



## SERVICE DIVISION

(08-2019 Draft)

These procedures are being implemented as a means of providing structure, stability, and fairness.

### I. TIME

- a. Non-exempt (hourly) employees are expected to report to work on a timely basis, with the understanding that productive work hours begin at 7:30AM.
- b. Normal working hours for the Service Division are established as 7:30AM to 4:00PM. Alternate work hours will be approved in advance by the Service Manager (SM). Emergency on-call service is outside of this clause.

Per the Employee Handbook, working outside of established work hours without authorization may lead to disciplinary action.

- c. Hourly employees working more than 6.5 hours per day are expected to take a 30 minute lunch break with this being recorded on timesheets. When working in the field, technicians and installers should contact the Service Coordinator (SC) at the onset of lunch and again when lunch is ended. If the SC is not directly available, contact should be made with the Service Manager (SM). SM provides authorization to delineate from this procedure. If the SM is not available, SC may give authorization and will communicate so with SM.
- d. SC will normally take a 30 minute lunch at the same time daily, with options of 12:00-12:30 or 12:30-1:00. Delineation should be authorized by SM. AS work load may affect the specific time, employees should contact SM starting at 12:00 to 1:00 unless communicated otherwise. If SM is unavailable via phone for verbal contact, employees should text or email SM. In the case of urgent to emergency situations, the text should begin with 911 (example being 911 water leak at brewery, need assistance)
- e. Missed assigned work hours, including tardy, early leave, or full-day absence, should be communicated with the SM by verbal phone conversation or text no later than 60 minutes prior to the beginning of the assigned work. In emergency situations, this may not be feasible and communication should be made as soon as possible. If the SM is not available or does not respond within 15 minutes, the SC is to be contacted. The SC will then alert the SM. Absentee Reports should be turned to Payroll with timesheets unless previously approved Leave Request was submitted.

## II. DOCUMENTATION

- a. Daily timesheets, service tickets, work orders, field reports, etc will be provided to the SM daily at the onset of the work day at 7:30AM for the previous day's work. If SM is not in the office, documents should be placed in his mailbox which is located on the door. Exceptions to this are to be approved in advance by SM.
- b. Hard copy and/or digital timesheets must be completed daily with all necessary information included.

If Operations project numbers or cost codes are needed, SC should be contacted prior the start of work tasks.

Service Division quoted work will be assigned a tracking number and cost codes by the SM. This information should be obtained when the work is assigned and prior to tasks being performed. Timesheets and field reports/work orders not utilizing this information will be considered incomplete.

Incomplete timesheets will not be accepted for processing, and the employee will be responsible for correcting inaccurate or missing information after normal Service Division work hours. The SC will not complete nor correct timesheets for technicians or installers.

- c. Service Tickets will be completed while at the customer's property. All designated areas should be completed with intent of answering who, what, when, where, and why. Customer or customer representative must sign the Service Ticket in designated area(s). Yellow copy to be presented to customer.

Digital Service Tickets will be addressed when iPads are issued.

- d. Timesheets will correlate with Service Tickets, Field Reports, or other as designated for the project. Technicians are responsible for ensuring this prior to turning in documents. This is not the responsibility of the SC. Incorrect or incomplete documentation will be corrected after normal Service Division work hours.
- e. Technicians will take before and after pictures for all service calls and maintenance. These are to be sent to SC prior to departure from the property. If pictures of quoted work are needed, this will be communicated by the SM. Before/After pictures are standard practice in the industry and assist in risk containment.

- f. HVAC Technicians performing equipment start up will complete Start Up Sheet. This will be returned with Daily Timesheet.
- g. Technicians performing Maintenance Sheet will complete the appropriate documents and return with Daily Timesheet.

### **III. PROCEDURES/COMMUNICATION**

- a. Service Division Huddle will be held on Monday from 7:30-8:00AM. Attendance is mandatory.
- b. Technicians and Installers will report to work in TAW uniforms which are clean and professionally presentable. Uniforms are to be turned in on the designated day for cleaning. If this is missed, it is the responsibility of the technician to launder his uniform. Issues with uniforms including stains, tears, rips, etc will be reported to the SC.
- c. Service vehicles are expected to be maintained in a clean and orderly fashion. Daily clean out of trash and debris should take place. Vehicle cabs should be free of obstruction which may cause safety concerns.

