# Defense Health Agency

# TECHNICAL MANUAL

SUBJECT:    Defense Medical Logistics Standard Support-Facilities Management
(DMLSS-FM) Volume 7:  Work Request Module

References:   See Enclosure 1.

1.  <u>PURPOSE</u>.  This Defense Health Agency-Technical Manual (DHA-TM), based on the authority of References (a) and (b), and in accordance with the guidance of References (c) through (h), establishes the Defense Health Agency's (DHA) procedures for managing data in the Military Health System's (MHS) Computer Aided Facility Management (CAFM) and Computerized Maintenance Management System (CMMS) of record, Defense Medical Logistics Standard Support–Facilities Management (DMLSS-FM).

2.  <u>APPLICABILITY</u>.  This DHA-TM applies to:

   a.  DHA and DHA Components (activities under the authority, direction, and control of DHA) and Military Departments (MILDEP).

   b.  All personnel to include assigned or attached active and reserve Service members, federal civilians, authorized contractors (when required by the terms of the applicable contract), and other personnel assigned temporarily to DHA or DHA Components.

3.  <u>POLICY IMPLEMENTATION</u>.  It is DHA's instruction, pursuant to References (b) and (d), to:

   a.  Implement policy, administer Defense Health Program Facilities Operations and Maintenance budgets, and perform financial oversight at an enterprise level in order to ensure consistency, optimize performance, and meet strategic priorities across the MHS facility portfolio consistent with guidance from the Assistant Secretary of Defense for Health Affairs (ASD(HA)).

b.  Develop consistent standards for medical facility management necessary for programmatic oversight of the Defense Health Program.

c.  Establish DMLSS-FM as the database of record for all MHS facility inventory, maintenance, requirements, and project data including related financial data.

4.  RESPONSIBILITIES.  See Enclosure 2.

5.  PROCEDURES.  See Enclosure 3.

6.  PROPONENT AND WAIVERS.  The proponent of this publication is the Deputy Assistant Director, Financial Operations.  When Activities are unable to comply with this publication the activity may request a waiver that must include a justification, including an analysis of the risk associated with not granting the waiver.  The activity director or senior leader will submit the waiver request through their supervisory chain to the Deputy Assistant Director, Financial Operations to determine if the waiver may be granted by the Director, DHA or their designee.

7.  RELEASABILITY.  **Cleared for public release**.  This DHA-TM is available on the Internet from the Health.mil site at:  https://health.mil/Reference-Center/Policies and is also available to authorized users from the DHA SharePoint site at: https://info.health.mil/cos/admin/pubs/SitePages/Home.aspx.

8.  EFFECTIVE DATE.  This DHA-TM:

a.  Is effective upon signature.

b.  Will expire 10 years from the date of signature if it has not been reissued or cancelled before this date in accordance with Reference (c).

/S/
RONALD J. PLACE
LTG, MC, USA
Director

Enclosures
1. References
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ENCLOSURE 1

REFERENCES

(a) DoD Directive 5136.01, "Assistant Secretary of Defense for Health Affairs (ASD(HA))," September 30, 2013, as amended
(b) DoD Directive 5136.13, "Defense Health Agency (DHA)," September 30, 2013
(c) DHA-Procedural Instruction 5025.01, "Publication System," August 24, 2018
(d) DHA "Plan 3: Implementation Plan for the Complete Transition of Military Medical Treatment Facilities to the Defense Health Agency," Version 6, August 12, 2019[1]
(e) DoD Directive 7045.14, "The Planning, Programming, Budgeting, and Execution (PPBE) Process," January 25, 2013, as amended
(f) DoD Instruction 6015.17, "Military Health System (MHS) Facility Portfolio Management," January 13, 2012, as amended
(g) DHA-Procedural Instruction 4165.01, "Real Property Asset (RPA) Management," June 22, 2017
(h) Military Health System Requirements, "MHS Real Property Systems Standards (RPSS)," current edition[2]

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[1] This reference is located at: http://facilities.health.mil/Repository/GetFile/56684 and can only be accessed with an approved Max.gov account.
[2] This DHA-managed database can be found at: https://facilities.health.mil/Project/View/1066 and can only be accessed with an approved Max.gov account.

