‘D’-Equipment PM request workflow when noted by a Facility Services worker

1. User installs new equipment that needs PM
   - FS Technician notices the new equipment & need for maintenance schedule
   - FS Tech informs supervisor of need for PM
   - Supervisor informs WOC of need

2. WOC sends ‘D’ equipment template to UBR (or responsible party) with the PM estimate
   - FS technician notices the new equipment & need for maintenance schedule
   - FS Tech informs supervisor of need for PM
   - Supervisor informs TMA Administrator of D Equipment record to be entered to TMA

3. WOC creates the estimate referral based on the PM shops’ estimate
   - FS Tech informs supervisor of need for PM
   - Supervisor informs TMA Administrator of D Equipment record to be entered to TMA

4. PM shop completes an estimate for the necessary preventive work at the recommended frequency
   - FS Tech informs supervisor of need for PM
   - Supervisor informs TMA Administrator of D Equipment record to be entered to TMA

5. User takes responsibility for maintenance and repair of equipment
   - FS Tech informs supervisor of need for PM
   - Supervisor informs TMA Administrator of D Equipment record to be entered to TMA

6. User / Owner approves or declines
   - FS Tech informs supervisor of need for PM
   - Supervisor informs TMA Administrator of D Equipment record to be entered to TMA

7. TMA Administrator sets up the PM work order:
   - Location
   - Frequency
   - Equipment number
   - Other details
   - FS Tech informs supervisor of need for PM
   - Supervisor informs TMA Administrator of D Equipment record to be entered to TMA

8. NO
   - FS Tech informs supervisor of need for PM
   - Supervisor informs TMA Administrator of D Equipment record to be entered to TMA

9. YES
   - FS Tech informs supervisor of need for PM
   - Supervisor informs TMA Administrator of D Equipment record to be entered to TMA

10. TMA Administrator completes admin. Work order and closes it (internal)
    - FS Tech informs supervisor of need for PM
    - Supervisor informs TMA Administrator of D Equipment record to be entered to TMA

11. Notifies and submits PM to the shop, which will automatically generate at the specified interval
    - FS Tech informs supervisor of need for PM
    - Supervisor informs TMA Administrator of D Equipment record to be entered to TMA

12. Abbreviation Key:
    - FS = Facility Services
    - iSD = iServiceDesk – work order request system
    - WOC = Work Order Center
    - PM = Preventive Maintenance

This allows FS to have a record of the equipment, whether or not the department chooses to have FS PM it.