



Document Number	Work Order SOP D.15.01
Owner/Contact Information:	A. Wall/D. Durham
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Related Policies and Procedures	<p>https://files.nc.gov/ncoshr/documents/files/On-call-Emergency_Callback_Policy.pdf</p> <p>https://files.nc.gov/ncoshr/documents/files/Shift_Premium_Pay_Policy_0.pdf?7kDUDT39S6yO9ax8kYOhDovl4suF4Rzb</p> <p>https://files.nc.gov/ncoshr/documents/files/Leave_Without_Pay_Policy.pdf</p>

1. Purpose/Introduction

To establish a standard operating practice to receive, assign, and track requests for work orders.

2. Definitions

- **General:**
 - Work orders are used to request, assign, and track work that needs to be accomplished by Facilities Operations for maintenance, repair, and minor construction work.
 - The work order also serves to document the completion of work and to record all costs associated with that work (i.e., labor expenses, materials issued from inventory and other expenses incurred for purchase of materials or payment to contractors).
- **Work Order Types:**
 - **Corrective Work Orders:** Corrective Work Orders are created for routine repair and/or maintenance of buildings and campus facilities. Corrective work orders are initiated internally by Facilities Operations staff.
 - Corrective work orders do not include non-maintenance work such as building new shelves, hanging whiteboards, hanging banners, making signs for events or providing staffing support for special events outside of normal work hours (see Special Billing work orders below).
 - **Service Request:** Service Requests are corrective work orders requested from a customer external to Facilities Operations.
 - **Special Billing (SPBILL) Work Order:** Customer requests for non-maintenance work orders (examples: building new shelves, signage) with an estimated cost of less than \$5,000 are billable to the requesting department.

- **MBILL:** Used to capture billable work for billable auxiliaries such as POCAM, Housing and Residence Life, Campus Enterprises retail locations, Gove Health, and Dining without requiring a BANFIN form.
- **Project:** Customer requests for non-routine maintenance work with an estimated cost of \$5,000 or more or for non-routine maintenance where tracking the involvement of multiple trades is beneficial (this does not include all multi-trade requests). Projects are only created in TMA if a Project Manager informs the CSC that it is in fact a project and the BANFIN is provided. Project requests shall be evaluated by the appropriate manager to determine if it should be a Facilities Design and Construction project due to scope or cost.
- **Business Office:** Used to create a work order for tracking purposes that is neither billable nor corrective.
- **Estimates:** Department request for estimated cost before proceeding with billable work. To have an estimate prepared the requesting department will send a request to Facilities Operations through mail, email, phone, or online.
- **Preventive Maintenance (PM):** Work orders automatically generated on a scheduled frequency to ensure that routine maintenance is performed.
- **Athletics:** Used to indicate where support is requested for athletic events so that costs associated will be charged to the Facilities Operations Athletic Facilities Maintenance fund regardless of the location or building.

- **Billing:**
 - Facilities Operations generates monthly billing to the following Auxiliaries:
 - Housing and Residence Life
 - Parking Operations and Campus Access Management
 - Campus Enterprises - Retail Locations
 - Dining Services
 - Student Health Services (Gove)
 - 15 Clubview Court (Chancellor's Residence) except for event support (see below)
 - All work order charges, regardless of work order type, are captured in the monthly billing to these external departments without requiring a BANFIN. Billing to these auxiliaries is generated by reviewing a report of all work orders for each building code assigned to the auxiliaries listed above and charging for all labor and materials regardless of the work order type. The retail spaces in Housing and Residence Life have an R in addition to the building code.
 - If a work order will require labor from multiple trades and is not a project the work order will include a task for each shop/trade. Billing will not occur until all tasks in the work order have been completed and noted on the BANFIN given to the Facilities Operations accounting office.
 - Facilities Operations generates semiannual billing for event support at 15 Clubview. Labor and materials used for event support are documented on a work order which is then linked to project number 66 in TMA by CSC staff. Bills are generated in June and December and sent to the Capital Improvements Administrator.