ENCLOSURE 2

RESPONSIBILITIES

1.  <u>DIRECTOR, DHA</u>.  The Director, DHA, will implement policy, guidance, and instructions consistent with References (b) through (h).

2.  <u>DEPUTY ASSISTANT DIRECTOR, FINANCIAL OPERATIONS, DHA.</u> The Deputy Assistant Director, Financial Operations will:

 a.  Prepare and submit program and budget requirements for sustainment, restoration, and modernization pursuant to guidance of the ASD(HA) for the DoD Planning, Programming, Budgeting, and Execution process.

 b.  Provide programmatic oversight of the DHA Operations and Maintenance appropriations in accordance with instructions issued by the ASD(HA), fiscal guidance issued by the Under Secretary of Defense (Comptroller)/Chief Financial Officer, and applicable law.

3.  <u>CHIEF, FACILITIES ENTERPRISE, DHA</u>.  The Chief, Facilities Enterprise, DHA, must:

 a.  Establish DMLSS-FM data standards for effective CAFM/CMMS management and operations that also reflect the real property asset management requirements of Reference (g).

 b.  Monitor DHA assigned facilities' operations to ensure conformance with established standards.

 c.  Program and budget for CAFM/CMMS maintenance requirements to be submitted by the Director, DHA for the DoD Planning, Programming, Budgeting, and Execution process.

 d.  Develop and implement training for DHA directed data management standards and reporting.

4.  <u>SECRETARIES OF THE MILDEPs</u>.  The Secretaries of the MILDEPs must:

 a.  Monitor and report the overall condition, readiness, utilization, and functionality of the MHS facility portfolio in accordance with Reference (f).

 b.  Establish internal controls to ensure compliance with established medical facility data management standards related to MILDEP property records.

5. <u>DHA MARKET, SMALL MARKET AND STAND-ALONE MEDICAL TREATMENT FACILITY ORGANIZATION (SSO), & DEFENSE HEALTH AGENCY REGION (DHAR) DIRECTORS</u>.  The DHA Markets, SSO, and DHAR Directors will coordinate with Defense Health Agency-Facilities Enterprise (DHA-FE) regarding Market/SSO/DHAR focused facilities requirements via the Market/SSO/DHAR based Facilities Liaison as prescribed in Reference (d) as follows:

a.  Serve as a communication contact point for disseminating information between the Market/SSO/DHAR and DHA-FE.

b.  Represent the Market/SSO/DHAR's goals and objectives.

c.  Provides Market/SSO/DHAR facilities status updates, forwards Director's Critical Information Requirements, and coordinates Market/SSO/DHAR driven demand signals.

d.  Supports DHA-FE led Market/SSO/DHAR based facilities master planning efforts.


6. <u>DHA FACILITIES MANAGERS</u>.  DHA Facilities Managers must:

a.  Ensure Facility Inventory Records include all assigned permanent, semi- permanent, and temporary facility assets (including DHA-assigned relocatable buildings, DHA-assigned Activities as tenants in a MILDEP building, and DHA-assigned leased facilities).

b.  Ensure all Facility Room Inventories properly reflect conditions at DHA- assigned facility assets and that any revisions are coordinated with Space Managers, Quality Assurance Evaluators, Janitorial Contractors, Maintenance Contractors, Facility Managers, Medical Maintenance staff, and other support staff.

c.  Ensure all Facility Systems Inventory records include all existing, new, and replacement Real Property Installed Equipment (RPIE) and record information, at a minimum, and reflect Real Property System Standard (RPSS) requirements as cited in Reference (h).

d.  Ensure all preventive maintenance procedures include all existing, new, and replacement RPIE and that tasks and schedules meet all applicable regulatory requirements.

e.  Ensure all preventive maintenance work orders are scheduled to include all existing, new, and replacement RPIE and that tasks and schedules meet all applicable regulatory requirements.

f.  Ensure all Defense Medical Logistics Standard Support (DMLSS) Work Requests (WR) are properly and completely entered, maintained, and closed out in accordance with established standards and as directed by DHA-FE.

g.  Initiate DMLSS Requirements for any unfunded liability/deficiency related to sustainment, restoration, or modernization that may be identified as a result of formal condition assessments, BUILDER work items, engineering studies, architect/engineer analysis, informal inspections, commander walk-through, maintenance technician observations.

