PM Work Order Exemption from Compliance Reporting

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<th>Approved by: Bill Paulus</th>
<th>Last Revised: 11/29/10</th>
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<td>Procedure owner: Rick Friebe</td>
<td>Effective Date: 11/29/10</td>
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Purpose

The purpose of this procedure is to provide data points that will allow for automation of reporting PM work orders that are exempt from the PM Compliance reporting for valid and authorized reasons.

Overview / Primary Steps

Team Manager / Supervisor:
At the time of work order closing, the Team Manager or Supervisor will indicate that a work order is exempt from compliance reporting and provide the reason for exemption.

Associate Director:
The Associate Director will review work orders identified as exempt and validate the reason provided by the Team Manager/Supervisor. The Associate Director will authorize or deny the work order exemption. The AD will inform the District Planner of Equipment/PM schedules which need to be modified (ex. Change equipment status from ONLINE to OFFLINE and un-schedule the PM.)

Planner:
The Planner will make changes to Equipment records and/or PM schedules as provided by the Associate Director and as indicated by valid and authorized reasons for exemption.

Impacted groups

Director (passive role)
Associate Director (active role)
Team Manager / Maintenance Supervisor (active role)
Planner (active role)

Reference documents

SOP for PM scheduling (un-scheduling)
SOP for modifying Equipment Records
Quick Start Training

Contact information

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Definitions
N/A

Process steps

**Team Manager/Maintenance Supervisor:**
For Non-route Work Order Closing / Compliance Exemption

From the Work Order Closing Form

Access Work Order(s)

Change Status to CLOSED

Enter Action EXEMPT PM

Click Audit button

In Comments field enter reason for exemption (limited to fifty-five characters)

Return to Work Order Closing Form

Close Work Order Closing Form

**For Route Work Order Closing / Compliance Exemption**

From the Route Work Order Closing Form

From the Close Work Orders tab uncheck all and then select the work order(s)/equipment that are exempt using the checkbox

Hit the Close button

Change Status to CLOSED

Enter Action EXEMPT PM and hit OK

Return to the Readings tab and highlight the exempted work order number and click on View

Hit Audit button and enter reason for exemption (limited to 55 characters) and return to the Close Work Order tab

If route is completed, check all work orders except the exempted work order and change the Status to CLOSED and enter COMPLETED as the action code and Save (F10 or disc icon)

Confirm Action Codes by scrolling to the right and viewing the ACTION column

Close the route entering CLOSED as the Status and COMPLETED as the action
**Associate Director:**

**For Non-route Work Order Closing / Compliance Exemption**

From Current Schedule (Exempt PMs View)

- Open Work Order Closing Form (right click on Work Order)
- Review and confirm Response Code entered by Team Manager (audit button/Action/Comments)
- In Authorized By field enter your Compass User Name if the response code is valid
- Close the Work Order Closing Form

- or

If the reason provided is not valid, change the work order status to an active status (open/ready), delete EXEMPT PM from the Action field and leave blank and delete the invalid reason from the Comments field.

**** DO NOT ENTER USER NAME IN AUTHORIZED FIELD IF REASON IS NOT VALID ****

(Optional)

At the work order, click the Audit button and in the comments field adjacent to the topmost audit trail enter “PM IS NON-COMPLIANT”

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**For Route Work Order Closing / Compliance Exemption**

From Current Schedule (Exempt PMs View)

- Right click on the work order to view and copy the Parent Work Order for querying in Route Closing Form
- Open Work Order Closing Form (right click on Work Order).
- Enter query mode and paste the parent work order in WO field and execute query
- Highlight the work order/equipment that are exempt (scroll to the right to view ACTION codes) and hit View
- From the work order, hit the Audit button and read reason for exemption and close out of the work order form
- Go to the Close Work Orders tab and check the exempt work orders (scroll to the right to view action codes)
- In Authorized By field enter your Compass User Name if reason provided is valid.
If the reason provided is not valid, change the work order status to an active status (open/ready), delete EXEMPT PM from the Action field and leave blank and delete the invalid reason from the Comments field.

**** DO NOT ENTER USER NAME IN AUTHORIZED FIELD IF REASON IS NOT VALID ****

(Optional)

At the work order, click the Audit button

In Comments field enter “PM is Non-Compliant”

Close the Route Closing Form.

Give direction to Planner to modify Equipment records or PM schedules as indicated by valid and authorized reasons for exemption.

Planner:

Make modifications to Equipment records and PM schedules as directed by Associate Director and in accordance with Equipment and PM modification SOPs.

Attachments

Background / History