establish a record-keeping system, including report forms or a computer-based data management system, to permit storage and subsequent evaluation of case records in a confidential manner.

4.7 The Agency shall establish a mechanism for reporting quality assurance/improvement performance scores to the appropriate personnel on a regular basis per agency and/or protocol guidelines.

4.8 The Agency should establish discipline-specific (i.e. law enforcement, fire/rescue, EMS) oversight committees who formally meet to insure compliance with Agency policies and procedures. Agendas and minutes of each meeting shall be maintained as part of the quality assurance process.

Chapter 5: Review Process Requirements

5.1 Scope
This chapter presents minimum requirements for the QA/QI review process. These requirements are listed in the form of objectives for review process controls, design considerations for achieving those objectives, and documentation indicating objectives have been met.

5.2 The review process shall include random reviews, catastrophic events, or any event as defined by the Agency.

5.3 The Agency shall meet the following minimum requirements when developing case review criteria.

5.3.1 The Agency shall ensure a sufficient number of case reviews are conducted for both call-taking and radio dispatch responsibilities of a telecommunicator.

5.3.1.1 The number of case reviews needed to effectively execute a quality assurance program will vary according to PSAP workload.

5.3.1.2 PSAP agencies shall, in the normal course of business, review at least 2% of all calls for service. Where the 2% factor would not apply or be overly burdensome due to low or excessively high call volumes, agencies must decide on realistic levels of case review.
5.3.2 The Agency shall ensure all cases involving catastrophic loss and/or high acuity are reviewed.

5.3.2.1 Reviews of cases involving high acuity should be specifically identified by the Agency.

5.3.2.2 These reviews shall occur as soon as possible after the receipt of the call and/or following the radio dispatch or at least within five (5) days, notwithstanding extenuating circumstances that prevent such a review.

5.3.3 The Agency shall maintain appropriate documentation when, in the normal course of business, case reviews are not conducted pursuant to established agency and/or protocol criteria. Such incidents should be limited to events creating extenuating or exigent circumstances within a specified timeframe that occurred to prevent case reviews. Such incidents shall be documented and/or logged by the Agency and maintained pursuant to Agency requirements.

5.4 Performance Review and Evaluation Procedures

5.4.1 The process shall adequately measure the quality and performance of the service provided. This process includes, but is not limited to, the following criteria:

5.4.1.1 Analysis of performance trends;
5.4.1.2 Compliance to protocols and standard operating procedures;
5.4.1.3 Customer Service;
5.4.1.4 Optimizing the use of agency resources;
5.4.1.5 Overall performance of each employee; and
5.4.1.6 Reviewing the operation as a whole

5.5 Documentation Criteria

5.5.1 The quality assurance reviews shall be maintained in accordance with a record-keeping or retention policy.

5.5.2 Review results shall be recorded and submitted to the appropriate personnel for cumulative reporting in accordance with the Agency’s written directives.

5.5.3 The evaluation findings and any actions resulting from the quality assurance process shall be documented and filed in accordance with the Agency written directives.
5.6 Reporting Criteria

5.6.1 The Agency shall develop appropriate reporting systems to inform management and employees about performance levels and help identify areas of superior performance as well as areas for improvement and remedial action.

5.6.2 The Agency shall develop a communication plan that defines the purpose of each report, the recipients, the sources of data, and the metrics used in case evaluations.

5.6.2.1 Each report shall be written with a specific level of detail appropriate to the intended audience.

5.6.2.2 The Agency shall identify the most appropriate use and form of each type of report. These may include but are not limited to:
   5.6.2.2.1 Those used for face-to-face discussions;
   5.6.2.2.2 Those that will be released in writing either by hardcopy or electronic means;
   5.6.2.2.3 Those that will be published on public or private access web-sites; or
   5.6.2.2.4 Those that will be used in formal presentations to both internal and external customers.

5.7 Recommendations for Improvement

5.7.1 All recommendations for improvement shall be derived from a structured Quality Assurance/Quality Improvement process. These recommendations shall, at a minimum:

   5.7.1.1 Provide a means to identify gaps in performance;
   5.7.1.2 Evaluate strengths and weaknesses;
   5.7.1.3 Suggest steps to improve individual performance as well as Agency operations, and
   5.7.1.4 Commendations for superior performance

5.7.2 Recommendations shall be clearly articulated during the review process and shall be retained on file pursuant to agency policy.

5.7.3 Recommendations shall be reviewed on a regular basis, as determined by the Agency and in conjunction with Agency employee evaluation procedures and/or guidelines to ensure compliance.
5.7.4 Final recommendations of commendation, remediation, or referral for disciplinary action pursuant to Agency policies should be consistent.

5.8 Feed Back Criteria

5.8.1 The Agency shall develop a communication plan that ensures timely, accurate, and objective feedback to each telecommunicator.

5.8.2 The communication plan shall allow for and solicit input into the process and review from all involved in the QA/QI process.

5.8.3 Dissemination of results to appropriate personnel should occur pursuant to Agency guidelines.

5.9 Action Plans

5.9.1 The Agency shall establish action plans to address performance issues in response to QA/QI review findings.

5.9.2 The QAE and shall identify and analyze individual, as well as Agency performance.

5.9.3 The Agency shall determine action items as needed.

5.9.4 The Agency shall develop short-term goals and objectives for final recommendations as well as the QA/QI program as a whole.

5.9.5 The Agency shall assign responsibility and timelines to final recommendations.

5.9.6 The QAE or Supervisor as assigned shall monitor implementation and/or completion of action plan.

5.9.7 The QAE shall file final documentation in accordance with the Agency record-keeping and retention policies.

End of ANS 1.107.1-2015
Special Acknowledgements*

Special recognition to the numerous facilitators, panelists, and hosting agencies that provided the pertinent research needed to successfully update this candidate standard.

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Addendum 1*

INSTRUCTIONS FOR CUSTOMIZING AND UTILIZING THE CASE EVALUATION TEMPLATES

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1. **Setting Up Your Forms.**
   
a. Thoroughly explain the QA process to your staff members prior to implementing the program.

b. It is highly advantageous to start out selecting calls or dispatches that have positive results so that telecommunicators do not become fearful of the QA process.

c. Carefully decide which questions are applicable to your Agency. Remove those that are definitely not applicable, modify questions to better fit your organization, and add new ones that are applicable.

d. Determine the desired point value for each question. You may adjust the point value to anything management feels is appropriate, the more important the question, the larger the point value should be. Each category is scored separately based on the percentage of total points for that group.

e. Determine if the question could be designated as “refused” or “NA”. Shade/highlight all the other questions in those columns where “refused” or “NA” would not be applicable. Note that most categories have no “refused” column.

f. The Excel formulas are provided at the end of Addendum #2, which will automatically score the evaluation.

g. Build an Excel spreadsheet with all of your employees’ names to track their scores. This will allow management to easily see the status of the employees’ progress or lack thereof.

h. For telecommunicators who are exhibiting performance or behavior (i.e., poor customer service) issues, you may expand the spreadsheet to track particular questions. This will provide management with a tool to measure patterns of performance and/or behavior change (i.e., is now in compliance, needs more remediation, etc.)

i. Expand the spreadsheet to include a spot for those staff members who receive “Exceeds Standards”. While this question will not have a numeric value, management can track how many times an employee obtained this accolade.

j. Determine what an acceptable overall score is for your PSAP. Consider starting the program with a lower threshold score of (80%). Once your staff members have become accustomed to this level of review, consider raising the bar every two months by 2% to 5%. Continue to raise the bar until management believes it is at the appropriate level. A level of 90% is recommended.