ENCLOSURE 3

WR MODULE PROCEDURES

1. <u>WR MODULE</u>.  The WR Module is designed to capture critical data about the preventive and corrective maintenance program of all RPIE associated with a DHA assigned facility.  Preventive maintenance work is designed to prolong the life of equipment and, for the DMLSS-FM WR Module, it is referred to as Recurring Work.  In addition, corrective maintenance work is performed to restore systems to an operational condition within the tolerances or limits established for in-service operations and, for the DMLSS-FM WR Module, it is referred to as Unscheduled Work (non-recurring maintenance).  The WR Module is used by customers and facility management personnel to track and manage a variety of different types of work including:  Recurring Work, Unscheduled Work (i.e., corrective maintenance, service calls, and safety requirements), and requests for new work (signs, keys, painting, small renovation jobs, etc.).  The WR Module in DMLSS-FM is used to track WRs from initiation to completion.

2. <u>STANDARDS FOR THE WR MODULE</u>.  When in the WR Module, a new WR is initiated simply by clicking on the "New" button.  When initiated, a new WR will be generated with separate tabbed sections.  The following provides a detailed summary of each tabbed section of the DMLSS-FM WR Module:

   a.  <u>Detail 1 Tab</u>.  Includes initial description and customer data at time of receipt.  The Detail 1 Tab is typically completed by a designated work reception Data Sustainment Specialist (DSS), but it can also be initiated by other designated government staff.  The Detail 1 Tab includes all required minimum information to document a WR being initiated at the time of request.  The Detail 1 Tab will contain the data fields outlined in Table 1 below:

Table 1.  DMLSS-FM Work Request "Detail 1 Tab" Data Fields

| Data Field | DMLSS-FM Mandatory Field | DHA-FE Mandatory Field | Optional (Local Use) | Remarks |
|---|---|---|---|---|
| Request Date and Time | X | | | Defaults to current date and time |
| Priority Group | X | | | Defaults to "Routine" |
| Subject | X | | | |
| Classification | X | | | Default classification can be set.  Note:  See "Standard Operating Procedures" for standard classifications |
| Work Order Number | | | X | For site tracking purposes |

| Work Request Type | | X | | Note:  See "Standard Operating Procedures" for standard Work Request Types included.  No local options |
|---|---|---|---|---|
| Work Found During Preventive Maintenance | | X | | Work Request Types may be modified to add "Found During Preventive Maintenance" |
| Confirmation Number | | | X | |
| Description | X | | | |
| Requester | X | | | |
| Telephone Number | X | | | |
| Department, Service, and Office Symbol | | | X | |
| Installation and Facility | X | | | Can be set up as specific default |
| Room#/Other Location | X | | | |
| RPIE ID | | X | | Only required if specific to RPIE item(s), otherwise not used. |

   b.  <u>Detail 2 Tab</u>.  Includes justification information and provides "decision point" to generate a "Requirement" within the DMLSS-FM Requirements module.  The Detail 2 Tab may be completed when the WR is initially generated but may be deferred until it is determined that work cannot be completed within 30 calendar days and must be documented as a "Requirement." The Detail 2 Tab will contain the data fields outlined in Table 2 below:

<p align="center">Table 2.  <u>DMLSS-FM Work Request "Detail 2 Tab" Data Fields</u></p>

| Data Field | DMLSS-FM Mandatory Field | DHA-FE Mandatory Field | Optional (Local Use) | Remarks |
|---|---|---|---|---|
| Local Use Fields | | | X | Site discretion on use. |
| Justification | | | X | |
| Convert To Requirement | | | X | |
| | | | | |

   c.  <u>Assign Tab</u>.  Includes information on responsible quality control (QC) Organization, assigned Maintenance Organization and when assigned.  The Assign Tab may be completed when the WR is initially generated but may be deferred until determined that work is not a new "Requirement" and can be assigned to an appropriate maintenance organization.  The Assign Tab will contain the data fields outlined in Table 3 below:

