



Standard Operating Procedure (SOP)
Closing Work Orders in TMA

Table with 4 columns: SOP No., Department, Dept. Head Approval, Director Approval. Contains handwritten signatures and dates like 10/22/07 and 1/23/08.

Purpose

To establish guidelines for Administrative Support Services on closing work orders to ensure the information on each work order is correct before the work order is closed in TMA.

Responsibility

- 1. The following people are responsible for following this SOP.
1.A. All Administrative Support Services employees.
1.B. All Warehouse employees.
1.C. All Lockshop employees.

Definitions

- 1. TMA: Facilities Management's computer maintenance management system/work order system.

Procedure

- 1. The Work Order (WO) finish date has been entered indicating that the WO has been completed.
2. Is WO for a key?
2.A. No; Go to step 11
2.B. Yes; Is key request for an internal employee?
2.B.1. No; Go to Step 6
2.B.2. Yes; Resource Management (RM) charges keys to appropriate shop account.
3. WO "status" is changed to "key available for pickup" in TMA.
4. Requestor picks up key and signs off on receiving the key.
5. RM verifies charges, enters a completion date in TMA, and changes status to "complete". (Process Complete.)
6. Lockshop sends keys to RM or Downtown Warehouse depending on location of requestor.
7. RM/Downtown Warehouse verifies key codes on keys against the WO.

8. WO status is changed to “key available for pickup” in TMA.
9. Requestor picks up key and signs off on receiving of the key.
10. RM verifies charges on WO and makes any necessary edits (Go to Billing Process AS-0010).
11. RM verifies account, type, status, labor, comments, material, trade, and supervisor on WO.
12. If work order is a repair “R” order is the cost of the parts plus other charges less than \$250.00?
 - 12.A. **No**; Go to step 13
 - 12.B. **Yes**; RM changes work order type to routine maintenance “M” and changes account number to the appropriate shop account.
13. Does WO have labor and comments entered?
 - 13.A. **No**; RM returns WO to appropriate shop for corrections (Go to step 14).
 - 13.B. **Yes**; Go to step 17
14. Shop makes corrections in TMA and returns to RM (Go to step 17)
15. Does WO have any open PO’s?
 - 15.A. **No**; Go to step 17
 - 15.B. **Yes**; RM sends open PO’s to warehouse (Go to step 16)
16. Warehouse verifies and closes open PO’s in TMA.
17. RM enters closed date and changes status to “complete” in TMA.
18. Is WO a chargeable work order?
 - 18.A. **No**; Process Complete
 - 18.B. **Yes**; RM sends to appropriate shop to verify charges (See Exhibit A).
19. RM makes any required changes in TMA.
20. Is WO linked to a project?
 - 20.A. **No**; Go to Billing Process AS-0010.
 - 20.B. **Yes**; Is project greater than \$10,000?
 - 20.B.1. **No**; Go to Billing Process AS-0010
 - 20.B.2. **Yes**; Send billing information to Facilities Expert Business Office (EBO).
21. RM changes WO status to “Billed” in TMA.
22. Process Complete

Exhibit A

TO:

FROM: Lisa Moser

SUBJECT: Charge Verification

DATE:

The attached Project and/or Work Order # _____ is complete.

Please verify charges and **sign and date this cover letter and all attached work order(s)** if cost meets your approval.

If you have any questions or concerns, please contact me at 3-6262 at your earliest convenience.

Thank you.

Approval to close Project/Work Order: _____
Signature/Date

AS-0006: Closing Work Orders
Revision: 1, October 15, 2007

