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Latest Version:	1.0	Revision Date:	5/05/2014
Effective Date:	09/16/2014	Replaces:	NEW
Revised By:	Joshua Graves	Review Cycle/Date:	Annual
Reviewed By:	Allison McMichael	Reviewing Unit:	ISD Billing
Title:	Parts Maintenance SOP		
Description:	This document is to outline the steps of adding or modifying a part.		

Parts Maintenance

Standard Operating Procedure

1. General Statement of Purpose
 - 1.1 This document shows the steps to add or modify a part within the ISD Service Parts List.
2. Scope
 - 2.1 This standard applies to OMES/ISD Service Owners.
3. Discipline
 - 3.1 Administrative Standards
4. Terms and Definitions
 - 4.1 Part Number or Subcategory– a sequential number assigned by the ISD Billing Group to a service or product, referred to as a “part”.
 - 4.2 Product Group – a product’s services grouping; matches the service catalog.
 - 4.3 Product Number – matches the Time & Labor Project ID.
 - 4.4 Short Part Description – the 30 character description of a part.
 - 4.5 Unit of Measure – the measurement by which an item is billed.
 - 4.6 Frequency – how often an item is billed.
 - 4.7 Unit Price – the price of an item. When it varies from job to job, then it will be listed at \$1.00.
 - 4.8 True Up/Actual – when an item is reconciled by a true-up process or billed actual as the quantity changes.
 - 4.9 Standard/Non-Standard – if an item is a set price per item or varies.
5. Process:
 - 5.1 If a Service Owner determines a part needs to be added or modified, they will complete the Part Billing Request Form and create a CRM Service Desk Case with the form attached to it. The **Part Billing Request Form** is accessible from the ISD Process Library (<http://eclipse.omes.ok.gov/>) under the Service Owner Role or in the network folders at: **J: Drive < Function < Customer Service < Agency Templates.**
 - 5.1.1 In the Summary put: *New/Updated ISD Part*

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5.1.2 In the Description:

Please Assign to the ISD Billing Provider Group.

Please add/update part on the Billing Change Order Template.

Attach the Part Billing Request Form to the Request.

- 5.2 The OMES Service Desk receives the case to have a part added or modified and assigns the CRM Case to the ISD Billing Provider Group.
 - 5.3 ISD Billing documents and confirms the billing rate.
 - 5.4 ISD Billing adds the part information into PeopleSoft Financials, into the Billing Change Order Template and in the Master Billing Database.
 - 5.6 ISD Billing will then add a note to the case and assign the case to the PMO Provider Group.
 - 5.7 The PMO Provider Group will then update the ISD Process Library with the latest billing template and close the case.
6. Roles and Responsibilities
- 6.1 Service Desk – Processes and assigns the CRM Case to the appropriate Provider Group.
 - 6.2 ISD Billing – Documents and confirms the billing rate is accurate; updates the Billing Change Order Template, PeopleSoft Financials and the Master Billing Database; and assigns the CRM Case to the PMO to update the ISD Process Library.
 - 6.3 PMO – Updates the ISD Process Library with the latest billing template and closes the case.
7. References
- 7.1. Part Billing Request Form – located in the ISD Process Library (<http://eclipse.omes.ok.gov/>) under the Service Owner Role or in the network folders at: **J: Drive < Function < Customer Service < Agency Templates.**
 - 7.2. Parts Maintenance Process Workflow