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2. **Scoring Calltaking or Dispatching.**
   
a. Remember that the whole point of a Quality Assurance program is to enable your staff to be the best they can be. This includes compliance to protocols, Agency policies and procedures, and providing excellent customer service.

b. Select a random call or dispatch for evaluation. If it is a hang-up or other type of call that won’t produce useful QA results, select another.

c. Bring up the CAD incident for review. When the evaluator is reviewing a calltaker’s work, a check of the CAD incident should be made to determine if the information was properly collected and entered into CAD. When the evaluator is reviewing a dispatcher’s work, a check of the CAD incident should be made to determine if the pertinent information entered into CAD by the calltaker was disseminated to the responders in an accurate and timely manner.

d. For each question that the call-taker or dispatcher handles appropriately, place the point value in the “yes” column.

e. For each question that the call-taker or dispatcher handles inappropriately or forgets, place a zero in the “no” column.

f. For each question that the call-taker or dispatcher attempts to obtain the information, but the caller refuses to answer, place the point value in the “refused” column.

g. For each question that is not applicable, remove the point value all together from the “points” column and place an “NA” in the “NA” column.

h. In the Supervisor’s Overview category:
   
i. The first question is an overall review of the call, and is intended to include any aspects of the call that are not specified on the QA form.
   
ii. The “See Supervisor” category has no point value and is used anytime an employee receives a “less than acceptable” evaluation. These situations require a one-on-one conversation between the employee and the supervisor.
   
iii. The “Exceeds Standards” category has no point value; however, you can track how many times a staff member goes above and beyond what is expected. Evaluations of this classification can be very useful at the annual performance evaluation time.
   
iv. Understandably, the comments section adds greatly to the effectiveness and objectives of the QA process.

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3. **Ultimately, each QA evaluation falls into one of the following categories:**
   - Exceeds expectations / requirements.
   - Meets expectations / requirements.
   - The QA review identifies call or incident processing issues that need improvement. Any unacceptable QA score (below the bar) should be signed by both the supervisor and the recipient. It is helpful to have the staff member review the audio of the calltaking or dispatching and grade the incident themselves. This methodology assists in making the conversation with the supervisor more objective and therefore more productive.

4. **Dissemination** –
   The staff member should always receive a copy of their completed QA evaluations as soon as possible. Time is of the essence in making the QA process a valuable learning tool. The original evaluation should be placed in the employee’s personnel file to be incorporated as part of their annual performance evaluation.

5. **Calibration** -
   QA evaluators need to be periodically assessed to ensure that they are being fair and equitable in their evaluation techniques. It is therefore very important to periodically, (weekly to begin with then monthly) review their evaluations to ensure fairness and consistency in this regard. Senior management can select one calltaking and one dispatching incident for review. Grade the incidents and then ask the evaluator(s) to do the same. If the scores do not match, discuss the discrepancies. Remind the evaluator(s) that there is no room for opinions or friendship discounts. The questions are objectively answered with either “yes” or “no”, not “sort of” or “maybe”.

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Addendum 2*

SAMPLE CASE EVALUATION AND SCORING TEMPLATES

*Informative material and not a part of this American National Standard (ANS)
Call Taking for Police Incidents

<table>
<thead>
<tr>
<th>Interview Questions</th>
<th>Points</th>
<th>Yes</th>
<th>Refused</th>
<th>No</th>
<th>NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Verified address of occurrence?</td>
<td>200</td>
<td>200</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Caller’s telephone number verified?</td>
<td>30</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asked about time of occurrence?</td>
<td>30</td>
<td>30</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asked about weapons?</td>
<td>80</td>
<td>80</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asked about alcohol and drug use?</td>
<td>40</td>
<td>40</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asked if it is physical or verbal abuse?</td>
<td>20</td>
<td>20</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Questioned about the need for an ambulance?</td>
<td>15</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Questioned about direction of travel?</td>
<td>NA</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Questioned about number of subject/offender(s) involved?</td>
<td>20</td>
<td>20</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Questioned about description of subject/offender(s)?</td>
<td>20</td>
<td>20</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Questioned about offender's location?</td>
<td>25</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Questioned about description of vehicle?</td>
<td>NA</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asked if the caller wants to see the officer?</td>
<td>NA</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asked other incident specific questions?</td>
<td>NA</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Caller’s name obtained?</td>
<td>10</td>
<td>10</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Caller’s address obtained?</td>
<td>5</td>
<td>5</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>495</strong></td>
<td><strong>415</strong></td>
<td><strong>10</strong></td>
<td></td>
<td><strong>85.86%</strong></td>
</tr>
</tbody>
</table>

**CAD Skills**

<table>
<thead>
<tr>
<th>CAD Skills</th>
<th>Points</th>
<th>Yes</th>
<th>No</th>
<th>NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Checked prior incidents at address?</td>
<td>15</td>
<td>15</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Complete info added to CAD?</td>
<td>50</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accurate info added to CAD?</td>
<td>50</td>
<td>50</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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### Telephone Protocol/Skills

<table>
<thead>
<tr>
<th>Point</th>
<th>Yes</th>
<th>No</th>
<th>NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Answered call within 3 seconds</td>
<td>50</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td>Proper greeting used?</td>
<td>10</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Listens and comprehends?</td>
<td>80</td>
<td>80</td>
<td></td>
</tr>
<tr>
<td>Takes control of call using good judgment?</td>
<td>25</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Remained calm?</td>
<td>30</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>Proper tone of voice used?</td>
<td>15</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Professional language used?</td>
<td>20</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Courteous?</td>
<td>25</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>No dead time while on phone</td>
<td>10</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Advises caller that they will be transferred to another Agency?</td>
<td></td>
<td></td>
<td>NA</td>
</tr>
<tr>
<td>Stays on the line to announce transfer to other Agency's personnel?</td>
<td></td>
<td></td>
<td>NA</td>
</tr>
<tr>
<td>Directs caller to proper non-public safety Agency?</td>
<td></td>
<td></td>
<td>NA</td>
</tr>
</tbody>
</table>

| Total Points | 265 | 240 | 90.57% |

### Supervisor's Overview

<table>
<thead>
<tr>
<th>Point</th>
<th>Yes</th>
<th>No</th>
<th>NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall call handled properly?</td>
<td>100</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>See Supervisor</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Exceeds Standards</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Total Points | 100 | 0  | 0.00% |

**Comments:** There are several problems with the way you handled this call. Even though you were told that a number of individuals were fighting, you did not ask if an ambulance was needed, nor did you ask where the incident was occurring since this property is rather large. Keep the caller on the line until you have all necessary information. This is one of the call types that can go bad very rapidly.

*Informative material and not a part of this American National Standard (ANS)*
<table>
<thead>
<tr>
<th>Category</th>
<th>Possible Points</th>
<th>Actual Points</th>
<th>% Correct</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interview Questions</td>
<td>495</td>
<td>425</td>
<td>85.86%</td>
</tr>
<tr>
<td>CAD Skills</td>
<td>115</td>
<td>65</td>
<td>56.52%</td>
</tr>
<tr>
<td>Telephone Protocol /Skills</td>
<td>265</td>
<td>240</td>
<td>90.57%</td>
</tr>
<tr>
<td>Supervisor's Overview</td>
<td>100</td>
<td>0</td>
<td>0.00%</td>
</tr>
<tr>
<td>Overall Score</td>
<td>975</td>
<td>730</td>
<td>74.87%</td>
</tr>
</tbody>
</table>

Evaluator's Signature

Employee's Signature
(if applicable)
Dispatcher's name – XXXX  
Evaluator's Name - QAE XXXXXX  
Nature of Incident - Armed Robbery

