I. PURPOSE

To establish a standard operating practice to receive, assign, and track all work orders except preventive maintenance work orders.

A. General

Work orders are used to request, assign, and track work that needs to be accomplished by Facilities Operations including, but not limited to, maintenance, repair, and minor construction work. The work order also serves to document the completion of work and to record and enter labor, material, and any other costs associated with the completion of that work for billing and cost allocation into the TMA computerized maintenance management system (CMMS). The primary functions that work orders accomplish for Facilities Operations are:

- Work orders serve as the vehicle/means to assign work and distribute the assignment to the appropriate service group (maintenance shop/trade/department) that is assigned responsibility for completing the work
- Work orders provide documentation of work for us, our customers, regulatory agencies, and Asset Management
- Work orders provide operational information. Having the ability to monitor and review statistical data provides the information needed to assess and improve operational processes.
- Work orders are used to allocate costs and to charge/bill auxiliaries for labor, materials and any other costs or resources utilized to complete the job or services.

B. Definitions

Corrective Work Order: work order for routine corrective maintenance. Does not include work orders for non-routine maintenance such as work related to utility shutdowns or for building new shelves, hanging banners, making signs for events or providing staffing support for special events outside of normal work hours (those would be examples of SPBILL work orders). These work orders are designated as work order type Corrective.

- Internally-Generated (Self-Reported) Corrective Work Orders: corrective work order that is initiated and requested by Facilities Operations employees (for example, a zone maintenance mechanic might notice that a ceiling tile is discolored due to a leaking HVAC system valve in the ceiling and generates a work order to fix the valve and replace the ceiling tile).
- Customer-Generated Corrective Work Orders: corrective work order submitted by faculty, staff, or students outside of Facilities Operations. Designated as work order types Service Request Email, Service Request Phone, or Service Request Web (for example, a professor notices that a light bulb is burnt out in a classroom and requests replacement).
• **Preventive Maintenance (PM):** PM work orders are input into the computerized maintenance management system and automatically generated on the scheduled due date per the scheduled frequency. The purpose of these work orders is to ensure that routine maintenance is performed.

• **Estimate:** Department request for an estimated cost before proceeding with a “project” or billable work. To have an estimate prepared the requesting department will send a request for Facilities Operations through email, phone or online. If work is to be done by contractors, a BanFin-59 will be requested from the department prior to providing the estimate in order to charge a service fee of $300. This fee will not be charged if the work is done by Facilities Operations personnel.

**Billable Work Orders:** There are several types of billable work orders,

1. **Student Fee Maintenance (SFM) Work Order:** all corrective and preventive maintenance work orders for Elliott University Center, Student Recreation facilities, intercollegiate athletic facilities, and Piney Lake. Charging of labor and materials and costs against these work orders to the Student Fee Maintenance (SFM) budget is done per the procedures outlined in the SFM charging guidelines.

2. **Special Billing (SPBILL) Work Order:** Customer requests for non-maintenance work (ex., building new shelves) work orders with an estimated cost of less than $1000 are billed, individually as each work order is completed via finalization of the BANFIN-59 form being sent to Accounting for Processing.

3. **Projects (PROJ):** Customer requests for non-maintenance work with an estimated cost of $1000 or more. If estimated cost exceeds $10,000, a 3% service fee shall be included in the cost of the project that includes the $300 charged for an estimate if an estimate was previously 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.

4. **Monthly billing to Auxiliary Departments:** The following auxiliaries are billed monthly for all corrective and/or PM work orders:
   - Residence Life
   - Dining Services
   - Gove Health
   - Parking Operations
   - Bryan House (the Chancellor's Residence)

Facilities Operations accounting personnel generate reports for each auxiliary entity showing each work order for which they are being billed and initiates invoicing the auxiliary for the amount due. Copies of the invoices and supporting documentation are sent to the customer.
Work Order Status:

Work Information Center (WIC) uses five work order statuses:

- **Approved** – Work request has been accepted and work order number assigned
- **Incomplete** – Work order has been printed and is in progress
- **Finished** – work has been completed by technician
- **Completed** – all processes have been completed and work order has been closed in TMA by the WIC. TMA automatically generates an e-mail to notify requestor that work has been completed unless requestor declined notification when work order was submitted.
- **Scheduled** – Customer e-mail, phone or web work orders where work cannot be performed immediately due to customer request or factors beyond our control (ex. weather) and must be scheduled more than two weeks from request date will be placed in a scheduled work status upon notification by requestor or the shop supervisor. Note: this does not include delay in completion of work order due to ordering of parts. It is the supervisor's responsibility to make contact with the customer making arrangements when work can be performed. Upon final agreement between shop supervisor and customer, the shop supervisor will notify Work Information Center so that the work order can be placed in a scheduled status and the scheduled completion date added to the comments section. **NOTE:** “Scheduled” is also indicated in the work order Priority field for scheduled work orders. Noting this in the Priority field will allow reports to be generated either with or without the “Scheduled” priority work orders included with other corrective maintenance work orders.
- **Cancelled**: work order was initiated but later deemed unnecessary prior to any work being performed. Supervisor of assigned shop must approve cancellation. Work Information Center can cancel work orders if they are obviously duplicates.