- **Work Order Status:**

- Customer Service Center (CSC) uses eight work order statuses:
 - **Approved:** Work request is approved when it has been accepted and a work order number assigned. TMA automatically generates an e-mail to notify requestor that a work order number has been assigned unless requestor declined notification when work order was submitted. Work orders with the status of approved have either yet to be assigned to a technician's handheld or have yet to be printed.
 - **Awaiting Funding:** Is used for work order requests that are considered billable but do not have a BANFIN associated with them yet. When a customer submits a request that requires a BANFIN via the web they are contacted by CSC to provide a BANFIN. Upon the customer's agreement to send a BANFIN, the work order is accepted and assigned to the CSC trade with this status. CSC should follow up with customers of work orders of this status once a week until the BANFIN has been provided to make sure that they do still want the work completed. Once the BANFIN has been acquired, the request date is changed to the BANFIN's acquisition day and the work order is treated as normal and changed to Approved.
 - **Cancelled:** Work order was initiated but later deemed unnecessary prior to any work being performed. The customer must call or email to cancel the work order, the supervisor of the assigned shop must approve cancellation, or the CSC can cancel work orders that are obvious duplicates. (CSC should uncheck the 'Notify Me' check box prior to cancelling to ensure that customers do not receive notification of cancellation).
 - **Billed:** Accounting will change the Status field in TMA to Billed for all work orders being billed to signify the customer has been billed.
 - **Completed:** All processes have been completed and work order has been closed in TMA by the CSC or the appropriate supervisor. TMA automatically generates an e-mail to notify requestor that work has been completed unless requestor declined notification when work order was submitted.
 - **Finished:** Work has been completed by the technician.
 - **In Progress:** Work order has been printed or assigned to the appropriate technician's handheld device and is in progress.
 - **Scheduled:** Requests where work cannot be performed immediately due to customer request or factors beyond our control (example: weather). Supervisors can notify the CSC to set a work order as scheduled but should include a reason and a scheduled date at the time of the request. NOTE: "Scheduled" will also be indicated in the work order Priority field for scheduled work orders. This will allow reports to be generated either with or without the "Scheduled" priority work orders included with other corrective maintenance work orders (example: weekly/monthly metrics and statistics).

- **Work Order Priorities:** The CSC will prioritize work orders based on five response levels. The examples of tasks in the priority matrix below are not an exhaustive list:

Priority	Level	Response Time	Description	Examples
P1	Emergency	Immediate	The response is immediate – work that requires immediate dispatch.	<ul style="list-style-type: none"> •Imminent or immediate safety and security risks •Potential for significant property loss •Reputation at risk •Lead to immediate impact on education •Single points of failure for utilities system in a significant area of the campus •Affects Chancellor or Trusty Board function
P2	Urgent	4 hours	Same day – (4hr response) Equipment down that significantly impacts the ability to meet campus goals but does not impact safety, security, or property.	<ul style="list-style-type: none"> •Calls regarding room/building temperature •No HVAC air flow •Plumbing clog that's not overflowing •Small indoor water leaks that could lead to a hazard •Trash pick-up •Pest control calls •Any potential ADA violations
P3	Routine	3 days	General Facility Needs (3 Business Days)	<ul style="list-style-type: none"> •Redundant utility systems with backups in place •General calls that do not require same day service
P4	PM	Within Scheduled Period	Preventative Maintenance Work, Scheduled Maintenance	<ul style="list-style-type: none"> •Work that is planned and scheduled •Vendor managed work on equipment
P5	Project	As Scheduled	Tasks or requests that will take planning and longer term to complete and have a minimal impact on campus activities. This includes any project in which a customer has been reached, and completion of a project has a scheduled date	<ul style="list-style-type: none"> •Office Equipment/fixtures updates •Equipment or cell moves •Decommissioning equipment •FIFO – first in, first out, prioritized in group meeting

3. Procedural Steps

- For Mobile Device Users – Please also reference the Mobile TMA Device Usage Standard Operating Practice for additional information.

3.1 General:

3.1.1 All work orders must be completed in a timely manner or cancelled (see below).

3.1.2 Work orders cannot be deleted.

3.1.3 All completed work orders require documentation of Facilities Operations labor and materials and any other costs incurred.

3.1.4 Technicians completing the work are responsible for recording the hours worked as well as indicating if the charge is to be Regular Time (RT) or Overtime (OT). The cost of all materials used and any outside service expense must be recorded on the work order whether obtained through the inventory distribution system or purchased outside the inventory system, via purchase order or p-card.

3.2 Receiving and Distributing Work Orders:

3.2.1 CSC personnel shall check for work requests submitted by e-mail or via TMA online regularly during normal business hours and at the beginning of each business day. Work orders received by these methods are entered into TMA as soon as possible. TMA will provide automatic customer notification of work order creation and status changes unless the customer requests to not be notified. Printed work orders will be distributed to the supervisors' mailboxes at 10:30 am and 4:30 pm.