<table>
<thead>
<tr>
<th>Dispatching for Police Incidents</th>
<th>Points</th>
<th>Yes</th>
<th>No</th>
<th>NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Processes incident promptly?</td>
<td>25</td>
<td>25</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Correct number of units assigned?</td>
<td>25</td>
<td>25</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nature given when initiating dispatch?</td>
<td>25</td>
<td>25</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Double phrased location?</td>
<td>25</td>
<td>25</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dispatched info accurately?</td>
<td>40</td>
<td>40</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dispatched info concisely?</td>
<td>20</td>
<td>20</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Notified officer of prior incidents?</td>
<td>30</td>
<td>30</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>190</td>
<td>190</td>
<td></td>
<td>100.00%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Summarization</th>
<th>Points</th>
<th>Yes</th>
<th>No</th>
<th>NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Disseminated info about weapons?</td>
<td>80</td>
<td>80</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Disseminated info about alcohol and drug use?</td>
<td>NA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Disseminated info about physical or verbal abuse?</td>
<td>NA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Disseminated info about number of offender/subjects involved?</td>
<td>30</td>
<td>30</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Disseminated info about description of offender/subject(s)?</td>
<td>30</td>
<td>30</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Disseminated info about offender's/subject's location?</td>
<td>30</td>
<td>30</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Disseminated info about description of vehicle?</td>
<td>30</td>
<td>30</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Disseminated info about direction of travel?</td>
<td>30</td>
<td>30</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Notified officer if the ambulance/fire apparatus has been dispatched?</td>
<td>NA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>All pertinent information from CAD disseminated?</td>
<td>30</td>
<td>30</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>260</td>
<td>260</td>
<td></td>
<td>100.00%</td>
</tr>
</tbody>
</table>

*Informative material and not a part of this American National Standard (ANS)
### Information Flow

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Points</th>
<th>Yes</th>
<th>No</th>
<th>NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Answered radio traffic in a timely fashion?</td>
<td>20</td>
<td>20</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Correctly identified units requesting info?</td>
<td>20</td>
<td>20</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Correctly identified info requested?</td>
<td>20</td>
<td>20</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Correctly identified info given?</td>
<td>20</td>
<td>20</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Complete info added to CAD?</td>
<td>25</td>
<td>25</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accurate info added to CAD?</td>
<td>25</td>
<td>25</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dissemination of critical/confidential information appropriately?</td>
<td>30</td>
<td>30</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>160</td>
<td>160</td>
<td></td>
<td>100.00%</td>
</tr>
</tbody>
</table>

### Radio Protocol/Skill

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Points</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Listens and comprehends?</td>
<td>60</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td>Articulates?</td>
<td>10</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Remained calm?</td>
<td>25</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>Professional language used?</td>
<td>20</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Professional demeanor?</td>
<td>20</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>135</td>
<td>135</td>
<td>100.00%</td>
</tr>
</tbody>
</table>

### Supervisor's Overview

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Points</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall call handled properly?</td>
<td>100</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>See Supervisor</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Exceeds Standards</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>100</td>
<td>100</td>
<td>100.00%</td>
</tr>
</tbody>
</table>

Comments: Outstanding! You handled the rapid pace of in-coming information from the tracker and the involved foot pursuit with professionalism and total control. Due to the coordinated efforts of the officers and yourself, the offender was apprehended.

*Informative material and not a part of this American National Standard (ANS)*
<table>
<thead>
<tr>
<th></th>
<th>Possible points</th>
<th>Actual Points</th>
<th>% Correct</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignment of Call</td>
<td>190</td>
<td>190</td>
<td>100.00%</td>
</tr>
<tr>
<td>Summarization</td>
<td>260</td>
<td>260</td>
<td>100.00%</td>
</tr>
<tr>
<td>Information Flow</td>
<td>160</td>
<td>160</td>
<td>100.00%</td>
</tr>
<tr>
<td>Radio Protocol/Skills</td>
<td>135</td>
<td>135</td>
<td>100.00%</td>
</tr>
<tr>
<td>Supervisor's Overview</td>
<td>100</td>
<td>100</td>
<td>100.00%</td>
</tr>
<tr>
<td>Overall Score</td>
<td>845</td>
<td>845</td>
<td>100.00%</td>
</tr>
</tbody>
</table>

Evaluator's Signature____________________________________________________

Employee's Signature (if applicable)________________________________________

*Informative material and not a part of this American National Standard (ANS)*)
<table>
<thead>
<tr>
<th>Calltaker's name -</th>
<th>CAD/RD Number - 201X-XXXXX</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evaluator's Name - QAE XXXX</td>
<td>Date and Time of Call - 5/2/1X  14:16:22</td>
</tr>
<tr>
<td>Nature of Call - Structure Fire</td>
<td>Address of Call - 987 First St, Any town</td>
</tr>
</tbody>
</table>

**Calltaking for Fire Incidents**

<table>
<thead>
<tr>
<th>Interview Questions</th>
<th>Points</th>
<th>Yes</th>
<th>Refused</th>
<th>No</th>
<th>NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Verified address of occurrence?</td>
<td>200</td>
<td>200</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Caller’s telephone number verified?</td>
<td>30</td>
<td>30</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asked about number of occupants in the building?</td>
<td>20</td>
<td>20</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>In the case of a fire, occupants are told to get out if it safe to do so?</td>
<td>25</td>
<td>25</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asked if anyone is injured?</td>
<td>15</td>
<td>15</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asked other incident specific questions?</td>
<td>20</td>
<td>20</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asked about time of occurrence?</td>
<td></td>
<td></td>
<td>NA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Caller's name obtained?</td>
<td></td>
<td></td>
<td>NA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Caller’s address obtained?</td>
<td></td>
<td></td>
<td>NA</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Total Points:** 310  **Yes:** 280  **Refused:** 30  **100.00%**

**CAD Skills**

<table>
<thead>
<tr>
<th>CAD Skills</th>
<th>Points</th>
<th>Yes</th>
<th>No</th>
<th>NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Checked prior incidents at address?</td>
<td></td>
<td></td>
<td>NA</td>
<td></td>
</tr>
<tr>
<td>Complete info added to CAD?</td>
<td>50</td>
<td>50</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accurate info added to CAD?</td>
<td>50</td>
<td>50</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Total Points:** 100  **Yes:** 100  **100.00%**

**Telephone Protocol/Skill**

<table>
<thead>
<tr>
<th>Telephone Protocol/Skill</th>
<th>Points</th>
<th>Yes</th>
<th>No</th>
<th>NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Answered call within 3 seconds?</td>
<td>50</td>
<td>50</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Proper greeting used?</td>
<td>10</td>
<td>10</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Listens and comprehends?</td>
<td>80</td>
<td>80</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Takes control of call using good judgment?</td>
<td>25</td>
<td>25</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Informative material and not a part of this American National Standard (ANS)
### Telephone Protocol/Skill (cont.)

<table>
<thead>
<tr>
<th>Points</th>
<th>Yes</th>
<th>No</th>
<th>NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remained calm?</td>
<td>30</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>Proper tone of voice used?</td>
<td>15</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Professional language used?</td>
<td>20</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Courteous?</td>
<td>25</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>No dead time while on phone?</td>
<td>10</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Advises caller that they will be transferred to another Agency?</td>
<td>NA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stays on the line to announce transfer to other Agency’s personnel?</td>
<td>NA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Directs caller to proper non-public safety Agency?</td>
<td>NA</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>265</td>
<td>265</td>
<td>100.00%</td>
</tr>
</tbody>
</table>

### Supervisor's Overview

<table>
<thead>
<tr>
<th>Points</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall call handled properly?</td>
<td>100</td>
<td>100</td>
</tr>
<tr>
<td>See Supervisor</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Exceeds Standards</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>100</td>
<td>100</td>
</tr>
</tbody>
</table>

Comments: Excellent call! You remained calm and collected while remaining on the phone with the caller who was trapped in an upstairs bedroom. Your CAD notes are a great example of clarity. You are part of the public safety team that saved the caller's life.

