



## **Facilities Operations Policy Statement OP-15**

### **Timely and Accurate Handling/Processing of Work Requests**

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1. Background: Timely and accurate processing of all work requests is essential for many reasons. Two of which follow: a) Data collected gives FM employees and managers at all levels valuable information on the cost to operate and maintain buildings and equipment. Using this information more cost effective, methods of doing business may be discovered and justified. b) Most importantly Facilities Operations performs a significant amount of reimbursable work for a large number of customers. Our customers are very important to us and deserve quality work at a reasonable cost completed in a professional and timely manner. To that end, billing shall be clear, concise, and accurate. This policy sets standards of timeliness for completing the paperwork following the physical completion of the work.
2. Timeliness: Facilities Operations employees shall do all they can to execute work requests in a timely manner in accordance with the critical nature of the request. This means everyone. Those involved in the processing of the paper, ordering the parts and/or executing the work. Since work-loads and work requests vary widely in terms of backlog and criticality this policy does not attempt to establish timelines on the front end. It is to ensure rapid closeout upon the physical completion of the work.
3. Prompt closeout responsibilities:
  - a) Craftsperson and/or LEAD Technician: 1 Day for submission:
    - 1) Review assignments in Archibus daily
    - 2) Ensure past assignments that were turned in as completed do not linger as incomplete on your assignments. Notify your supervisor of any work request numbers you have previously completed.
    - 3) Note recent completions and review the work tickets to ensure all labor hours, materials and craftsperson notes are accurate before turning into the PA as completed.
    - 4) Submit the work request ticket to the PA for processing not later than the day following completion of the work.
  - b) PA: 1 Day review-green pen:
    - 1) Review daily all completed work requests submitted by the craftsperson and/or lead technician. Enter &ll new data and resolve any discrepancies noted between Archibus information previously entered and that shown on the work ticket.
    - 2) Annotate work ticket as required (green pen only), change status in Archibus to completed and for paper copy to Supervisor for his review and approval not later than the day following craftsperson's submission.
  - c) Supervisor: 1 Day review – red pen:
    - 1) Review daily all completed work requests submitted by craftsperson and forwarded by PA for final approval and marking "ready to bill" in Archibus.
    - 2) Ensure all time and material costs are reasonable for the scope of work requested. Resolve any issues by contacting appropriate individuals; craftsperson, customer, material supplier.
    - 3) Use craftsperson notes to record and/or communicate information.
    - 4) Annotate paper copy of work request with red pen, accepting or rejecting green pen recommendations by PA. Making any other annotations to the paper copy you want to have entered



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- into Archibus for the record.
- 5) Review and reconciliation process to be completed within one day of submission by PA and then approved for billing.
- d) PA/Supervisor – "Ready to Bill"- 1 Day:
- 1) A day is allowed for the PA to enter supervisor's annotations and finalize and mark the fully reviewed and reconciled work request as "ready to bill" in Archibus.
- e) Five work days after a work request is completed it should be in a "ready to bill status." This is aggressive in order to easily meet the bi-monthly billing cycles set by Facilities Business Office.
- f) Managers:
- 1) Managers shall review their supervisor's Over 14 Day Reports not less than weekly to ensure work requests are being completed in a timely manner.
  - 2) In addition to having the physical work completed these work requests must be approved for billing in a timely manner. Managers are to monitor the progression of reimbursable and non-reimbursable work requests through the billing cycle and into the historical record.
  - 3) One way this may be accomplished is by also reviewing the "Billable Work Request Summary" to ensure work orders are moving from the "No" category in "Ready for Billing?" to the "Yes" category on periodic basis (not less than weekly).
  - 4) Not less than four days prior to billing (Thursday before) Managers shall ensure all completed work requests have moved from the "No" category to the "Yes" category under "Ready for Billing?"
  - 5) Provide direction and guidance to supervisors.
- g) Facilities Operations Director or designated appointee:
- 1) Review in same manner as noted for Managers but not less than three days prior to billing (Friday before).
  - 2) Provide direction and guidance as needed to resolve issues and maximize movement.
4. The craftsperson's paper copies of the work request shall be maintained along with any notes and/or other attachments in the Zone or Shop which completed it. It shall be maintained in a file until all information is transferred into Archibus and for a period of not less than three years from completion.
5. Supervisors shall be responsible for providing customers with ample information in regards to charges. Supervisors and Managers will seek to resolve any issues their customers may have with billing or workmanship. Any issues they cannot resolve with customers will be brought to the Facilities Operations Director.

  
Lee Snodgrass  
Facilities Operations Director