Table 3.  DMLSS-FM Work Request "Assign Tab" Data Fields

| Data Field | DMLSS-FM Mandatory Field | DHA-FE Mandatory Field | Optional (Local Use) | Remarks |
|---|---|---|---|---|
| QC Organization | X | | | Defaults in from the Real Property Maintainer Org in Facility Inventory. |
| Responsible Maintenance Organization | | X | | Drop down selection |
| Specialty Shop | | | X | |
| Point of Contact | | | X | |
| Assignment Reason | X | | | System Default |
| Assignment Date | X | | | Defaults with Request Date |
| Required Completion Date | | | X | |
| Add/Delete Assigned Organizations | | | X | |

d. <u>Estimate Tab</u>.  Includes Expense Center and estimated cost information.  The Estimate Tab is updated when estimated costs are identified and decisions are made concerning appropriate funding source.  The Estimate Tab is typically completed by a Government DMLSS-FM DSS.  The Estimate Tab will contain the data fields outlined in Table 4 below:

Table 4.  DMLSS-FM Work Request "Estimate Tab" Data Fields

| Data Field | DMLSS-FM Mandatory Field | DHA-FE Mandatory Field | Optional (Local Use) | Remarks |
|---|---|---|---|---|
| Funding Fiscal Year | X | | | Defaults to current fiscal year |
| Estimate Date | | X | | Required for Close Out |
| Project center | | X | | Required for Close Out |
| Expense Center | | X | | Required for Close Out |
| Comm Class/Element of Resource | | X | | |
| Estimate | | | X | |

e. <u>Status Tab</u>.  Includes WR Status information.  Status Tab is updated during the life of the WR.  The tab is typically completed by a Government DMLSS-FM DSS.  The Status Tab will contain the data fields outlined in Table 5 below.

Table 5.  DMLSS-FM Work Request "Status Tab" Data Fields

| Data Field | DMLSS-FM Mandatory Field | DHA-FE Mandatory Field | Optional (Local Use) | Remarks |
|---|---|---|---|---|
| Current Status | X | | | System displays Current Status, not-editable field |
| Estimated Start Date | | | X | |
| Actual Start Date | | | X | |
| User Status Changed Date | | | X | |
| New Status | | | X | |
| Priority Number | | | X | |
| Actions | | X | | Any new status requires an action and can view previous actions. |
| Related Work Requests | | X | | For any Found During Preventive Maintenance WR |

  f.  QUALITY ASSURANCE (QA)/QC Tab.  Includes inspection criteria and assignment. The QA/QC Tab is provided to document required and random work inspections.  Required inspections are established as part of the default site preferences.  The QA/QC Tab can be updated during the life of the WR.  An example of when "Random" Inspection is superseded is where the RPSS indicates an equipment item has a "Category 1–Catastrophic" or "Category 2–Critical" Risk Factor where regulatory requirements require maintenance, inspection and testing activities to have a 100% completion rate.  The QC portion is typically completed by a designated QC representative of a maintenance organization/contractor.  The QA portion is typically completed by a designated government QA representative of the Facility Management Department.  The QA/QC Tab will contain the data fields outlined in Table 6 below:

Table 6.  DMLSS-FM Work Request "QA/QC Tab" Data Fields

| Data Field | DMLSS-FM Mandatory Field | DHA-FE Mandatory Field | Optional (Local Use) | Remarks |
|---|---|---|---|---|
| QA Required | | X | | |
| Criteria ID | | X | | |
| Inspector Organization | | X | | |
| Inspector | | X | | |
| Evaluation Date | | X | | |
| Hours | | X | | |
| Status | | X | | Only appears after a record is closed and WR is tagged with QA.  Drop down options. |

| QC Required | | | X | |
| Criteria ID | | | X | |
| Inspector Organization | | | X | |
| Inspector | | | X | |
| Evaluation Date | | | X | |
| Hours | | | X | |
| Status | | | X | Only appears after a record is closed and WR is tagged with QC. Drop down options. |

g. <u>Coordinate Tab</u>. Is used to document potential impacts to users and staff of an area(s) affected by either the maintenance actions (e.g., utility outage or hallway blocked off) required to resolve the issue identified in the WR or by the issue itself. Coordinate Tab data is informational only and does not interact with other data in DMLSS. The Coordinate Tab can be updated during the life of the WR. The Coordinate Tab is typically completed by a Government DMLSS-FM DSS. The Coordinate Tab will contain the data fields outlined in Table 7 below:

