RESPONSIBILITY – (The following personnel have responsibility to this SOP)

- Design & Renovations Staff
- Logistics Staff
- Service Center/Administrative Services Staff
- Shop Supervisors
- Shop Technicians

KEY WORDS –

- Shops refer to all “groups” we call trades, CUP, Design & Renovations, Plumbing, etc...
- Technician – the FS person who is actually performing the work
- Requestor – department or staff member wanting work to be done
- **Nomenclature:** WO – Work Order; SC – Service Center; Stockroom - Logistics

PROCESSES INVOLVED –

1. As work requests are received, SC will either convert it to a work order and forward to the appropriate supervisor or reject the request. SC will contact the customer regarding rejected work orders, and will ensure all data is as accurate as possible on the work order.

   
   *It is critical that technicians have work orders generated for all of their operational work no matter how insignificant they think the work may be. Customers who see the technicians in the field and ask them to “take care of something” should be told to submit a work order online.*

   **Trouble Calls** will be processed and placed in the shop’s box after SC dispatches it to the technician. The printed Trouble Call must be presented to the stockroom(logistics) to obtain materials for the Trouble Call without an MTO – see MTO explanation below.

2. SC will forward all approved WO’s to supervisors for assignment to technicians

3. The technician should assess the job to determine if materials and/or outside vendors (yearly service contract or generation of a new PO) are needed.

4. **IF MATERIALS ARE NEEDED** - The technician should write all the materials needed to complete the job on a **Material Takeoff Sheet (MTO)** – see attached examples. After the technician completes the MTO and gets an authorized signature, he should drop off the MTO and a copy of the WO at the Logistics window.

   *The technician will not order any materials!*
All MTO’s delivered after noon will be processed the next day. Once an MTO is received, it will be processed and available for pickup by the afternoon of the third day unless special items are needed. (Example: materials requested on an approved MTO submitted at 11:00A.M. on Monday will be available after lunch on Wednesday). If the MTO is completed before two days, the stockroom will release the material earlier than two days. When the materials on the MTO have been received/pulled from stock, the technician will be called for MTO pick up as soon as possible.

Security on the job site is a concern, therefore technicians do not have to retrieve all of the MTO’s items at the same time. A technician can leave items that are NOT needed for that work day with Logistics. Note: All materials should be ordered at once with the MTO. The technician does not physically have to move everything out of Logistics for a job that will run for an extended period.

If the technician determines that substantially more material is needed after the initial MTO has been submitted, he should fill out another MTO and submit it. For situations in which one or two items were “forgotten” the technician can request these items from the Logistics window. (Discretion must be exercised here)

5. IF AN OUTSIDE VENDOR IS NEEDED (Through use of a yearly service contract, generation of a new PO, or professional services agreement) – The technician will fill out the appropriate CVO or requisition and turn it in to Administrative Services, with a copy of the work order. After the CVO is approved, a purchase order is issued, or contract signed. The technician will then be given verification that the vendor can proceed.

6. The technician will repeat steps 4 and/or 5 until the WO is completed.

7. COMPLETING THE WORK ORDER - When the job is complete, the technician should confirm that all the labor and “rolling” stock has been recorded on the back of the work order. ALSO, the technician must write comments regarding what he actually did to complete the job, especially if he did something that was not included in the work order or if the problem was completely different than what was initially assessed.

Further discussion to drive this point home
• Any material issued through Logistics will already be accounted for. The technician has to account for labor/material that was NOT issued by or ordered by Logistics on an MTO. The technician will not be expected to keep a running total of what he pulled from Logistics unless he wants this for his own records. He WILL be expected to keep an accurate account of what was used that was not run through Logistics and sufficient comments explaining what was done and the results for every WO.

8. CLOSING THE WORK ORDER – Supervisors are asked to turn the work orders in to SC gradually. Please refrain from turning in large batches all at once. After the completed WO’s are turned over to SC, ALL of the WO’s (chargeable and non-chargeable) will be costed out. All of this information will assist FS in building a historical database to use for project planning, budgeting, and routine reports to answer questions from administration about the feats our staff are truly accomplishing.

9. The Logistics window will be closed from 11:30 to 12:30 for lunch and from 3:00 to 4:30 everyday. During this time, Logistics staff will be in the office processing MTO’s – they will be available for trouble calls and emergencies only.