Queue Monitor

The role of Queue Monitor rotates among the TPMs according to a schedule. You (the Queue Monitor) manage all new intake requests in the queue. Your responsibility for an intake begins with the Requester's submittal. It ends when you assign the intake to a TPM.

Briefly, your daily and weekly responsibilities for the intake request queue consist of:

1. **INSPECT**: Inspect new and resubmitted intake requests for completeness.
2. **DESIGNATE & ESTIMATE**: Designate the category for each new request; estimate the labor hours that would be needed.
3. **RANKING APPROVED**: If Department VP has ranked the request, change status to "Ranking Approved."
4. **TOP 20**: Update the ranks of intakes that have been designated as the "Top 20."
5. **ASSIGN**: Designate a TPM to manage the intake and Developer(s) to work it.

Prerequisites and permissions:

Vary by intake status, so they are described in the "What to do" section below.

Coordinate with: Department VP, Requester, TPM

What to do

There are tasks that must be performed *daily* and some *weekly*. They are:

INSPECT: Daily

1. In the intake database, filter all open intake requests for those with the status "New" or "Intake Resubmitted."

2. **STATUS CHANGE:** For each filtered intake requests, examine the Intake Request form (MS Word document) attached to the intake. Evaluate its completeness and clarity.
   - If it FAILS, set the intake's status to "**Intake Returned**" in the intake database.
   - If it PASSES, set the intake's status to "**Analysis/ Estimate**."

DESIGNATE & ESTIMATE: Daily

This task can be done immediately after setting the status to "Analysis/Estimate." For each task in "Analysis/Estimate" status (i.e., the request passed the quality check):

1. Identify the category for which this intake's time should be reported. Record this in the intake database record for this request, using the "Time Category" field.

2. Create an initial estimate of hours for completion of this intake. Record that number in the "Estimated hours" field for this intake in the intake database. See Appendix A for how to estimate time.

3. **STATUS CHANGE**: Update the intake status to "**Ranking Pending**." This status tells the Department VP that the new intake request is ready for them to prioritize (rank).

RANKING APPROVED: Daily

1. In the intake database, filter all open intakes for those with the status of "Ranking Pending." For each, see if the Department VP has recorded a rank.
2. **STATUS CHANGE**: If the Department VP has recorded a rank for an intake, change its status to "**Ranking Approved.**" The Department VP will use this status later to identify which requests to consider for the weekly "Top 20 Intakes" list. It also alerts the Requester to review the intake record to see where their request ranks in relation to others.

TOP 20: Weekly

When you receive the Department VP's "Top 20 Intakes" list, record the Top 20 score of each of those intakes in the intake database, using the "Master Rank Override" field.

ASSIGN: Weekly

1. At the next staff meeting following your recording of the "Top 20" ranks, consult with all TPMs and Developers on how to assign each "Top 20" intake. Specifically:
   - A TPM to manage the intake through completion.
   - One or more Developers to work the intake.

2. After the staff meeting, update the intake database with the names of the TPM and Developer for each of the "Top 20" intakes.

Once you have updated the intake database with the name of the assigned TPM and Developer, your responsibility for the intake as Queue Monitor ends and the TPM's responsibility begins.

Things to keep in mind

The daily task of "INSPECT" is critical for getting enough information for you to confidently estimate hours. That information is also vital to the assigned TPM: it will tell them the skills and experience needed for the intake and so aid them in recommending the best available Developer for what is needed.