<table>
<thead>
<tr>
<th>Possible points</th>
<th>Actual Points</th>
<th>% Correct</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interview Questions</td>
<td>310</td>
<td>310</td>
</tr>
<tr>
<td>CAD Skills</td>
<td>100</td>
<td>100</td>
</tr>
<tr>
<td>Telephone Protocol /Skills</td>
<td>265</td>
<td>265</td>
</tr>
<tr>
<td>Supervisor's Overview</td>
<td>100</td>
<td>100</td>
</tr>
<tr>
<td><strong>Overall Score</strong></td>
<td>775</td>
<td>775</td>
</tr>
</tbody>
</table>

Evaluator’s Signature ____________________________

Employee’s Signature (if applicable) ____________________________

Informative material and not a part of this American National Standard (ANS)
<table>
<thead>
<tr>
<th>Calltaker's name -</th>
<th>CAD/RD Number - 201X-XXXXX</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evaluator's Name - QAE XXXX</td>
<td>Date and Time of Call - 5/2/1X 14:16:22</td>
</tr>
<tr>
<td>Nature of Incident - Structure Fire</td>
<td>Address of Call - 1025 Second St, Any town</td>
</tr>
</tbody>
</table>

### Dispatching for Fire incidents

<table>
<thead>
<tr>
<th>Assignment of Incident</th>
<th>Points</th>
<th>Yes</th>
<th>No</th>
<th>NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Processes incident promptly (under 1 minute)?</td>
<td>25</td>
<td>25</td>
<td>0</td>
<td>NA</td>
</tr>
<tr>
<td>Correct number of apparatus assigned?</td>
<td>25</td>
<td>25</td>
<td>0</td>
<td>NA</td>
</tr>
<tr>
<td>Nature given when initiating dispatch?</td>
<td>15</td>
<td>15</td>
<td>0</td>
<td>NA</td>
</tr>
<tr>
<td>Followed Agency's dispatch protocol?</td>
<td>40</td>
<td>40</td>
<td>0</td>
<td>NA</td>
</tr>
<tr>
<td>Immediately notify out of quarters apparatus?</td>
<td>40</td>
<td>40</td>
<td>0</td>
<td>NA</td>
</tr>
<tr>
<td>Double phased location?</td>
<td>25</td>
<td>25</td>
<td>0</td>
<td>NA</td>
</tr>
<tr>
<td>Dispatched info accurately?</td>
<td>40</td>
<td>40</td>
<td>0</td>
<td>NA</td>
</tr>
<tr>
<td>Dispatched info concisely?</td>
<td>20</td>
<td>20</td>
<td>0</td>
<td>NA</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>230</strong></td>
<td>170</td>
<td></td>
<td>73.91%</td>
</tr>
</tbody>
</table>

### Summarization

<table>
<thead>
<tr>
<th>Summarization</th>
<th>Points</th>
<th>Yes</th>
<th>No</th>
<th>NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notified responders of scene safety issues?</td>
<td>30</td>
<td>30</td>
<td></td>
<td>NA</td>
</tr>
<tr>
<td>All pertinent info from CAD disseminated?</td>
<td>20</td>
<td>20</td>
<td></td>
<td>NA</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>30</strong></td>
<td>30</td>
<td></td>
<td>100.00%</td>
</tr>
</tbody>
</table>

### Information Flow

<table>
<thead>
<tr>
<th>Information Flow</th>
<th>Points</th>
<th>Yes</th>
<th>No</th>
<th>NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Answered radio traffic in a timely fashion?</td>
<td>20</td>
<td>20</td>
<td></td>
<td>NA</td>
</tr>
<tr>
<td>Correctly identified apparatus requesting info?</td>
<td>20</td>
<td>20</td>
<td></td>
<td>NA</td>
</tr>
<tr>
<td>Correctly identified info requested?</td>
<td>20</td>
<td>20</td>
<td></td>
<td>NA</td>
</tr>
<tr>
<td>Correctly identified info given?</td>
<td>20</td>
<td>20</td>
<td></td>
<td>NA</td>
</tr>
<tr>
<td>Complete info added to CAD?</td>
<td>25</td>
<td>25</td>
<td></td>
<td>NA</td>
</tr>
<tr>
<td>Accurate info added to CAD?</td>
<td>25</td>
<td>25</td>
<td></td>
<td>NA</td>
</tr>
</tbody>
</table>

*Informative material and not a part of this American National Standard (ANS)*
### Information Flow (cont.)

<table>
<thead>
<tr>
<th>Points</th>
<th>Yes</th>
<th>No</th>
<th>NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>25</td>
<td>25</td>
<td></td>
<td></td>
</tr>
<tr>
<td>155</td>
<td>155</td>
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<td>100.00%</td>
</tr>
</tbody>
</table>

### Radio Protocol/Skill

<table>
<thead>
<tr>
<th>Points</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>60</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>25</td>
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</tr>
<tr>
<td>20</td>
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</tr>
<tr>
<td>20</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>135</td>
<td>135</td>
<td></td>
</tr>
</tbody>
</table>

### Mutual Aid & Automatic Aid

<table>
<thead>
<tr>
<th>Points</th>
<th>Yes</th>
<th>No</th>
<th>NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>10</td>
<td></td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>25</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>10</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>10</td>
<td></td>
<td></td>
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<tr>
<td>20</td>
<td>20</td>
<td></td>
<td></td>
</tr>
<tr>
<td>75</td>
<td>50</td>
<td></td>
<td>66.67%</td>
</tr>
</tbody>
</table>

### Supervisor's Overview

<table>
<thead>
<tr>
<th>Points</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>100</td>
<td>100</td>
<td>0</td>
</tr>
<tr>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>100</td>
<td>0</td>
<td>0.00%</td>
</tr>
</tbody>
</table>

Comments: The original dispatch was not disseminated in a timely fashion, nor did you remember to notify the out of quarter’s apparatus. Fire doubles in size every minute, so it is imperative that the information is toned out without any delay. Additionally, when a higher alarm was requested, you were not prepared by having the information out and ready, which hindered a rapid and appropriate response.

*Informative material and not a part of this American National Standard (ANS)*
<table>
<thead>
<tr>
<th>Category</th>
<th>Possible Points</th>
<th>Actual Points</th>
<th>% Correct</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignment of Call</td>
<td>230</td>
<td>170</td>
<td>73.91%</td>
</tr>
<tr>
<td>Summarization</td>
<td>30</td>
<td>30</td>
<td>100.00%</td>
</tr>
<tr>
<td>Information Flow</td>
<td>155</td>
<td>155</td>
<td>100.00%</td>
</tr>
<tr>
<td>Radio Protocol/Skills</td>
<td>135</td>
<td>135</td>
<td>100.00%</td>
</tr>
<tr>
<td>Mutual Aid and Automatic Aid</td>
<td>75</td>
<td>50</td>
<td>66.67%</td>
</tr>
<tr>
<td>Supervisor's Overview</td>
<td>100</td>
<td>0</td>
<td>0.00%</td>
</tr>
<tr>
<td>Overall Score</td>
<td>725</td>
<td>540</td>
<td>74.48%</td>
</tr>
</tbody>
</table>

Evaluator's Signature ________________________________

Employee's Signature (if applicable) ________________________________

*Informative material and not a part of this American National Standard (ANS)
Calltaker's name -  
Evaluator's Name - QAE XXXX  
Nature of Call - Difficulty Breathing