Table 7. DMLSS-FM Work Request "Coordinate Tab" Data Fields

| Data Field | DMLSS-FM Mandatory Field | DHA-FE Mandatory Field | Optional (Local Use) | Remarks |
|---|---|---|---|---|
| Impact Reason | | | X | Set by Impact Reason Table |
| Impact Type | | | X | Set by Impact Type Table |
| Impact Date, Time & Duration | | | X | |

h. <u>Parts/Materiel Tab</u>. Used to document parts and materiel used to complete the WR. The Parts/Materiel Tab can be updated during the life of the WR. The Parts/Materiel Tab is typically completed by a Government DMLSS-FM DSS but can be delegated to the approved DMLSS-trained staff working for the Maintenance Organization. The Parts/Materiel Tab will contain the data fields outlined in Table 8 below:

Table 8. DMLSS-FM Work Request "Parts/Materiel Tab" Data Fields

| Data Field | DMLSS-FM Mandatory Field | DHA-FE Mandatory Field | Optional (Local Use) | Remarks |
|---|---|---|---|---|
| Part Description | | | X | Set by WR PART DESCRIPTION table |
| Part Number | | | X | Set by WR PART DESCRIPTION table |
| Provided By | | | X | |

| | | | | |
|---|---|---|---|---|
| Source | | | X | |
| Quantity Used | | | X | |
| Unit Cost | | | X | |
| Total Cost | | | X | Automatically calculated |

i. Close Out Tab. Includes information related to when the assigned Maintenance Organization completes their work. The Close Out Tab is used to document labor portion of completed WR based on established Shop Rates and recorded labor hours. The Close Out Tab is typically completed by a Government DMLSS-FM DSS but can be delegated to approved DMLSS-trained staff working for the Maintenance Organization. The Close Out Tab will contain the data fields outlined in Table 9 below:

Table 9.  DMLSS-FM Work Request "Close Out Tab" Data Fields

| Data Field | DMLSS-FM Mandatory Field | DHA-FE Mandatory Field | Optional (Local Use) | Remarks |
|---|---|---|---|---|
| Organization | | X | | Defaults to "Assigned" organization |
| Specialty Shop | | X | | Defaults to "Assigned" Specialty Shop |
| Shop Rate | | X | | Defaults to Specialty Shop Rate established during set up |
| Point of Contact | | X | | Defaults to Specialty Shop Point of Contact |
| SVC Performed | | X | | Defaults to "Assignment Reason" value from Assign Tab |
| Date | | X | | |
| RPIE ID | | X | | Defaults to RPIE ID selected in Detail 1 Tab |
| Hours | | X | | Includes direct hours to complete work, complete associated paperwork (admin time).  DOES NOT INCLUDE TRAVEL TO & FROM WORKSITE |
| Service Performed Funds Line Items | | X | | Defaults to respective "Estimate Tab" information |
| Cost | | X | | Automatically calculates labor cost if shop rate and hours entered. |
| Prorate | | X | | |

j. Finish Window. Documents who the WR was completed by, parts and materiel, and the reason the WR is being closed out (e.g., Completed, Cancelled, Converted to Rqmt). When all data is entered on the Close Out Tab, the DSS will click on the Finish Button which is located on the DMLSS-FM vertical toolbar. The resulting Finish Window pops up to enable documenting the completion or cancellation of a WR using the "Close Out Work Request Reason" field.  For a

completed WR, the Finish Window is used to identify the associated Maintenance Organization. The window is typically completed by a Government DMLSS-FM DSS.  The Finish Window will contain the data fields outlined in Table 10 below:

<u>Table 10</u>.  <u>DMLSS-FM Work Request "Finish Window" Data Fields</u>

| Data Field | DMLSS-FM Mandatory Field | DHA-FE Mandatory Field | Optional (Local Use) | Remarks |
|---|---|---|---|---|
| Completed By | | X | | Technician Names noted |
| Completed Date/Time | | X | | Must match with Close Out information and not the default "Current Date" |
| Parts/Materiel | | X | | General info rather than the Parts/Materiel Tab info |
| Project | | | X | Documents if Work Request to be completed via project |
| Close Out Work Request Reason | X | | | Established in set up |

GLOSSARY

PART I.  ABBREVIATIONS AND ACRONYMS

Unless otherwise noted, these abbreviations and acronyms are for the purposes of this DHA-TM.

| | |
|---|---|
| ASD(HA) | Assistant Secretary of Defense for Health Affairs |
| CAFM | Computer Aided Facility Management |
| CMMS | Computerized Maintenance Management System |
| DHA | Defense Health Agency |
| DHAR | Defense Health Agency Region |
| DHA-TM | Defense Health Agency-Technical Manual |
| DMLSS | Defense Medical Logistics Standard Support |
| DMLSS-FM | Defense Medical Logistics Standard Support–Facilities Management |
| DHA-FE | Defense Health Agency-Facilities Enterprise |
| DSS | Data Sustainment Specialist |
| MHS | Military Health System |
| MILDEP | Military Department |
| QA | quality assurance |
| QC | quality control |
| RPIE | Real Property Installed Equipment |
| RPSS | Real Property System Standard |
| SSO | Small Market and Stand-Alone Medical Treatment Facility Organization |
| WR | Work Request |

PART II.  DEFINITIONS

Unless otherwise noted, these terms and their definitions are for the purposes of this DHA-TM.

building.  A roofed and floored facility enclosed by exterior walls and consisting of one or more levels that is suitable for single or multiple functions and that protects human beings and their properties from direct harsh effects of weather such as rain, wind, sun, etc.

facility.  A building, structure, or linear structure whose footprint extends to an imaginary line surrounding a facility at a distance of 5 feet from the foundation that, barring specific direction to the contrary such as a utility privatization agreement, denotes what is included in the basic record

for the facility (e.g., landscaping, sidewalks, utility connections).  This imaginary line is commonly referred to as the "5-foot line."  A facility will have a Real Property Unique Identifier received from the Real Property Unique Identifier Registry and entered into a Service Real Property Inventory system as a unique real property record.

internal control.  An integral component of an organization's management that provides reasonable assurance that the following objectives are being achieved:  effectiveness and efficiency of operations, reliability of financial reporting, and compliance with applicable laws and regulations.  Synonymous with management control, internal control helps government program managers achieve desired results through effective stewardship of public resources.

RPIE.  An item of equipment that is affixed and built into a facility as an integral part of that facility.  To qualify as RPIE, the equipment must be necessary to make the facility complete, and if removed, would destroy or severely reduce the designed usefulness and operation of the facility.  RPIE costs are included as a funded initial construction or renovation cost.  RPIE may be accounted for as a real property equipment asset record, but not as a separate facility record in the Real Property Inventory.  RPIE includes, but is not limited to, such items as chillers, boilers, air handling units, pumps, generators, elevators, electrical panel boards, fire doors, control systems, and emergency lighting.  For all potential RPIE that could be utilized at a DHA-assigned facility, the MHS RPSS as cited in Reference (h) provides standardized default information including, but not limited to, nomenclature, preventive maintenance procedures, maintenance drivers, maintenance frequencies, and risk categories.

Real Property Unique Identifier.  A non-intelligent code used to permanently and uniquely identify a DoD real property asset.

unscheduled work.  Summary term for all possible non-recurring work processed through the DHA-assigned facility work reception office.  Work can be the result of various sources, including customer requests, planned improvements, repair requirements found during preventive maintenance procedures or controlled inspections, etc.  The DHA-assigned facility work reception office will identify the work type, the work priority, and assign the work to the appropriate service provider as a work request via the DMLSS-FM work order management system.