

Operations Department (OD) — Complete SOP Set

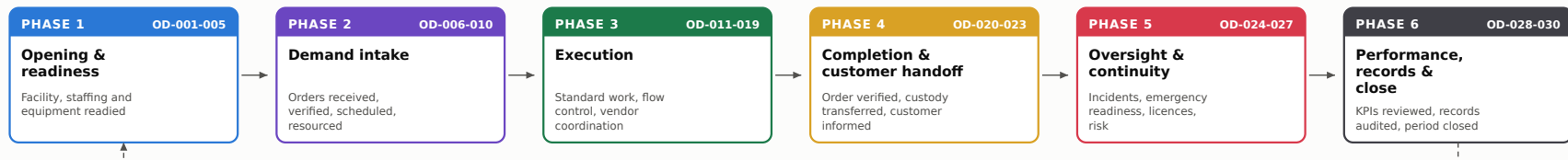
Archetype: ADMIN_SUPPORT_SERVICES · Admin Support Services

Tier: Free (entire Operations department) · Modules: 30 · Standard: locked 13-section

Contents

PHASE	MODULES
1 · Opening & readiness	OD-001 ... OD-005
2 · Demand intake	OD-006 ... OD-010
3 · Execution	OD-011 ... OD-019
4 · Completion & customer handoff	OD-020 ... OD-023
5 · Oversight & continuity	OD-024 ... OD-027
6 · Performance, records & close	OD-028 ... OD-030

FIGURE 1 — OPERATIONS WORKFLOW



Six phases · 30 modules · one continuous operating cycle, closing back into Phase 1 the next operating day.

Modules

- OD-001 — Daily Operations Opening Procedure
- OD-002 — Shift Handover & Briefing
- OD-003 — Staffing & Coverage Verification
- OD-004 — Work Area Readiness & Housekeeping Inspection
- OD-005 — Operational Equipment Availability Check
- OD-006 — Customer Order / Work Request Intake
- OD-007 — Order Verification & Acceptance Review
- OD-008 — Job Scheduling & Sequencing
- OD-009 — Resource & Capacity Allocation
- OD-010 — Incoming Material / Supply Verification
- OD-011 — Standard Work Execution & Process Adherence
- OD-012 — Work-in-Progress Tracking & Status Update
- OD-013 — Operational Handoff Between Work Stages
- OD-014 — Output Monitoring & Throughput Review
- OD-015 — Bottleneck Identification & Response
- OD-016 — Rework & Nonconforming Work Handling
- OD-017 — Schedule Deviation & Change Management
- OD-018 — Subcontractor & Vendor Coordination
- OD-019 — Interdepartmental Coordination Review
- OD-020 — Job / Order Completion Verification
- OD-021 — Delivery / Service Turnover
- OD-022 — Customer Communication & Status Notification
- OD-023 — Customer Feedback & Complaint Intake
- OD-024 — Operational Incident Reporting & Response
- OD-025 — Emergency & Business Continuity Readiness Check
- OD-026 — Regulatory, License & Permit Currency Verification
- OD-027 — Operational Risk Review
- OD-028 — Operational KPI Review
- OD-029 — Operational Records Retention & Documentation Audit
- OD-030 — End-of-Shift / End-of-Day Operations Closeout

Phase 1 — Opening & readiness

OD-001 — Daily Operations Opening Procedure

Estimated completion time: 20-45 minutes per shift start

Provided for general informational and operational purposes as part of the Admin Support Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

This procedure establishes a consistent facility and shift start-up sequence so that service operations — whether processing lines, contact-center queues, mail/document intake, or field-dispatch desks — begin the day with confirmed staffing, active systems, and a documented readiness sign-on. It ensures the operation is verifiably ready to accept and process client work before the first transaction.

2. Scope

Covers the opening sequence from facility access through the shift-readiness sign-on that authorizes work to begin, across facility-based and field-dispatch service lines. Excludes work-area housekeeping (see OD-004), equipment availability confirmation (see OD-005), and safety-specific readiness verification (see SD-001); those are authored in their own modules and only handed off to here.

3. Responsibilities

- Shift Supervisor — leads the opening sequence, confirms staffing against the schedule, and grants or withholds the readiness sign-on.
- Operations Lead — verifies systems, communications, and client-facing queues are live; escalates unresolved items.
- Opening Operator — completes assigned pre-start checks and reports exceptions to the Shift Supervisor.

4. Required PPE & Lockout/Tagout

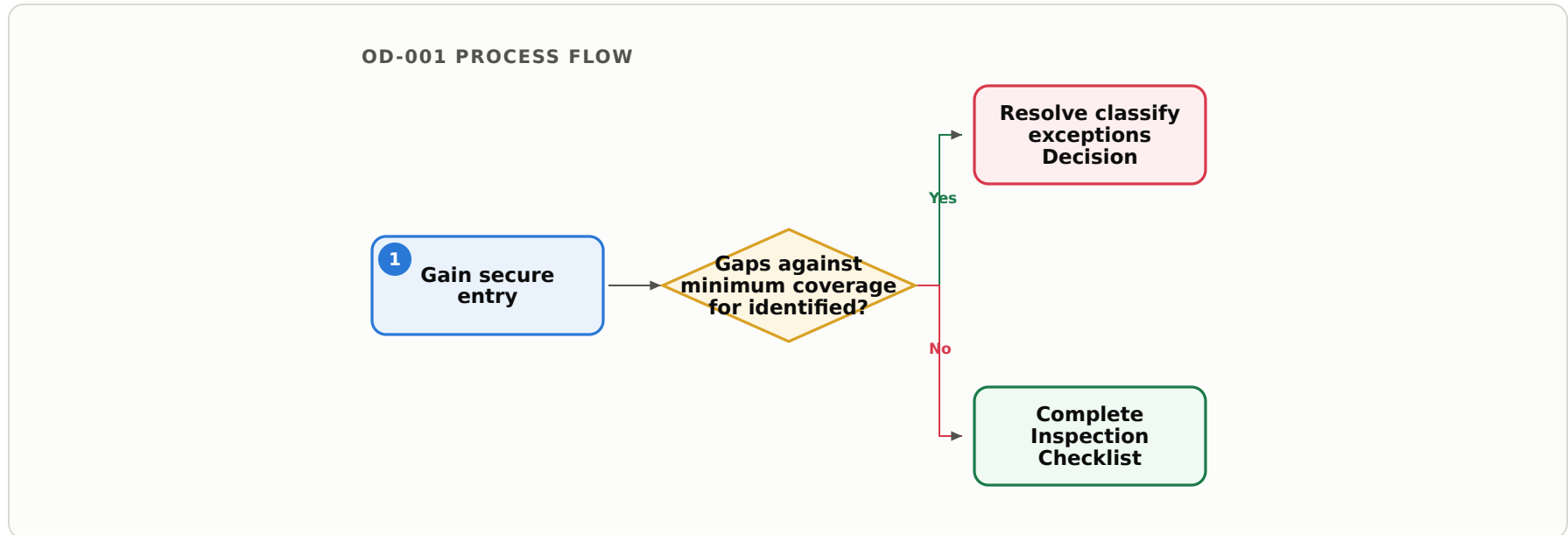
- Standard facility PPE per site; hi-visibility vest and gloves where the service line handles bulk materials or operates in a processing/loading area.
- Not applicable — no hazardous energy is de-energized or controlled by this procedure; any equipment power-up hazards are handled under OD-005/SD-001.

5. Regulatory References

- 29 CFR 1910 (OSHA General Duty / general industry provisions applicable to all covered workplaces)
- 29 CFR 1904 (recording and reporting of occupational injuries and illnesses — confirms recordkeeping readiness at shift start)

- Fair Labor Standards Act (29 U.S.C. §201 et seq.) — accurate start-of-shift time capture
- Member-specific regimes appear only as examples (e.g., USPS regulations for mail centers; FTC Telemarketing Sales Rule for contact centers; state licensing for septic service lines) and do not govern this procedure.
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow



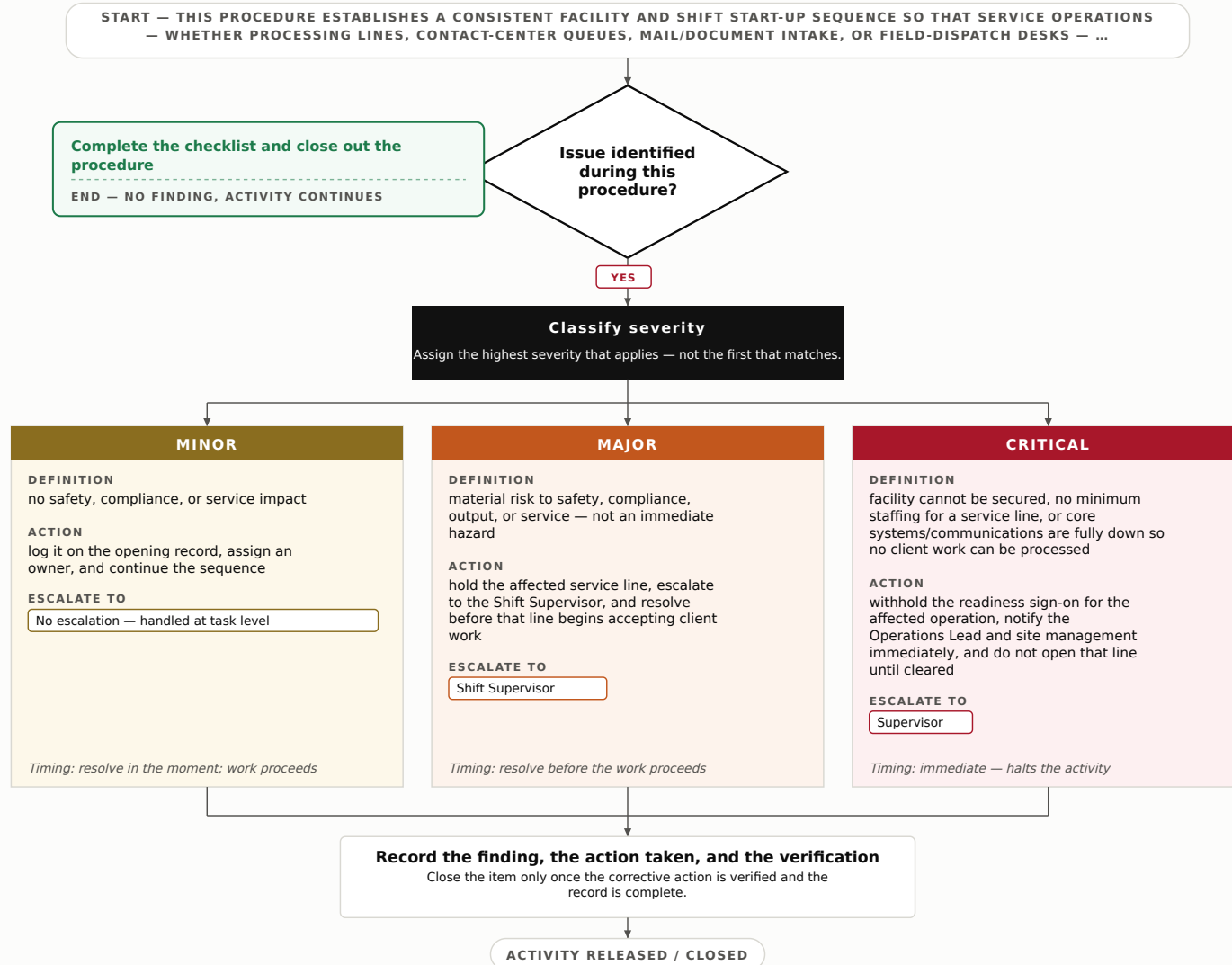
7. Step-by-Step Procedure

1. Gain secure entry to the facility or dispatch point; disarm access controls and confirm no overnight alarm, entry, or incident flags require escalation.
2. Confirm attendance against the shift schedule; record actual start times and note any gaps against minimum coverage for each service line.
3. Bring up core systems and confirm network/computing readiness (workstations, servers, and client platforms sourced per 334111); log any device that fails to boot for OD-005 hand-off.
4. Verify communications channels are live — phone/queue systems for contact lines, intake terminals for mail/document lines, dispatch radio/mobile for field service lines.
5. Confirm the day's client work is queued and prioritized: open orders, scheduled routes, pending tickets, or inbound volumes are visible and assigned.
6. Confirm records and reporting tools are accessible for the shift (attendance log, incident log, and client service-level tracker).
7. Resolve or classify any exceptions per the Decision Tree before authorizing work.

8. Complete the Inspection Checklist and record the readiness sign-on with time, signer, and any open items carried forward.

8. Decision Tree

Decision Tree — Daily Operations Opening Procedure



READING THIS TREE

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Attendance confirmed against schedule with minimum coverage met for every open service line.
- All client-facing systems and communications channels verified live before first transaction.
- Opening record and readiness sign-on completed with time and signer.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Secure entry gained; no overnight alarm/entry/incident flags		
Attendance confirmed; minimum coverage met per service line		
Core computing/network systems booted and reachable		
Communications channels (phone/queue/dispatch/intake) live		
Client work queued, prioritized, and assigned		
Records & reporting tools accessible for the shift		
Readiness sign-on recorded with time and signer		

11. KPIs

- On-time opening: readiness sign-on completed by scheduled shift start $\geq$ 98% of shifts.
- Opening exceptions cleared before work begins $\geq$ 95%.
- Zero shifts opened for client work without a recorded readiness sign-on.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

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1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for ADMIN_SUPPORT_SERVICES.	Archetype Content Team

OD-002 — Shift Handover & Briefing

Estimated completion time: 15-30 minutes per shift boundary

Provided for general informational and operational purposes as part of the Admin Support Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To ensure a structured, documented transfer of operational status, open issues, and shift priorities from the outgoing to the incoming crew so that client work, queues, and commitments continue without gaps, loss of context, or missed deadlines across shift boundaries.

2. Scope

Covers the end-of-shift and start-of-shift information handover for all Operations personnel — status of active work queues, open client issues, pending callbacks/tickets, staffing coverage, and next-shift priorities. Excludes the safety pre-shift briefing (covered under SD-003) and maintenance-crew handover (covered under MD-001).

3. Responsibilities

- Outgoing Shift Lead — compiles the handover log, states open issues, priorities, and any escalations before departing.
- Incoming Shift Lead — confirms receipt, questions gaps, acknowledges priorities, and assumes accountability for open items.
- Operations Supervisor — verifies the handover occurred, resolves disputed or unclear items, and signs off.

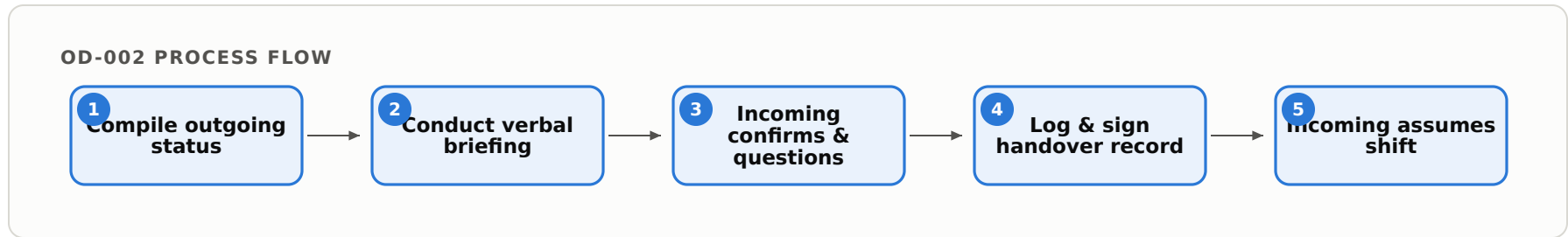
4. Required PPE & Lockout/Tagout

- Standard facility PPE per site policy (none specific to this task; where the service line operates field vehicles or processing floors, wear the PPE required for the area in which the handover is conducted).
- Not applicable — no hazardous energy involved.

5. Regulatory References

- None sector-specific to shift handover; internal operations policy governs. General recordkeeping and confidentiality obligations apply across the span — e.g., protection of client/personal information under applicable state data-privacy statutes, and retention of operational records per contractual and internal policy (e.g., FTC Telemarketing Sales Rule call records where the service line places/receives telemarketing calls; USPS Mailing Standards where the service line handles mail). Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

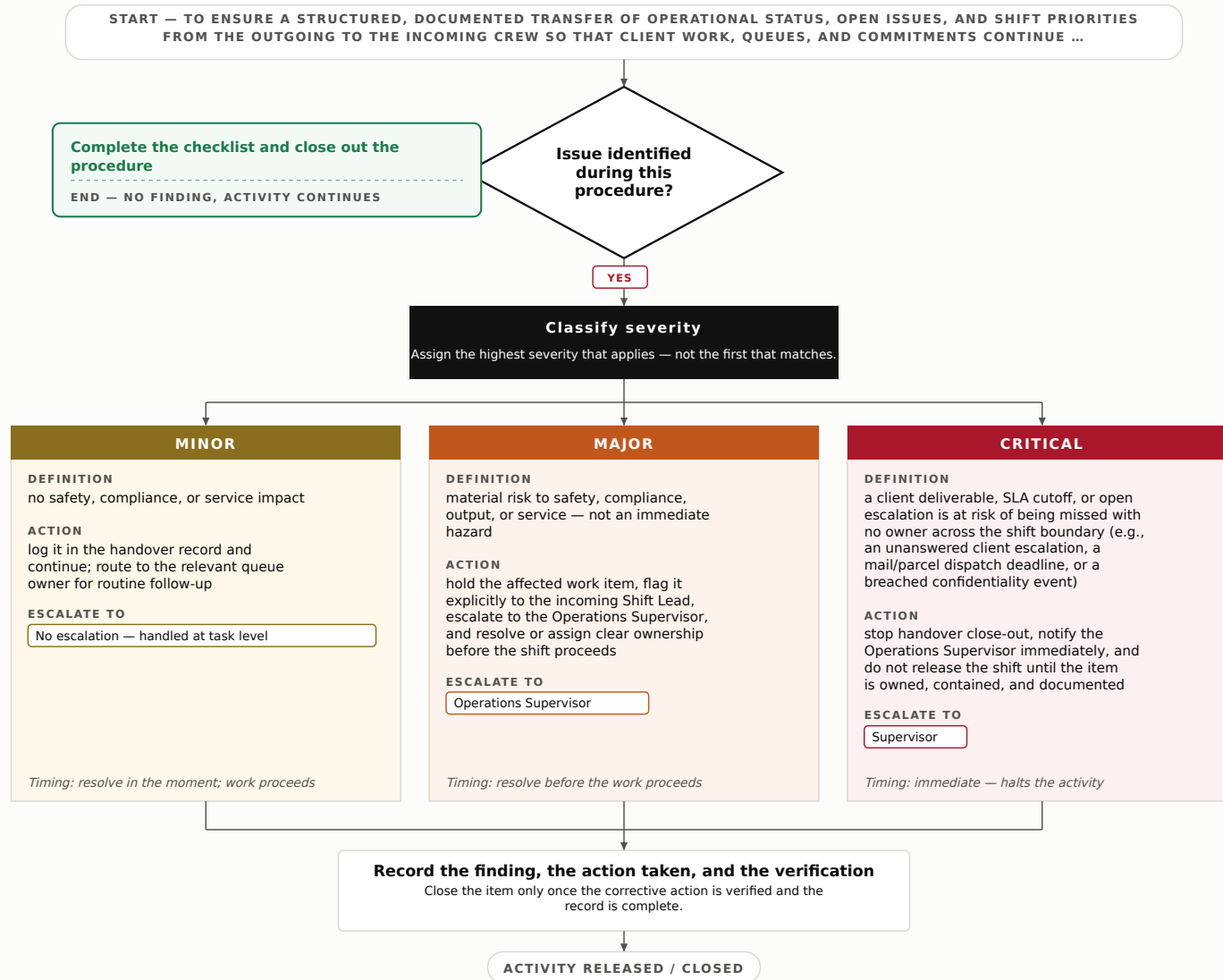


7. Step-by-Step Procedure

1. Outgoing Shift Lead updates the handover log with current status of each active work queue (open tickets, pending callbacks, mail/parcels in process, in-flight client deliverables).
2. List all open issues with client name/reference, status, and owner; flag anything client-sensitive or breaching a service-level commitment.
3. State the top priorities and deadlines for the next shift, including any time-critical client cutoffs.
4. Note staffing/coverage for the incoming shift and any absences or reassignments.
5. Conduct a face-to-face (or logged remote/phone) briefing; incoming Lead reviews the log and asks clarifying questions until no gaps remain.
6. Incoming Shift Lead confirms understanding and formally accepts ownership of all open items.
7. Both Leads record the handover in the shift log or ticketing system with timestamp; unresolved or disputed items are escalated to the Operations Supervisor.
8. File the completed handover record per retention policy and confirm entry is accessible to the next shift.

8. Decision Tree

Decision Tree — Shift Handover & Briefing



READING THIS TREE

■ **No finding**

Activity stands. Complete the checklist and continue.

■ **Minor**

Handled in place at task level; no escalation.

■ **Major**

Supervisory decision required before the next stage.