<table>
<thead>
<tr>
<th>Call Taking for EMS Incidents</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Interview Questions</strong></td>
</tr>
<tr>
<td>Verified address of occurrence?</td>
</tr>
<tr>
<td>Verified caller's telephone number?</td>
</tr>
<tr>
<td>Determined why an ambulance is needed?</td>
</tr>
<tr>
<td>Determined if the caller is with the patient?</td>
</tr>
<tr>
<td>Determined the approximate age of the patient?</td>
</tr>
<tr>
<td>Determined if the patient is conscious/awake?</td>
</tr>
<tr>
<td>Determine if the patient is breathing?</td>
</tr>
<tr>
<td>Followed Agency's prescribed protocols/policies regarding further questioning for additional information?</td>
</tr>
<tr>
<td>Gave appropriate instructions to the caller/patient regarding bleeding control, airway maintenance, CPR, or childbirth according to Agency's prescribed protocols/policies?</td>
</tr>
<tr>
<td>Gave appropriate instructions to the caller to assist the responders?</td>
</tr>
<tr>
<td>Questioned about the number of injured persons?</td>
</tr>
<tr>
<td>Caller’s name obtained?</td>
</tr>
<tr>
<td>Caller’s address obtained?</td>
</tr>
<tr>
<td><strong>Total</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>CAD Skills</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Points</strong></td>
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<tr>
<td>Checked prior incidents at address?</td>
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<tr>
<td>Complete info added to CAD?</td>
</tr>
<tr>
<td>Accurate info added to CAD?</td>
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*Informative material and not a part of this American National Standard (ANS)*
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<th>Telephone Protocol/Skill</th>
<th>Points</th>
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<td>Answered call within 3 seconds</td>
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<td>Proper greeting used?</td>
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<td>80</td>
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<td>Takes control of call using good judgment?</td>
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<tr>
<td>Remained calm?</td>
<td>30</td>
<td>30</td>
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<td>Proper tone of voice used?</td>
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<td>Professional language used?</td>
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<td>Courteous?</td>
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<td>No dead time while on phone</td>
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<td>Advises caller that they will be transferred to another agency</td>
<td></td>
<td></td>
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<tr>
<td>Stays on the line to announce transfer to other agency's personnel</td>
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<tr>
<td>Directs caller to proper non-public safety agency</td>
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<td></td>
<td><strong>265</strong></td>
<td><strong>255</strong></td>
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<table>
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<tbody>
<tr>
<td>Overall call handled properly?</td>
<td>100</td>
<td>100</td>
<td></td>
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<tr>
<td>See Supervisor</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Exceeds Standards</td>
<td></td>
<td></td>
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<td></td>
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Comments: Just a reminder to remember that the caller does not know what you're doing, so silence while typing can unnerve the person on the other end of the phone.

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<tr>
<td>Telephone Protocol /Skills</td>
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<td>255</td>
<td>96.23%</td>
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<tr>
<td>Supervisor's Overview</td>
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<td>100.00%</td>
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<tr>
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<td>925</td>
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Evaluator's Signature

_____________________________________

Employee's Signature (if applicable)

_____________________________________

*Informative material and not a part of this American National Standard (ANS)
<table>
<thead>
<tr>
<th>Assignment of Call</th>
<th>Points</th>
<th>Yes</th>
<th>No</th>
<th>NA</th>
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<tr>
<td>Processes incident promptly (under 1 minute)?</td>
<td>25</td>
<td>25</td>
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<td>Nature given with initial dispatch?</td>
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<td>15</td>
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<td>Followed Agency's dispatch protocol?</td>
<td>40</td>
<td>40</td>
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<tr>
<td>Immediately notify out of quarters apparatus/units?</td>
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<tr>
<td>Dispatched info accurately?</td>
<td>40</td>
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<tr>
<td>Dispatched info concisely?</td>
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<tr>
<td>Notified EMS personnel of prior incidents?</td>
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<td><strong>Total</strong></td>
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<table>
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<th>Points</th>
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<th>NA</th>
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</thead>
<tbody>
<tr>
<td>Notified responders of scene safety issues?</td>
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<td>All pertinent info from CAD disseminated?</td>
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<tr>
<td><strong>Total</strong></td>
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<table>
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<td>Correctly identified apparatus requesting info?</td>
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<td>Correctly identified info requested?</td>
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<tr>
<td>Correctly identified info given?</td>
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<tr>
<td>Complete info added to CAD?</td>
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<tr>
<td>Accurate info added to CAD?</td>
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<tr>
<td>Dissemination of critical/confidential information appropriately?</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>130</strong></td>
<td><strong>70</strong></td>
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<td><strong>53.85%</strong></td>
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*Informative material and not a part of this American National Standard (ANS)
### Radio Protocol/Skill

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<tbody>
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<tr>
<td>Articulates?</td>
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<td>10</td>
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<tr>
<td>Remained calm?</td>
<td>25</td>
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<tr>
<td>Professional language used?</td>
<td>20</td>
<td>20</td>
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<tr>
<td>Professional demeanor?</td>
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**Total:** 135 50  37.04%

### Supervisor's Overview

<table>
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<tr>
<th>Overview</th>
<th>Points</th>
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<th>No</th>
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</thead>
<tbody>
<tr>
<td>Overall call handled properly?</td>
<td>100</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>See Supervisor</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Exceeds Standards</td>
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</table>

**Total:** 100 0  0.00%

**Comments:** You missed several radio transitions from the responders who requested another ambulance be dispatched because they were stuck by a freight train. You also did not remain calm when dispatching this incident.

### Examination Scores

<table>
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<tr>
<th>Category</th>
<th>Possible Points</th>
<th>Actual Points</th>
<th>% Correct</th>
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<td>Information Flow</td>
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<td>53.85%</td>
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<td>Radio Protocol/Skills</td>
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<td><strong>Overall Score</strong></td>
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**Evaluator's Signature** ____________________________

**Employee's Signature (if applicable)** ____________________________

*Informative material and not a part of this American National Standard (ANS)
## SAMPLE SPREADSHEET SCORING FORMULAS

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*Informative material and not a part of this American National Standard (ANS)
Addendum 3*

QUALITY ASSURANCE SAMPLE GUIDELINES FOR CALL TAKING AND DISPATCH

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Calltaking for Law Enforcement Incidents

Interview Questions

1. Verified address of occurrence?
   - Obtained and verified the location of the occurrence including city, (state, if applicable), apt/unit #, access codes, cross streets, and common place/landmark names when applicable.

2. Caller’s telephone number verified?
   - Contact number(s) of the caller were obtained unless anonymity was requested.
   - Telephone number of the patient verified (if different from caller’s telephone number).

3. Asked about time of occurrence?
   - Obtained details regarding when the incident occurred; clarifies ambiguous times such as “just happened”; “not happening now”, etc.

4. Asked about weapons?
   - Ascertained whether any weapons were used, seen or indicated as well as the existence of any weapons in or around the premise.

5. Asked about alcohol and drug use?
   - Ascertained whether or not any of the involved parties are currently under the influence of drugs or alcohol, or if there is any history of drug or alcohol abuse.

6. Asked if it is physical or verbal abuse?
   - When applicable, determined whether the altercation involved physical contact or was only verbal in nature.

7. Questioned about the need for an ambulance?
   - When applicable, obtained information regarding the presence and extent of injuries to any party including whether or not anyone was strangled or grabbed by the throat.

8. Questioned about direction of travel?
   - Information was obtained and clarified when applicable regarding the direction and mode of travel by persons of interest.

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9. Questioned about number of subject/offender(s) involved?
   • Questions regarding the number of parties / subjects involved were asked and the information obtained was clarified. Example “several” converted to a number i.e. “less than 10”.

10. Questioned about description of subject / offender(s)?
    • Ascertained details regarding physical description - gender, age, race, height, build/weight, hair color, any distinguishing marks, scars, tattoos, features, facial hair, etc.
    • Obtained clothing description (top to bottom; inside out) including accessories such as hat, glasses, scarves, backpack, purse, etc.

11. Questioned about offender’s location?
    • Information obtained and verified regarding the current or last known location of the offender(s) or subject(s).

12. Questioned about description of vehicle?
    • Attempted to obtain details regarding the color, year, make, model, type, license plate number, and any distinguishing characteristics on the vehicle (i.e. dents, scratches, rust, etc.).

