

Standard Operating Procedure: FSS0011-131105

Title: PM Work Order Development and Processing

The following departmental procedure shall be utilized by all Facilities Management personnel when completing, developing or modifying a Preventative Maintenance (PM) work order. To assist with the processing of a PM work order, the following procedures are provided:

### Developing a New PM Work Order

- Employees should submit a request for a potential new equipment PM work order to their unit manager for consideration and approval by using the form “Equip & PM Data Entry Form”.
- If the request for a new equipment PM work order is approved by the unit manager, the request will be forwarded to Facilities’ Support Services for entry into the maintenance management system.

### Modifying an Existing PM Work Order

- Employees wishing to modify existing PM equipment work orders should submit the same request form to their manager for consideration and approval. Once the request is approved, the manager will submit the form to Facilities’ Support Services for entry into the maintenance management system.

### Assignment & Tracking of PM Work Orders

- PM work orders are generated by Facilities’ Support Services using a maintenance management software application on a weekly basis. All weekly PM work orders are reviewed by unit managers and resources are identified to begin the jobs.
- When received, the unit manager will assign resources to the PM and/or make a determination that the PM can be deferred. Typically, PM work orders are only deferred under the following circumstances: a) labor resources are not available to perform the PM tasks, b) budget constraints prevent completion of the PM tasks, c) facility and/or space access conflicts with the pre-scheduled PM, and d) the PM tasks are not needed at that date in time.
- If needed, the unit manager notifies the campus community of day, time and location of the job starts.
- PM work is performed by the assigned labor resource. If, during the process of performing PM work, additional maintenance or repair work is determined to be needed beyond the original PM tasks on the work order, the employee performing the work shall notify their unit manager of their findings. The unit manager will review the findings and if needed, contact Planning & Design for assistance.
- When PM work is completed, individuals who have performed the work will record their labor on the PM work order and turn in the PM work order, marked as completed, for review by the unit manager. After managerial review, the completed PM work order is submitted to the Work Order Clerk for entry into the maintenance management system.

- The Work Order Clerk reviews the PM work order labor entries and if needed, consults with the unit manager regarding any labor discrepancies and/or material charges on the work order. The Work Order Clerk will then enter the employee's labor and change the work order status from "Issued" to "Closed" in the maintenance management system.

#### REFERENCES

- Work Order Flow Process Mapping: From Creation to Completion and Close Out (C3)
- Equip & PM Data Entry Form