■ **Critical**

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every active queue and open issue has a named owner on the incoming shift.
- All time-critical deadlines and SLA cutoffs are explicitly stated and acknowledged.
- Handover record is completed, timestamped, and signed by both Leads.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Handover log updated with current queue status		
Open issues listed with client reference and owner		
Next-shift priorities and deadlines stated		
Staffing/coverage confirmed for incoming shift		
Incoming Lead acknowledged and accepted ownership		
Record timestamped and signed by both Leads		
Escalations routed to Operations Supervisor		

11. KPIs

- Handover completion rate (logged & signed): 100% of shift boundaries
- Open items carried without a named owner: 0 per handover
- SLA/deadline breaches attributable to handover gaps: $\leq 1\%$ of shifts per month

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

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1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for ADMIN_SUPPORT_SERVICES.	Archetype Content Team

OD-003 — Staffing & Coverage Verification

Estimated completion time: 20-40 minutes per operating period

Provided for general informational and operational purposes as part of the Admin Support Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To confirm that every role required to run the operating period is present, currently qualified, and formally assigned before customer-facing work begins — so that service commitments, client SLAs, and any minimum-coverage obligations are met without gaps.

2. Scope

Covers the pre-period verification that assigned personnel are actually on-site or logged-in, credentials are unexpired, and each required role has a named, present holder or covered backup across all service lines. Excludes schedule/shift assignment, which is owned by HR-015, and staff competency determination, which is owned by TR-020.

3. Responsibilities

- Operations Supervisor — runs the verification before period start, confirms role-by-role coverage, and authorizes the period to open or holds it.
- Shift/Floor Lead — reports actual attendance and login status by station or service line and flags no-shows or credential lapses.
- Coverage Coordinator — sources approved backups from the qualified pool (per TR-020) and updates the coverage log when reassignments occur.

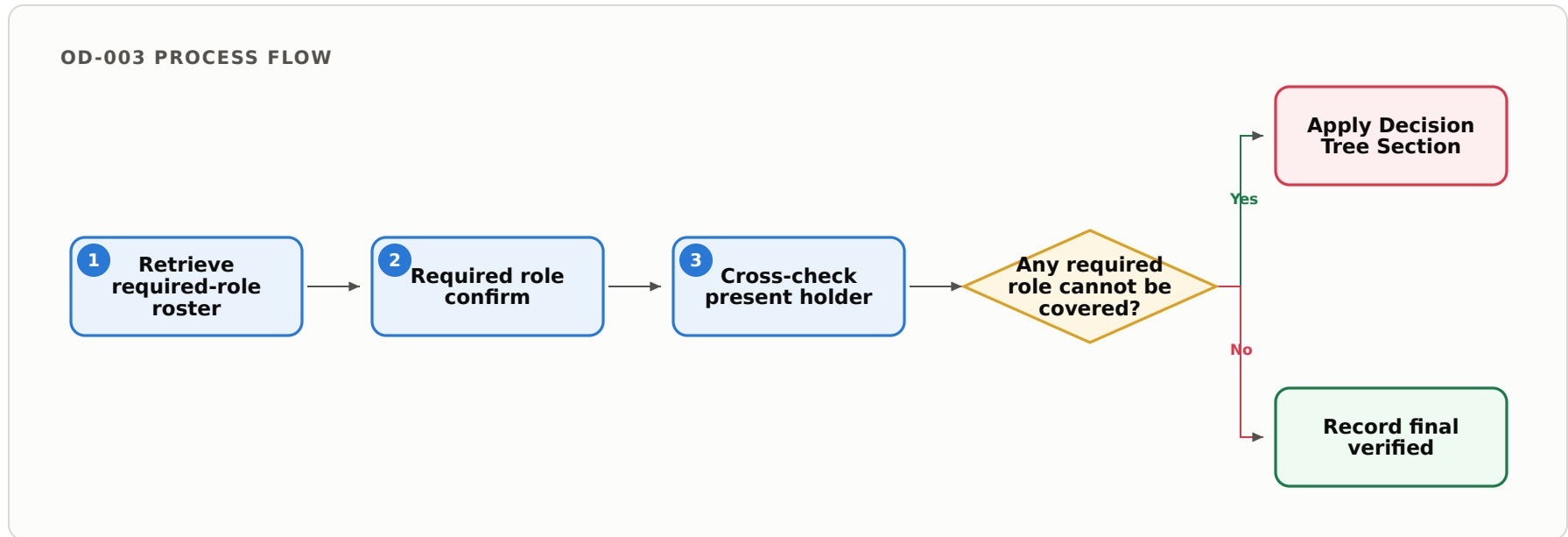
4. Required PPE & Lockout/Tagout

- Standard facility PPE only where the service line requires it (e.g., hi-vis and gloves for materials-recovery or septic field crews; none for contact-center, document-prep, or office-administrative stations).
- Not applicable — no hazardous energy involved in this verification task.

5. Regulatory References

- None sector-specific to coverage verification; internal policy applies. General applicable authorities: Fair Labor Standards Act (29 CFR Part 785) for on-duty/hours-worked recordkeeping, and OSHA 29 CFR 1904 for maintaining required first-aid/emergency-response coverage where applicable. Member-specific examples only: DOT hours-of-service (49 CFR Part 395) where the service line operates commercial vehicles; state PEO registration coverage rules where the entity is a licensed PEO. Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

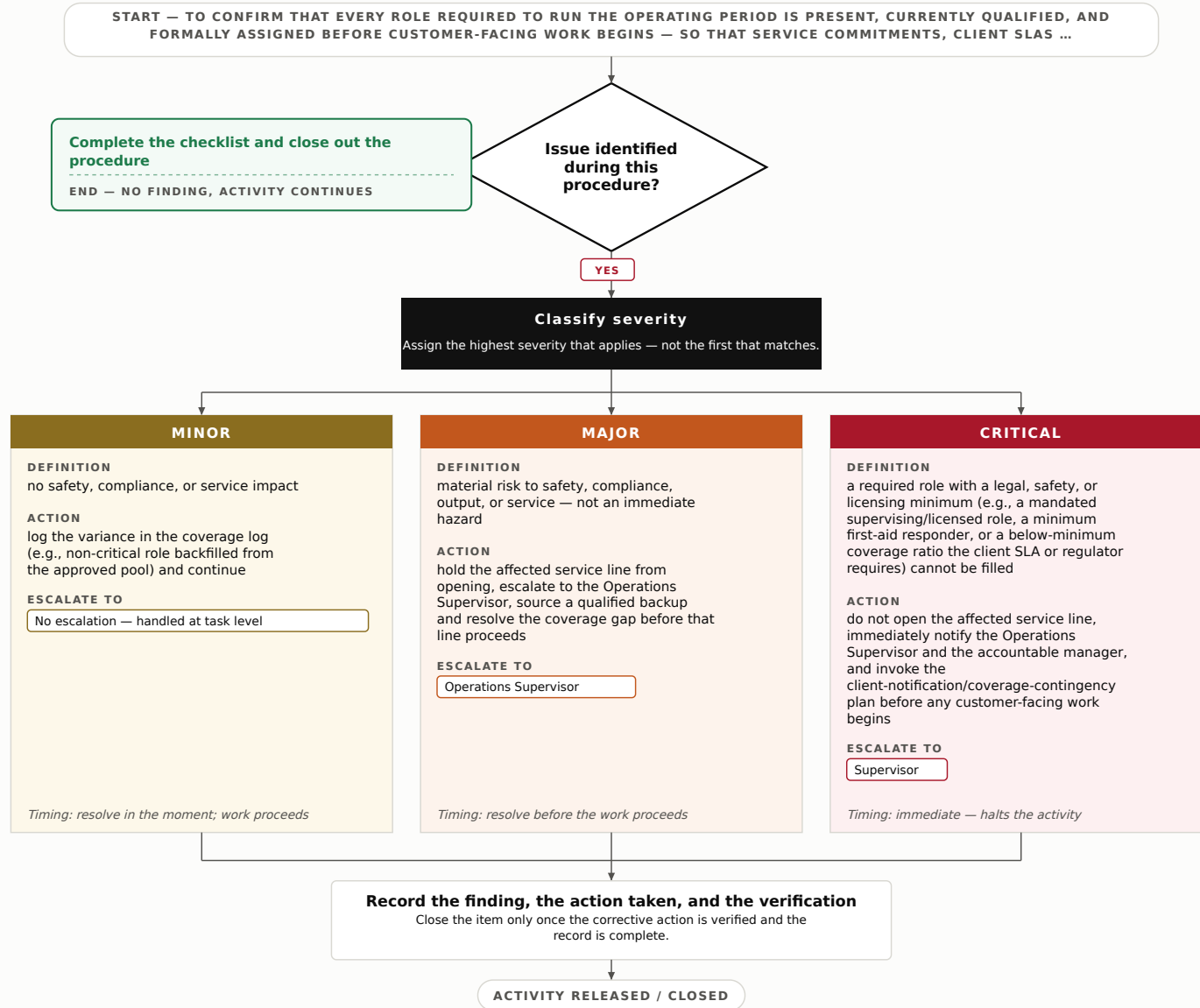


7. Step-by-Step Procedure

1. Retrieve the required-role roster for the upcoming operating period from the workforce system (roles and assignments originate in HR-015 — do not alter assignments here).
2. For each required role, confirm the assigned person is physically present or authenticated into the operating system (contact-center ACD login, document-prep workstation, facility check-in, or field-crew dispatch confirmation).
3. Cross-check each present holder's credential/eligibility status is current and unexpired (qualification standard is defined in TR-020 — this step confirms currency, not competence).
4. Identify any role with no present holder, an expired credential, or a below-minimum coverage ratio for the service line.
5. For each gap, have the Coverage Coordinator source an approved backup from the qualified pool and confirm that backup's presence and credential currency.
6. Confirm minimum coverage thresholds are met for every active service line and client SLA before opening the period.
7. If any required role cannot be covered, apply the Decision Tree (Section 8) before authorizing.
8. Record the final verified coverage state, all substitutions, and the authorization decision in the coverage log with timestamp and verifier name.

8. Decision Tree

Decision Tree — Staffing & Coverage Verification



READING THIS TREE

No finding

Activity stands. Complete the checklist and continue.

Minor

Handled in place at task level; no escalation.

Major

Supervisory decision required before the next stage.

Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every required role for the period has a confirmed, present holder or approved backup.
- All present holders show current, unexpired credentials/eligibility.
- Minimum coverage ratios met for every active service line and client SLA.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Required-role roster pulled for correct operating period		
Each required role has a present or logged-in holder		
Credentials/eligibility current for all holders		
Minimum coverage ratios met per service line		
Backups sourced from approved qualified pool for all gaps		
Client SLA / regulatory coverage minimums satisfied		
Coverage log completed, timestamped, and signed		

11. KPIs

- Periods opened with 100% required-role coverage $\geq$ 98%
- Verification completed before scheduled period start $\geq$ 99%
- Unresolved Critical coverage gaps at period open = 0

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

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1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for ADMIN_SUPPORT_SERVICES.	Archetype Content Team

OD-004 — Work Area Readiness & Housekeeping Inspection

Estimated completion time: 20–40 minutes per work area, once per operating shift

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1. Purpose

To confirm that each operating work area — workstations, service counters, contact-center floors, document/mail processing stations, and shared circulation space — is clear, organized, and fit for the day's operations before staff begin customer-facing or production work, reducing slip/trip hazards, obstructed egress, and processing errors.

2. Scope

Covers the pre-shift readiness and housekeeping inspection of active administrative work areas, service counters, processing stations, and shared common paths at a facility or field-service reporting site. Excludes warehouse housekeeping, which is covered under WH-023, and maintenance-shop housekeeping, which is covered under MD-025.

3. Responsibilities

- Operations Supervisor — owns the inspection cycle, reviews findings, verifies close-out, and authorizes the area as fit for work.
- Shift/Area Lead — performs the walkthrough, completes the checklist, and stages minor corrections before shift start.
- Assigned Staff Member — restores individual workstations to standard, reports hazards, and does not begin work in an area marked not ready.

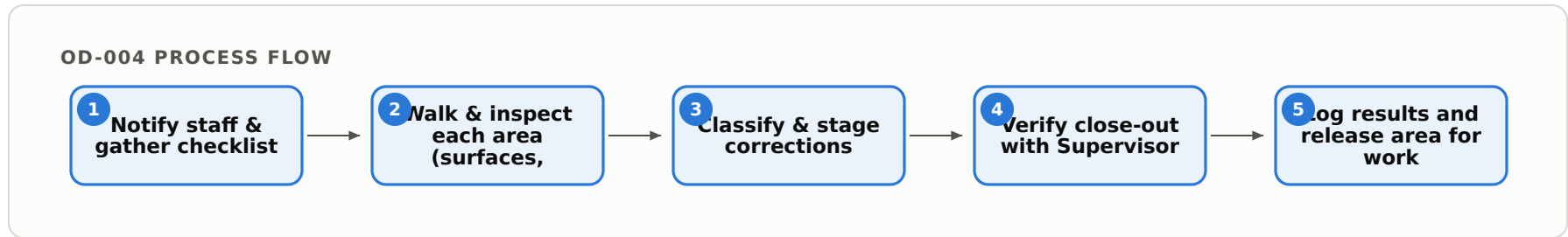
4. Required PPE & Lockout/Tagout

- Standard facility PPE; closed-toe footwear where liquids or heavy items are handled; where the service line operates field vehicles or handles waste/recovery materials, add gloves and high-visibility vest per site rule.
- Not applicable — no hazardous energy involved. Powered equipment servicing is out of scope (see MD-025).

5. Regulatory References

- 29 CFR 1910.22 (Walking-Working Surfaces — housekeeping, clean/orderly/dry condition)
- 29 CFR 1910.36 & 1910.37 (Means of egress — unobstructed exit routes and access)
- 29 CFR 1910.141 (Sanitation — workplace cleanliness, waste containment)
- General Duty Clause, OSH Act §5(a)(1); member-specific example only, e.g., waste-handling members may layer additional state sanitation rules.
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

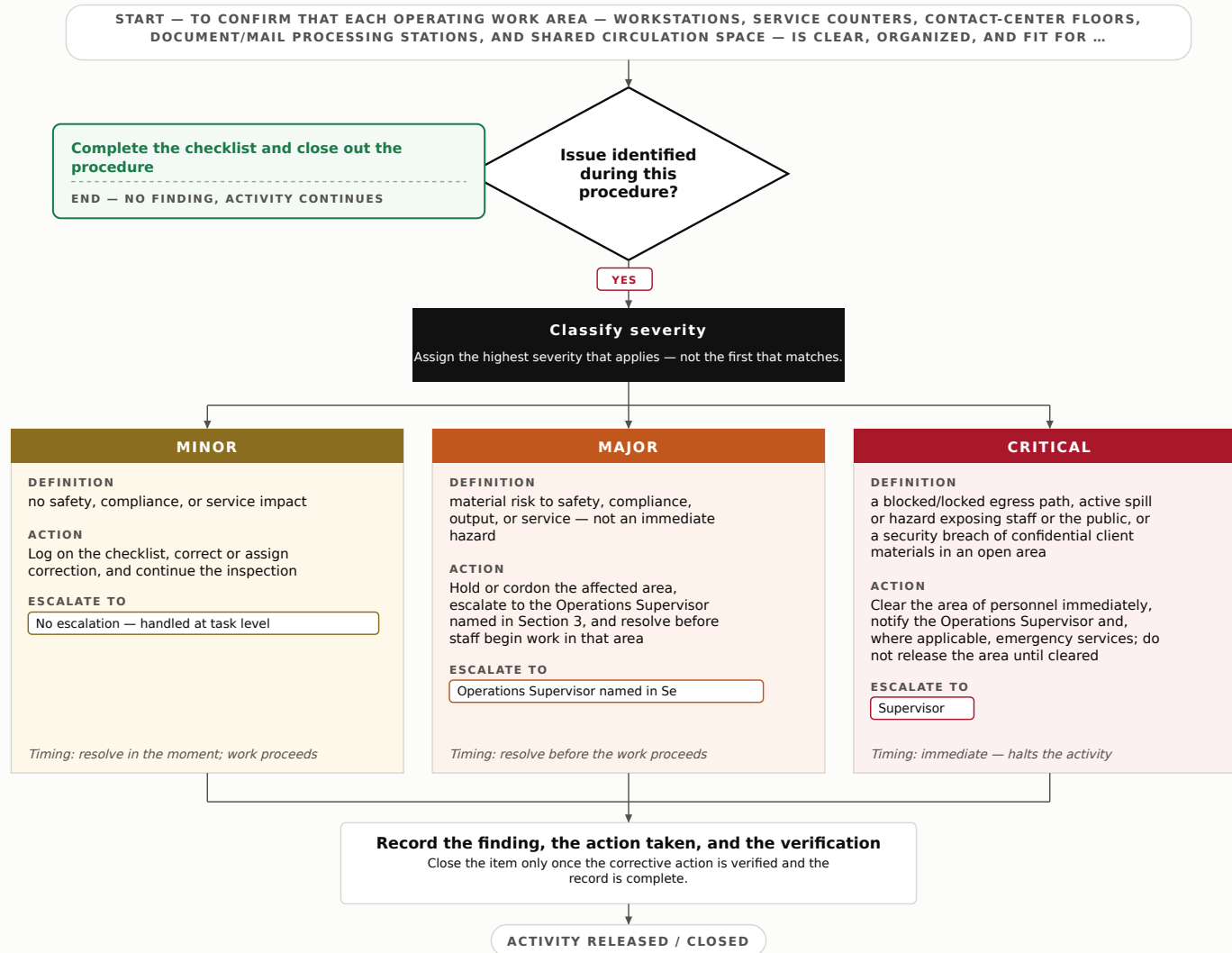


7. Step-by-Step Procedure

1. At shift start, the Area Lead retrieves the current checklist and confirms which work areas are active for the day's operations.
2. Inspect floors and walking surfaces for spills, debris, trailing cables, and trip hazards; confirm circulation paths are clear.
3. Verify all egress routes, exit doors, and fire-equipment access are unobstructed and clearly visible.
4. Check each workstation and service counter: surfaces clear of clutter, materials and IT hardware from prior shift stowed, confidential documents secured, monitors/headsets/terminals seated and undamaged.
5. Confirm waste and recycling receptacles are emptied or containable and not overflowing; check sanitation of shared surfaces.
6. Verify lighting, signage, and any area-readiness postings are functional and legible.
7. Stage or complete minor corrections; escalate anything unresolved per Section 8.
8. Record all findings, corrective actions, and area status on the Inspection Checklist and obtain Supervisor verification before releasing the area.

8. Decision Tree

Decision Tree — Work Area Readiness & Housekeeping Inspection



READING THIS TREE

No finding

Activity stands. Complete the checklist and continue.

Minor

Handled in place at task level; no escalation.

Major

Supervisory decision required before the next stage.

Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- All active egress routes confirmed unobstructed and signage legible.
- All workstations and counters clear, sanitary, and equipment seated for use.
- All findings logged with a named corrective owner and status.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Floors/walking surfaces clear, dry, no trip hazards		
Egress routes and exit doors unobstructed		
Workstations/counters clear; confidential materials secured		
IT hardware/headsets/terminals seated and undamaged		
Waste/recycling contained, not overflowing; surfaces sanitary		
Lighting and readiness signage functional/legible		
All findings logged with corrective owner assigned		

11. KPIs

- Areas inspected before shift start: 100% of active areas
- Repeat (recurring) housekeeping findings: $\leq$ 5% shift-over-shift
- Critical findings unresolved at shift release: 0

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

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1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for ADMIN_SUPPORT_SERVICES.	Archetype Content Team

OD-005 — Operational Equipment Availability Check

Estimated completion time: 15-30 minutes per operating period (start-of-shift), longer at multi-station or field-service sites

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1. Purpose

To confirm, before an operating period begins, that the equipment and tools required to deliver the period's service — whether at a fixed facility or on a field service route — are present, powered/functional, and formally released for use, so that scheduled work is not interrupted by missing or unready assets.

2. Scope

Covers the start-of-period verification that required equipment is on hand, operable, and cleared for use across all Operations service lines (contact/answering stations, document-processing equipment, mail/parcel handling and metering, materials-recovery sorting lines, and field-service vehicles and portable gear). Excludes equipment condition/inspection (see ED-003), preventive-maintenance status (see PM-024), and mobile handling equipment pre-use checks (see WH-004) — this procedure confirms availability and release only, not condition or maintenance state.

3. Responsibilities

- Operations Supervisor — owns the period readiness check, authorizes release-for-use, and holds work when required assets are unavailable.
- Shift/Station Lead — executes the physical availability walk-through against the period equipment list and records findings.
- Facilities/Asset Coordinator — maintains the equipment register, arranges substitute or loaner assets, and coordinates with vendors on replenishment or repair hand-offs.

4. Required PPE & Lockout/Tagout

- Standard facility PPE for the service line (e.g., gloves and hi-vis where sorting lines or dock areas are entered; standard office attire at contact/document stations).
- Not applicable for the availability check itself — no hazardous energy is isolated during this task. Any de-energization or lockout belongs to ED-003/PM-024 and is not performed here.

5. Regulatory References

- OSHA General Duty Clause, 29 U.S.C. §654(a)(1) — maintenance of a workplace free of recognized hazards, including provision of functional equipment.
- 29 CFR 1910.132 — general PPE requirements where PPE accompanies equipment use.

