WestVirginiaUniversity
Facilities Management

Standard Operating Procedure (SOP)
Insurance Claims

SOP No.	AS-0017	**Revision:**	0
Department:	Administrative Support	**Date:**	5/01/08
Dept. Head Approval:	*[signature]*		5/1/08
Director Approval:	*[signature]*		5/2/08

Purpose

To establish guidelines for Facilities Management Administration staff for filing Property Insurance Claims.

Responsibility

1. The following people are responsible for following this SOP:

    a. All Facilities Management Employees.

Definitions

1. <u>TMA:</u> Facilities Management's computer maintenance management system/work order system.

2. <u>EBO:</u> Expert Business Office.

3. <u>Risk Management:</u> Administers all insurance claims.

Procedure

1. Request is submitted for repairs to WVU property.

2. Individual work orders are made for the appropriate trades.

3. Pictures are taken of all damage and are submitted to Resource Management. Resource Management will file hardcopies, scan link information to the project record in TMA, and forward the photos to Risk Management.

4. Operations Managers and Associate and Assistant Directors determine if damages are going to be an insurance claim (deductible > $2,500.00). *(If project is not >$2,500.00 it is not considered an insurance claim, and the project is completed and is billed from the Operations & Maintenance account).*

5. The immediate Supervisor responsible for the repair must notify Resource Management that an insurance claim will be needed and provides any additional detailed information. Resource Management creates a project in TMA.

6. Any work orders issued for this work are linked to the project in TMA.

7. Risk Management and FM Director, and Associate/Assistant Directors are notified of TMA project number, and a Project Manager / Operations Manager is established.

8. Project Manager/Operations Managers send quotes and cost estimates to Resource Management. Resource Management will file hard copies, scan and link information to the project record, and forward it to Risk Management.

9. Once repairs are made and Resource Management is notified that the project has been completed. Resource Management sends the project record to Risk Management.

10. Risk Management provides Proof of Loss worksheet breakdown on costs. This is reviewed and signed by the Operations Manager or Associate/Assistant Director, and the signed copy is sent to Resource Management and Risk Management. Resource Management will file hard copies, and scans and links this information to the Project record.

11. Project status is updated in TMA to "Awaiting Insurance Payment."

12. Notification of insurance reimbursement deposit is received from the EBO.

13. Project status is updated in TMA as "Insurance Check Deposited."

14. Project is completed in TMA.

15. Process is complete.

Request is submitted for repairs to university property.
→ Individual work orders are made for appropriate trades.
→ Pictures are taken of damage and submitted to Resource Management. RM will file hard copies, scan and link them to the project record, and forward to Risk Management.
→ Operations Managers / Associate & Assistant Directors determine if damages are going to be an insurance claim deductible > $2,500.00. *(If the project is not > than $2,500.00, the project is completed and billed from the OM account.)*

The immediate Supervisor must notify Resource Management that an insurance claim is needed and is also provided with any additional detailed request information, and a project is created in TMA.
→ Any work orders are linked to the project.
→ Risk Management, FM Director, and Associate/Assistant Directors are notified of project number, and an FM contact is established.
→ Project Manager/Operation Manager will send quotes and cost estimates to Resource Management. RM will file hard copies, scan and link information to the project record, and forward information to Risk Management.

Once repairs are made and RM is notified of completion, copies of all completed work orders, TMA purchases, and the project records, are sent to Risk Management by Resource Management
→ Proof of Loss worksheet (*See attached worksheet*) is reviewed and signed by Operations Managers or Associate/Assistant Director. Resource Management forwards signed copy to RM and Risk Management
→ Project status is updated in TMA to "Awaiting Insurance Payment."
→ Notification of insurance reimbursement deposit is received from EBO Department.

Project status is updated in TMA to "Insurance Check Deposited."
→ Project is completed in TMA.
→ Process is complete.