II. PROCEDURES

A. General

1. All work orders must be completed in a timely manner or cancelled (see below). Work orders cannot be deleted.
2. All completed work orders require documentation of Facilities Operations labor and materials and any other costs incurred.
3. The Technician(s) completing the work is responsible for recording the hours worked on the work order as well as indicating if the charge is to be Regular Time (RT) or Overtime (OT). The cost of all materials used and/or outsourced expenses incurred must be recorded on the work order whether they were obtained through the inventory distribution system or purchased outside the inventory system (via purchase order or p-card). All supplies taken from inventory are noted on both the work order and the inventory sign-out sheet at the storeroom location.
4. Routine work generally done by Grounds or Facility Services does not require a work order.

5. Work done for student fee-supported facilities shall be documented and processed as indicated in the Facilities Operations Student Facility Maintenance Work Order procedure.

Receiving and Distributing Work Orders

1. Work Information Center (WIC) receives work requests either by phone, by e-mail, interoffice mail, or via TMA online.

2. WIC personnel check for work requests submitted by e-mail or via TMA online hourly during regular business hours and at the beginning of each business day. Work orders received by these methods are entered into TMA on the same business day as received. All work requests received are entered as work orders into TMA will provide automatic customer notification of work order status/change/completion unless customer requests to not be notified. Work orders are printed and distributed to the trade supervisors’ mailboxes at 10:30 am and 4:30 pm.

3. Emergency Work Orders (for flooding or other situations requiring immediate response to avoid injury or property damage): WIC personnel contact appropriate personnel immediately by radio.

4. Work orders received by phone:
   i. WIC personnel obtain the following from the caller:
      a) First and last name of requestor
      b) Email address of requestor
      c) Building name, room number/location & phone # of the requestor
      d) Building name, room number/Location of the problem area where work is to be done (be very specific, if outside and/or no room # is available, designate southwest corner of building near statue or fountain, etc.)
      e) Description of work requested
      f) If they wish to decline automatic notification of work order status change (unless designated, requestor will receive email notification of status change.

5. Work orders are entered into TMA with the information noted above and the following additional information:
   I. Trade Code Assignment
   II. Work Order Type and sub-type if appropriate: the work order is classified as one of the following types based on the definitions below.
## Work Order Types

<table>
<thead>
<tr>
<th>Code-Work Order Type</th>
<th>Description</th>
<th>Subtypes</th>
</tr>
</thead>
<tbody>
<tr>
<td>03 – Corrective</td>
<td>Corrective work order requested by Facilities Operations personnel</td>
<td>Safety, Energy, Department of Insurance, DHHS, Technical Assistance, Other</td>
</tr>
<tr>
<td>EM-Service Request Email</td>
<td>Corrective work order requested by anyone other than Facilities Operations personnel</td>
<td>Safety, Energy, Department of Insurance</td>
</tr>
<tr>
<td>02- PM</td>
<td>These are system generated for PM based on operation and maintenance manuals</td>
<td></td>
</tr>
<tr>
<td>SPBILL-Special Billing</td>
<td>Customer request for non-routine work that is not part of regular building maintenance (i.e. Facility Services support, banners, signage, keys, etc.) with an estimated cost of less than $1000.</td>
<td></td>
</tr>
<tr>
<td>04 -Project</td>
<td>Customer request for non-routine work that is not part of regular building maintenance (i.e. Facility Services support, banners, signage, keys, etc.) with an estimated cost of $1000 or more.</td>
<td></td>
</tr>
<tr>
<td>05-Estimate</td>
<td>Customer request for an estimated cost before proceeding with a Project or Special Billing work.</td>
<td>Estimate in Progress, Awaiting Funding, Estimate FRS</td>
</tr>
<tr>
<td>BO-Business Office “Tracking/Information Only”</td>
<td>Fac. Ops. business office tracking use</td>
<td>Vehicle/Equipment Requests, Special Event Requests</td>
</tr>
<tr>
<td>RL- Residence Life Billable</td>
<td>Corrective work orders for Housing and Residence Life</td>
<td></td>
</tr>
<tr>
<td>IT-IT Support Enhancements</td>
<td>In-house IT technical support</td>
<td></td>
</tr>
<tr>
<td>06- Gray Home Support</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
6. Input work order subtype if applicable.
7. **For Estimate work orders**, the automatic e-mail notification feature is disabled in TMA by WIC staff.
8. **For Special Billing and Project work orders**, the following is done after receiving an Interdepartmental Invoice (BANFIN-59) authorizing the work:
   - Verify that BANFIN-59 is signed and that the BANFIN-59 has a DR Fund & Acct #.
   - If Banfin is not signed and/or does not include a DR fund & acct, contact the requestor to obtain a completed form before proceeding. Charge to department shall include the 3% project management fee ($300 minimum including amount charged for estimate) if work is to be done by contractors.
   
