|  |
| --- |
| ***Instructions to complete the template for your Occupant Service Request Program***  *All grey italic text with borders are instructions to help you prepare the required BEST Practice for your building.*   1. *Replace all* [blue text in brackets] *in the document with building specific information.* 2. *Where required, complete the necessary tasks, or engage a third-party consultant to complete the tasks so that you are able to fill the relevant sections of the template with building specific information.* 3. *Delete all grey italic text when you have filled all relevant sections with building specific information.* 4. *Complete the Checklist below to confirm your Occupant Service Request Program meets the BEST Practice requirements.* |

|  |
| --- |
| ***Checklist***  *The Occupant Service Request Program must include:*  *A mechanism to ensure that all service requests are reviewed and acted upon within 1-2 weeks, unless otherwise specified (e.g., critical area or critical equipment)*  *Information on the origins of the service request*  *Information on the status of the service request (e.g., in progress, resolved, etc.)*  *Information on the corrective action taken*  *Demonstration of implementation is required, such as sample of work orders completed recently*  *Documentation must be kept on file for a minimum of three (3) months* |

**OCCUPANT SERVICE REQUEST PROGRAM**

[Date of most recent review]

[Insert Building Name and / or Address]

[Insert Name of Organization]

[insert Building Description – number of floors, tenants, parking spaces (underground or surface) and other distinguishing features]

# Introduction and Purpose

Service request for maintenance are used to identify issues pertaining to the building. Having a formal process in place allows tracking of various Key Performance Indicators such as critical equipment maintenance and critical building maintenance.

# Responsibilities

[Insert Name], Property Manager ([Insert Name of Organization]) of [Insert Building Name], is responsible for the following:

* Develop the Occupant Service Request Program
* Assign responsible parties who will execute the program implementation, addressing service requests received within a 2-week window, unless otherwise specified (e.g., critical area or critical equipment).
* Review, track and sign off on service requests to document completion.
* Maintain records of completed work orders for a minimum of three (3) months

# Strategy

## Guidelines

[Briefly describe the process established to address occupant service requests at the building.]

Refer to **Appendix A** for the blank Occupant Service Request form.

|  |
| --- |
| *Building management must have in place a documented means for addressing occupant (tenant and building staff) concerns regarding maintenance service requests. Visitors to the building may also log service requests. Such service request logs can provide evidence of occupant dissatisfaction and its causes. Trends in complaint rates over time may indicate occupant reactions to changes in building operation.*  *The Occupant Service Request Program may be electronic or manual, but must have a mechanism in place for recording the following information:*   * *Incident log number* * *Occupant name, company and department, location in building* * *Date complaint was received* * *Description of complaint* * *Suggested cause* * *Summary of problem* * *Actions completed* * *Date of occupant interview (if applicable)* * *Remedial action report* * *Date of when occupant was advised about actions taken* * *Additional details (as required)* |

## Record Action

Refer to **Appendix B** for examples of the Occupant Service Request logs from the past 3 months.

*All service requests are to be reviewed and acted upon within 1 to 2 weeks, unless otherwise specified (e.g., critical area or critical equipment).*

*Include logs from the past 3 months in Appendix B to document how occupant service requests are addressed and completed at the building.*

# Time Period

This program was implemented on [Insert Date] and will be reviewed and updated at least once a year.

Appendix A: Occupant Service Request Form

*Complete this form to document how occupant service requests are addressed and completed. If your building uses a different form, please place that version here instead.*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Incident log number: |  | | | Date complaint received: | |  |
| Occupant name: | |  | | | | |
| Company and department: | |  | | | | |
| Location in building: | |  | | | | |
| Description of complaint: | | | | | | |
| Suggested cause: | | | | | | |
| Summary of problem: | | | | | | |
| Actions completed: | | | | | | |
| Occupant interview required: Y / N | | |  | | | |
| Date of occupant interview (if applicable) | | |  | | | |
| Remedial action report: | | | | | | |
| Date of when occupant was advised about actions taken: | | | | |  | |
| Additional details: | | | | | | |
| Date Service Request Completed: | | |  | | | |
| Service Request Completed by: | | | Signature: | | | |
| Date Service Request Closed: | | |  | | | |
| Service Request Response Reviewed by: | | | Signature of Building Manager: | | | |

Appendix B: Examples of Occupant Service Request Logs

*Attach examples of logs from the past 3 months that document how occupant service requests are addressed and completed at the building.*

*Check that all service requests have been reviewed and acted upon within 1 to 2 weeks, unless otherwise specified (e.g., critical area or critical equipment).*