

SERVICE ORDER ROUTINE
 FIELD FORCES AND
 SERVICE ORDER COMPLETION (SOC)

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1. GENERAL

1.01 This section covers the stroking, completion and correction of service orders that are handled by Plant Field Forces and Service Order Completion.

1.02 This Section is issued to update information on service order completion due to the adoption of the USO/SORD system in the Southwestern Company.

2. RESPONSIBILITY

2.01 The Service Order Completion Center (SOC) and the installer completing the service order work are responsible for the accuracy of the completion data.

2.02 If correction orders are needed, the service order completion center shall

aid the installer in obtaining such orders. The company's revenue and basic statistics require a complete reporting job.

3. SERVICE ORDER STROKING

3.01 The various station statistics and completion information to be entered on the Universal Service Order (USO) upon service order completion are described in the following paragraphs. Exhibit 1 is the "IW" (Installer Work) copy of the USO form. The entries made on the "IW" copy must correspond to the entries made on the "CC" (Commercial Completion) copy of the USO form. The encircled numbers correspond to completion entry instructions in the text of this section.

① "CD" (Completion Date) - The month, day and year the USO is completed is entered in the space provided in the Identification Section of the USO.
NOTE: The installer and SOC clerk will longhand the date in this space. When the order is completed by the SORD completion typist, this entry will appear as a typed entry as will all statistical and completion information.

② "R__C__S__" - These spaces are used for recording the type of order and the count of stations worked on. These spaces stand for Regular, Complex and Special. Regular orders include flat and measured one, two, four and eight party residence, flat and measured business service (excluding PBX), and services installed on instruments of one-button or less or

their equivalent. Complex orders include both flat and message rate multiline residence and business installed on four or more key type telephone sets or equivalent. They also include Coin, PBX, Centrex and Design Line Telephone. Special are all orders issued for service normally considered as special services. These include Private Switched Services, WATS, Picturephone, FX Service, Mobile Service, Common Carrier Service, Private Non-Switched Services and services which require design and station engineering such as PBX, C.O. trunk, CU Centrex trunks, etc.

- 3 Missed Appointment - When an appointment is "not met" as defined in the P.A.P. V66.201 (Customer Installation Service Results Plan), the appropriate "missed appointment" code is entered directly following the Appointment Code or in the space provided if no code appears on the USO. The following are the authorized missed appointment codes:

Company misses

- F - Lack of Facilities (Outside Plant or Central Office)
- L - Plant Work Load Conditions
- E - Station Equipment and Supplies
- O - All Other Company Reasons

Customer misses

- SA - No Access
- SL - Customer Requests Later Date
- SR - Customer Not Ready
- SO - All Other Customer Reasons
- SE - Subscriber Request Earlier Date

When a subsequent due date is negotiated with the customer, it may be entered directly following the missed appointment code, preceded by the field

identifier (FID) "SD" (Subsequent Due Date). EXAMPLE: SR/SD 9-20

NOTE: A missed appointment code entry is provided for each missed appointment. Each missed appointment code is followed with the subsequent due date entry. Due to space limitations in the Identification Section of the USO format, the next line(s) immediately under the Identification Section of the USO may be used for such entries as required. EXAMPLE: SR/SD 9-20 SA/SD 9-22 L/SD 9-23.

- 4 Changes, corrections, additions or deletions to the Service and Equipment (S&E) portion of the USO are limited to departmental authorizations. For the Plant Department, longhand correction of service orders shall be confined to the following items:

- (a) Addition or deletion of extensions on regular residence and small business orders.
- (b) Additions, changes or deletions of color sets on an order.
- (c) Inside moves on telephone stations as shown in the S&E portion of the order.
- (d) Secondary addresses, i.e., apartment numbers.
- (e) Miscellaneous items of equipment, i.e., extension bell, extra length cords, etc.
- (f) Changes in class of service, excluding residence to business.
- (g) Changes of telephone number.

- (h) Change of order classification, provided corrections made to warrant classification change are listed above as qualified longhand corrects.
- (i) Billing instructions in the "S&E" space; e.g., "NNRC", "NC", "NSCC", etc.
- (j) Change or correction in the "RMKS" section affecting Plant installation.

NOTE: Changes on service orders other than those listed above require typed correcting orders with appropriate suffix to the order number, e.g., "A", "B", etc.

5 A Plant Sale (PS) is entered in the S&E section of the USO on the same line the sale item is displayed. The FID "PS" together with certain suffixes, provide identification of the individual Plant group responsible for the sale(s). (Refer to P.A.P. V66.117, Plant Sales Results Plan.)