- Internal policy applies as the governing frame: Operations Equipment Register and Release-for-Use Policy. Member-specific regimes may add requirements (e.g., DOT roadworthiness checks where a service line operates vehicles; USPS/PC Postal requirements where postage meters are used).
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

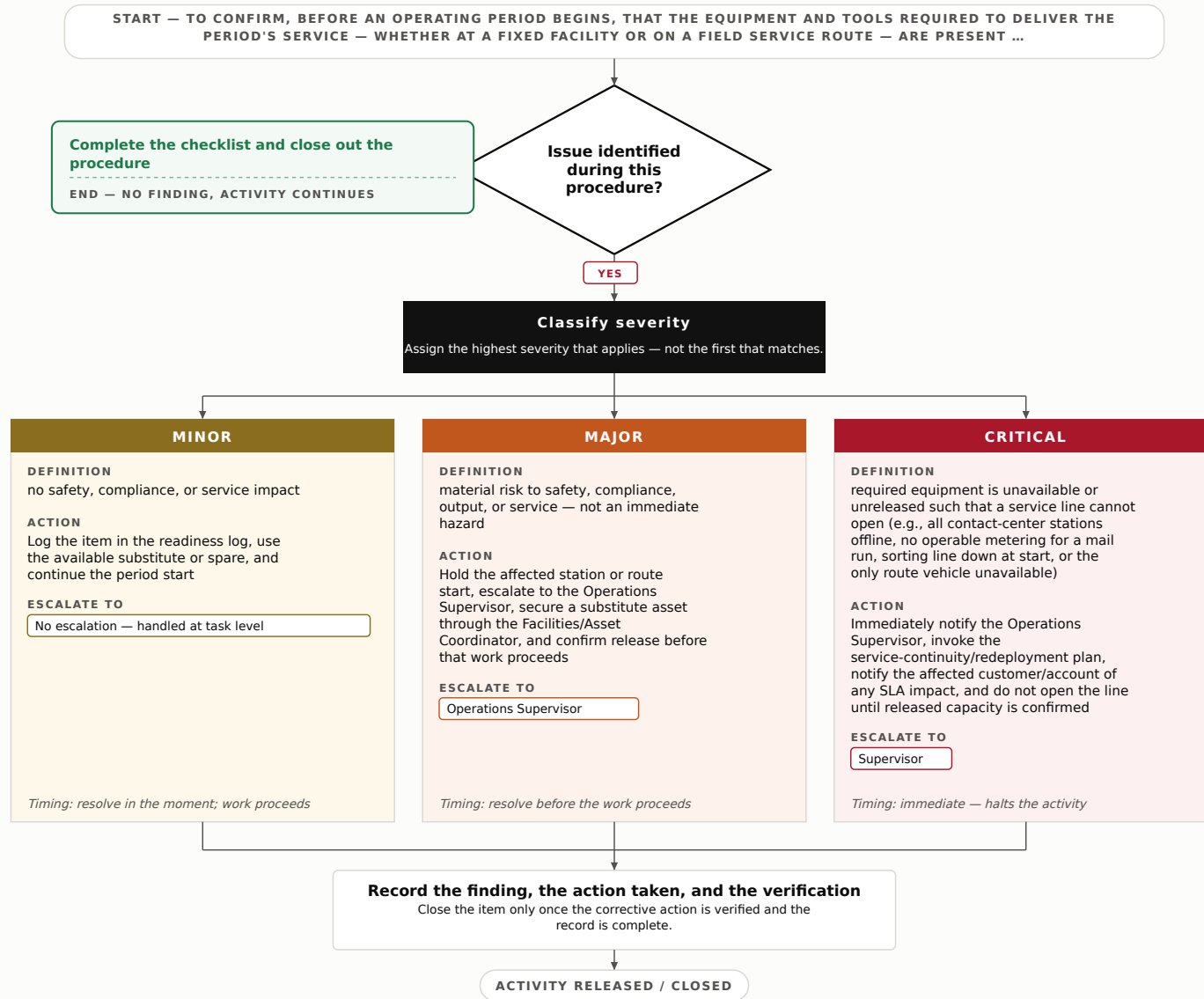
6. Process Flow



7. Step-by-Step Procedure

1. Pull the equipment list for the upcoming operating period from the equipment register (station roster, document-processing devices, metering/scales, sorting-line tools, or route vehicle and portable kit).
2. Physically locate each listed asset at its assigned station, staging area, or vehicle; account for shared and portable items against sign-out records.
3. Power up or activate each asset and confirm a normal ready/boot response (workstation and headset login, scanner/meter self-check, device online indicator).
4. Confirm consumables and dependent items needed to operate are present in usable quantity (labels/postage credit, media, blades/tools staged, chargers and spare batteries).
5. Verify each asset's release status — that it is not tagged out, held under ED-003/PM-024, or reserved to another shift — and confirm connectivity to required systems.
6. For any missing, non-responsive, or unreleased asset, apply the Section 8 decision tree; arrange a substitute via the Facilities/Asset Coordinator where possible.
7. Confirm the period can start with a complete, released asset set, or record the specific shortfall and its containment.
8. Record the check outcome, exceptions, and substitutions in the shift/period readiness log and obtain Supervisor authorization to begin.

8. Decision Tree

Decision Tree — Operational Equipment Availability Check**READING THIS TREE**

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every asset on the period list is accounted for as present or formally substituted.
- Each accounted asset returned a normal ready/functional response and is confirmed released (not held under ED-003/PM-024).
- All exceptions and substitutions are logged with time and disposition before period start.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Period equipment list retrieved and matched to service line		
All listed assets located and accounted for		
Each asset powers up / responds normally		
Consumables & dependent items present in usable quantity		
Release status confirmed (not tagged/held elsewhere)		
Substitutes arranged for any shortfall		
Readiness log completed and Supervisor authorization obtained		

11. KPIs

- Period readiness completed before scheduled start: $\geq 99\%$ of periods.
- Unplanned service delays caused by unavailable equipment: $\leq 1\%$ of periods.
- Availability exceptions logged and dispositioned same shift: 100%.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

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1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for ADMIN_SUPPORT_SERVICES.	Archetype Content Team

Phase 2 — Demand intake

OD-006 — Customer Order / Work Request Intake

Estimated completion time: 10-25 minutes per intake

Provided for general informational and operational purposes as part of the Admin Support Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To receive, verify, and log every incoming customer order, job, or service request into the operations intake system so that each request is captured accurately, time-stamped, and routed for downstream handling. Reliable intake protects service commitments and creates the audit trail this archetype depends on.

2. Scope

Covers all inbound customer requests received by any channel (phone, email, web form, walk-in, client portal, or transferred ticket) up to the point of logging and assigning an intake reference. Excludes acceptance/capability review — whether the request can and should be accepted — which is covered under OD-007.

3. Responsibilities

- Intake Coordinator — receives the request, captures required fields, verifies requester identity/authorization, assigns the intake reference, and logs the record.
- Operations Supervisor — resolves incomplete or disputed intakes, approves exceptions, and owns escalations classified Major or Critical.
- Records/Compliance Custodian — maintains the intake register, retention schedule, and access controls for logged customer data.

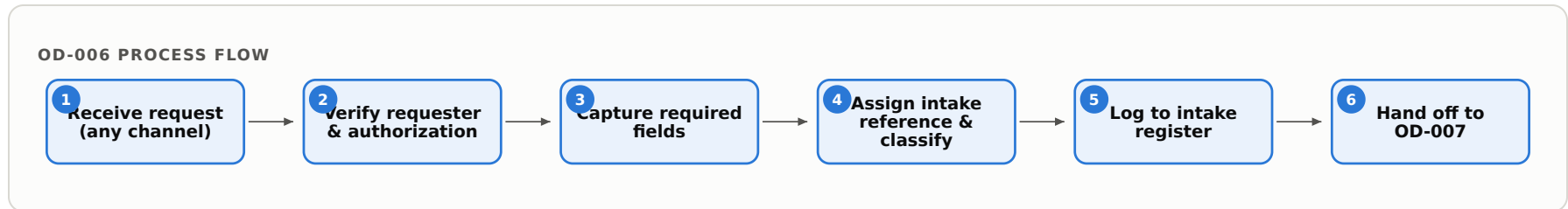
4. Required PPE & Lockout/Tagout

- Standard facility/office PPE; where the service line performs field or facility floor work, follow that line's site PPE rules before any physical walk-through tied to an intake.
- Not applicable — no hazardous energy involved in the intake task itself.

5. Regulatory References

- FTC Act §5 (15 U.S.C. §45) — accurate representation of services and terms at point of intake.
- Telemarketing Sales Rule (16 CFR Part 310) and TCPA (47 U.S.C. §227) — where requests are taken or confirmed by telephone.
- State consumer-protection and data-privacy/breach-notification statutes governing customer records (e.g., CCPA where applicable).
- Internal Intake & Records Control Policy governs fields, retention, and access where no sector-specific rule applies.
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

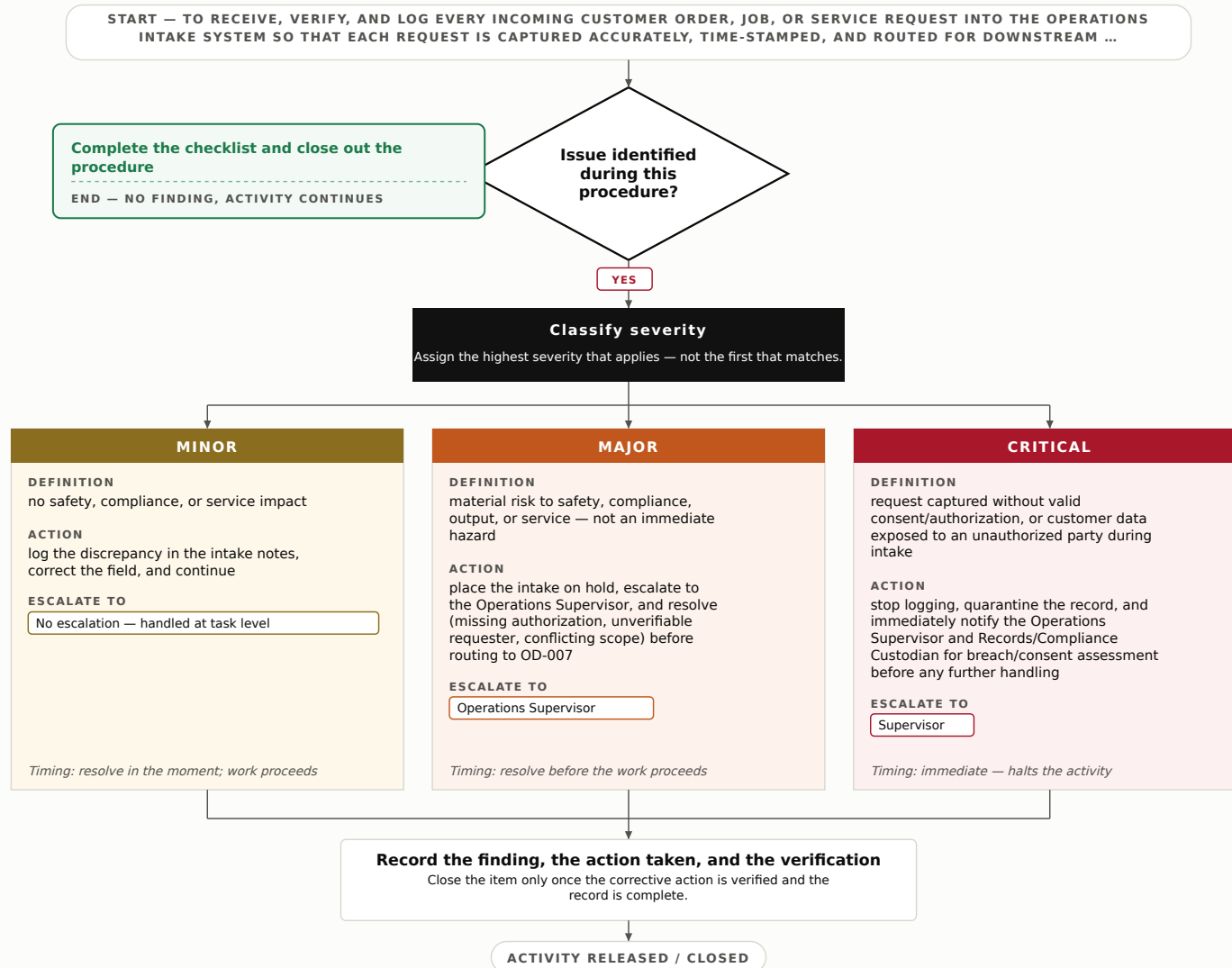


7. Step-by-Step Procedure

1. Acknowledge the incoming request within the channel's response window and confirm the channel of origin (phone, email, web form, portal, walk-in, transfer).
2. Verify the requester's identity and authorization to submit the request; note any consent language required for the channel used (recorded-line notice, opt-in confirmation).
3. Capture required fields: requester name and contact, account/client identifier, requested service or work description, quantity/scope indicators, requested date, and any special instructions.
4. Confirm the request against existing account records; flag duplicates, related open jobs, or prior references.
5. Assign a unique intake reference and time-stamp; record the receiving Intake Coordinator.
6. Perform a completeness check against the intake field standard; request missing information before logging where the channel allows live follow-up.
7. Log the completed record to the intake register and route it to acceptance/capability review per OD-007 — do not perform that review here.
8. Confirm the logged record is retrievable and that any consent/notice artifacts are attached, then close out the intake step.

8. Decision Tree

Decision Tree — Customer Order / Work Request Intake



READING THIS TREE

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- All required intake fields captured and legible before a reference is assigned.
- Requester identity/authorization and any channel-specific consent verified and attached.
- Intake reference is unique, time-stamped, and the record is retrievable in the register.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Channel of origin recorded		
Requester identity & authorization verified		
Required consent/notice captured (if applicable)		
All required intake fields complete		
Unique intake reference & time-stamp assigned		
Duplicate/related-job check performed		
Record logged and routed to OD-007		

11. KPIs

- Intake acknowledgement within channel window $\geq 95\%$.
- Intake records complete and error-free at first log $\geq 98\%$.
- Consent/authorization documented on applicable channels = 100%.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for ADMIN_SUPPORT_SERVICES.	Archetype Content Team

OD-007 — Order Verification & Acceptance Review

Estimated completion time: 20-60 minutes per order

Provided for general informational and operational purposes as part of the Admin Support Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

This procedure ensures that every incoming client order or service request is verified for scope, specification, deliverable capability, and commercial terms before the operation commits to it, so the business only accepts work it can lawfully and reliably perform.

2. Scope

Covers verification and formal acceptance (or decline) of client orders across all service lines in the archetype, including confirmation of deliverable specification, turnaround feasibility, resource capability, and contract terms. Excludes intake logging, which is covered under OD-006, and job scheduling, which is covered under OD-008.

3. Responsibilities

- Operations Coordinator — receives the verified intake record, confirms scope and specification against the client request, and prepares the acceptance recommendation.
- Service Line Supervisor — validates capability and resource availability, confirms commercial terms, and authorizes acceptance or decline.
- Account/Client Liaison — clarifies ambiguous requirements with the client and communicates the accept/decline decision and any conditions.

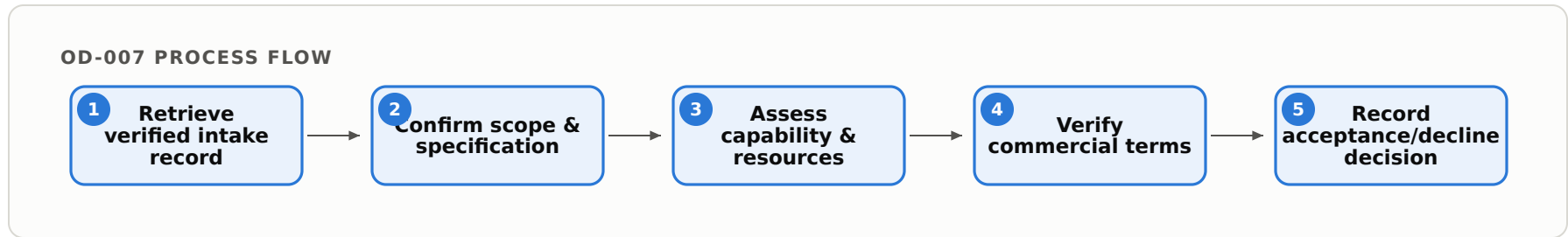
4. Required PPE & Lockout/Tagout

- Standard facility PPE; not applicable to this administrative review beyond general workplace requirements. Where the service line operates in a facility environment (e.g., recovery or field service intake), apply that site's standing PPE rule during any physical inspection of order materials.
- Not applicable — no hazardous energy involved.

5. Regulatory References

- None sector-specific govern order acceptance across the full span; internal policy (Client Acceptance Policy) applies. Applicable cross-cutting authorities include the FTC Act §5 (15 U.S.C. §45) on unfair/deceptive representations of service capability, state Uniform Commercial Code Article 2/2A provisions on offer and acceptance where goods or leases are involved, and applicable state consumer-protection and contract law. Member-specific regimes (e.g., FTC Telemarketing Sales Rule for contact-center work; USPS/DMM standards for private mail centers) may apply as examples but do not govern the whole span. Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

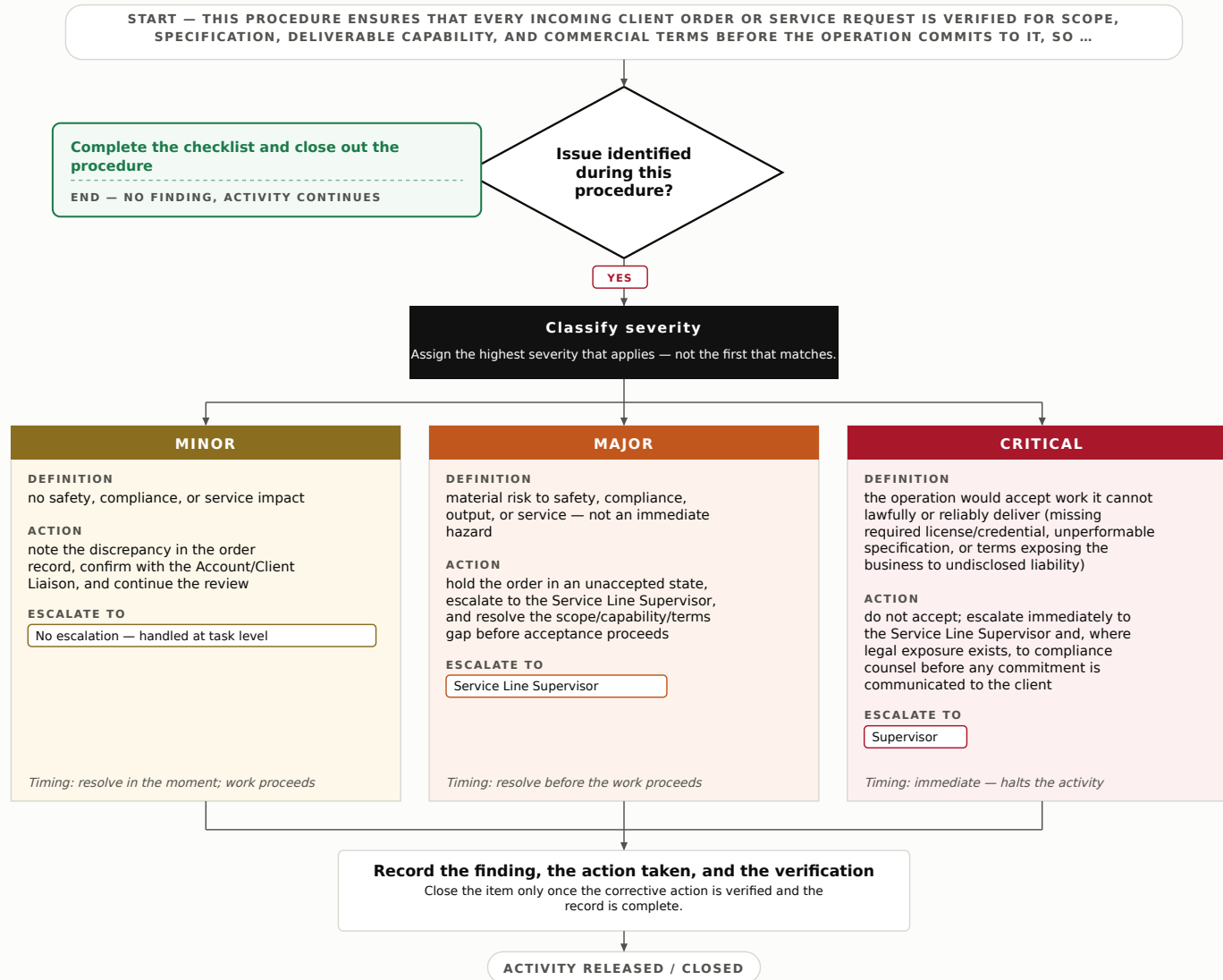


7. Step-by-Step Procedure

1. Retrieve the verified intake record for the order (per OD-006); confirm the client identity and request reference are complete before proceeding.
2. Read the requested deliverable against the stated specification — quantity, format, service level, turnaround expectation — and flag any ambiguity or missing detail.
3. Where requirements are unclear, route the item to the Account/Client Liaison for written clarification; do not proceed on assumed scope.
4. Assess capability: confirm the operation has the trained staff, licensing/credentials where required, and equipment (e.g., computing hardware and software from 334111) available to meet the specification.
5. Verify commercial terms — pricing, payment terms, liability limits, and any client-specific contractual conditions — against the standard Client Acceptance Policy and note any deviation requiring authorization.
6. Confirm feasibility of the requested turnaround against current load without authoring the schedule itself (handed off to OD-008).
7. Record the accept/decline recommendation with rationale; the Service Line Supervisor authorizes the final decision and any acceptance conditions.
8. Document the completed verification, the decision, and any conditions in the order record and notify the client of acceptance or decline.

8. Decision Tree

Decision Tree — Order Verification & Acceptance Review



READING THIS TREE

No finding

Activity stands. Complete the checklist and continue.