   i. if $1000 or more:
      a) Create the Project work order
      b) After saving, TMA will generate the Work Order (main) number.
      c) Click copy
      d) Edit information in the request field as needed and assign trade.
      e) When you click copy it will put the main number in the Reference # field and assign a new work order for that number. By putting the main number in the Reference # field you know the work order is attached to another work order or Project number.
   
   ii. If under $1000: create a work order for a trade with a work order type Special Billing (SPBILL).

9. TMA automatically assigns a work order number once all required information is entered and the work order is “saved”. Work order status at this point is “approved”.

10. Approved work orders are printed by WIC twice daily at 10:30 a.m. and 4:30 p.m. and placed in the mailboxes of the appropriate supervisors.

11. Supervisors shall pick up work orders from their mailboxes each business day. If the supervisor is absent then his designee is responsible for picking up the work orders from the shop mailbox.

12. Supervisors or their designees distribute work orders to shop staff as appropriate.

**Closing a Work Order**

A. Completed work orders are submitted to the Work Information Center located on the 2nd floor of the Sink Building within one business day of work completion. Completed work orders must include:
   1. The name of each employee that performed work against that work order.
   2. The number of labor hours for each employee and the time type (designated as regular time (RT) or overtime (OT)). This should include all time directly
associated with completion of the work including travel time, time to obtain parts, etc. (see below).

B. The following should be considered time worked on a job by the Technician(s) and recorded on the work order:
   1. Time spent communicating with the supervisor, staff, or customer about the job
   2. Driving to the job
   3. Time spent going to the warehouse or shop to obtain parts for the job. If parts for several work orders are obtained at one time, prorate the time between the work orders.
   4. Time spent performing task
   5. Time spent processing work order and purchasing documents specific to a job.

C. The following is not required to be recorded as time worked:
   1. Time spent returning to the shop specifically for lunch.
   2. Time spent returning to the shop at the end of the day.
   3. Time spent performing activities not related to work order completion such as:
      • Attending training
      • Attending shop meetings
      • Performing administrative tasks unrelated to work orders

D. 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 (ex., 15 minutes should be shown as 0.25 hour, half an hour as 0.50 hour, and 45 minutes as 0.75 hour).

E. Description of the corrective action required to complete the work order

F. Work finished date

G. For inventory items, inventory number and quantity of parts and supplies used

H. For items not kept in inventory, total cost of parts and supplies (or contracted services) with copy of original receiving documents attached. All original receiving documents must be submitted to the Facilities Operations Accounting office.

I. Work Information Center completes/closes, Corrective and Service Request Email, Service Request Web, and Service Request Phone work orders in TMA within one business day of receiving by inputting the information above. All other work types are closed within 2 business days.

J. TMA sends automatic e-mail notification of work order completion unless declined by requestor or WIC upon initial request.

K. For billable work orders, WIC shall forward the original work order to Facilities Operations Accounting.

L. For non-billable work orders, WIC will retain the original work order for a period of at least one month but no more than three months.

**Billable Work Orders**

A. **Special Billing, Project, and SFM Work Orders:** these work orders are submitted to WIC upon completion with the same information on the work order as for other types.

   1. After entering labor and materials in TMA, WIC forwards the Special Billing, Project, and SFM work orders to the Utilities Manager for review of appropriate
charges. The Buildings & Trades Manager is responsible for this review during the absence of the Utilities Manager.

2. Utilities Manager forwards the approved work orders to the Facilities Operations Accounting office.

3. The Facilities Operations Accounting office enters the correct charges into the SFM ledger for SFM work orders and into Banner for the Special Billing and Project work orders.