6 A select group of FIDs appropriate for reporting and processing of statistical data are preprinted in the departmental work space on the USO. It is the responsibility of any employee who processes the USO to develop a complete and thorough understanding of the definition and use of the S&E preprinted FIDs. Because of the effect statistical entries have upon customer bills and company records, the accuracy of reporting cannot be overemphasized. The following subparagraphs discuss each of the preprinted FIDs:

- (a) "NI" (New Install) - Enter the number of stations installed where all new station wiring is used or

when any additional inside wiring is used to establish an extension circuit. Station wiring is defined as any or all of the following:

1. The drop or block wire.
2. The protector and associated ground wire.
3. The inside wire or inside wiring cable.
4. The connecting block or equivalent terminating device.

(b) "RI" (Reinstall) - Enter the number of stations reinstalled where all, or any part of existing non-working station wiring was used.

(c) "RF" (Reconnect Field) - Enter the number of stations found in place on the premises that are put back in service.

(d) "RFC" - Enter the number of stations reconnected in the field but changed for customer reasons. (Example: Found 1FRBC, Customer wanted 1FRYC).

(e) "RFM" - Enter the number of stations reconnected in the field but actually installed in a different location on the customer's premises.

NOTE: If a station(s) is both changed and moved, stroke only in the "RFM" block.

(f) "DPN" - Enter the number of new drops placed. The drop(s) must be new in its entirety to be entered in this space. If a new multiple-pair aerial drop wire is placed in lieu of a single-pair wire, stroke three (3) new drops

regardless of the number of pairs connected at the time. If a multiple-pair buried or underground drop is placed, stroke only one drop regardless of the number of pairs connected at the time.

NOTE: Positive stroking is required. If no drop was required, report zero "0" in the "DPN" space.

- (g) "**DPR**" - Enter the number of drops reused IN THIS SPACE. Drop wire placed in connection with reinstalls, reconnects, regrades, or other change work shall be stroked as drop reused "DPR".
- (h) "**BD**" - If the drop wire(s) placed, either new or reused, is a buried drop, enter the number of buried drop wires used. This entry is in addition to the entry for new or reused drops.
- (i) "**RCO**" - When sets are left-in at the premises and the drop is in place, the number of stations reconnected is entered here. The "RCO" (Reconnected in Central Office) space is only used when no field visit is involved in reconnecting the customer's service. The space "NFW" (No Field Work) must also be stroked when "RCO" is used.
- (j) "**LIF**" - Enter in this space the number of telephone sets left-in at the customer's premises after a visit was made to disconnect the service.
- (k) "**LIC**" - Enter in this space the number of telephone sets left-in at the customer's premises when no field visit has been made for removal. Both the sets and the

drop wire remain in place.

- (l) "**TSR**" (Total Stations Removed) - Enter in this space the number of telephone sets actually removed on either complete or partial disconnects.
- (m) "**NFW**" - Stroke this space if no field work was necessary to complete the service order (i.e., no visit made).

NOTE: Assignment forces will make this entry.

- (n) "**COC**" - Enter the initials of the central office employee who completes the service order. Also enter the time of completion.
- (o) "**VER**" - The installer will make a complete verification of residence and small business (excluding key and PBX accounts) station equipment on "C" orders where a field visit is required. When the equipment on the customer's premises agrees with the recap on the service order, a "Y" shall be placed in the "VER" space. (Refer to paragraph 4 for procedures for handling discrepancies encountered on record verification.)
- (p) "**TRM**" - Place a stroke in this space if the transmission requirements were met. (Refer to BSP 680-810-010 for procedures to follow in the event that requirements are not met.)
- (q) "**ERM**" - Enter number of sets reported as lost or found on an Exception Report, Form SW-6311a in this space. (Ref. BSP 680-495-904SW).

(r) "NCG" - All orders involving a change in telephone number require a change of dial number plate stickers. The space is used to show the quantity of dial plates that the installer changed in connection with the service order. This is stroked only when no physical change is made to the involved station(s).

(s) "XKJ" - This FID is not used in the Southwestern Company.

(t) "PFR" - This FID is not used in the Southwestern Company.

(u) "CPR" - This FID is not used in the Southwestern Company.

(v) "FCO" - This FID is not used in the Southwestern Company.

(w) "OCB" (Order Completed By) - When a field visit is made to complete a service order, the initials or crew number of the installer who completed the order is shown in this space. Also enter the time that the order was completed.

(x) "HRS" - When one installer completes an order in one day or less, the hours spent on the order are placed in this space. Fractions of an hour are divided in quarter hours only. The quarter hours must always be shown and are shown as a decimal, e.g.,

1/4 hour	=	.1
1/2 hour	=	.2
3/4 hour	=	.3
Full hour	=	1.0

If another employee helped to work the order, or the one installer took more than one day to work the

order, the date(s) and time spent are shown in the "AE" space (Item z). Enter the total hours spent to complete the work in the "HRS" space.

