



## *What to Request Before Receiving a Maintenance Company's First Invoice*

Most likely you have contractors to service the building's special mechanical and electrical equipment because the facility just doesn't have that in-house expertise nor does it usually need specialized technicians for the few times their skills are needed. This is why service providers and maintenance contractors are available to assist with those needs that are outside the expertise of the Diocese's building management group.

Examples of special equipment needing a service contractor are refrigeration technicians for the air-conditioning system, plumbing and heating technicians for the boiler-heating system, domestic hot water heating system, city water backflow test, and electricians for electric panel infrared testing.

With each of these contractors come annual, semi-annual monthly, and weekly service contracts and with each contract one can read the often very detailed payment requirements. All of this is standard procedure but what about those contractor invoices? How often does one receive a bill for services provided that states not much more than the date and time of the work, hours charged, and a brief note along with the actual bill for services provided.

As the individual responsible for hiring these service providers and paying their invoices there should be a relatively detailed scope of work and also a detailed invoice scope of work. For example when a service contractor comes to the Diocesan entity and performs semi-annual preventive maintenance work the contractor should be using a detailed checklist of things-to-do called a **work order checklist**.



This to-do list should state the tasks to be completed and, using a boiler as our example of the preventive maintenance work order requirements, the service technician's tasks include but are not limited to the following:

1. Visually inspect the combustion air piping, flue gas vent piping, heating pipes, and valves for any indications of leakage, deterioration, or signs of blockage.
2. Examine the relief valve discharge pipe and boiler relief valve for any noticeable signs of leakage or weeping.
3. Investigate the condensate drain line, PVC fittings, drain system, and drain trap for any types of blockages if the system is a condensing boiler.

4. Inspect burner flame for visual assessment of equipment burner performance, as well as flame sensors, igniter, and burner assemble.
5. Inspect/test the low water cutoff to manufacturer's boiler level.
6. Clean and adjust burner based on manufacturer's required readings.
7. Clean and inspect all boiler connections and wiring condition.
8. Check control settings, as well as, test safety controls and operating controls.

completed and signed work order checklist.

The technician should be required to sign-off on this preventive maintenance work order confirming the equipment is functioning properly.

Knowing there is a work order to-do list as noted above, as well as other technician requirements on the service contractor's work order, a completed and signed-off work order should be requested to be included with the invoice. Without this completed work order attached to the bill then there is no document to use for completing a walk-around visual inspection of the work performed.

Going forward with every service contract it will be understood that every contract has a list of things-to-do that explains the services provided. If not written into the contract, such as snow removal tasks then the signed contract should reference the use of a **standardized work order** to be used that goes into detail of the work to be performed with each visit.

So before signing the next service contract with a service provider, included in the contract should be a quality control process in place, a means to efficiently manage this process, and a means to complete a walk through the document to visually inspect the work performed. Going forward, and in the signed contract it should be stated and agreed upon at signing this contractor shall include the

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