13. Asked if the caller wants to see the officer?
    • Verified whether or not the caller wished to speak with the responding officer(s).

14. Asked other incident specific questions?
    • Standard operating procedures were followed according to the type of incident reported and specific details were obtained.

15. Complainant’s name obtained?
    • First and last name of the caller was obtained and spelling verified unless anonymity was requested.

16. Complainant’s address obtained?
    • Complainant’s current address was obtained, verified and recorded in the occurrence including apt/unit number.
    • Ascertained whether the occurrence location is different from the complainant’s address.

**CAD Skills**

1. Checked prior incidents at address?
   • Location history was checked in CAD and pertinent results added to the occurrence.

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2. Complete information added to CAD?
   • All necessary information or explanations when information was not available was entered into the occurrence in a concise, organized manner.

3. Accurate information added to CAD?
   • Information entered into the occurrence was accurate according to the responses received from the complainant and query results.

Telephone Protocol / Skills

1. Answered the 9-1-1 or emergency 10-digit line within 10 seconds?
   • An Agency specific criteria.

2. Proper greeting used?
   • Appropriate greeting according to Agency standards and protocols.

3. Listens and comprehends?
   • Caller was given time to answer questions.
   • Communication techniques such as paraphrasing or clarifying questions were used to ensure understanding.

4. Takes control of call using good judgment?
   • Politely and professionally interrupts caller only when necessary.
   • Asks pertinent questions to redirect conversation back to current situation.
   • Professionally calms emotional callers.
   • Redirects the caller’s focus if their attention wavers or they get involved with the situation (i.e. conversing with or yelling at another person involved).

5. Remained calm?
   • Rate of speech remained consistent, did not speed up during stressful situations.
   • Volume of speech was appropriate to the current situation and environment (call-taker did not yell at the complainant).
   • Tone of voice did not waiver, speech was clear.
   • Information was added into the occurrence immediately (call-taker did not “freeze”).

6. Proper tone of voice used?
   • Professional and polite.
   • Volume was appropriate to the situation.

*Informative material and not a part of this American National Standard (ANS)
• Empathy/compassion was evident when applicable.
• Call taker sounded engaged (not bored, sarcastic, or irritated).

7. Professional language used?
• No slang or police jargon was used.
• Addressed the caller respectfully.
• No swearing or inappropriate words/phrases were used.

8. Courteous?
• Addressed the caller by name.
• Explained reason for transfer or putting caller on hold.
• Provided updates to the caller when placed on hold for a prolonged period of time.
• Provided information to the caller regarding procedures (i.e. “officers will check the area first and then come to see you”), and anticipated delays.

9. No dead time while on phone
• Questioning continued while entering previous information in to the incident. Calltaker did not pause while typing; was able to multi-task.
• Explanations or other appropriate conversation was initiated when updating the call when no further information needed to be obtained.

10. Advises the caller that they will be transferred to another agency?
• Caller is told which agency they will be speaking with and when the transfer is taking place.

11. Stays on the line to announce transfer to another agency’s personnel?
• Calltaker ‘introduces’ the caller to the new agency and provides a brief explanation.
• Calltaker advises when they are disconnecting from the phone call.

12. Directs caller to proper non-public safety agency?
• Advises the caller that another agency may be able to assist them and why.

*Informative material and not a part of this American National Standard (ANS)*
Dispatching for Law Enforcement Incidents

Assignment of Incident

1. Processes incident promptly?
   • According to Agency protocols, available units, call priority and number of incidents for service waiting.
   • Attention is given to the incident as soon as practicable given current radio traffic at the time the incident is received.
   • Incident is dispatched, broadcast or brought to the attention of a patrol supervisor when unable to be immediately dispatched.

2. Correct number of units assigned?
   • According to Agency standards and protocols regarding minimum number of officers dispatched.
   • Control was taken by the dispatcher to ensure too many units were not assigned to the incident.

3. Nature given when initiating dispatch?
   • Pertinent details regarding the nature of the incident were provided during the initial dispatch transmission.

4. Double phrased location?
   • The location of the incident was provided twice. Once with the street address or intersection and once with cross streets and common-place name if applicable.

5. Dispatched information accurately?
   • Information in the incident was interpreted and relayed accurately to the responding officers.

6. Dispatched information concisely?
   • Incident information was provided to responding officers in a clear and concise manner.
   • Incident information was condensed, not read word for word.
   • Only pertinent details were provided.

7. Notified officer(s) of prior incidents?
   • Responding officers were advised of previous calls for service to the address/location that are relevant or provided essential information (hazards, entry points, previous related occurrences, etc.).

*Informative material and not a part of this American National Standard (ANS)
**Summarization**

1. Disseminated information about weapons?
2. Disseminated information about alcohol and drug use?
3. Disseminated information about physical or verbal abuse?
4. Disseminated information about number of offender(s)/subject(s) involved?
5. Disseminated information about description of offender(s)/subject(s)?
6. Disseminated information about offender(s) / subject(s) location?
7. Disseminated information about description of vehicle?
8. Disseminated information about direction of travel?
9. Notified officer if the ambulance/fire apparatus has been dispatched?
10. All pertinent information from CAD disseminated?
   - All pertinent information entered into the incident was provided to the responding officers including related query results (vehicle registration, NCIC, RMS, etc.).

**Information Flow**

1. Answered radio traffic in a timely fashion? (needs to be measurable, timely fashion to one Agency may not be the same to another, example - within 5 seconds)
   - According to agency standards.
2. Correctly identified units requesting information?
3. Correctly identified information requested?
   - Information requested was interpreted accurately and answered correctly.
4. Correctly identified information given?
   - Dispatcher demonstrated an understanding of the information provided by officers and/or call takers and responded appropriately:

   *Informative material and not a part of this American National Standard (ANS)*
i. Recognized what resources may be required from the information.
ii. Identified the incident to which the information pertained.
iii. Provided the necessary notifications according to the information.

5. Complete information added to CAD?
   • All pertinent details were entered into CAD.

6. Accurate information added to CAD?
   • All information was accurately entered into the CAD incident.

7. Dissemination of critical/confidential information appropriately?
   • Critical/confidential information was provided according to specific Agency protocols.

Radio Protocol/Skill

1. Listens and comprehends?
   • Responded to all transmissions.
   • Requested information to be repeated when unable to hear or comprehend.

2. Articulates?
   • Information was provided with clarity and effectiveness.
   • Transmissions were easy and fluent; clear, distinct and precise.

3. Remained calm?
   • Rate of speech remained consistent, did not increase.
   • Voice remained steady; did not waiver or sound excited.

4. Professional language used?
   • Slang or inappropriate words/phrases were not used.
   • When applicable, Agency specific codes were used to assist with comprehension.

5. Professional demeanor?
   • Demeanor was not sarcastic, bored, playful, etc.
   • Transmissions were professional; tone was not angry or annoyed.

*Informative material and not a part of this American National Standard (ANS)*
Calltaking for Fire Incidents

Interview Questions

1. Verified address of occurrence?
   • Obtained and verified the location of the occurrence including city, (state, if applicable), apt/unit #, access codes, cross streets, and common place/landmark names when applicable.
   • Verified the type of structure.

2. Complainant’s telephone number verified?
   • Contact number(s) of the caller were obtained unless anonymity was requested.

3. Asked about number of occupants in the building?
   • Advised occupants to exit the building, if safe to do so.

4. Asked if anybody was injured?

5. Asked other incident specific questions?
   • Standard operating procedures were followed according to the type of incident reported and specific details were obtained.

6. Complainant’s name obtained?
   • First and last name of the caller was obtained and spelling verified unless anonymity was requested.

7. Complainant’s address obtained?
   • Complainant’s current address was obtained, verified and recorded in the occurrence including apt/unit number.
   • Ascertained whether the occurrence location is different from the complainant’s address.