Items being transported in the bed of a service vehicle must be secured at all times.

Vehicles will be periodically inspected to ensure compliance.

Weekly Vehicle Inspections will be completed and provided to the SC during the Monday Huddle.

- d. Employees will take the most direct path of travel to and from customer sites. Driving behavior is monitored by GPS. All are expected to abide by TAW Vehicle Use Policy/Safe Driving Compliance.
- e. During normal Service business hours, SC will direct first assignment of the day and all successive assignments. Technicians will not direct appointments of/for other technicians. Technicians will not schedule their own appointments including service calls, maintenance, return calls, operations projects, service quoted projects, or any other without authorization of the SC. In the absence of the SC, the SM will direct.
- f. Technicians and Installers will verbally contact or text the SC upon arrival to the appointment and when leaving. This will be done for each appointment. There is no exception to this as this is standard procedure in industry.

- g. Upon arrival, Technician will find the appropriate customer or customer representative. Confirm the problem. Request initial signature authorizing diagnostics or work and validating payment in the case of residential clients.
- h. Residential customers will provide payment at time of service, unless otherwise authorized by SC or SM.
- i. Service requests during overtime hours will be communicated to the customer and authorized with customer signature prior to the start of work. As this is during non-business hours, SM will be notified of start/stop via phone, text, or email.
- j. Quoted work will be performed during normal business hours unless authorized by SM. SM will provide quote information at the onset of the project including hours appropriated, equipment submittals, specifications, etc. Quoted work will not be started until necessary information has been shared with Technicians and/or Installers.
- k. Technical questions will be directed to the SM. Only when the SM is not available will other technicians assist with technical information. Utilize previously mentioned 911 preface to message if response time is critical and SM has not answered the initial phone call.
- l. TAW tools and equipment, whether general and stored in the Shop or specific to the Service Division and stored in a secure location, must be signed out appropriately prior to leaving the building.
- m. Technicians handling refrigerant or recovering equipment must be certified and maintain a refrigerant log and recovery log in compliance with EPA standards.
- n. Discarded equipment and debris returned to the Shop or yard must be disposed of appropriately. "Dumping" is prohibited.
- o. SC will invoice service tickets and tracking jobs in a timely manner and on a daily basis.
- p. On-call is for a 7 day duration on a rotation basis beginning on Monday at 7:30AM and ending the following Monday at 7:29AM. Scheduled on call assignment is determined by the SC. Technicians wanting to exchange on-call day(s)/week(s) will receive prior approval from SM who will communicate to the SC.

Service Technicians requesting day(s) off, whether PTO or unpaid, during previously scheduled On-call are requested to exchange with another technician prior to submitting a Leave Request. Leave Requests are submitted and approved by the SM.

On-call Technician will respond to any/all service calls for any trade with a minimum of a phone call. Calls are not to be forwarded or passed on to another Technician unless authorized by SM.

When reporting to an on-call visit, the Technician determines the scope of work is beyond his expertise, a verbal call, text, or email will be made SM for further directives.

- q. All incidents, accidents, injuries, will be immediately report to the SM by verbal phone call. If SM is absent, contact will be made with SC or HR/Safety. Procedures are listed in the Employee Handbook.
- r. Technicians requesting to leave work early for illness or lack of work will notify the SM prior to leaving. If SM is not available, SC will be contacted who will then communicate such to SM.

I acknowledge that I have received, read, and understand the procedures listed given to me by T.A. Woods Company. I understand that I am expected to comply with these procedures as presented.

T.A. Woods Company retains discretion to make changes to these procedures of which you will be apprised.

\_\_\_\_\_  
(Employee Name -printed)

\_\_\_\_\_  
Date

\_\_\_\_\_  
(Employee Signature)

\_\_\_\_\_  
Date