Minor

Handled in place at task level; no escalation.

Major

Supervisory decision required before the next stage.

Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Scope and specification confirmed against the client request with no open ambiguities.
- Capability and credential/licensing requirements verified as available before acceptance.
- Commercial terms and liability conditions reviewed and any deviation authorized.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Verified intake record complete and client identity confirmed		
Deliverable specification clear and unambiguous		
Required capability, staff, and credentials available		
Equipment/software resources sufficient for the specification		
Commercial terms and liability conditions reviewed		
Turnaround feasibility confirmed (per OD-008 hand-off)		
Accept/decline decision recorded and authorized		

11. KPIs

- Orders accepted with complete verification record: $\geq 98\%$
- Post-acceptance scope/capability rework or re-negotiation rate: $\leq 3\%$
- Verification completed within target cycle time: $\geq 95\%$ within one business day

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for ADMIN_SUPPORT_SERVICES.	Archetype Content Team

OD-008 — Job Scheduling & Sequencing

Estimated completion time: 30-60 minutes per scheduling cycle (daily or per intake batch)

Provided for general informational and operational purposes as part of the Admin Support Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To place accepted work orders into the operating schedule in an order that honors client priority levels, contractual due dates, and available capacity — so that every committed job is sequenced for on-time completion across the service line.

2. Scope

Covers the sequencing of already-accepted jobs into the daily/weekly operating schedule, including priority ranking, due-date alignment, and slot placement across all service queues (facility-based batches and, where the service line operates field crews, dispatch windows). Excludes resource assignment (staff, crews, and equipment allocation), which is covered under OD-009, and maintenance scheduling, which is covered under PM-008.

3. Responsibilities

- Operations Scheduler — builds and maintains the operating schedule, sequences accepted jobs by priority and due date, and flags capacity conflicts.
- Operations Supervisor — approves the sequence, resolves priority disputes, and authorizes reschedules or expedites.
- Client Services Coordinator — confirms client priority tier and contractual due date, and communicates schedule changes to the client of record.

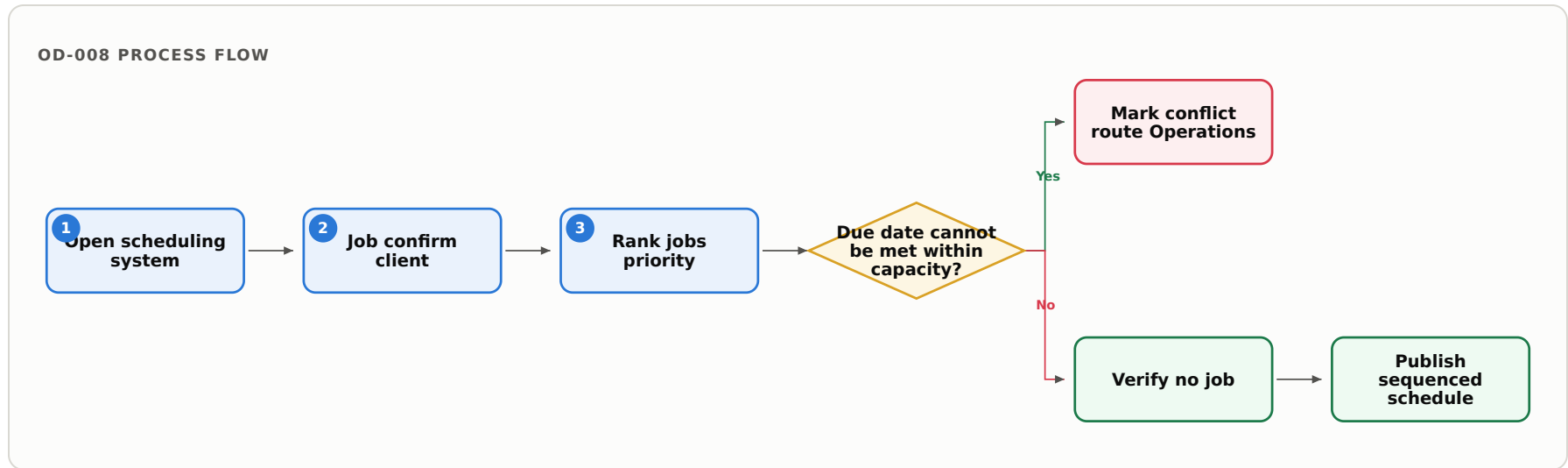
4. Required PPE & Lockout/Tagout

- Standard facility PPE per site policy; none specific to this desk-based scheduling task. Field-based service lines follow their own crew PPE standard once dispatched (out of scope here).
- Not applicable — no hazardous energy involved.

5. Regulatory References

- None sector-specific to job sequencing; internal scheduling policy and the governing client service agreement apply. General obligations that hold across the span include record-retention and accuracy of service records under contract terms, applicable state consumer-protection/unfair-practices statutes governing stated turnaround commitments (e.g., timely-delivery representations), and OSHA General Duty Clause 29 CFR 1903.1 for the workplace generally. Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

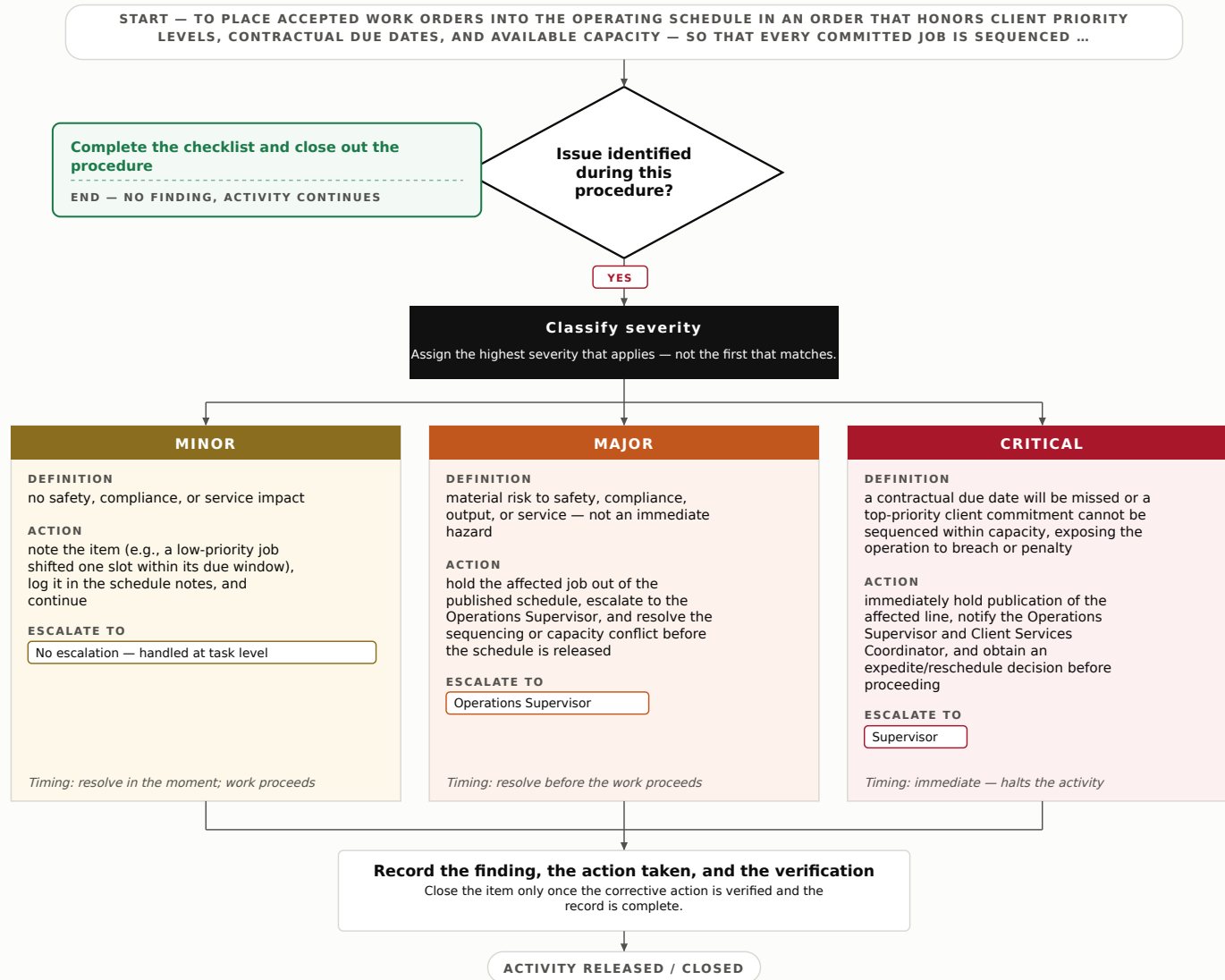


7. Step-by-Step Procedure

1. Open the scheduling system on the workstation and pull the current accepted-work queue; confirm each job carries an intake ID and an "accepted" status.
2. For each job, confirm the client priority tier and contractual due date with the Client Services Coordinator where any field is missing or ambiguous.
3. Rank jobs by priority tier first, then by earliest due date within tier; break ties by intake timestamp.
4. Compare the ranked list against published capacity windows (available shifts, queues, or dispatch slots) without assigning specific staff or equipment — that allocation is handled under OD-009.
5. Place each job into an available schedule slot; if a due date cannot be met within capacity, mark the conflict and route to the Operations Supervisor for expedite or reschedule authorization.
6. Verify no job is double-booked into the same slot and that all Critical/rush jobs have earliest feasible placement.
7. Publish the sequenced schedule to the operating team and notify the Client Services Coordinator of any changed committed dates.
8. Save the baseline schedule and log the run (date, scheduler, conflicts flagged, approvals) in the operations record per retention policy.

8. Decision Tree

Decision Tree — Job Scheduling & Sequencing



READING THIS TREE

No finding

Activity stands. Complete the checklist and continue.

Minor

Handled in place at task level; no escalation.

Major

Supervisory decision required before the next stage.

Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every accepted job in the queue is placed or explicitly flagged — none dropped.
- Priority tier and due date confirmed for every scheduled job.
- No slot double-booked; all rush/Critical jobs at earliest feasible placement.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Accepted-work queue fully retrieved and reconciled		
Priority tier confirmed for each job		
Contractual due date confirmed for each job		
Sequence honors priority-then-due-date rule		
No double-booked slots		
Capacity conflicts flagged and escalated		
Baseline schedule saved and run logged		

11. KPIs

- On-time schedule adherence — $\geq 95\%$ of jobs completed by committed due date.
- Sequencing accuracy — $\leq 2\%$ of jobs requiring reschedule after publication.
- Priority-conflict resolution time — 100% of flagged conflicts escalated and resolved within 1 business day.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for ADMIN_SUPPORT_SERVICES.	Archetype Content Team

OD-009 — Resource & Capacity Allocation

Estimated completion time: 30-60 minutes per scheduling cycle (shift, day, or engagement window)

Provided for general informational and operational purposes as part of the Admin Support Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

This procedure assigns qualified personnel, working equipment (workstations, terminals, service vehicles, processing lines, or mail/parcel bays as applicable), and physical or logical space to work items that have already been scheduled, and confirms that the committed capacity genuinely exists before work begins. It prevents over-commitment, idle resources, and service failures across the Operations line.

2. Scope

Covers the allocation and capacity-confirmation of people, equipment, and space against scheduled work at an Admin Support Services operation, including reconciliation of nominal versus real available capacity. Excludes staffing presence and attendance confirmation (see OD-003) and the ordering or sequencing of scheduled work items (see OD-008); this procedure begins once the schedule and its sequence are fixed.

3. Responsibilities

- Operations Coordinator — builds the allocation plan, matches resources to scheduled work, and confirms real capacity against each assignment.
- Operations Supervisor — reviews and approves the allocation, resolves contention, and authorizes reallocation when capacity gaps are found.
- Resource/Asset Custodian — verifies equipment operability and space availability and reports unavailable or degraded resources to the Coordinator.

4. Required PPE & Lockout/Tagout

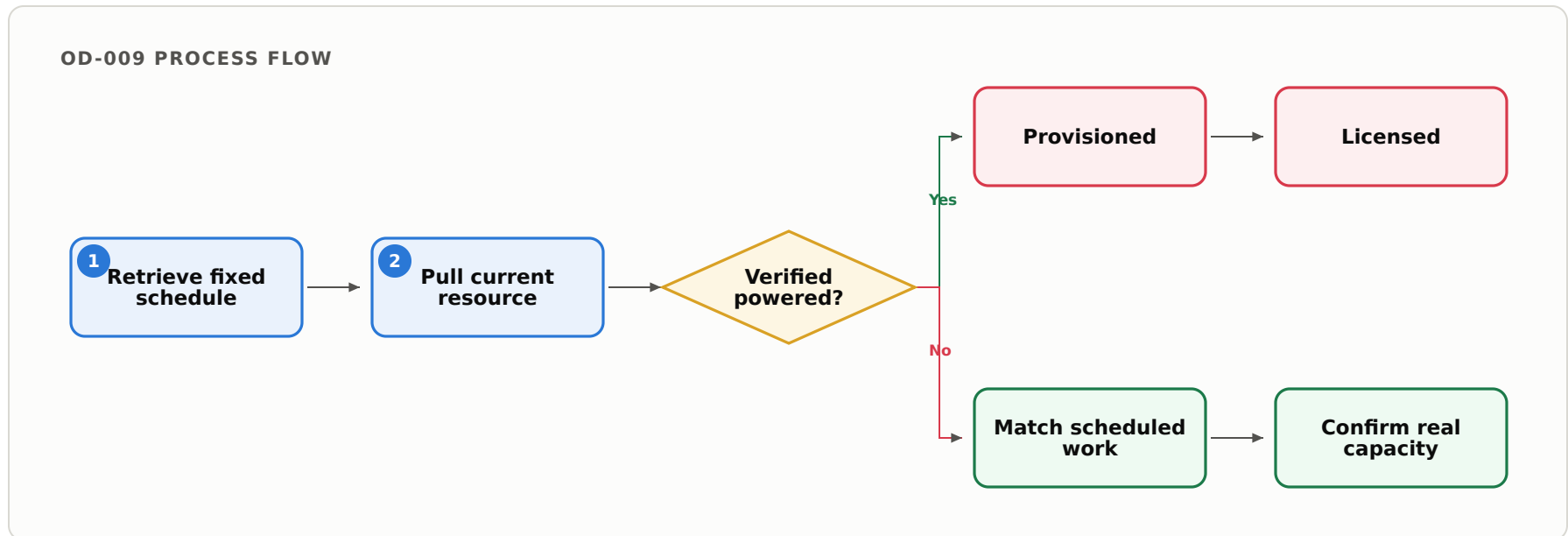
- Standard facility PPE where a service line operates in a facility environment (e.g., high-visibility vest and closed footwear at materials recovery or processing floors; standard office attire otherwise).
- Not applicable — this is a planning and confirmation task involving no hazardous energy. Any equipment requiring lockout is handled under its own maintenance procedure, not here.

5. Regulatory References

- 29 CFR 1904 (OSHA recordkeeping) and 29 CFR 1910 general-industry provisions, where the service line occupies a physical worksite — governs safe occupancy and equipment fitness underlying any capacity claim.
- Fair Labor Standards Act (29 U.S.C. §201 et seq.) — governs hours, overtime, and the real availability of assignable labor capacity.
- Americans with Disabilities Act (42 U.S.C. §12101 et seq.) — governs workspace and accommodation constraints on assignment.

- None member-specific is used as the governing frame; where a member operates vehicles or PEO client-worksite assignments, additional client-contract or DOT provisions may apply as examples only. Internal Resource Allocation Policy applies in all cases.
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow



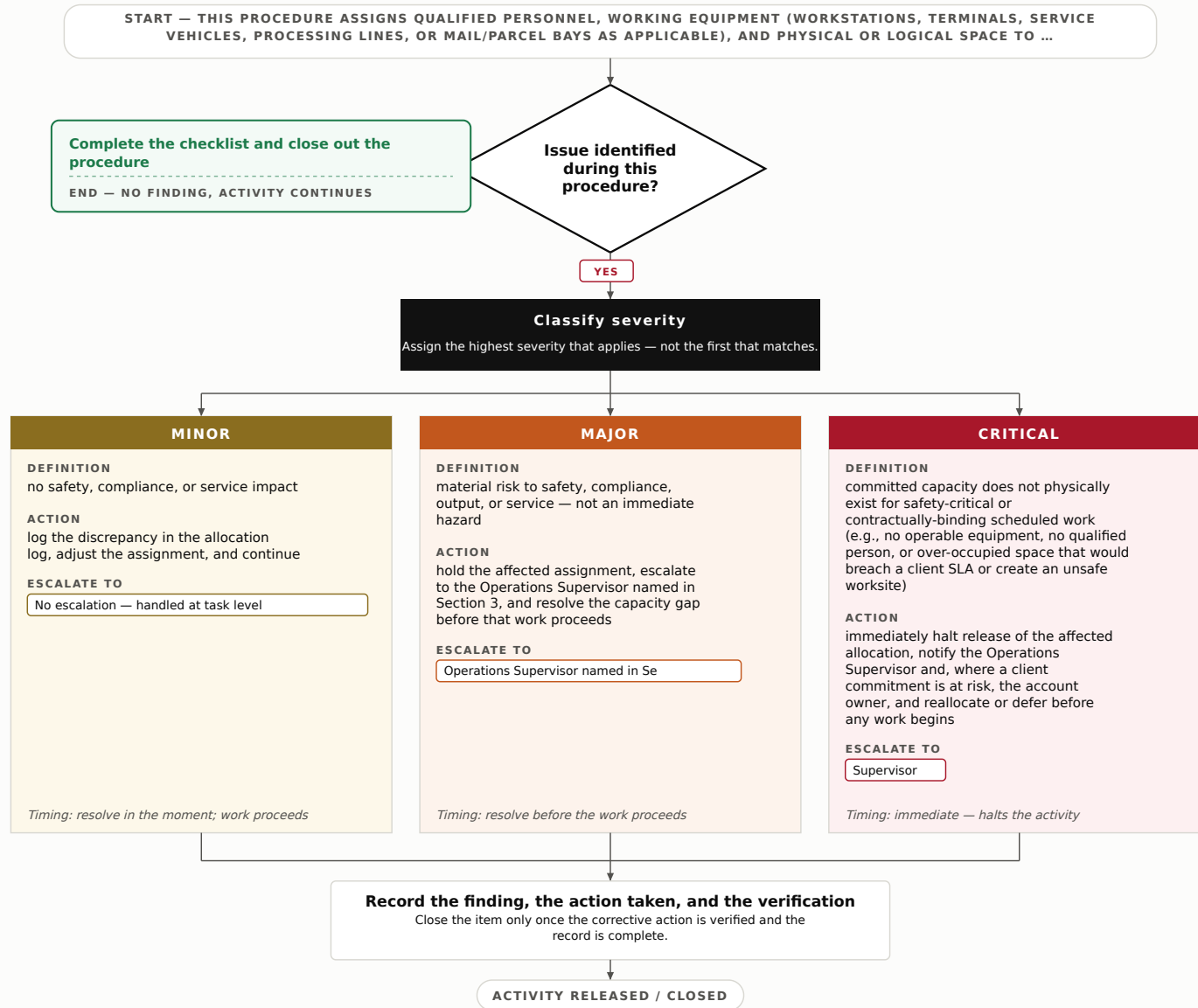
7. Step-by-Step Procedure

1. Retrieve the fixed schedule and its sequence (per OD-008) for the target window; do not alter sequence within this procedure.
2. Pull the current resource inventory: available/qualified personnel rosters, operable equipment (terminals, workstations, service vehicles, processing lines, mail/parcel bays), and available space or logical capacity (queue slots, seats, docks).
3. Confirm equipment operability with the Resource/Asset Custodian — flag any unit out of service or degraded; treat 334111-sourced computing hardware as available only when verified powered, provisioned, and licensed.
4. Match each scheduled work item to a qualified person, an operable equipment unit, and a defined space, respecting skill and credential requirements.
5. Confirm real capacity: subtract committed hours, occupied equipment, and reserved space from nominal totals; verify no resource is double-booked and that headroom exists for known variability.
6. Identify and resolve contention or shortfall — reallocate, defer non-critical items, or escalate to the Operations Supervisor for authorization.
7. Publish the confirmed allocation to the affected teams and, where applicable, to downstream office-equipment provisioning channels (423420).

8. Document the final allocation, confirmed capacity figures, any gaps, and resolutions in the Operations allocation log; retain per internal policy.

8. Decision Tree

Decision Tree — Resource & Capacity Allocation



READING THIS TREE

No finding

Activity stands. Complete the checklist and continue.

Minor

Handled in place at task level; no escalation.

Major

Supervisory decision required before the next stage.

Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every scheduled work item has a named person, an operable equipment unit, and a defined space assigned.
- Confirmed capacity reconciles against nominal capacity with no double-booking.
- All equipment and space marked "available" was verified operable/vacant by the Resource/Asset Custodian.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Fixed schedule and sequence retrieved (per OD-008)		
Personnel qualified/credentialed for assigned work		
Equipment verified operable and provisioned		
Space/logical capacity verified available		
No resource double-booked in the window		
Capacity gaps escalated and resolved		
Final allocation documented in the log		

11. KPIs

- Allocation accuracy (assignments requiring no rework): $\geq 98\%$
- Confirmed-vs-nominal capacity variance flagged before work start: 100%
- Unresolved Critical capacity findings at publish: 0

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for ADMIN_SUPPORT_SERVICES.	Archetype Content Team

OD-010 — Incoming Material / Supply Verification

Estimated completion time: 15-45 minutes per delivery, depending on line-item count

Provided for general informational and operational purposes as part of the Admin Support Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To confirm that inbound materials and supplies — office consumables, IT hardware and computer equipment, forms stock, and service-line materials — match the purchase order in item, quantity, and physical condition before they are accepted into inventory and released for use.