(z) "AE" - Enter the initials of other employees who worked on the order and the time spent on the order by each of the additional employees including the date(s). Also enter in this space the initials, time spent and date(s) of the installer completing the order if this employee spent more than one day working on the order or was assisted by other employee(s).

4. RECORD VERIFICATION - RESIDENCE AND SMALL BUSINESS

4.01 The record verification of residence and small business is a part of a continuing program to validate the accuracy of the Company's records.

4.02 The installer will make a complete verification of all station equipment for residence and small business (except key and PBX accounts) on "C" orders where a field visit is required.

4.03 When the equipment on the customer's premises agrees with the recap on the service order, the installer shall place a "Y" in the "VER" space (Item "o" above) and notify the service order completion clerk.

4.04 When a discrepancy is encountered on station equipment where a recurring monthly rate applies, e.g., extensions, Trim-line telephone, 25 ft. cords, etc., the installer shall place a "N" in the "VER" space and inform the service order completion clerk of the discrepancy. The completion clerk will prepare Form SW-1052 (Record Verification). When discrepancies are

encountered on items where no monthly recurring rate applies, both copies ("CC" and "IW") of the service order shall be longhand corrected. No Form SW-1052 is required.

4.05 All discrepancies will be investigated by the business office.

4.06 Form SW-1052 is a four ply form (Exhibit 2). The 1st and 2nd copies are for the business office use. The 3rd copy is forwarded by the business office to the Accounting Department. The 4th copy is distributed to the Plant Department. After the business office has resolved the discrepancy, the original will be forwarded to the Accounting Department.

4.07 When equipment cannot be verified because of off premise extensions or no access to certain rooms on the premises, the installer will report to the Service Order Completion Center - verification not made. The field copy and the completion center copies of the service order will be marked by placing the letter "N" in the "VER" space.

4.08 The field supervisor is responsible for equipment verification of service orders. When "N" has been entered in the "VER" space the field supervisor must be sure there was a valid reason for not making the verification.

5. METHOD FOR HANDLING THE INSTALLATION OF PARTIAL OR TEMPORARY SERVICE

5.01 In connection with certain telephone installations involving PBX service, key equipment, etc., it is sometimes necessary to install temporary or partial service. This happens when the customer requests partial or temporary service before the due date for the completion of the order.

5.02 If it is known at the time the subscriber's order is taken that temporary or partial service is necessary, the Commercial Department will issue an appropriate service order to establish the temporary or partial service and another appropriate order to provide for the permanent service.

5.03 If the need for temporary or partial service arises after the issuance of the subscriber's original order, the following should be done:

(a) Longhand correct the order or request a correction order, as appropriate, to reduce the service called for, to that which is established on a temporary or partial basis.

(b) Request an additional order to provide for the change from temporary or partial to the permanent service.

(c) If, on working the service order requested in (b), it is found that all the services or equipment still cannot be installed, continue the procedures listed in (a) and (b) until the complete service is installed.

6. MISSED APPOINTMENT LOG - FORM E-4951

6.01 The installers shall notify the Service Order Completion (SOC) Center promptly of missed appointments. The SOC Center shall prepare Form E-4951, Installation Appointments Not Met, daily. Enter on Form E-4951 the information indicated at the top of each column. Exhibit 3 shows examples and additional instructions concerning information to be listed.

6.02 These logs will be sent to appropriate Plant forces as determined locally.

7. SERVICE ORDER COMPLETION LOG

7.01 Form SW-6134a-c, "Installation and Repair Forces Log and Telephone Set Activity Record", shall be used as the service order completion log. This form is prepared on the day prior to the due date to include all orders to be worked on the next work day. One copy of the logs and their associated "CC" copies will be forwarded by Plant to the SOC Center so that they are available at the start of the business day.

7.02 A separate log sheet is prepared for each installer's orders for the day (Exhibit 4). In addition, a separate log shall be prepared for all "NFW" (No Field Work) orders. Each log shall bear a log number and/or installer's name. Assignment forces shall list each order to be worked by number on the log, the Exchange name or Wire Center, the route number, and the date the orders are due.

7.03 As each order is completed, the SOC clerk will note the log and will obtain the order number of the job that the installer is going on next. The SOC clerk will enter the time that the installer will start on the next order in the "Time Started" column.