4. The Facilities Operations Accounting office changes to status field to “Closed” in TMA for each work order after the charges have been billed.

**Estimate Work Order:**

A. Upon receipt of request for an estimate, WIC enters it into TMA as an Estimate work order and forwards to the appropriate manager or supervisor.

B. Supervisor or manager submits the estimate on the standard Facilities Operations Estimate Form (Appendix A) to the requestor.

C. Supervisor or manager submits a copy of the estimate and the Estimate work order to WIC to close. The finished date on the Estimate work order should match the date on the Estimate Form.

D. WIC closes the Estimate work order and retains the estimate for reference for 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-59.

**Cancelling a Work Order**

A. There are three reasons for canceling a Corrective Work Order and it must be documented in the Comments field:

B. the first and most prevalent is if the originator of the work order cancels the work.

C. the second is if the job is refused by management for any number of reasons, and

D. the third is to remove a duplicate work order (the newest work order shall be cancelled; the oldest work order remains open)

E. Work orders requiring cancellation must be documented with a reason on the work order in the comments field. Shop supervisors are required to review and approve the work order cancellation by signing the work order. The shop supervisor shall forward work order marked “cancelled” with reason indicated to the Work Information Center.

F. Shop supervisors are responsible for documenting the reason the work order is cancelled. The Work Information Center is responsible for notifying the original requestor that their work has been cancelled and the reason why. When the requestor cancels the work order, no notification is required. When the requestor is the same shop performing the work, then no notification is required.
Transferring a Work Order To Another Shop or Adding a Shop to a Work Order

A. Transferring a Work Order to Another Shop:

The following shall be done to transfer a work order to another shop when the original shop assigned will have no further involvement with the work order:

1. Shop personnel will make a note “Transfer to (or Add) Shop Name/Keep Open” on the work order and submit to WIC. Time and material should be shown on the work order in the usual manner. The work order will be transferred by WIC in the most expeditious means available – radio, telephone call, etc. – to prevent delay in completing the work.
2. WIC will enter a comment in TMA for the work order indicating that the work order has been transferred including the shop involved and the date of transfer. Time and material, if any, shall be entered into TMA for the original shop.
3. WIC will add a task to the original work order to transfer to the other shop. This original work order will remain open with the Completion Date field left empty.
4. WIC will reprint the work order and place in the mailbox of the supervisor of the shop that the work order has been transferred to.
5. Once the work is completed, the shop will indicate the usual information on the work order including the date that the work was completed and submit to the WIC.
6. WIC will close the work order per the usual process.

B. Adding a Shop to a Work Order:

The following shall be done to add a shop to the work order when the original shop will perform work during or after the additional shop has completed their portion of the work:

1. Shop personnel shall contact WIC requesting that another shop be added to the work order. The shop will keep their work order.
2. WIC will enter a comment in TMA for the work order indicating that a shop has been added indicating the shop involved and the date of transfer.
3. WIC will add a task to the original work order to add the other shop. This original work order will remain open with the Completion Date field left empty.
4. WIC will reprint the work order and place in the mailbox of the supervisor of the shop that has been added to the work order.
5. Once the work is completed, the shop will indicate the usual information on the work order including the date that the work was completed and submit to the WIC.
6. WIC will close the work order per the usual process.
C. Work Order Tracking and Reporting

1. Weekly Work Order Reports:
   I. WIC will schedule TMA to automatically generate the following reports on a weekly basis each Monday:
   
   II. Supervisors (Buildings & Trades, Utilities, Grounds, and Facility Services):
      a. 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.
      b. Estimate Work Orders Over 14 Days Old
      c. All Work Orders Over 30 Days Old
   
   III. Managers (Buildings & Trades, Utilities, Grounds, and Facility Services) receive same reports listed above for all Shops and Zones under their management.
   
   IV. Director: receives reports listed above for entire department

D. Weekly Report Response

1. Supervisors shall respond to the WIC reports in the following manner:
   
   I. 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 WIC 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. WIC 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 WIC so that they can note in the Comments field of the work order. WIC will also note that the work order has been changed to “Scheduled” in the Priority field.
   
   II. 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 WIC after consulting with customer. WIC will enter this information in the comments section of the work order.
   
   III. Estimate Work Orders Over 14 Days Old: supervisors shall take action to complete estimates and send to the department and a copy to WIC 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 WIC within two business days.
2. Managers shall respond to the WIC reports in the following manner:
   
   I. 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 WIC by end of day each Wednesday.

   II. 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 WIC by end of day each Wednesday.

3. WIC 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.