3.2.2 For emergency work orders: CSC personnel should contact appropriate personnel immediately by radio. (flooding or other situations requiring immediate response to avoid injury or property damage).

3.2.3 Work orders received by phone:

- CSC personnel should obtain the following necessary information:
 - Requestor's first and last name
 - Requestor's email address
 - Requestor's phone number
 - Building name, room number/location of the problem area where work is requested (be as specific as possible)
 - Description of work requested
 - If they request to not receive automatic notification of work order status changes leave the requestor's email blank.
- Choose the appropriate trade code (shop) assignment
- Set the appropriate Work Order Type

3.2.4 Estimate work orders:

- The automatic e-mail notification feature is disabled in TMA.
- Create a work order the same as a corrective except the work order type should be Estimate.
- All estimates will be printed regardless of whether the trade uses handhelds.

- Estimate work orders will be printed on blue paper.

3.2.5 BANFINs received through interdepartmental mail or via email:

- Verify the BANFIN is signed and has a debit fund and account number. (If it doesn't include a fund and account number or is not signed, contact the requestor to obtain a completed form before proceeding.)
- Using the information on the BANFIN, fill out the work order information as you would a normal corrective except set the work order type to SPBILL
- A paper copy will not be printed if work order is assigned to a trade that uses handheld devices
- Printed SPBILL work orders will be printed on gold paper and a copy of the BANFIN will be attached to the back.

3.2.6 TMA automatically assigns a work order number once all required information is entered and the work order is saved.

3.3 Does Not Require a Work Order:

3.3.1 Routine services provided by Grounds or Facility Services generally do not require a work order with the exception that all work performed at 15 Clubview Court shall be documented on a work order.

3.4 Multi-Trade Work Orders:

3.4.1 A request that will require the assistance of more than one shop will be set up using one work order and task for each shop/trade involved. CSC staff will not change the work order status to Completed until all tasks (i.e., all work) has been completed.

▪ **Adding a Task to a Work Order for Another Shop:**

- Supervisors shall contact CSC to have a task added to an existing work order for additional shops/trades.
- CSC will reprint or schedule the additional task as appropriate.

3.5 Completing a Work Order:

3.5.1 Once the requested work on a printed work order has been Finished it should be submitted to the CSC within one business day of work completion.

3.5.2 Finished work orders should include:

- The name of each employee that performed work against that work order.
- The number of labor hours for each employee including:
 - Time spent communicating with supervisor, staff, or customer about the work order.
 - Time spent driving to and from the job (prorated as appropriate for multiple work orders at same site).
 - Time spent retrieving materials and parts (If retrieving parts for several work orders at one time prorate the time between work orders).
 - Time spent performing the task.
 - Time spent processing the work order and purchasing documents specific to the work order.
- The time type, designated as regular time (RT) or overtime (OT).
- The date each set of hours was worked.
- Any materials used from inventory and/or the cost of purchased materials outside of inventory and services paid to an outside contractor must be recorded on the

work order (in description field); a copy of the external invoice or p-card receipt should be linked to the work order.

- A description of the work done to correct the issue when appropriate.

3.5.3 Time worked by Facilities Operations employees performing jobs is to be recorded on the work order in quarter hours (15 minutes) increments as a decimal (example: 15 minutes should be shown as 0.25 hour, half an hour as 0.50 hour, and 45 minutes as 0.75 hour). Time will be rounded up to the nearest quarter if not recorded properly on the sheet.

3.5.4 Copies of all purchasing documents must be submitted with the completed work order.

3.5.5 Printed work orders should be Completed by the CSC or appropriate supervisor within one business day of receiving.

3.5.6 Completed paper SPBILLS should be forwarded to Facilities Operations Accounting with original BANFIN attached.

3.5.7 Completed mobile SPBILLS will be checked for weekly and the original BANFIN will be turned into Facilities Operations Accounting.

3.5.8 For non-billable printed work orders, CSC will retain the original work order for a period of at least one month.

3.6 Billable Work Orders:

3.6.1 The Facilities Operations Accounting office changes the status field to Billed in TMA for each work order after the charges have been billed.

3.6.2 Facilities Operations Accounting will forward a copy of the final billing/invoice to the customer for their files.

3.7 Estimate Work Order:

3.7.1 Estimates are provided by Facilities Operations on request and will be provided to the requestor by the trade supervisor after investigation of the request. This is only an estimate; the actual cost may be higher or lower depending on numerous factors including changes in material cost, asbestos abatement, and unforeseen changes in project scope. Labor rates are updated yearly in July.

