



New Mexico State University

Facilities Services

ADM-013: Work Order Adjustment Process

<p>Effective: July 1, 2008</p> <p>Last Updated: March 26, 2010</p> <p>Procedure Owner: Facilities and Services Operations</p> <p>Procedure Contact/ Subject Matter Expert Executive Director of Administration</p>	<p>Related Policies & Procedures:</p> <p>ADM-003.A_WorkOrder1 ADM-006.A_WorkOrder2</p>
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Procedure Statement

Facilities and Services Business Services is responsible for the accuracy and completeness of Work Order billing. All changes, corrections or adjustments to WO billing are to be processed through the Facilities and Services Business Services area.

Reason for Procedure

This policy was instituted in response to findings of the Special Audit Report, December 20, 2007. Facilities and Services Business Services and shops regarding documentation, requirements and processes for Work Order billing adjustments, changes or corrections.

Purpose: This guideline is intended to provide internal controls that document requirements for requesting and approval of a change, correction or adjustment to work order billing.

Procedures

Request for adjustment, change or correction (adjustment) to Work Order billing will require the following:

- Name of person requesting the billing adjustment
- Date of the request
- Reason or justification of why the billing adjustment is appropriate
- The Work Order number that the request applies to

Who has authority to request a billing adjustment?

- The individual responsible for the account(s) that were billed.
- The Shop Supervisor, Assistant Supervisor, Project Manager or Director responsible for the work or project.
- Facilities and Services Business Services staff.

Who must approve a billing adjustment?

- The individual responsible for the account(s) that were billed or the Shop Supervisor, Assistant Supervisor, Project Manager or Director responsible for the work or project.
- Facilities and Services Business Services Accountant or Executive Director of Administration must approve.

Who is authorized to create a billing adjustment?

- Facilities and Services Business Services Accountant or Executive Director of Administration.

Required written documentation:

- Request for adjustment identifying the justification and the Work Order number.
- Approval by individual responsible for the account(s) that were billed or the Facilities and Services Shop Supervisor, Assistant Supervisor, Project Manager or Director responsible for the work or project.
- Approval by Facilities and Services Business Services Accountant or Executive Director of Administration.