7.04 "No Field Work" orders (NFW) are not completed in the same manner as the regular orders. Assignment attaches the "IW" copies to the log and forwards to the work group designated locally for completion. One person should be designated as being responsible for calling completions on NFW orders to the SOC clerk.

8. DAILY WORK REPORT

8.01 Before leaving the premises, the installer shall record the order completion on the daily work report as provided. At this time the installer should also record the order activity on telephone set control records, Form SW-6134. Refer to BSP 680-495-906SW.

9. LINE OR STATION TRANSFER PROCEDURES

9.01 Line or Station Transfer Associated With a Service Order and Completed Together

(a) The installer shall stroke in the space provided "See Related Order" and combine the time spent on the Service Order and the Line or Station Transfer. This time will be placed in the appropriate space on the Service Order. Do not show time on the transfer when service order and transfer are completed together.

(b) When instrument changes are involved on transfers, labor unit credit will be obtained for these changes by preparing Form SW-9261 (Memo). (Refer to P.A.P. V61.024, Plant Service Orders.)

(c) Upon completion of Line and Station Transfers, the installer will post his crew number on the field copy.

9.02 Line or Station Transfer Associated With a Service Order But Worked Separate

(a) The installer will stroke in the space provided, the time spent working on the transfer. If more than one day or more than one installer is involved, additional stroking space is provided.

(b) When instrument changes are involved on transfers, labor unit credit will be obtained for these changes by preparing Form SW-9261 (Memo). (Refer to P.A.P. V61.024, Plant Service Order.)

(c) Upon completion of Line or Station Transfers, the installer will post his crew number on the field copy. Examples of line or station transfers associated with service orders but worked separate are as follows:

- (1) A service order is SA, SR, etc., but the related transfer is completed.
- (2) The service order is completed by one installer and the related transfer is completed by another installer.

9.03 Completed Line or Station Transfer Not Associated With a Service Order

(a) The installer will stroke in the space provided, the time spent working on the transfer. If more than one day or more than one installer is involved, additional stroking space is provided.

(b) When instrument changes are involved on transfers, labor unit credit will be obtained for these changes by preparing Form SW-9261 (Memo). (Refer to P.A.P. V61.024, Plant Service Order.)

(c) Upon completion of Line or Station Transfers, the installer will post the appropriate crew number on the field copy.

10. TELETYPEWRITER ORDERS

10.01 Teletypewriter Orders - IW copy of service orders covering the inward movement, rearrangements, changes and outward movement of teletypewriters will be sent to the Central Editing Group following completion.

10.02 Some teletypewriter services require special handling in the reporting of labor operations. To assure that no labor operations are lost due to misinterpretation, the installer shall stroke and attach a copy of Form E-4435, "Station Installation Work Units - Teletypewriter", to the "IW" copy and send to the Central Editing Group.

11. MOBILE TELEPHONE SERVICE

11.01 Mobile Telephone - The installer or foreman in charge of mobile service installation work will prepare a Form E-4436, "Station Installation Work Unit - Radiotelephone", and attach to the completed "IW" copy before forwarding to the Central Editing Group for labor unit credit. The "IW" copy and the attached E-4436 must be forwarded on the completion date to the Central Editing Group in an envelope showing the installers crew number.

11.02 Mobile Telephone Installation Work For Other Telephone Companies - Mobile telephone installation forces shall not undertake any installation work, i.e., installing new, transferring to another automobile or removing the mobile station belonging to another Telephone Company unless the installer has a copy of a Custom Work Order authorizing the work or has been furnished a custom work order number and adequate details to permit doing the work. In the latter case, the installer shall prepare Form SW-9261 (Memo) for use pending the receipt of the order. Make no exceptions to this rule. The CWO number should be obtained from the Plant Engineering group.

12. WORK UNIT REPORTING

12.01 The Installation Performance Report is produced monthly. The report contains individual employee performances and is summarized by crew and District.

12.02 The plan calls for all installation documents to be forwarded to the Central Editing Group where they will be interpreted and coded.

12.03 All time spent working on measured installation accounts must be forwarded on a document to the Central Editing Group. These hours are used in computing the individual work units per hour.

12.04 Measured Installation Accounts are:

18 C, X, M
28 C, X, M
38 C, X, M

12.05 Work Unit Source Documents - The installation work documents used by the field forces are:

- (a) "IW" copy of the service order
- (b) Plant Service Order (SW-9261 Memo)
- (c) Line or Station Transfers
- (d) "LIF" copies of LI disconnects
- (e) SW-6311a Telephone Set Lost and Found Report

12.06 Reporting Measured Man Hours:

- (a) If one installer completes an order in one day or less, the total time is placed in the space marked "HRS".

(b) When work on an order extends over one calendar day, the space marked "AE" will be used to report the initials, date and hours worked.