- The Supervisor or Manager will submit the estimate on the standard Facilities Operations Estimate Form located on the W: drive (W:\Facilities Operations Forms and Info\FORMS) to the requestor.
- The Supervisor or Manager will enter the total amount of the estimate on the estimate tab, total estimate cost, located at the bottom right of the work order in TMA or submit a copy of the estimate and the Estimate work order to the CSC to close.
- CSC should close the Estimate work order and retain the estimate for reference for at least 3 months in case the customer decides to proceed with the work. A Project or Special Billing work order will be opened upon authorization of work via submittal of a BANFIN.

3.8 Cancelling a Work Order:

3.8.1 Reasons for cancelling a Corrective work order:

- The requestor of the work order requests cancellation in writing.
- The request is refused by management; management will request cancellation, in writing or by email.
- The work order is a duplicate request (in this situation, the email address of the requestor needs to be removed so that they will not get the automatic email).

3.8.2 Supervisors are required to review and approve work order cancellation by signing the work order and marking it as “Cancelled”. The work order should also indicate a reason why it is being cancelled and should be forwarded to the CSC. This can also be done by the supervisors and managers emailing CSC at fowork@uncg.edu indicating the reason.

3.8.3 Cancelled work orders must be documented with a reason on the work order in the general comments field in TMA by CSC.

3.8.4 The CSC is then responsible for notifying the original requestor that their work has been cancelled and the reason why unless it was a duplicate request.

3.8.5 When the requestor cancels the work order, no notification is required.

3.8.6 When the requestor is the same shop performing the work, then no notification is required.

3.9 Work Order Reports

3.9.1 Weekly Work Order Reports:

CSC will schedule TMA to automatically generate the following reports on a weekly basis each Monday:

- Supervisors (Buildings & Trades, Utilities, Grounds, and Facility Services):
 - Corrective Work Orders Over 7 Days Old for their respective shop or zone. Report lists work orders by age with oldest listed at top of report.
 - Estimate Work Orders Over 14 Days Old
 - All Work Orders Over 30 Days Old
- Managers (Buildings & Trades, Utilities, Grounds, and Facility Services) receive same reports listed above for all Shops and Zones under their management.
- Director: receives reports listed above for entire department

3.9.2 Weekly Work Order Reports:

- Supervisors shall respond to the CSC reports in the following manner:

- For all corrective work orders on the Over 7 Days Old Report, supervisors shall take immediate action to complete, transfer, or change status to Scheduled (if appropriate after assessment and conversation with customer – see definition of Scheduled work orders above) or other work order type. Supervisors shall provide a written response to the CSC and their respective manager within 2 business days (typically end of day each Wednesday) indicating the status of these work orders. Response shall contain the current status and estimated completion date. CSC will enter this information in the comments section of the work orders. For work orders changed to “Scheduled” status, supervisor must provide the scheduled date of completion to the CSC so that they can note in the Comments field of the work order. CSC will also note that the work order has been changed to “Scheduled” in the Priority field.

- Scheduled Corrective Work Orders Over 30 Days Old: For scheduled corrective work orders over 30 days old, supervisors shall review and submit any changes to completion date to CSC after consulting with customer. CSC will enter this information in the comments section of the work order.
- Estimate Work Orders Over 14 Days Old: supervisors shall take action to complete estimates and send to the department and a copy to CSC as soon as possible. Supervisors shall also provide a written status and estimated completion date for all Estimate work orders listed on report to their manager and to CSC within two business days.
- Managers shall respond to the CSC reports in the following manner:
 - For corrective work orders on the Over 7 Days Old Report that are 14 days old or older, managers shall take measures to expedite completion and closing of work order. Managers shall also ensure that appropriate comments regarding status, estimated completion date, and that any appropriate work order category changes have been provided to CSC by end of day each Wednesday.
 - For all work orders on the Over 30 Day report, managers shall take measures to expedite completion as appropriate and ensure that comments regarding the current status and estimated completion date have been provided to CSC by end of day each Wednesday.
 - Supervisor and/or CSC inputs comments received from Supervisors and Managers into Comments section of work orders by end of day each Friday so that the comments will be included in the next week's reports.

4. Revision Table

Revision #	Section #	Summary of Changes	Approval Date