2. Scope

Covers verification of all inbound deliveries against the originating purchase order or supply requisition across the operation, from carrier hand-off to acceptance or rejection. Excludes spec-conformance testing (functional/technical acceptance), which is covered under QC-003; putaway, covered under WH-006; and dock count, covered under SH-008.

3. Responsibilities

- Receiving Clerk — inspects each delivery against the PO, records condition, and completes the inspection checklist.
- Operations Supervisor — reviews discrepancies, authorizes acceptance or rejection, and approves vendor claims or returns.
- Procurement Coordinator — reconciles the PO, notifies the vendor of shortages/damage, and manages replacement or credit.

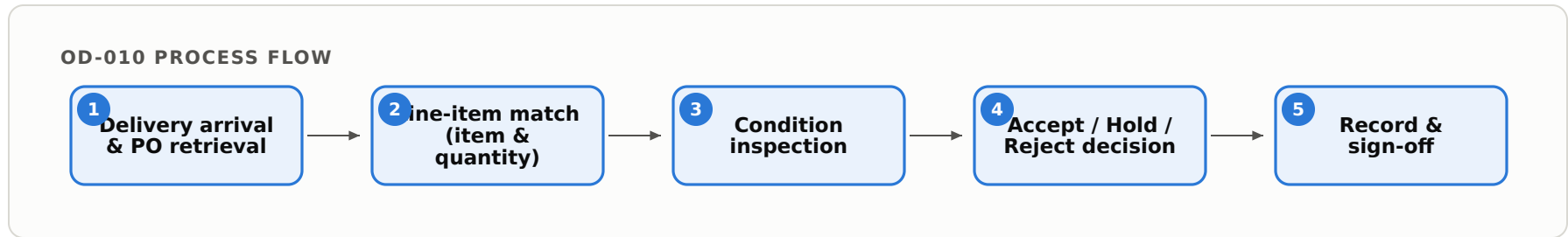
4. Required PPE & Lockout/Tagout

- Standard facility PPE; cut-resistant gloves and closed-toe footwear where pallets, banding, or heavy equipment cartons are handled.
- Not applicable — no hazardous energy involved. Where a service line uses powered lift equipment for heavy deliveries, follow that equipment's own LOTO procedure.

5. Regulatory References

- None sector-specific governs incoming material verification across all archetype members; internal procurement and receiving policy applies. General duty of safe handling under OSHA 29 CFR 1910 (General Industry) applies where materials are physically handled. Member-specific examples may apply (e.g., DOT hazmat receiving rules where a service line takes delivery of regulated materials; state e-waste handling rules for returned electronics). Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

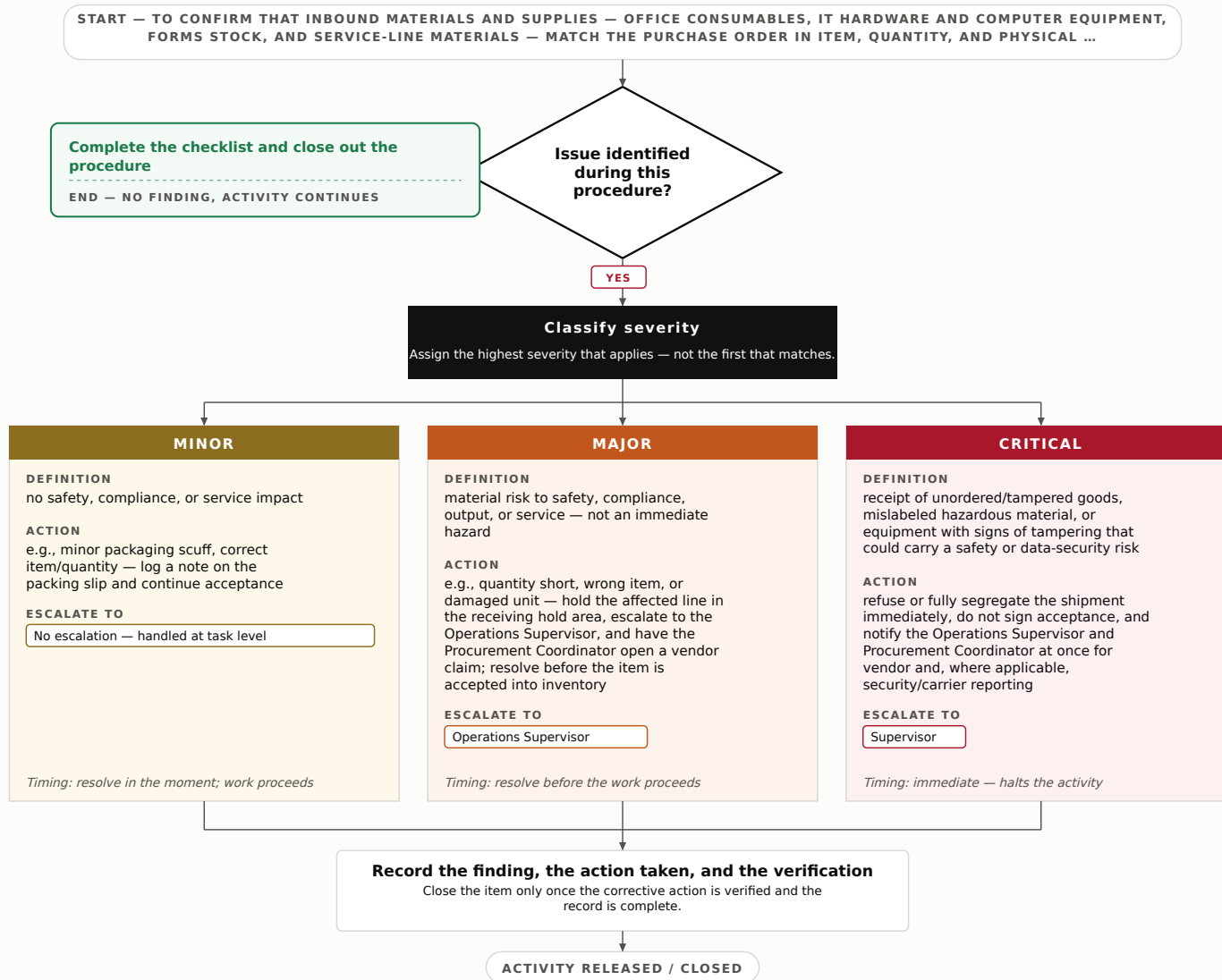


7. Step-by-Step Procedure

1. Retrieve the open purchase order or supply requisition matching the delivery's packing slip or manifest; confirm vendor and PO number align.
2. Verify each line item on the packing slip against the PO — correct SKU, model, or catalog reference (e.g., specified computer hardware from the electronic computer manufacturer, correct forms stock, correct consumable grade).
3. Count received quantity per line and compare to ordered and to packing-slip quantity; note over/under shipments.
4. Inspect external and internal condition — crushed cartons, water damage, broken seals, tampered packaging, or visibly damaged units; do not open sealed anti-static or licensed-media packaging beyond what is needed to confirm identity.
5. Segregate any short, wrong, or damaged items into the receiving hold area; do not release them to inventory.
6. Determine accept / hold / reject per the Decision Tree and record the outcome.
7. Complete the Inspection Checklist and note the disposition of each line item.
8. Log the verification result in the receiving record, attach the annotated packing slip, and route accepted items forward (functional acceptance per QC-003; putaway per WH-006).

8. Decision Tree

Decision Tree — Incoming Material / Supply Verification



READING THIS TREE

No finding

Activity stands. Complete the checklist and continue.

Minor

Handled in place at task level; no escalation.

Major

Supervisory decision required before the next stage.

Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- PO number and vendor confirmed against packing slip before any count begins.
- Every line item matched on identity and quantity, with discrepancies segregated to hold.
- Condition inspection completed and documented for each carton/line.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
PO / requisition matches packing slip (vendor & number)		
All ordered line items present		
Received quantities match ordered quantities		
Item identity correct (SKU/model/catalog ref)		
Packaging intact — no crush, water, or tamper damage		
Sealed/anti-static/licensed media unbroken		
Discrepant items segregated to hold area		

11. KPIs

- Verification accuracy (accepted lots later found discrepant): $\leq 1\%$
- Deliveries verified same business day as arrival: $\geq 98\%$
- Discrepancies logged and escalated within 24 hours of receipt: 100%

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for ADMIN_SUPPORT_SERVICES.	Archetype Content Team

Phase 3 — Execution

OD-011 — Standard Work Execution & Process Adherence

Estimated completion time: 20-45 minutes per work batch or service cycle

Provided for general informational and operational purposes as part of the Admin Support Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To ensure work in the Operations department is performed to the documented standard method — the approved work instruction, client specification, or service-level agreement — so that output is consistent, repeatable, and traceable, and so that any departure from the defined method is identified and recorded at the point it occurs.

2. Scope

Covers execution of defined operational tasks (document/mail processing, contact-center call handling, staffing/placement workflows, facility service routes, or material-sorting runs, as applicable to the service line) against the governing work instruction, and the identification and logging of deviations from that method. Excludes in-process quality checks, which are covered under QC-007, and safe-work method, which is covered under SD-005.

3. Responsibilities

- Operations Associate — performs the work to the current approved method; identifies and reports any deviation before proceeding.
- Operations Team Lead — confirms the correct work instruction/version is in use; classifies and dispositions deviations; authorizes resumption.
- Operations Supervisor — owns method documentation and version control; verifies adherence; approves permanent method changes.

4. Required PPE & Lockout/Tagout

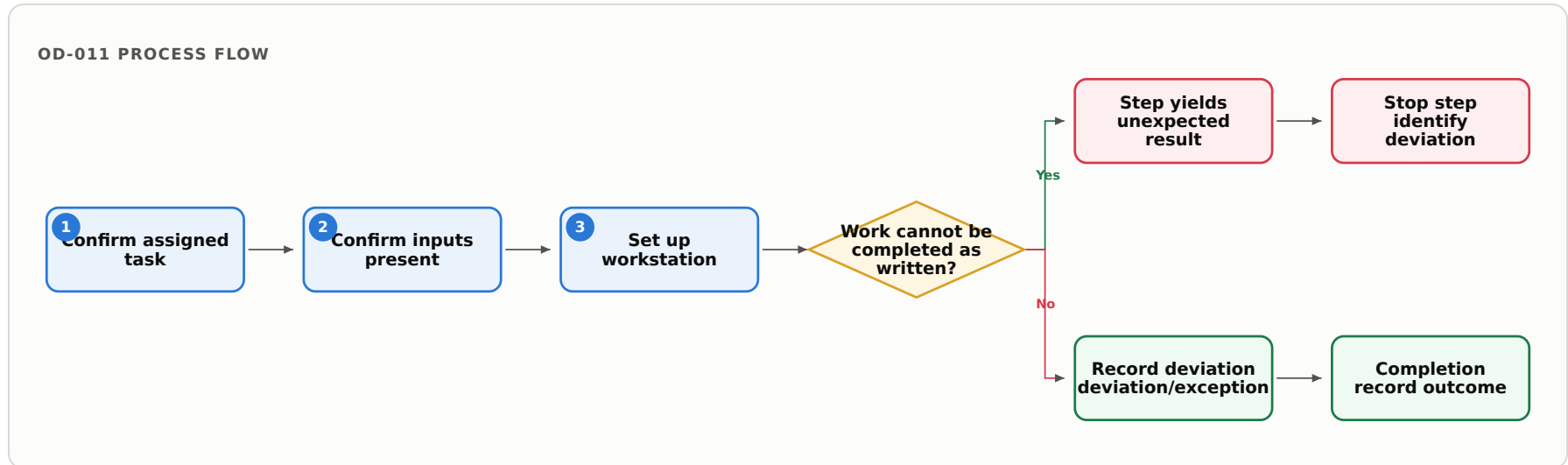
- Standard facility PPE per the service line; where the service line involves field routes, material handling, or vehicle operation, apply the PPE defined in SD-005.
- Not applicable — no hazardous energy involved in the execution/adherence task itself; any energy-isolation requirement is governed by SD-005.

5. Regulatory References

- 29 CFR 1904 — OSHA recording and reporting of occupational injuries/illnesses (recordkeeping obligations common to all covered employers).
- 29 CFR 1910 — OSHA General Industry standards, as applicable to the workplace.
- Fair Labor Standards Act (29 CFR 785) — hours-worked and recordkeeping applicable to all covered employers (e.g., PEO/staffing lines apply co-employment terms; contact-center lines apply per-shift time records).
- Internal policy basis: controlled work-instruction register and client service-level agreements govern the defined "standard method" where no sector-wide external standard applies.

- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

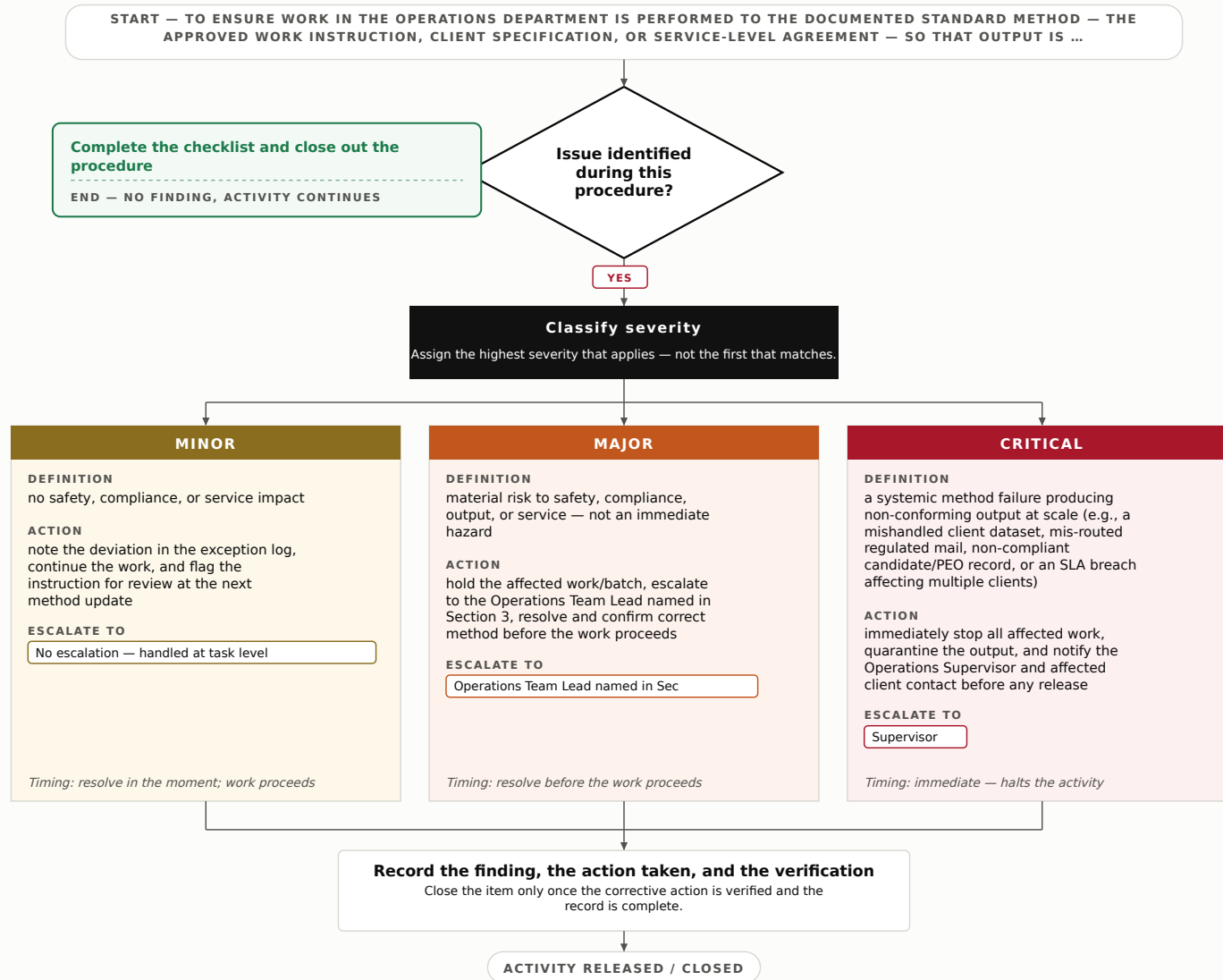


7. Step-by-Step Procedure

1. Confirm the assigned task and pull the current controlled work instruction, client specification, or SLA from the register; verify the version/revision matches the effective one.
2. Confirm inputs are present and correct for the method (source documents, call scripts, candidate/client files, route sheet, or intake load, as applicable) and that supporting IT hardware/software from equipment suppliers is functioning.
3. Set up the workstation or route per the defined method; confirm required tools and reference data are available.
4. Execute each defined step in sequence; do not substitute an undocumented shortcut or alternate method.
5. At each method-defined control point, confirm the work matches the instruction; where an in-process quality verification is required, perform it per QC-007.
6. If the work cannot be completed as written, or a step yields an unexpected result, stop at that step and identify it as a deviation (do not improvise a fix).
7. Record the deviation in the deviation/exception log with task ID, instruction version, step affected, and disposition per Section 8.
8. On completion, record the outcome, complete the inspection checklist, and route the record for supervisor verification and retention.

8. Decision Tree

Decision Tree — Standard Work Execution & Process Adherence



READING THIS TREE

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Correct and current work-instruction version confirmed before start.
- Each method-defined step executed in sequence with no undocumented substitutions.
- All deviations captured in the exception log with disposition.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Current work-instruction/SLA version verified against register		
Inputs and reference data present and correct		
Work executed step-by-step to the defined method		
No undocumented method substitutions used		
Deviations identified and logged with version + step		
Outcome recorded and routed for retention		
Escalations (if any) dispositioned per Section 8		

11. KPIs

- Method adherence rate $\geq$ 98% of executed tasks performed to the current instruction.
- Deviation logging completeness = 100% of identified deviations recorded.
- Unresolved Critical findings at close-out = 0.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for ADMIN_SUPPORT_SERVICES.	Archetype Content Team

OD-012 — Work-in-Progress Tracking & Status Update

Estimated completion time: 15-30 minutes per update cycle (typically start-of-shift, midday, and end-of-shift)

Provided for general informational and operational purposes as part of the Admin Support Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To ensure the current status of every active job, engagement, service order, or work item is recorded in a shared system and visible to the Operations team and client-facing staff, so that no work item stalls unseen and status inquiries can be answered accurately at any time.

2. Scope

Covers logging, updating, and displaying the live status of in-progress work items across all Operations service lines — from intake through the last pre-completion stage. Excludes throughput/volume measurement, which is covered under OD-014, and quality-conformance data, which is covered under QC-027.

3. Responsibilities

- Operations Supervisor — owns the tracking system, sets status definitions, resolves stalled or escalated items, verifies the update log at close of shift.
- Work Coordinator / Dispatcher — records new items at intake, advances status as work moves between stages, flags exceptions.
- Service Team Member (office- or field-based) — reports real-time status of assigned items to the Coordinator or updates their own records where system access is granted.

4. Required PPE & Lockout/Tagout

- Standard facility PPE only; no task-specific PPE required for status-tracking activity. Field-based service lines follow their own line PPE when reporting status from a job site.
- Not applicable — no hazardous energy involved.