8. Asked about time of occurrence?
   • Obtained details regarding when the incident occurred; clarifies ambiguous times such as “just happened”; “not happening now”, etc.

CAD Skills

1. Checked prior incidents at address?

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• Location history was checked in CAD and pertinent results added to the occurrence.

2. Complete information added to CAD?
   • All necessary information or explanations when information was not available was entered into the occurrence in a concise, organized manner.

3. Accurate information added to CAD?
   • Information entered into the occurrence was accurate according to the responses received from the complainant and query results.

**Telephone Protocol / Skills**

1. Answered call within 10 seconds
   • An Agency’s specific criteria.

2. Proper greeting used?
   • Appropriate greeting according to Agency standards and protocols.

3. Listens and comprehends?
   • Caller was given time to answer questions.
   • Communication techniques such as paraphrasing or clarifying questions were used to ensure understanding.

4. Takes control of call using good judgment?
   • Politely and professionally interrupts caller only when necessary.
   • Asks pertinent questions to redirect conversation back to current situation.
   • Professionally calms emotional callers.
   • Redirects the caller’s focus if their attention wavers or they get involved with the situation (i.e. conversing with or yelling at another person involved).

*Informative material and not a part of this American National Standard (ANS)*
5. Remained calm?
   - Rate of speech remained consistent, did not speed up during stressful situations.
   - Volume of speech was appropriate to the current situation and environment (call taker did not yell at the complainant).
   - Tone of voice did not waiver, speech was clear.
   - Information was added into the occurrence immediately (call-taker did not “freeze”).

6. Proper tone of voice used?
   - Professional and polite.
   - Volume was appropriate to the situation.
   - Empathy/compassion was evident when applicable.
   - Call taker sounded engaged (not bored, sarcastic, or irritated).

7. Professional language used?
   - No slang or police jargon was used.
   - Addressed the caller respectfully.
   - No swearing or inappropriate words/phrases were used.

8. Courteous?
   - Addressed the caller by name.
   - Explained reason for transfer or putting caller on hold.
   - Provided updates to the caller when placed on hold for a prolonged period of time.

9. No dead time while on phone?
   - Questioning continued while entering previous information to the incident. Calltaker did not pause while typing; was able to multi-task.
   - Explanations or other appropriate conversation was initiated when updating the call when no further information needed to be obtained.

10. Advises the caller that they will be transferred to another agency?
    - Caller is told which agency they will be speaking with and when the transfer is taking place.

11. Stays on the line to announce transfer to another agency’s personnel?
    - Calltaker ‘introduces’ the caller to the new agency and provides a brief explanation.
    - Calltaker advises when they are disconnecting from the phone call.

12. Directs caller to proper non-public safety agency?
    - Advises the caller that another agency may be able to assist them and why.

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Dispatching for Fire Incidents

Assignment of Incident

1. Processes incident promptly?
   • According to Agency protocols, available units, incident priority and number of incidents waiting.
   • Attention is given to the incident as soon as practicable given current radio traffic at the time the incident is received.
   • Incident is dispatched, broadcast or brought to the attention of a patrol supervisor when unable to be immediately dispatched.

2. Correct number of units assigned?
   • According to Agency standards and protocols regarding minimum number of fire personnel dispatched.
   • Control was taken by the dispatcher to ensure too many units were not assigned to the incident.

3. Nature given when initiating dispatch?
   • Pertinent details regarding the nature of the incident were provided during the initial dispatch transmission.

4. Double phrased location?
   • The location of the incident was provided twice. Once with the street address or intersection and once with cross streets and common-place name if applicable.

5. Dispatched information accurately?
   • Information in the incident was interpreted and relayed accurately to the responding fire personnel.

6. Dispatched information concisely?
   • Incident information was provided to responding fire personnel in a clear and concise manner.
   • Incident information was condensed, not read word for word.
   • Only pertinent details were provided.

7. Notified fire personnel of prior incidents?
   • Fire personnel were advised of previous calls to the address/location that are relevant or provided essential information (hazards, entry points, previous related occurrences, etc.).

*Informative material and not a part of this American National Standard (ANS)
**Summarization**

1. Notified responders of scene safety issues?
   - All pertinent information from CAD disseminated.

**Information Flow**

1. Answered radio traffic in a timely fashion? (needs to be measurable, timely fashion to one Agency may not be the same to another, example - within 5 seconds).
   - According to Agency standards.

2. Correctly identified units requesting information?

3. Correctly identified information requested?
   - Information requested was interpreted accurately and answered correctly

4. Correctly identified information given?
   - Dispatcher demonstrated an understanding of the information provided by fire personnel and/or call takers and responded appropriately:
     i. Recognized what resources may be required from the information.
     ii. Identified the incident to which the information pertained.
     iii. Provided the necessary notifications according to the information.

5. Complete information added to CAD?
   - All pertinent details were entered into CAD.

6. Accurate information added to CAD?
   - All information was accurately entered into the CAD incident.

7. Dissemination of critical / confidential information appropriately?
   - Critical/confidential information was provided according to specific Agency protocols.

**Radio Protocol/Skill**

1. Listens and comprehends:
   - Responded to all transmissions.
   - Requested information to be repeated when unable to hear or comprehend.

*Informative material and not a part of this American National Standard (ANS)*
2. Articulates?
   • Information was provided with clarity and effectiveness.
   • Transmissions easy and fluent; clear, distinct and precise

3. Remained calm?
   • Rate of speech remained consistent, did not increase
   • Voice remained steady; did not waiver or sound excited.

4. Professional language used?
   • Slang or inappropriate words/phrases were not used.
   • When applicable, Agency specific codes were used to assist with comprehension.

5. Proper demeanor?
   • Transmissions were professional; tone was not angry or annoyed.
   • Demeanor was not sarcastic, bored, playful, etc.

Mutual Aid and Automatic Aid

1. Proper departments selected and notified?

2. Immediate dissemination of escalated alarm information (under 1-minute)?

3. Staging information disseminated?

4. Correct alarm level disseminated?

5. Appropriate notifications made in a timely fashion?

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Calltaking for EMS Incidents

Interview Questions

1. Verified address of occurrence?
   • Obtained and verified the location of the occurrence including city, (state, if applicable),
     apt/unit #, access codes, cross streets, and common place/landmark names when applicable.

2. Caller’s telephone number verified?
   • Contact number(s) of the caller were obtained unless anonymity was requested or caller
     refused.
   • Telephone number of the patient verified (if different from caller’s telephone number).

3. Determined why an ambulance was needed?
   • Followed Agency’s policy for determining chief complaint.

4. Determined if the caller is with the patient?

5. Determined the age or approximate age of the patient?

6. Determined if the patient was conscious/awake?

7. Determined if the patient was breathing?

8. Followed Agency’s prescribed protocols/policies regarding further questioning for additional
   information?

9. Gave appropriate instructions to the caller/patient regarding bleeding control, airway maintenance, CPR,
   or childbirth according to the Agency’s prescribed protocols/policies?

10. Gave appropriate instructions to the caller to assist the responders?

11. Questioned about the number of injured persons?

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12. Complainant’s name obtained?
   • First and last name of the caller was obtained, spelling verified unless anonymity was requested.

13. Complainant’s address obtained?
   • Complainant’s current address was obtained and verified and recorded in the occurrence including apt/unit number.
   • Ascertained whether the occurrence location is different from the complainant’s address.

**CAD Skills**

1. Checked prior incidents at address?
   • Location history was checked in CAD and pertinent results added to the occurrence.

2. Complete information added to CAD?
   • All necessary information or explanations when information was not available was entered into the occurrence in a concise, organized manner.

3. Accurate information added to CAD?
   • Information entered into the occurrence was accurate according to the responses received from the complainant and query results.