(c) When more than one employee works on the same order, the initials of each person and the date and time spent will be shown in the "AE" space.

(d) Total the hours if more than one day, or more than one employee works on the order and enter in "HRS" space.

(e) Lost time due to SA, SR, etc., should be charged to the account code appropriate for the work that would have been done.

12.07 The crew number must be placed on every "IW" copy and Form SW-9261 (Memo) on which the completion is written. The following examples can be used in determining the proper crew number to be used on a given order.

(a) Ordinarily the crew number will be that of the foreman responsible for the job.

(b) If several installers are working (AE) on the order and more than one crew number is involved, the crew number that should be used on the order is the crew number of the foreman responsible for the job.

(c) When a field employee is loaned to another crew in the District for one full day or longer, the crew number of the foreman to whom the employee is loaned is used.

(d) An employee borrowed for a portion of a day (other than AE) by another foreman for work in the same District shall continue to report measured hours

to the employee's regular crew number. Work operation credit will also be given to the employee's regular crew.

(e) When a separate daily work report is required for work done in another District, the crew number of the responsible foreman in whose District the work is done shall be used. These completed orders should be mailed to the "borrowing" foreman or the Central Editing Group in an envelope marked with the "borrowing" foreman's crew number.

12.08 When an order is issued in one location and requires work operations in two or more districts or locations, the hours and work units shall be taken in the District or location where the actual work was done. Each employee working on the order (other than AE) should forward a document to the Central Editing Group showing work done, hours, and the employee's regular crew number.

12.09 Form SW-9261 (Memo) used as a temporary copy of a service order must be matched with the IW copy before being forwarded to the Central Editing Group.

12.10 Transmitting Documents to the Central Editing Group - A business reply envelope, Form SW-6560, provides a uniform method for mailing work operations and time reports to the Central Editing Group. A transmittal label is printed on the back of the envelope. The label must be stroked to show:

- (1) Crew number
- (2) Completion date
- (3) ELI Log enclosed (BSP 680-495-903SW)

12.11 Documents must be mailed to the Central Editing Group daily. All business completed on the last day of the month must be sent on that day. If nothing was completed, note the back of the envelope and forward to the Central Editing Group.

NOTE: Any documents returned to the foreman for inquiry must be corrected and returned to C.E.G. promptly.

EXHIBIT 1

"IW" Copy
COMPLETION ENTRIES

72NR1	EX	OC	SL	R	S	D
725-1052	STL	R	3151K	9-13		
			9-23-74	9-14	*W	SR/SD 9-20 SA
						GW-9276-4 REV. 10-71 USOP SEC II

1	SD	9-22	L/SD	9-23	STAT	1	1	
2	ILN	WHIGS, ROBT N			NI		RI	1
3	ILA	4321 DELMAR			RF		RFC	
4	ILOC	2ND FL			RPM		DPN	0
5					DPR		SD	
6	---	BILL			RCO		LIF	
7	IPO	08			LIC		TSR	
8	ITAR	OCL			NFW			
9	ICC	B			COC			
10					VER		TRM	
11	---	RMKS			ERM		NCG	
12	RMK	APT 9 AM, GO TO SIDE DOOR			XKJ		PFR	
13					CPR		FCO	
14	---	S&E	IFREC		OCB	RF 11:00A		
15	I	21RDC	5.50		HRS	4.2	CN	215
16	I	9CM	NC		AE	JTK (9-14) 1.0		
17						RF (9-14) 2.2		
18	PG	1L				RF (9-23) 1.0		
19	I	EXTEC 1PS C-4I						
20								
21								
22								
23								
24								
25								
26								
27								
28								
29								
30								
31	---	ASGM	DIST	IST				
			CA	PAIR				
32	OE							
33	I	F1						
34	OP							
35	O							
36								
37	OE							
38	I	F1						
39	OP							
40	O							
41								
42	RT	/TZ	/OAB	/LST	/LJ	/RM	/LS	
43	LID					SUP	ATT	

680-500-903SW

RECORD VERIFICATION	
DISTRICT _____	SERIAL # _____
TELEPHONE # _____	ORDER # _____
_____ Former Telephone Number If Number Changed	
<input type="checkbox"/> CHECK IF ADDITIONAL PLANT WORK IS REQUIRED _____	DATE PREPARED _____
DISCREPANCY	
<u>COMPANY RECORDS</u>	<u>CUSTOMER EQUIPMENT</u>
BUSINESS OFFICE	
COMMERCIAL AND ACCOUNTING	_____
	SERVICE ORDER ISSUED NUMBER
	DATE _____ INITIALS _____