5. Regulatory References

- None sector-specific to status tracking; internal policy governs. General applicable frameworks: FTC Act §5 (accuracy of representations, including status/turnaround claims made to clients); contractual confidentiality and data-handling terms in client service agreements; applicable state data-protection and records-retention statutes where the tracking log contains personal or client-identifying information (e.g., state breach-notification laws). Where the service line handles regulated personal data, additional client-mandated safeguards may apply. Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

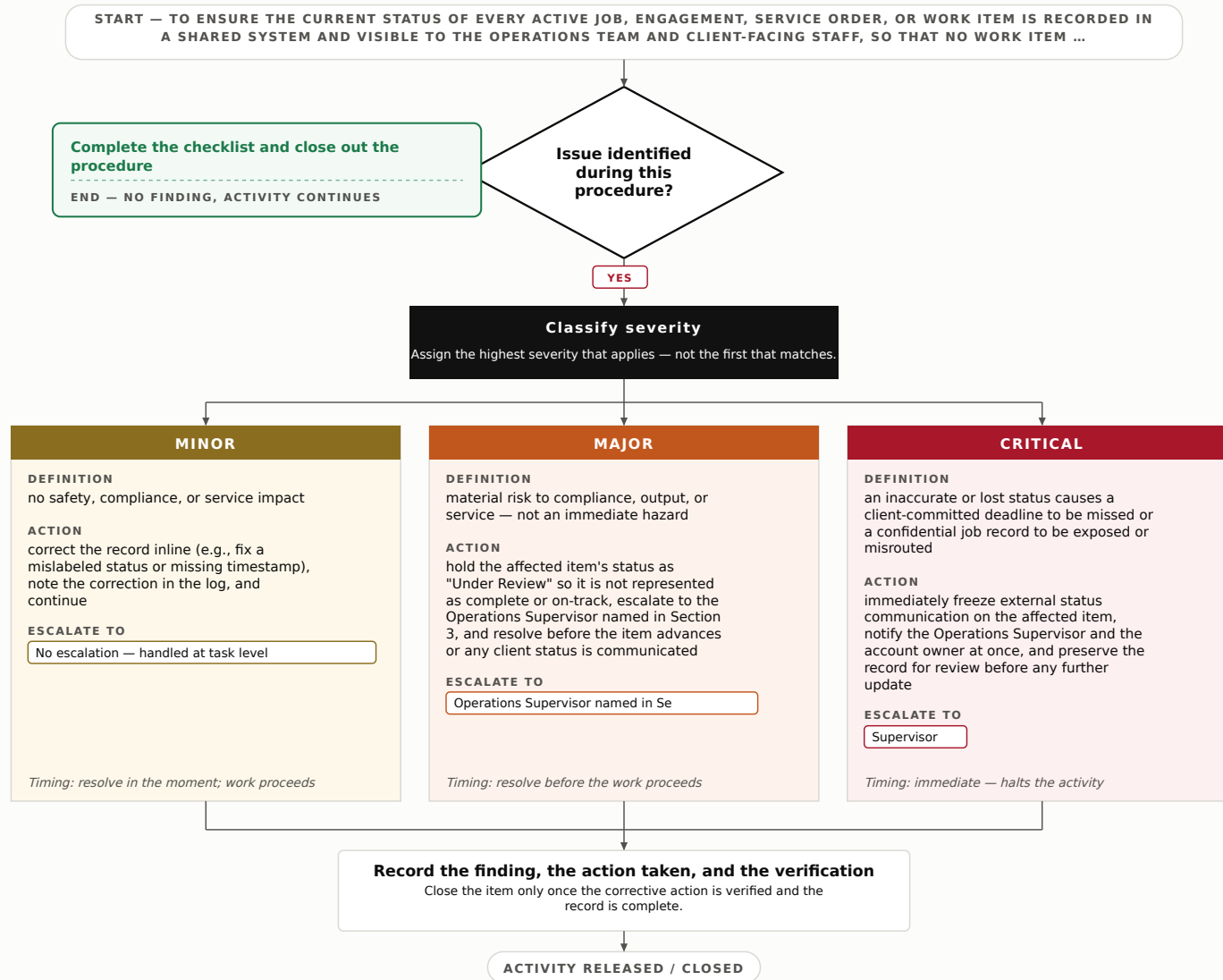


7. Step-by-Step Procedure

1. At intake, open the tracking system (shared board, ticketing/CRM tool, or job register) and create a record for each new work item with a unique reference, client, service line, owner, and target stage.
2. Assign an opening status from the approved status set (e.g., Received → In Progress → On Hold → Ready for Handoff) and confirm the item is visible on the shared view to Operations and client-facing staff.
3. Advance each item's status as it moves between stages, entering the change with a timestamp and the responsible owner's initials; never advance a status you cannot verify.
4. For any item placed On Hold, record the hold reason and the party responsible for release; set a follow-up date.
5. At each scheduled update cycle, reconcile the board against actual work in the queue — confirm no active item is missing, mislabeled, or stalled beyond its expected dwell time.
6. Flag exceptions (stalled, aging, or blocked items) to the Work Coordinator; escalate per Section 8 if unresolved.
7. Communicate current status to any client or downstream party on request, using only the recorded status — do not improvise.
8. At close of shift, the Operations Supervisor reviews the update log, confirms all active items carry a current status, and signs off in Section 12.

8. Decision Tree

Decision Tree — Work-in-Progress Tracking & Status Update



READING THIS TREE

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every active work item has an owner and a current status visible on the shared view.
- No item exceeds its expected dwell time in any stage without a recorded reason.
- Status labels drawn only from the approved status set; no free-text or ambiguous statuses left standing.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
All active items present in tracking system with unique reference		
Each item shows current status, owner, and last-update timestamp		
On Hold items carry documented reason and release party		
Shared view visible/accessible to Operations and client-facing staff		
No item aging beyond expected dwell time without a note		
Status labels conform to approved status set		
Update log reviewed and signed off for the shift		

11. KPIs

- Status currency: $\geq 98\%$ of active items updated within the current shift.
- Stalled-item resolution: 100% of flagged aging items assigned a documented next action within 1 business day.
- Status accuracy: $\leq 1\%$ of items with a status found inaccurate at supervisor reconciliation.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for ADMIN_SUPPORT_SERVICES.	Archetype Content Team

OD-013 — Operational Handoff Between Work Stages

Estimated completion time: 10-25 minutes per handoff

Provided for general informational and operational purposes as part of the Admin Support Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To ensure that work in progress — client files, service tickets, physical items, or job records — moves cleanly from one work stage or crew to the next with no loss of instructions, status, or accountability. A controlled handoff prevents dropped tasks, duplicated effort, and client-service gaps at Admin Support Services operations.

2. Scope

Covers the structured transfer of active work between sequential stages, crews, or teams within a single service line, including the transfer packet, status confirmation, and receiving-party acceptance. Excludes shift handover, which is covered under OD-002, and stage quality release, which is covered under QC-013.

3. Responsibilities

- Operations Supervisor — owns the handoff protocol, resolves disputes over incomplete transfers, and authorizes exceptions.
- Releasing Operator — assembles the transfer packet, confirms work status, and hands off only complete, accurately documented work.
- Receiving Operator — verifies packet completeness against the log, accepts or rejects the transfer, and confirms receipt in the tracking record.

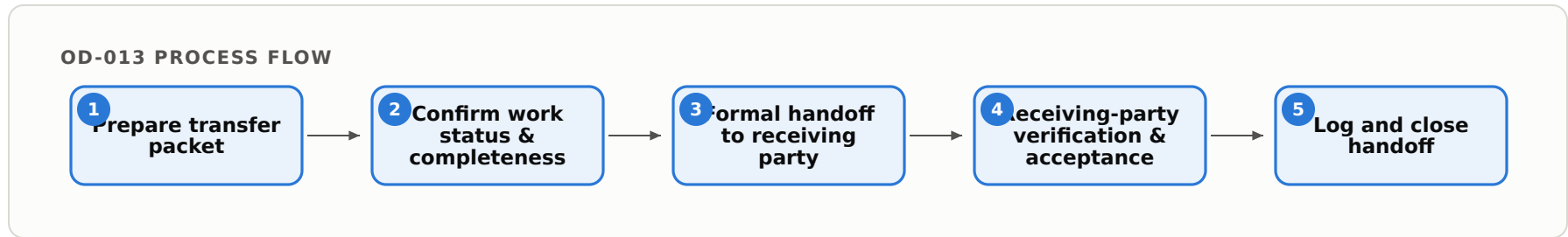
4. Required PPE & Lockout/Tagout

- Standard facility PPE per the service line; where the service line handles physical items (mail, recovered materials, waste-service equipment), gloves and any line-specific protective equipment apply.
- Not applicable — no hazardous energy involved in the handoff itself. Where equipment accompanies the transfer, ensure it is powered down/secured per its own operating procedure before transfer.

5. Regulatory References

- None sector-specific to a work-stage handoff across all archetype members; internal Operations policy governs. General duty and recordkeeping frames apply: OSHA General Duty Clause, 29 U.S.C. §654(a)(1) (safe workplace during any physical handling); and, where transferred work contains personal or confidential client data, the operator's contractual confidentiality and data-handling obligations (e.g., FTC Act §5 unfair/deceptive practices, applicable state data-protection statutes). Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

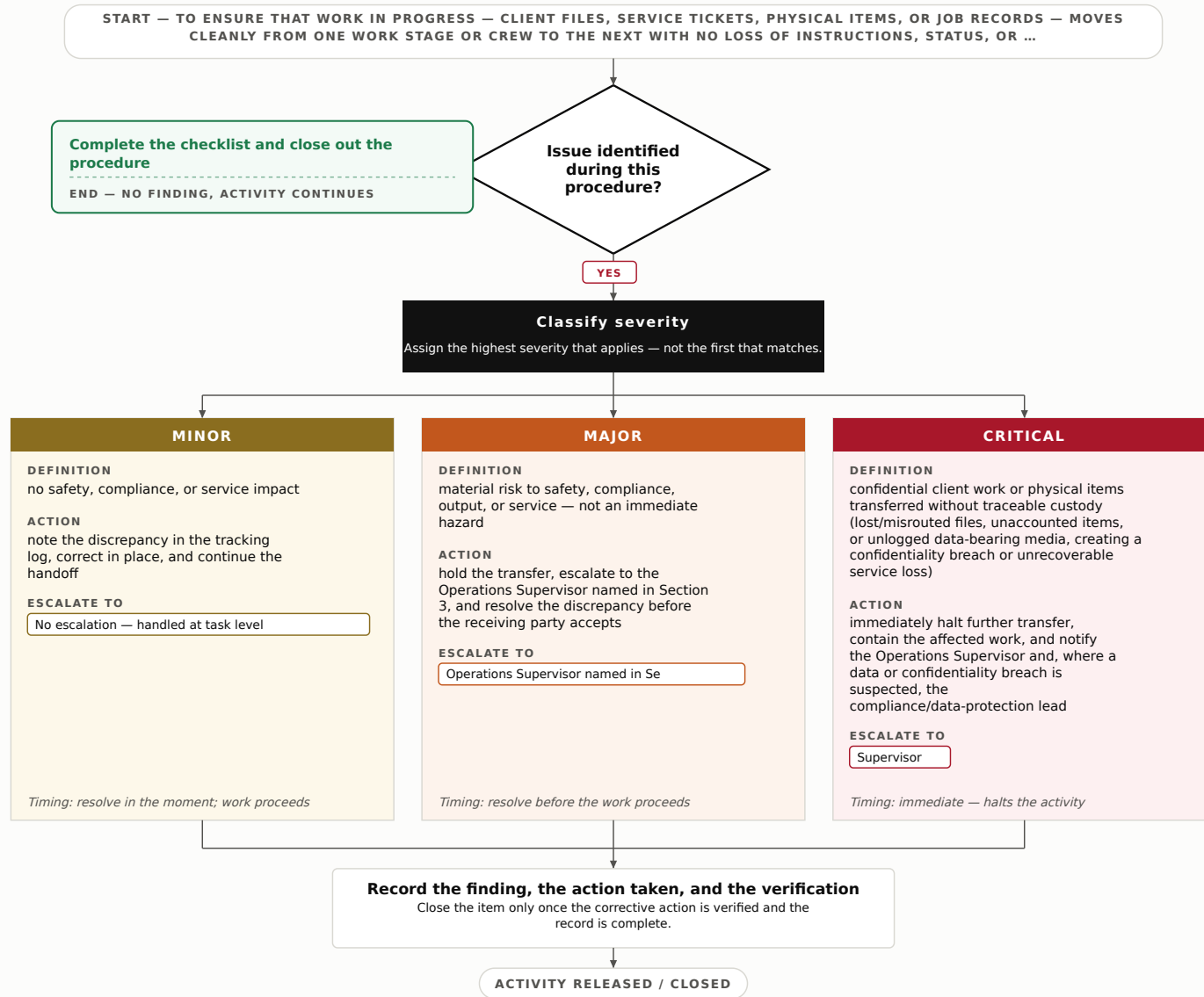


7. Step-by-Step Procedure

1. Identify the unit of work being transferred (file batch, ticket queue, item lot, or job record) and confirm it is at a defined stage boundary — not mid-task.
2. Assemble the transfer packet: current status, outstanding actions, client/account references, special instructions, and any physical items or IT hardware/media (systems sourced from 334111 Electronic Computer Manufacturing).
3. Reconcile the packet against the work-tracking log; confirm counts, ticket numbers, or file IDs match and nothing is missing.
4. Contact the Receiving Operator (or crew lead) and walk through open items, deadlines, and known issues.
5. Physically or electronically transfer the work and packet; for physical items, confirm secure custody and location.
6. Receiving Operator verifies packet against the log, inspects contents, and either accepts or rejects the transfer with a stated reason.
7. On acceptance, both parties confirm status in the tracking record; on rejection, work returns to the Releasing Operator for correction.
8. Record the handoff — time, parties, unit of work, and acceptance status — in the work-tracking log and close the procedure.

8. Decision Tree

Decision Tree — Operational Handoff Between Work Stages



READING THIS TREE

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Transfer packet reconciled to the work-tracking log before handoff.
- Receiving-party acceptance recorded with time and identity.
- All open items, deadlines, and special instructions confirmed understood by receiving party.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Unit of work is at a defined stage boundary		
Transfer packet complete (status, actions, references, instructions)		
Counts / IDs reconciled against tracking log		
Physical items / data-bearing media custody confirmed		
Receiving party briefed on open items and deadlines		
Acceptance (or rejection with reason) recorded		
Handoff logged with time and parties		

11. KPIs

- Handoff acceptance rate (first-pass, no rejection): $\geq 95\%$
- Discrepancies found after acceptance: $\leq 2\%$ of handoffs
- Handoffs logged with complete record: 100%

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for ADMIN_SUPPORT_SERVICES.	Archetype Content Team

OD-014 — Output Monitoring & Throughput Review

Estimated completion time: 30-60 minutes per monitoring cycle (per shift or per queue interval)

Provided for general informational and operational purposes as part of the Admin Support Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

This procedure establishes how Operations staff monitor the rate and volume of completed operational output — calls handled, mail pieces processed, documents prepared, loads sorted, service tickets closed — against the shift or period plan, so that shortfalls and surges are detected early and staffing or routing adjustments can be made while the work is still in progress.

2. Scope

Covers the periodic comparison of actual output rate and volume to the committed plan across active work queues, service lines, or processing stations for a defined monitoring interval. Excludes formal KPI review and target-setting (covered under OD-028) and process capability analysis (covered under QC-026); this procedure only observes and flags throughput against an existing plan.

3. Responsibilities

- Operations Supervisor — owns the monitoring cycle, sets the interval, reviews variance flags, and authorizes intra-shift staffing or routing changes.
- Queue/Station Lead — pulls output counts from the workflow system at each interval, records actuals against plan, and raises variances to the Supervisor.
- Operations Analyst — maintains the plan baseline and dashboard data feeds, reconciles counts, and archives the variance record.

4. Required PPE & Lockout/Tagout

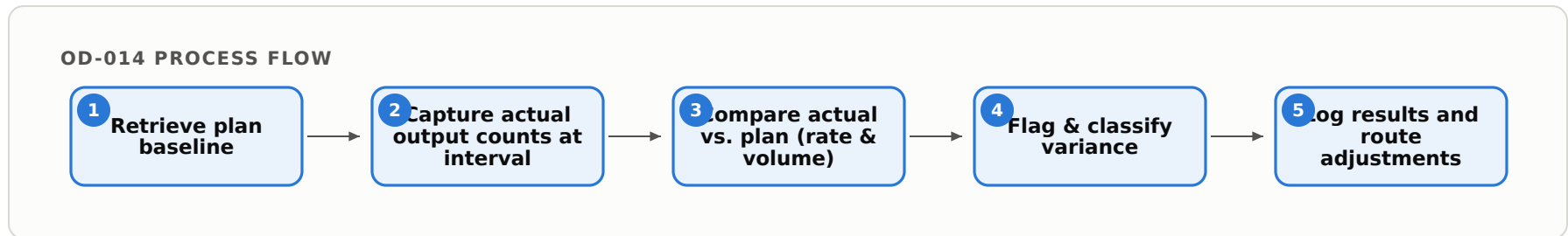
- Standard facility PPE per the local site; where the service line operates in a materials-handling or field environment (e.g., sorting floors, service vehicles), site-required hi-vis, footwear, and gloves apply for anyone entering the operating area to observe throughput.
- Not applicable — no hazardous energy is controlled by this task; monitoring is performed from workstations or observation points, not on energized equipment.

5. Regulatory References

- None sector-specific to output monitoring; internal operations policy and client service-level agreements govern. Where the interval requires directly observing staff activity or recording performance data, general workplace record-keeping under the Fair Labor Standards Act (29 CFR Part 516) and applicable state wage-and-hour rules apply; where a Professional Employer Organization or co-employment arrangement is in place, monitoring records must respect the client-services agreement. Data captured in dashboards must follow the organization's data-privacy policy

(e.g., contractual PII/PHI handling for contact-center or document-prep clients). Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

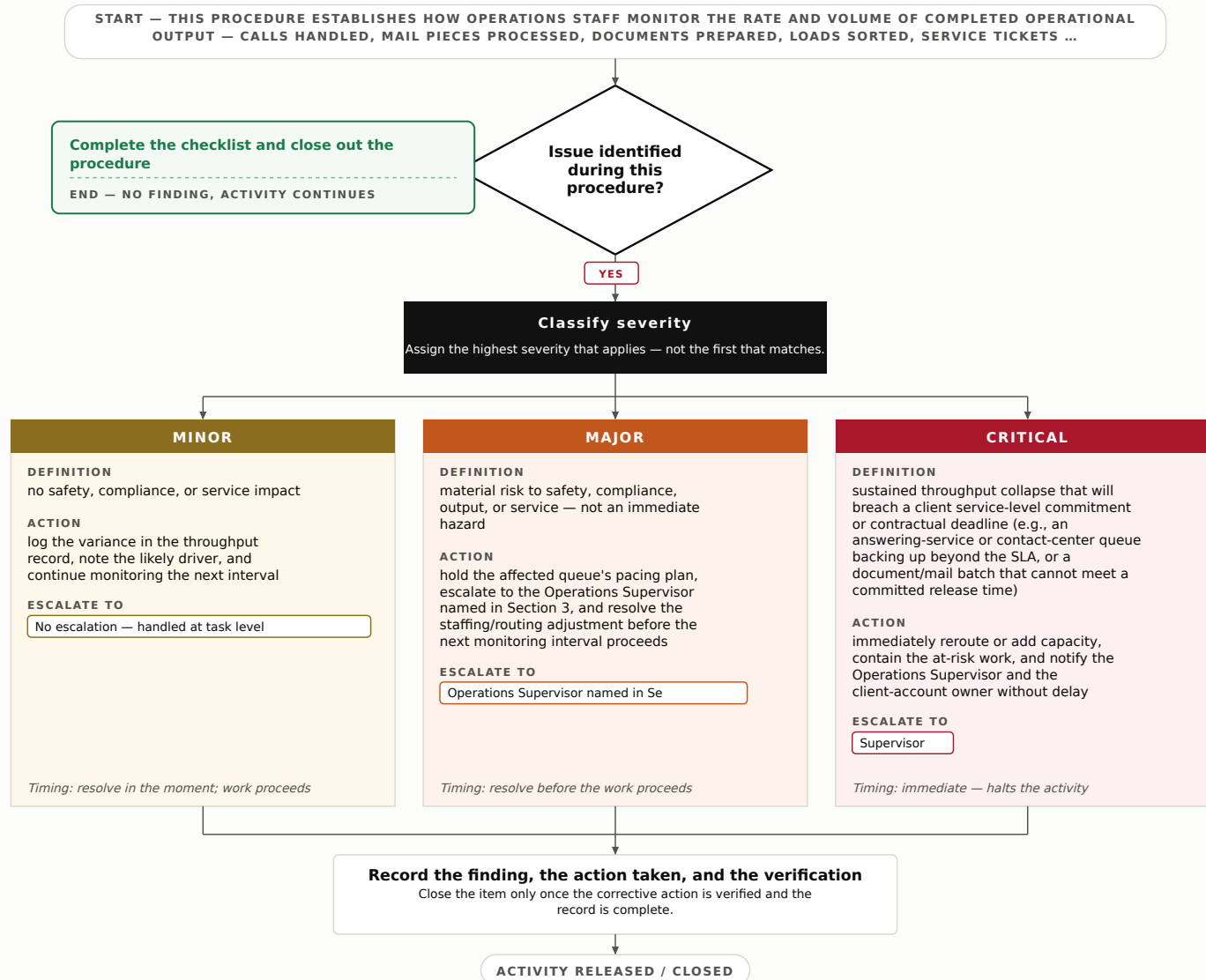
6. Process Flow



7. Step-by-Step Procedure

1. Confirm the current shift/period plan baseline for each active queue or station (target rate per hour and cumulative volume target) from the workflow or dashboard system.
2. At the scheduled interval, capture actual completed-output counts per queue — calls closed, pieces processed, documents finalized, loads sorted, tickets resolved.
3. Normalize counts to the same unit and interval as the plan (e.g., items/hour) so actuals and plan are directly comparable.
4. Compute variance in both rate and cumulative volume against plan; note direction (shortfall or surge) and magnitude as a percentage.
5. Cross-check any anomaly against known drivers — staffing gaps, system slowdowns from computing hardware, upstream intake spikes — before treating it as a true throughput issue.
6. Classify each material variance using the Decision Tree (Section 8) and raise flags to the Operations Supervisor.
7. Where authorized, apply the intra-shift adjustment (reassign staff, reroute queue, adjust pacing) and note the action taken.
8. Record the interval's actuals, variances, classifications, and any actions in the throughput log and dashboard; retain per the retention policy.

8. Decision Tree

Decision Tree — Output Monitoring & Throughput Review**READING THIS TREE**■ **No finding**

Activity stands. Complete the checklist and continue.

■ **Minor**

Handled in place at task level; no escalation.

■ **Major**

Supervisory decision required before the next stage.