**Telephone Protocol / Skills**

1. Answered call within 10 seconds?
   • An Agency’s specific criteria.

2. Proper greeting used?
   • Appropriate greeting according to Agency standards and protocols.

3. Listens and comprehends?
   • Caller was given time to answer questions.
   • Communication techniques such as paraphrasing or clarifying questions were used to ensure understanding.

4. Takes control of call using good judgment?
   • Politely and professional interrupts caller only when necessary.

*Informative material and not a part of this American National Standard (ANS)*
• Asks pertinent questions to redirect conversation back to current situation.
• Professionally calms emotional callers.
• Redirects the caller’s focus if their attention wavers or they get involved with the situation (i.e. conversing with or yelling at another person involved).

5. Remained calm?
• Rate of speech remained consistent, did not speed up during stressful situations.
• Volume of speech was appropriate to the current situation and environment (call taker did not yell at the complainant).
• Tone of voice did not waiver, speech was clear.
• Information was added into the occurrence immediately (call taker did not “freeze”).

6. Proper tone of voice used?
• Professional and polite.
• Volume was appropriate to the situation.
• Empathy/compassion was evident when applicable.
• Calltaker sounded engaged (not bored, sarcastic, or irritated).

7. Professional language used?
• No slang or police jargon was used.
• Addressed the caller respectfully.
• No swearing or inappropriate words/phrases were used.

8. Courteous?
• Addressed the caller by name.
• Explained reason for transfer or putting caller on hold.
• Provided updates to the caller when placed on hold for a prolonged period of time.

9. No dead time while on phone?
• Questioning continued while entering previous information to the incident. Calltaker did not pause while typing; was able to multi-task.
• Explanations or other appropriate conversation was initiated when updating the call when no further information needed to be obtained.

10. Advises the caller that they will be transferred to another Agency?
• Caller is told which agency they will be speaking with and when the transfer is taking place.

*Informative material and not a part of this American National Standard (ANS)*
11. Stays on the line to announce transfer to another agency’s personnel?
   • Calltaker ‘introduces’ the caller to the new Agency and provides a brief explanation.
   • Calltaker advises when they are disconnecting from the phone call.

12. Directs caller to proper non-public safety agency?
   • Advises the caller that another Agency may be able to assist them and why.

*Informative material and not a part of this American National Standard (ANS)*
Dispatching for EMS Incidents

Assignment of Incident

1. Processes Incident promptly?
   • According to Agency protocols, available units, incident priority and number of incidents waiting.
   • Attention is given to the incident as soon as practicable given current radio traffic at the time the call is received.
   • Incident is dispatched, broadcast or brought to the attention of a shift commander when unable to be immediately dispatched.

2. Correct number of units assigned?
   • According to Agency standards and protocols regarding minimum number of EMS personnel dispatched.
   • Control was taken by the Dispatcher to ensure too many units were not assigned to the incident.

3. Nature given when initiating dispatch?
   • Pertinent details regarding the nature of the incident were provided during the initial dispatch transmission.

4. Dispatched incident in order according to Agency policy?

5. Immediately notify out of quarters apparatus?

6. Double phrased location?
   • The location of the incident was provided twice. Once with the street address or intersection and once with cross streets and common-place name if applicable.

7. Dispatched information accurately?
   • Information in the incident was interpreted and relayed accurately to the responding EMS personnel.

8. Dispatched information concisely?
   • Incident information was provided to responding EMS personnel in a clear and concise manner.
   • Call information was condensed, not read word for word.
   • Only pertinent details were provided.

*Informative material and not a part of this American National Standard (ANS)*
9. Notified EMS personnel of prior incidents?
   • EMS personnel were advised of previous calls to the address/location that are relevant or provided essential information (hazards, entry points, previous related occurrences, etc.).

**Summarization**
1. Notified responders of scene safety issues?
   • All pertinent information from CAD disseminated.

**Information Flow**
1. Answered radio traffic in a timely fashion? (needs to be measurable, timely fashion to one Agency may not be the same to another, example - within 5 seconds)
   • According to Agency standards.

2. Correctly identified units requesting information?

3. Correctly identified information requested?
   • Information requested was interpreted accurately and answered correctly.

4. Correctly identified information given?
   • Dispatcher demonstrated an understanding of the information provided by EMS personnel and/or call takers and responded appropriately:
     i. Recognized what resources may be required from the information.
     ii. Identified the incident to which the information pertained.
     iii. Provided the necessary notifications according to the information.

5. Complete information added to CAD?
   • All pertinent details were entered into CAD.

6. Accurate information added to CAD?
   • All information was accurately entered into the CAD incident.

7. Dissemination of critical/confidential information appropriately?
   • Critical/confidential information was provided according to specific Agency protocols.

**Radio Protocol / Skill**
1. Listens and comprehends?  

*Informative material and not a part of this American National Standard (ANS)*
- Responded to all transmissions.
- Requested information to be repeated when unable to hear or comprehend.

2. Articulates?
   - Information was provided with clarity and effectiveness
   - Transmissions easy and fluent; clear, distinct and precise

3. Remained calm?
   - Rate of speech remained consistent, did not increase.
   - Voice remained steady; did not waiver or sound excited.

4. Professional language used?
   - Slang or inappropriate words /phrases were not used.
   - When applicable, Agency specific codes were used to assist with comprehension.

5. Professional demeanor?
   - Demeanor was not sarcastic, bored, playful, etc.
   - Transmissions were professional; tone was not angry or annoyed.

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Addendum 4*

QUALITY ASSURANCE PROCESS OVERVIEW MATRIX

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Quality Assurance Process Overview

Develop SOP & Operational Standards
- Establish objectives.
- Define goals.
- Create policies.
- Develop documentation per policy.
- Create rating scale.
- Develop selection guidelines.

Create Quality Assurance process
- Train to expectations

Apply QA process
- Follow QA process steps.

Analyze QA process
- Utilize trend analysis and employee input to change QA process as needed.
- Amend SOPs.
- Train to new standards.

Train employees to standards

Implement revised QA process

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Addendum 5*

QUALITY ASSURANCE PROCESS FLOW CHART

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Quality Assurance Process - Specific

Call Selection
- Use established selection protocol
  - Identify type:
    - Random
    - Targeted
    - Real-Time

Data Evaluation
- Review incident data.
  - (CAD, Complaint Card, Run Sheet)
  - Listen to audio.
  - (Telephone, Calls and/or Radio)

Exit QA Process

Does call meet selection criteria? (Correct criteria, if targeted) (Correct protocol followed)

Performance and Outcome Assessment
- Determine performance level.
  - (Human, System, Policy, Environmental Issues)
  - Compare to agency protocols.
  - (Agency adopted standards, established protocols, written evaluation guidelines, Standard Evaluation Guidelines)
  - Determine level of compliance with protocols
    - Evaluate outcome.
    - Determine:
      - Compliant
      - Non-Compliant
      - Mitigating Circumstances

Findings Documentation
- Document Determination:
  - Compliant
  - Non-Compliant
  - Mitigating Circumstances
  - List areas of strengths.
  - List areas of needed improvements.

Does employee conduct require disciplinary referral?

Develop recommendations.
- Refer for commendation, remediation, or refer for disciplinary process.

Recommendation
- Disseminate results to appropriate personnel.
  - Solicit employee input.
  - Update findings as appropriate.
  - Update recommendations as appropriate.

Feedback

Action Planning
- Identify and analyze trends.
  - (Positive or negative employee and/or system performance)
  - Determine action items.
    - (Policy, training, technology, employee, agency)
  - Develop short-term goals and objectives.
  - Assign responsibility and timeline to final recommendations.

Documentation
- Monitor implementation/completion of action plan.

Compliance Verification
- File final documentation.
  - Follow agency record retention policy.

Exit QA Process

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NOTES*: 

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