

Module 2: Urgency (Triage)

Goal: Sort every call as emergency, same day, or scheduled, so the most urgent work gets help first.

About 8 minutes

All names, phone numbers, addresses, and companies in this lesson are made-up examples. They are marked "(example)".

Why This Matters to the Employer

A trade company only has so many techs and so many hours. If a slow drain gets the next tech while a flooding kitchen waits, the damage grows and the customer is lost. If a small job gets an after-hours emergency trip, the company loses money. Good triage puts the right job first.

What "Triage" Means

Triage means sorting calls by how urgent they are. Many people from the military or medical field already know the idea. At a trade company, you sort every call into one of three levels.

Emergency: Danger to people or property right now.

- Water pouring and it won't stop
- A night call about a burst pipe flooding a home, for a water damage (restoration) company
- Burning smell from an electrical panel, sparks, or smoke
- A gas smell
- No heat or cooling for someone at risk, if your company treats that as an emergency

Same day: A real problem, but nobody is in danger.

- Water heater not working
- One circuit or a few outlets out
- AC running but not cooling well

Scheduled: It can wait for the next open slot.

- Maintenance or tune-ups
- Estimates and quotes
- Small repairs, like a dripping faucet
- Adding an outlet or a light

Safety First: Use the Emergency Script

Some calls are about danger, not repairs. A gas smell, smoke, sparks, or someone hurt. For these, **follow your company's emergency script right away**. That script usually tells the caller to get to safety and call the right emergency line first. Don't stop to fill in the whole ticket. Safety comes before paperwork.

Learn your company's script on day one. Keep a copy at your desk. If your company doesn't have one, ask your manager for it.

Ask the Right Questions

You can't see the problem. So you ask. Keep the questions short and simple:

- "Is anyone hurt or in danger right now?"
- "Do you smell gas or anything burning?"
- "Is anything sparking or smoking?"
- "Is water still running? Can you find the shutoff valve?"
- "Is anyone in the home elderly, sick, or very young?"
- "When did this start?"

Listen to the answers, not just the tone. A calm caller can have a real emergency. A loud caller can have a small problem. Sort by the facts.

Know Your Company's Rules

Every company draws the lines a little differently. One shop may treat no AC in a heat wave as an emergency. Another may call it same day. Some charge more for after-hours work. Learn your company's rules and follow them.

When in doubt, ask. Call your manager or the on-call lead. Guessing wrong in either direction costs something. Asking takes a minute.

Mark It Clearly

Once you decide, **write the urgency level at the top of the ticket**. Use the words your company uses. Everyone who opens the ticket should see it first. If the level changes later, update it and add a note saying why.

Say This, Not This

Instead of this...	Say this...
"Is it really an emergency?"	"Is anyone in danger? Is water still running?"
"We'll get to you when we can."	"I've marked this as same day. I'll call you back by 2 with a time."
"I think it's probably fine."	"Let me check with my lead so we handle this the right way."

Example Scenario

EXAMPLE SCENARIO. All names and numbers are made up.

It's Tuesday morning at Example Heating & Air (example). The company also has plumbing and electrical techs. Chris (example) is on the phones. Two calls come in five minutes apart.

Call 1:

Caller: Hi, my kitchen sink is draining really slow. It's been like this for a week.

Chris: Thanks for calling. Can I get your name and best number?

Caller: James Carter (example), (619) 555-0117.

Chris: That's (619) 555-0117? Got it. Is any water backing up onto the floor?

Caller: No, it just drains slow.

Chris: Okay. I can book a plumber for tomorrow morning, 8 to 10. Does that work?

Caller: That's fine.

Chris marks it **Scheduled**.

Call 2:

Caller: There's water all over my kitchen floor! It's coming from under the sink!

Chris: I'm going to help you right now. What's your name and best number?

Caller: Grace Park (example), (619) 555-0163.

Chris: (619) 555-0163. Grace, is the water still running?

Caller: Yes!

Chris: Open the cabinet under the sink. Do you see two small handles on the pipes?

Caller: Yes.

Chris: Turn them both to the right, clockwise, until they stop.

Caller: Okay... it stopped.

Chris: Great job. Is anyone hurt? Is water near any outlets or cords?

Caller: No, we're okay.

Chris: Good. What's the address?

Caller: 321 Placeholder Ln (example).

Chris: I'm sending a plumber now. I'll call you back in 10 minutes with the arrival window.

Chris marks it **Emergency** at the top of the ticket and calls the dispatcher right away.

What went right: Chris sorted by facts, not by tone. He asked if water was still running, helped stop the damage, checked for danger near electricity, and marked the urgency clearly. The slow drain waited. The flood didn't.

Quick Tips

- Three levels: emergency, same day, scheduled.
- Gas, smoke, sparks, or someone hurt? Follow the company emergency script first.
- Ask simple questions: danger? still running? when did it start?
- Sort by facts, not by how loud the caller is.
- Learn your company's rules. When in doubt, ask your lead.
- Put the urgency level at the top of the ticket.
- If the level changes, update it and note why.

Quiz

1. A customer wants a quote for a new electrical panel. Which level is it?

- a) Emergency
- b) Same day
- c) Scheduled

Answer: c. Nothing is broken or dangerous. It can wait for the next open slot.

2. A caller says they smell gas. What do you do first?

- a) Get their full address and billing info
- b) Follow your company's emergency script
- c) Book the next open appointment

Answer: b. Safety comes before paperwork. The script tells you what to do right now.

3. A caller is very calm and says water is still spraying from a pipe. A second caller is yelling about a dripping faucet. Who goes first?

- a) The calm caller with the spraying pipe
- b) The yelling caller
- c) Whoever called first

Answer: a. Sort by the facts, not the tone. Spraying water is damage happening now.

4. You're not sure if a call counts as an emergency. What's the best move?

- a) Guess and move on
- b) Mark everything as an emergency to be safe
- c) Ask your manager or on-call lead

Answer: c. It takes a minute and avoids an expensive mistake either way.

5. Where should the urgency level go on the ticket?

- a) At the top, where everyone sees it first
- b) At the bottom, after the notes
- c) Only in your head

Answer: a. The tech and dispatcher need to see it right away.