■ **Critical**

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Plan baseline confirmed for every active queue before the interval is measured.
- Actual counts reconciled to the source system, not estimated.
- Every variance above the local threshold classified and, where Major or Critical, escalated.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Current plan baseline retrieved for all active queues		
Actual output counts captured at scheduled interval		
Actuals normalized to plan units/interval		
Rate and volume variance computed and directioned		
Variances classified per Decision Tree		
Major/Critical variances escalated to Operations Supervisor		
Interval results logged and archived per retention policy		

11. KPIs

- Monitoring intervals completed on schedule $\geq 98\%$
- Variance flags logged within 15 minutes of interval close $\geq 95\%$
- Unresolved Critical throughput findings at shift end = 0

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for ADMIN_SUPPORT_SERVICES.	Archetype Content Team

OD-015 — Bottleneck Identification & Response

Estimated completion time: 45-90 minutes per identified constraint (excluding downstream corrective work)

Provided for general informational and operational purposes as part of the Admin Support Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

This procedure defines how Operations staff detect constraints that slow the flow of client work — whether that work is inbound documents, inbound calls, processed materials, or field-service tickets — and act to relieve or contain them before service levels degrade. It exists to protect turnaround commitments and contract obligations common to every service line in this archetype.

2. Scope

Covers detection, classification, and first-response containment of any bottleneck affecting a live work queue or service line during an operating shift. Excludes rescheduling of committed work, which is covered under OD-017 (Schedule Change), and reassignment of throughput capacity across queues, which is covered under OD-009 (Capacity Allocation); this procedure only identifies and contains the constraint and hands off to those modules where re-planning is required.

3. Responsibilities

- Operations Team Lead — monitors queue metrics each shift, performs initial bottleneck identification, applies first-response containment, and logs findings.
- Operations Supervisor — validates severity classification, authorizes containment holds, and coordinates hand-off to OD-017 or OD-009 when re-planning is needed.
- Operations Manager — owns Critical escalations, notifies affected clients where contractual service levels are at risk, and approves resource intervention.

4. Required PPE & Lockout/Tagout

- Standard facility PPE per site rules; where the service line performs field or materials-handling work, use the PPE mandated for that environment (e.g., gloves, hi-visibility vest, hearing/eye protection at a materials recovery or septic-service site).
- Not applicable to the analytic portion of this task — no hazardous energy involved. Physical Lockout/Tagout applies only where a bottleneck traces to fixed equipment and the site's separate LOTO procedure governs.

5. Regulatory References

- 29 CFR 1910.132 (OSHA General Requirements for PPE) — applies to all members maintaining a workplace.
- 29 CFR 1904 (OSHA Recording and Reporting Occupational Injuries and Illnesses) — where a bottleneck response involves a recordable incident.

- Contract Service-Level Agreements and internal Operations policy govern throughput and turnaround thresholds; no single federal throughput standard applies across the archetype.
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

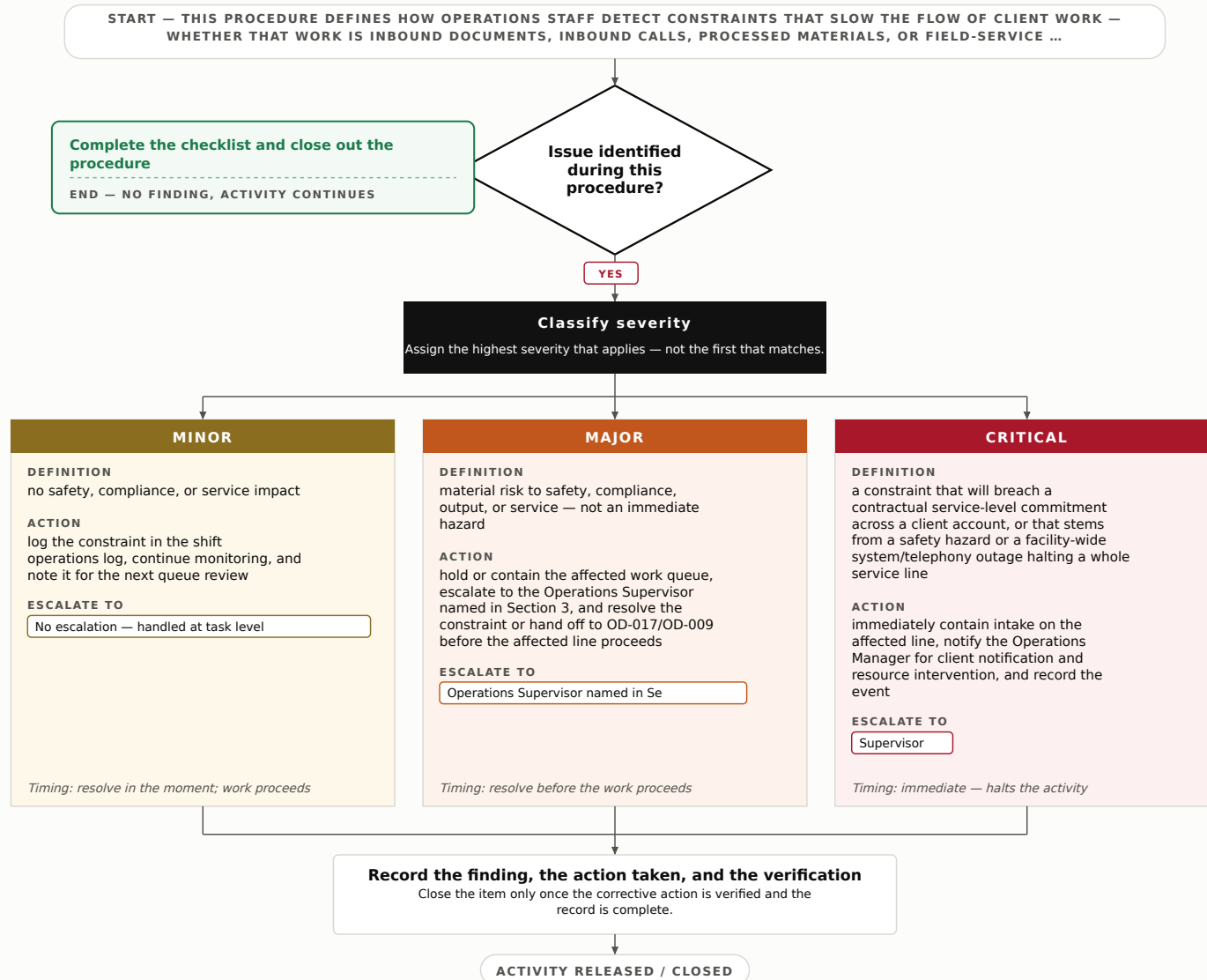


7. Step-by-Step Procedure

1. At shift start and at defined intervals, pull current queue metrics for each active work line (open items, age of oldest item, arrival rate vs. completion rate, staffed positions, and system/hardware availability from 334111-sourced workstations and telephony).
2. Compare each metric against its committed threshold (SLA turnaround, answer-time, processing backlog, or ticket age) and flag any line where completion rate trails arrival rate or an item exceeds its age limit.
3. Locate the constraint: identify whether the slowdown is caused by staffing, workstation/software/hardware availability, an upstream input gap, or a single congested processing stage.
4. Confirm the constraint is real, not a momentary spike, by observing the queue across at least two measurement intervals.
5. Classify severity using the Decision Tree in Section 8.
6. Apply first-response containment appropriate to severity — reroute the affected work within the current staffing, isolate the failing station, or hold intake at the constrained stage until relieved.
7. Where relief requires re-planning committed work or moving capacity between lines, hand off to OD-017 or OD-009 respectively; do not re-plan within this procedure.
8. Record the finding, constraint cause, action taken, and hand-off reference in the shift operations log and close out.

8. Decision Tree

Decision Tree — Bottleneck Identification & Response



READING THIS TREE

■ **No finding**

Activity stands. Complete the checklist and continue.

■ **Minor**

Handled in place at task level; no escalation.

■ **Major**

Supervisory decision required before the next stage.

■ **Critical**

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every active work line has been measured against its committed threshold this shift.
- Each flagged constraint has a documented cause and a classified severity.
- All Major findings show either a resolution or a logged hand-off reference (OD-017/OD-009).
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
All active work lines measured against committed thresholds		
Constraint cause identified (staffing / hardware / input / stage)		
Deviation confirmed across ≥ 2 measurement intervals		
Severity classified per Section 8		
Containment action applied to each Major/Critical finding		
Hand-off to OD-017 / OD-009 referenced where re-planning required		
Shift operations log completed and closed		

11. KPIs

- Bottleneck detection lead time: constraint flagged within 1 measurement interval (≤ 30 min) of onset.
- SLA breach rate from unaddressed constraints: 0 per month.
- Major/Critical findings with documented containment before line proceeds: 100%.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for ADMIN_SUPPORT_SERVICES.	Archetype Content Team

OD-016 — Rework & Nonconforming Work Handling

Estimated completion time: 30-90 minutes per nonconforming work item, depending on volume and re-run complexity

Provided for general informational and operational purposes as part of the Admin Support Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

This procedure establishes how the Operations team identifies, segregates, and re-runs work products (processed documents, contact-center call outcomes, mail items, data entries, or service outputs) that fail to meet the applicable client specification or internal quality standard, so that only conforming work is released to the client or downstream channel.

2. Scope

Covers detection, physical or logical segregation, root-cause tagging, and controlled re-run of nonconforming work across all Operations service lines from the point of failure detection to re-verified output. Excludes formal disposition determination (accept/reject/return decisions), which is covered under QC-014, and rework authorization sign-off, which is covered under QC-016.

3. Responsibilities

- Operations Team Member — identifies suspect work, halts release, segregates the item into the designated hold location or hold queue, and logs the nonconformance.
- Operations Quality Coordinator — reviews segregated items, tags root cause, coordinates the re-run once authorization is confirmed per QC-016, and re-verifies output against spec.
- Operations Supervisor — owns the hold register, escalates Critical findings, and provides final verification that re-run work conforms before release.

4. Required PPE & Lockout/Tagout

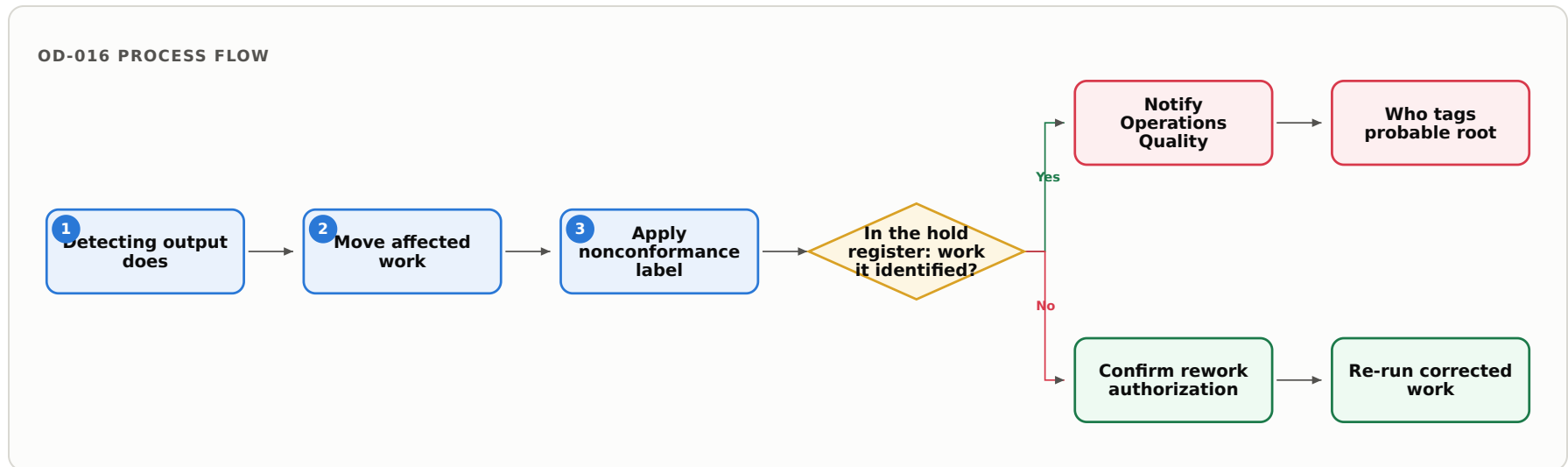
- Standard facility PPE where the service line handles physical materials (e.g., cut-resistant gloves and hi-visibility vest for recovery/sorting lines, gloves for mail/document handling); none required for screen-based clerical and contact-center work.
- Not applicable — no hazardous energy involved. Where a service line operates powered sortation or processing equipment, defer to that equipment's dedicated LOTO procedure before any physical intervention.

5. Regulatory References

- None sector-specific governs rework handling across all members; internal quality policy and the governing client service agreement / SLA apply. General applicable frames: contractual conformance obligations under each client agreement; recordkeeping duties under applicable state consumer-protection and data-retention statutes; and confidentiality obligations for handled information (e.g., GLBA Safeguards Rule where

financial data is processed, HIPAA where PHI is processed). Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

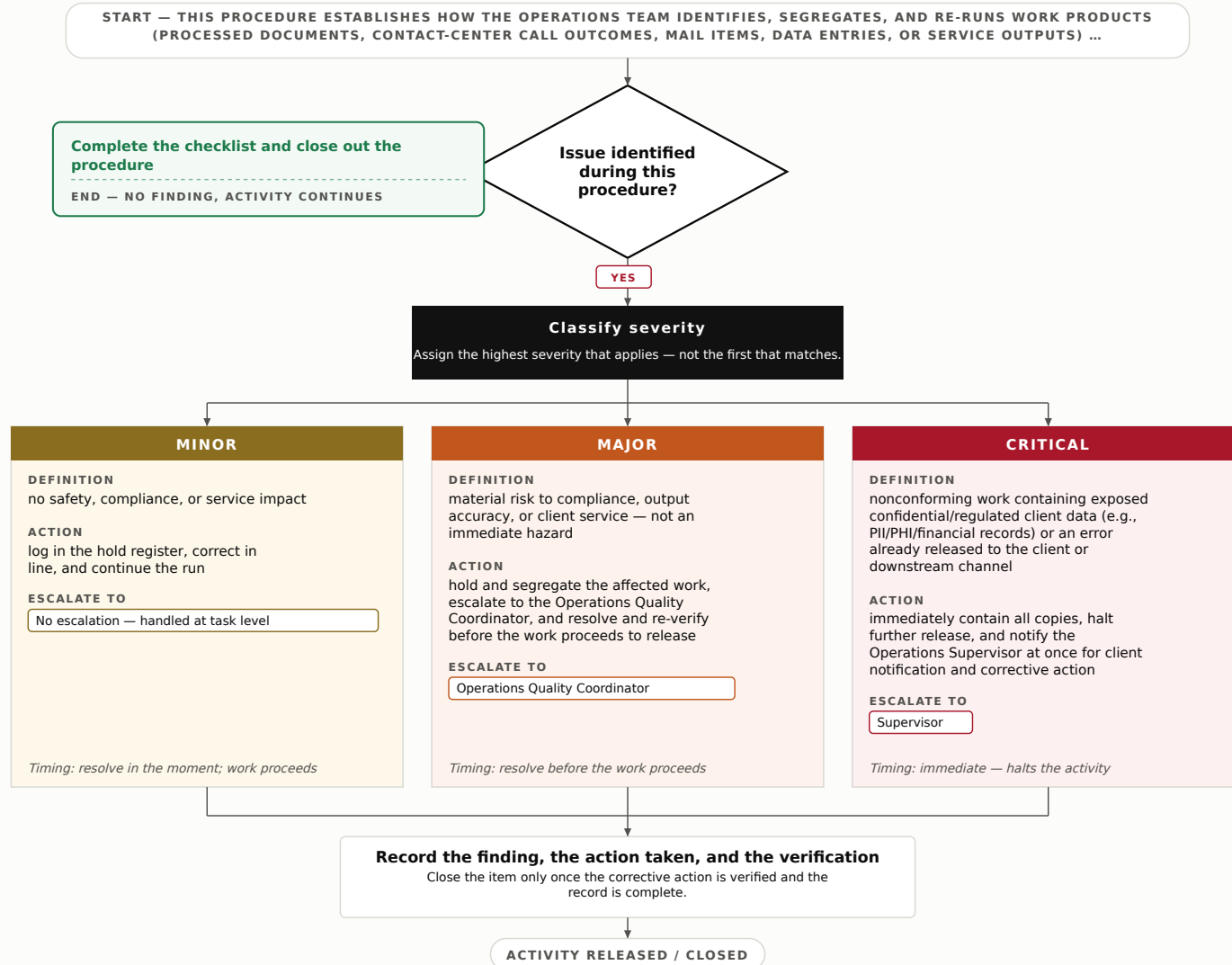


7. Step-by-Step Procedure

1. On detecting output that does not meet the client specification or internal standard, immediately stop release of that item and any related batch.
2. Move the affected work to the designated hold location (physical hold bin/shelf for mail, documents, or recovered materials) or move the record to the hold queue (for data, call outcomes, or electronic files).
3. Apply a nonconformance label or flag showing item ID, date, detecting staff, and a short defect description.
4. Record the nonconformance in the hold register: work item, quantity, client/account, defect type, and detection point.
5. Notify the Operations Quality Coordinator, who tags a probable root cause (input error, process error, upstream data/hardware fault, or spec misinterpretation).
6. Confirm rework authorization is in place per QC-016 before beginning any re-run; do not re-run unauthorized items.
7. Re-run the corrected work and re-verify the output against the same specification that was originally failed; conform items only.
8. Update the hold register with disposition reference (per QC-014), re-run result, and release status; retain the record per the client agreement retention term.

8. Decision Tree

Decision Tree — Rework & Nonconforming Work Handling



READING THIS TREE

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every segregated item carries a nonconformance label/flag and a matching hold-register entry.
- Root-cause tag applied before any re-run begins.
- Re-run output independently re-verified against the original failed specification.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Nonconforming work stopped and segregated from conforming work		
Nonconformance label/flag applied with item ID and defect description		
Hold-register entry complete (item, quantity, client, defect, detection point)		
Root cause tagged by Quality Coordinator		
Rework authorization confirmed per QC-016 before re-run		
Re-run output re-verified against original specification		
Confidential/regulated data secured throughout handling		

11. KPIs

- Nonconforming items segregated before release $\geq 99\%$.
- Re-run first-pass conformance rate $\geq 95\%$.
- Nonconformances escalated as Critical closed within 24 hours $\geq 100\%$.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for ADMIN_SUPPORT_SERVICES.	Archetype Content Team

OD-017 — Schedule Deviation & Change Management

Estimated completion time: 20–45 minutes per deviation event

Provided for general informational and operational purposes as part of the Admin Support Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To provide a controlled method for recording, assessing, and re-committing work when a scheduled deliverable, service window, or task priority changes — so that service-level commitments remain visible and defensible across every client engagement.

2. Scope

Covers detection, logging, severity classification, re-sequencing, and internal re-commitment of any change, delay, or priority shift affecting scheduled Operations work at this facility or service line. Excludes bottleneck root-cause response, which is covered under OD-015, and client-facing notification of the change, which is covered under OD-022.

3. Responsibilities

- Operations Coordinator — detects and logs the deviation, updates the master schedule/queue, applies severity classification, and initiates re-commitment.
- Operations Supervisor — reviews Major and Critical deviations, authorizes re-sequencing across engagements, and confirms revised commitments are recorded.
- Account/Engagement Lead — validates that revised timelines remain within contractual service-level terms and flags contractual impact for hand-off to OD-022.

4. Required PPE & Lockout/Tagout

- Standard facility PPE only; none specific to this administrative task. Where the service line operates a physical processing floor or vehicles, existing floor PPE rules remain in force during any on-floor schedule review.
- Not applicable — no hazardous energy involved.

