DISTRICT OF COLUMBIA
PUBLIC SCHOOLS

DC Public Schools Food & Nutrition Services

Equipment Repair Process

QuickBase Operations (QB)

Ticket Tracker

DC Public Schools Food & Nutrition Services (FNS) uses a QuickBase (QB) application to track equipment issues supported by our hot and cold equipment vendors. Field Specialists and Area Directors work in tandem to ensure tickets are addressed and the appropriate equipment pieces are fixed. These should not be issues that are owned by Department of General Services (DGS) and/or a custodian. Please refer to the **Troubleshooting Guide** in index A.

Generally, FNS Equipment vendors work to fix the physical equipment. DGS is responsible for repairing issues affecting utilities like water, gas, electrical, etc. Often both teams may be needed to implement a fix for a particular issue. In these instances, the appropriate FNS Equipment vendor should first rule out whether the issue is with the equipment or with a utility. If the latter, then FNS can work with the appropriate team to escalate to DGS. Please use your discretion and judgement as to which issues need to be QB tickets or DGS work orders. The process and expectations are the following:

1. An Area Director (AD) or Field Specialist encounters an issue at a school site that requires an equipment vendor to assess the equipment. For emergent situations, QB tickets should be inputted but also escalated up the management chain (Lead → Area Director (QB Input - *Copy Field Specialist and Vendor Director of Operations/General Manager*)→ Field Specialist→ Designated Point of Contact (FNS POC) → Vendor).

2. Area Director, or in special circumstances such as new equipment refresh and preventative maintenance follow up, should a Field Specialist input a QB ticket describing the situation at the appropriate school site. Each QB ticket is allocated a job # in the system.
   a. A singular QB ticket should be used to reflect one equipment item and/or issue at a time. We should be able to follow the issue to repair process for a specific problem in one ticket.
   b. If after a reported repair the issue persists, open a new ticket and check the box indicating if the unit was previously repaired in the last 30 days. If yes, enter the reference number.

3. The QB app sends an email notification to the FNS POC tied to the equipment vendor prompting review.

4. Daily, the FNS POC sends an email to the vendor with open job numbers. For reporting guidelines, please refer to the **FNS Equipment Repair Policy** in index B. The FNS POC is responsible for updating QB with the current job-status:
   a. **Open** - Issue is in QB but no movement on ticket has been made.
   b. **Reported to Vendor** - The FNS POC has made the vendor aware of the issue. The FNS POC is responsible for adjusting this status change.
   c. **Fixed** – FSMC Vendor has reported the issue as resolved as related to the job number in the notes section in QB. The respective FNS hot or cold vendor POC is responsible for adjusting this status change from "Reported to Vendor" to "Fixed".

5. The equipment vendors submit invoices to the Budget Assistant on differing timelines. However, once an invoice for a repair is received, the Budget Assistant indicates Invoice Submitted – Yes in the appropriate field. Area Directors have 48 hours to verify that this work is correct and complete.
    a. A report can be pulled in Quickbase for all tickets with Invoice Submitted – Yes that require verification.
    b. If work is not complete, FNS vendor POC indicates in notes and leaves status as "Reported to Vendor"

6. Once the work has been reported as fixed and invoiced (with supporting documentation) the Budget Assistant will change ticket job-status to "**Closed.**"
    a. **NOTE:** A ticket is not marked closed until the repair invoice and voucher numbers have been entered by the Budget Assistant.

Equipment Vendor Quotes

Requests and Approvals

The FNS POC is responsible for all quote requests submitted to the vendor. If a Field Specialist, Central Office employee, or vendor requests a piece of equipment, all requests must be funneled through the FNS POC to ensure adherence to the process. The following step by step guide looks at what quote approval and tracking looks like:

1. FNS POC receives and reviews quote for accuracy, feasibility and market analysis. All vendor quotes should be on company letterhead and have the following information: date, vendor contact information on company letterhead, school site, job number (if applicable), and description of service. At this point, it is the discretion of the FNS POC to approve or deny a quote based on feasibility or need.

2. FNS POC sends the quote to the Budget Assistant for budget review and signature.

3. Budget Assistant inputs the quote into the appropriate purchase order reconciliation report to assess budget feasibility. Two possible outcomes:
   a. **Budget is available-** Budget Assistant assigns a purchase order number, signs and dates quote and sends back to FNS POC for their final signature before vendor submission.
   b. **Budget is not available-** Budget Assistant lets the FNS POC know that the budget cannot support the purchase. FNS POC must report back to the vendor that the quoted services or goods should not be provided on the present purchase order. The FNS POC should cc the Budget Assistant in the cancellation email to the vendor.

   Please note: If a quoted service or good exceeds an available purchase order but is a high priority need, the FNS POC should notify the Budget Assistant immediately.

   ***Timing may play a role in repairs as budget loading between September 30 and October 10 (for example) may be impacted by system changeover in the new fiscal year. Other issues may also occur, please continue to check with the Finance Team for funding updates.

4. Once the Budget Assistant and FNS POC both sign the quote, the Budget Assistant is responsible for emailing the approved quote to the vendor, cc'ing the FNS POC. **Quotes that are not signed by the Budget Assistant and the FNS POC will be considered incomplete.**
5. FNC POC reflects quote submission by selecting "quote approved" on the QB ticket.

Please note:
- All active quotes require a QB ticket.
- At the end of each fiscal year, any quoted work that is not complete must be cancelled. A new quote is required for the work to be completed in the new fiscal year. These updated quotes follow the process noted above.
- The QB ticket is not cancelled, only the quote needs to be reissued.

Progress Reporting

- FNS POC communication with Equipment Vendor
  - o FNS POC hosts weekly check-in with equipment vendor
    - Review job sheet and/or scope of work for the week
    - Follow up on any outstanding quotes
    - Status updates on tickets
    - Follow up on call backs for repairs that did not fix the issue the first time
    - Discuss timeline for quote completion
    - Invoice discrepancies
      - Work can only be invoiced once completed
- FNS internal communication
  - o FNS POCs include finance team on quote completion timeline updates at monthly meeting.
- FNS communication with FSMC Vendor
  - o Weekly email to Area Directors
  - o Weekly escalation to FSMC vendor senior leadership on progress

Invoicing Process

Vendor Invoicing Expectations

Vendors are expected to submit invoices on a weekly or biweekly basis. Invoices will not be reviewed until supporting documentation is submitted. Documentation must be submitted in a compiled, scanned PDF, following the same order as listed on the invoice cover page. Alternatively, documentation may be provided in hard-copy via delivery or mail, following the same expectations as mentioned above.

1. All invoices must be submitted with the following information:
    a. Date; Invoice Number; Purchase Order (PO) Number; Job Number (if applicable); Reference Number; School Site with Brief Description of Good/Service; Amount

2. Supporting documentation must include the following information:
    a. QuickBase Job Number
    b. Date of Service
    c. School Site (Please reference the DCPS School Directory for appropriate spelling)
    d. Description of Work

3. Upon receipt of the supporting documentation, the FNS POC reviews, signs and dates the invoice.

4. The FNS POC submits the signed invoice to the Budget Assistant.

5. The Budget Assistant scans and sends the signed invoice to the vendor prompting them to submit via the e-invoicing portal. Within this email, the Budget Assistant is expected to provide a charge breakdown for each line on the purchase order.

6. The vendor submits invoice via the e-invoicing platform and attaches the signed invoice to the form.

7. Once the invoice has been assigned a voucher number in PASS, the Budget Assistant will receive on the purchase order and approve the voucher.