5. Regulatory References

- None sector-specific governs schedule change management across all members; internal policy and each client's contractual service-level agreement are the governing frame. General recordkeeping and business-record integrity obligations apply (e.g., IRS record-retention guidance; state contract and consumer-protection statutes where applicable; sector-specific overlays such as TSR call-record rules for contact-center members or EPA/state manifest timelines for recovery/septic members appear only as examples). Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow



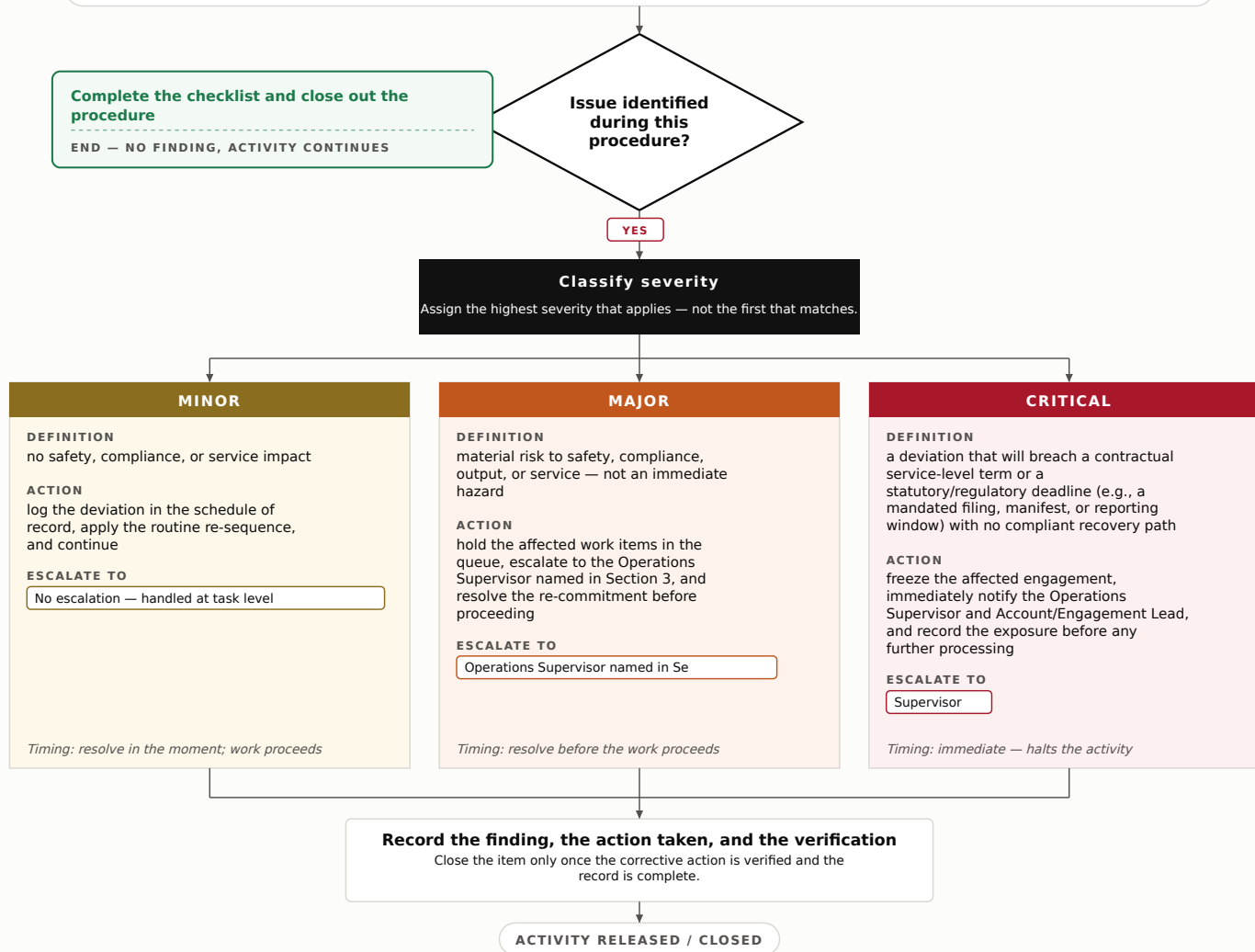
7. Step-by-Step Procedure

1. Detect the deviation — identify any change to a committed deliverable, service window, or task priority (client request, resource shortfall, upstream input delay, or internal reprioritization).
2. Timestamp and log the event in the schedule of record (queue/ticketing system, master calendar, or engagement tracker), capturing original commitment, requested change, and source.
3. Confirm the current commitment baseline for every affected engagement — the promised turnaround or service window on file.
4. Classify severity per Section 8 against safety, compliance, output, and service-level impact.
5. Re-sequence affected work: determine which commitments can be held, which must shift, and the revised internal target for each; obtain Operations Supervisor authorization for any cross-engagement shift.
6. Record the revised commitment and rationale in the schedule of record; mark any commitment now at risk of breaching a contractual service-level term.
7. Route hand-offs — refer root-cause capacity issues to OD-015 and any client-facing notification to OD-022; do not close either here.
8. Document the closed deviation entry with classification, actions taken, revised commitments, and hand-off references, then confirm completion of the checklist.

8. Decision Tree

Decision Tree — Schedule Deviation & Change Management

START — TO PROVIDE A CONTROLLED METHOD FOR RECORDING, ASSESSING, AND RE-COMMITTING WORK WHEN A SCHEDULED DELIVERABLE, SERVICE WINDOW, OR TASK PRIORITY CHANGES — SO THAT SERVICE-LEVEL COMMITMENTS REMAIN ...

**READING THIS TREE**

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every deviation is timestamped and logged in the schedule of record before re-sequencing begins.
- Revised commitments are checked against contractual service-level terms for each affected engagement.
- Required hand-offs to OD-015 and OD-022 are opened and referenced, not authored here.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Deviation logged with original commitment, change, and source		
Severity classified per Section 8		
Affected engagements identified and baselines confirmed		
Supervisor authorization obtained for cross-engagement shifts		
Revised commitments recorded in schedule of record		
Contractual service-level impact flagged where applicable		
Hand-offs to OD-015 / OD-022 opened and referenced		

11. KPIs

- Deviations logged within 30 minutes of detection: $\geq 95\%$
- Revised commitments recorded before affected work resumes: 100%
- Critical deviations with a documented recovery or exposure entry: 100%

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for ADMIN_SUPPORT_SERVICES.	Archetype Content Team

OD-018 — Subcontractor & Vendor Coordination

Estimated completion time: 45-90 minutes per engagement cycle (initial setup); 15-30 minutes per recurring coordination check-in

Provided for general informational and operational purposes as part of the Admin Support Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

This procedure standardizes how an Admin Support Services operation engages, tasks, and monitors external subcontractors and vendors who perform a discrete portion of a client-facing operation, so that hand-offs are controlled, deliverables meet client requirements, and accountability is documented.

2. Scope

Covers vendor/subcontractor selection confirmation, scope-of-work definition, tasking, coordination, deliverable acceptance, and records for external providers supporting any service line in this archetype. Excludes contractor maintenance supervision, which is covered under MD-018, and contractor safety, which is covered under SD-023.

3. Responsibilities

- Operations Coordinator — issues the scope of work, schedules the external provider, tracks deliverables, and logs coordination records.
- Operations Supervisor — approves vendor selection, resolves escalations, and signs off on deliverable acceptance.
- Vendor/Contract Administrator — verifies the provider's active agreement, current insurance certificate, and required credentials before work begins.

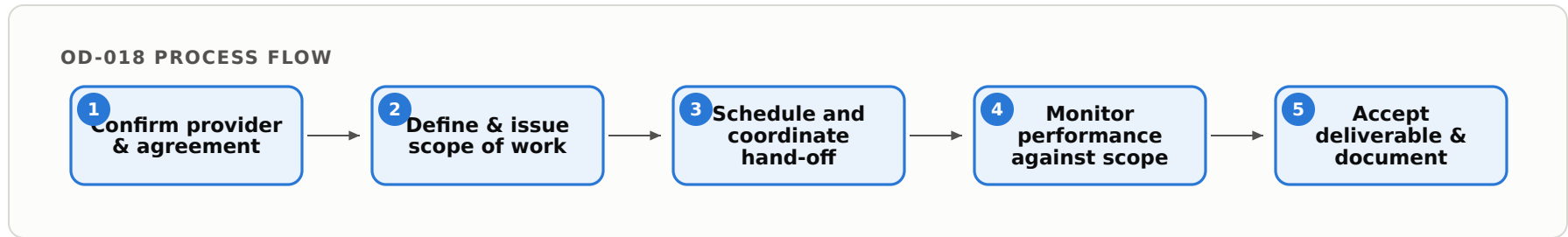
4. Required PPE & Lockout/Tagout

- Standard facility PPE only where the coordination occurs on an operating floor (e.g., high-visibility vest and closed-toe footwear at a materials recovery or facility-support site); none for office-based coordination.
- Not applicable — no hazardous energy involved in the coordination task itself.

5. Regulatory References

- None sector-specific govern this coordination task across all members; internal contract-administration and vendor-management policy applies. General applicable references: contract terms enforceable under state commercial/contract law; IRS worker-classification guidance (independent contractor vs. employee) where classification of the provider is in question; and data-protection obligations flowed down by contract where the provider handles client information (e.g., state privacy statutes, or client-mandated confidentiality terms). Member-specific regimes may apply as examples (e.g., waste-manifest chain-of-custody for a septic or recovery service line; USPS/PRC requirements for a mail-center line). Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

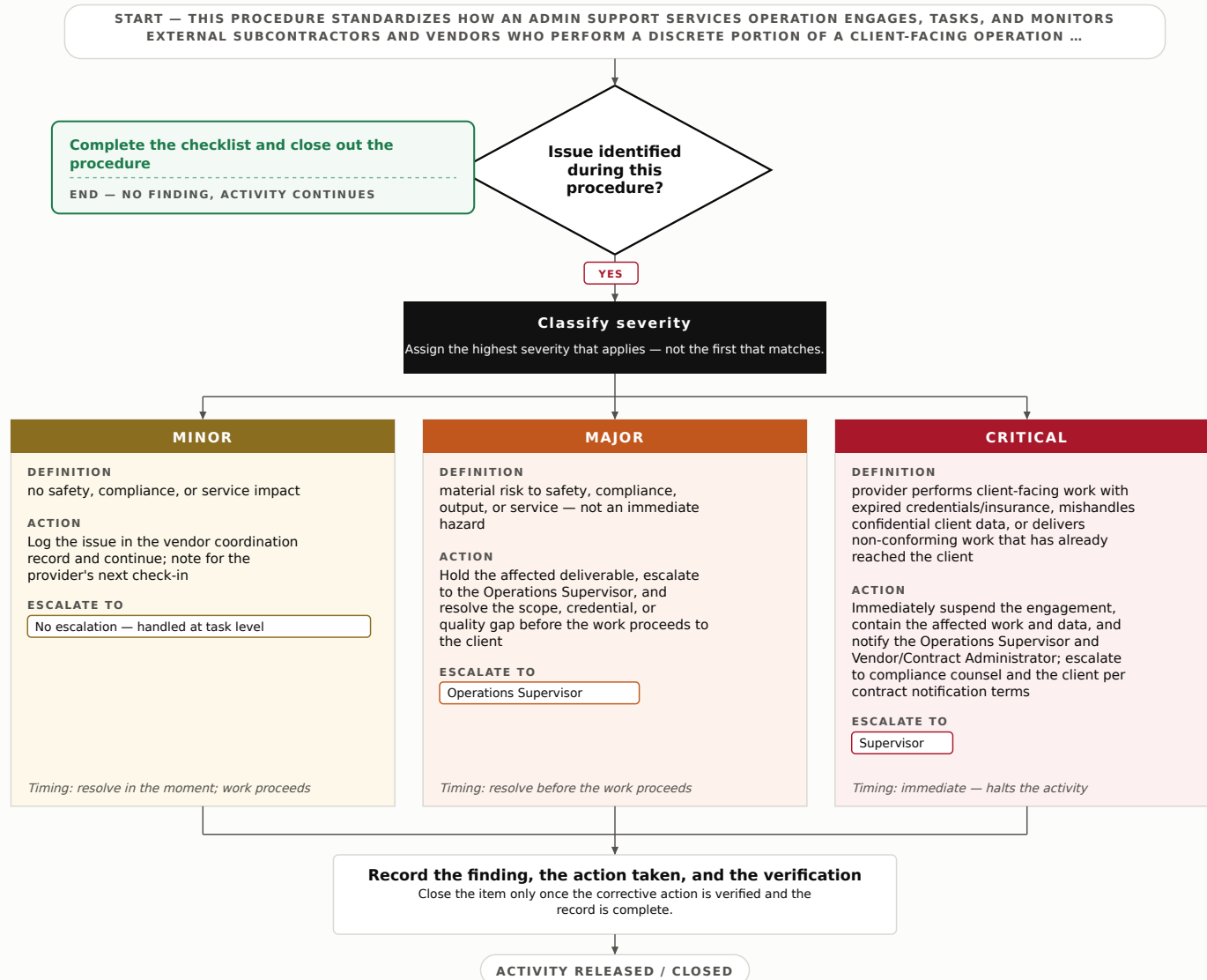


7. Step-by-Step Procedure

1. Confirm the external provider has an active master agreement or purchase order and a current insurance certificate on file; the Vendor/Contract Administrator verifies before any tasking.
2. Define the scope of work in writing — deliverable, quantity, format, acceptance criteria, and deadline — referencing the client requirement that drives it.
3. Confirm the provider's tools and inputs are compatible with your workflow (e.g., computing hardware and equipment sourced via 334111 Electronic Computer Manufacturing for data-entry, document-prep, or contact-center providers).
4. Schedule the engagement and confirm the hand-off point, contact person, and communication channel with the Operations Coordinator.
5. Provide only the client data or materials the provider needs, applying the confidentiality and data-handling terms of the agreement; log what was released.
6. Monitor performance at agreed checkpoints against the scope-of-work acceptance criteria; document deviations as they arise.
7. Receive the deliverable, verify it against acceptance criteria, and obtain Operations Supervisor sign-off before turnover to the client or downstream channel (e.g., office equipment routed via 423420 Office Equipment Wholesalers).
8. Record the completed coordination cycle — scope, dates, provider, acceptance result, and any findings — in the vendor coordination log.

8. Decision Tree

Decision Tree — Subcontractor & Vendor Coordination



READING THIS TREE

■ **No finding**

Activity stands. Complete the checklist and continue.

■ **Minor**

Handled in place at task level; no escalation.

■ **Major**

Supervisory decision required before the next stage.

■ **Critical**

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Active agreement, insurance certificate, and required credentials verified before tasking.
- Written scope of work with acceptance criteria issued and acknowledged by the provider.
- Deliverable verified against acceptance criteria and signed off by the Operations Supervisor.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Master agreement / PO active and on file		
Insurance certificate and required credentials current		
Written scope of work issued and acknowledged		
Data/materials released logged with confidentiality terms applied		
Performance checkpoints met against acceptance criteria		
Deliverable verified and Supervisor sign-off obtained		
Coordination cycle recorded in vendor log		

11. KPIs

- Provider credential/insurance verification completed before tasking: 100%
- Deliverables accepted against scope on first submission: $\geq 90\%$
- Coordination cycles fully documented at close-out: 100%

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for ADMIN_SUPPORT_SERVICES.	Archetype Content Team

OD-019 — Interdepartmental Coordination Review

Estimated completion time: 45-90 minutes per coordination cycle (recurring per client engagement or per shift-change interval)

Provided for general informational and operational purposes as part of the Admin Support Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

This procedure aligns the Operations Department with every other department that touches the same client work — intake, service delivery, billing, and account management — so that scope, timelines, data-handling rules, and hand-off points are agreed and documented before work advances. It prevents duplicated effort, dropped hand-offs, and conflicting client commitments across the service chain.

2. Scope

Covers the recurring cross-department coordination review for a shared client engagement or workflow at an Admin Support Services operation: confirming ownership boundaries, hand-off timing, shared-record access, and open-action tracking among departments touching the same work. Excludes internal quality-conformance testing and formal contract-change authorization, which live in their own modules; this procedure references those hand-offs by ID only and does not author their steps.

3. Responsibilities

- Operations Supervisor — owns the review, confirms Operations' commitments, tracks and closes cross-department action items.
- Department Coordination Liaison — represents each other department (intake, service delivery, billing/account management) and confirms their hand-off dependencies and timelines.
- Records & Compliance Coordinator — verifies that shared-record access, data-handling, and retention rules are consistent across departments touching the same work.

4. Required PPE & Lockout/Tagout

- Standard facility PPE; none specific to this administrative task. Where the review is conducted on a floor shared with a field or facility service line (e.g., materials-handling or vehicle-dispatch areas), observe that area's posted PPE requirements.
- Not applicable — no hazardous energy involved.

5. Regulatory References

- None sector-specific governs interdepartmental coordination across all members of this archetype; internal coordination policy applies. Members must still honor generally applicable obligations that surface in this review — e.g., contractual confidentiality and data-handling terms with clients, applicable federal/state privacy and record-retention requirements for the records exchanged, and OSHA General Duty Clause (29 U.S.C. §654)

where a coordinated task creates a workplace exposure. Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

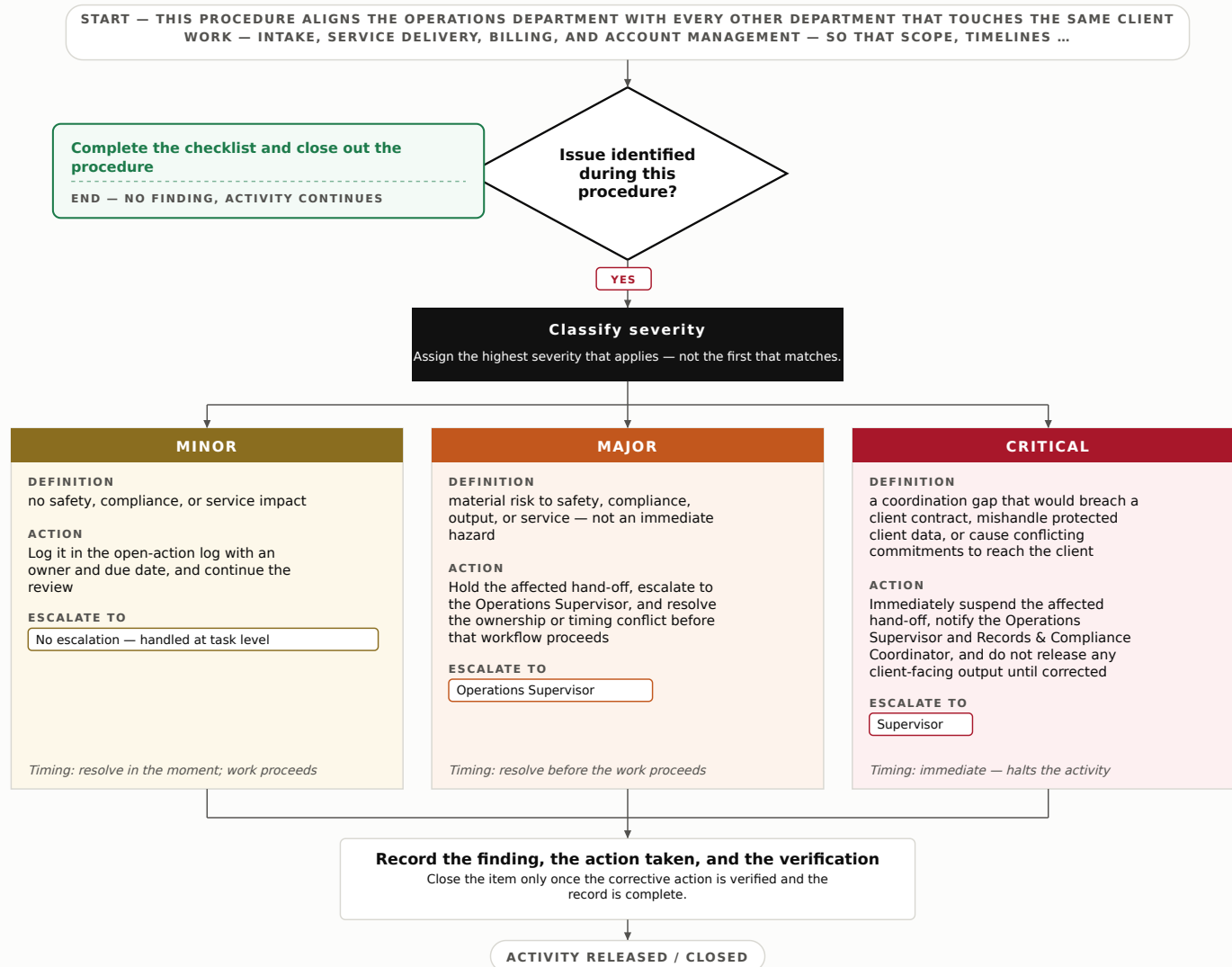


7. Step-by-Step Procedure

1. Identify each client engagement or workflow that Operations shares with another department this cycle; list the departments and name the Department Coordination Liaison for each.
2. Distribute the current hand-off map and open-action log to all participants at least one business day before the review.
3. Convene the review; walk each shared workflow and confirm which department owns each stage and where control transfers.
4. Confirm hand-off timing and format for each transition — including any client-committed deadlines and the shared-record or system entry each department relies on.
5. With the Records & Compliance Coordinator, verify that shared-record access rights, data-handling rules, and retention windows are consistent across the departments touching the work.
6. Capture disagreements, gaps, or duplicated effort as discrete action items; assign an owner and due date to each; classify severity per Section 8.
7. Confirm any commitment that changes contracted scope is routed to the contract-change module for authorization (referenced by ID only) rather than agreed here.
8. Record decisions, the updated hand-off map, and the open-action log; distribute to all participants and archive to the coordination file per retention policy.

8. Decision Tree

Decision Tree — Interdepartmental Coordination Review



READING THIS TREE

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every shared workflow has a single, agreed owner at each stage with no unassigned gap.
- Hand-off timing and record format are confirmed and consistent with client-committed deadlines.
- Shared-record access and data-handling rules verified consistent across departments.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
All departments touching the shared work were represented		
Ownership confirmed for each workflow stage with no gap		
Hand-off timing/format agreed against client deadlines		
Shared-record access & data-handling rules verified consistent		
All open actions assigned an owner and due date		
Scope-changing commitments routed to contract-change module		
Decisions and updated hand-off map distributed and archived		

11. KPIs

- On-time hand-offs across coordinated departments $\geq 98\%$.
- Coordination action items closed by due date $\geq 95\%$.
- Client-facing conflicts or duplicated commitments per cycle: 0.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for ADMIN_SUPPORT_SERVICES.	Archetype Content Team

Phase 4 — Completion & customer handoff

OD-020 — Job / Order Completion Verification

Estimated completion time: 10-25 minutes per job/order

Provided for general informational and operational purposes as part of the Admin Support Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To confirm that a completed job or order matches the client's documented specification, scope, and turnaround terms before it is handed to release. This protects service quality and reduces rework, chargebacks, and disputes across the operation.

2. Scope

Covers verification that all line items, deliverables, and instructions on the work order are present, accurate, and complete against the client specification, plus resolution routing for any gaps found. Excludes independent spec-conformance/final inspection (QC-012) and formal release/turnover to the client or channel (QC-013).

3. Responsibilities

- Operations Verifier (Order Fulfillment Clerk) — performs the line-by-line completeness check against the work order and records findings.
- Operations Team Lead — adjudicates flagged gaps, authorizes hold/rework, and confirms readiness for hand-off.
- Account/Contract Coordinator — owns the client specification of record and confirms any ambiguous scope or client-specific instruction.

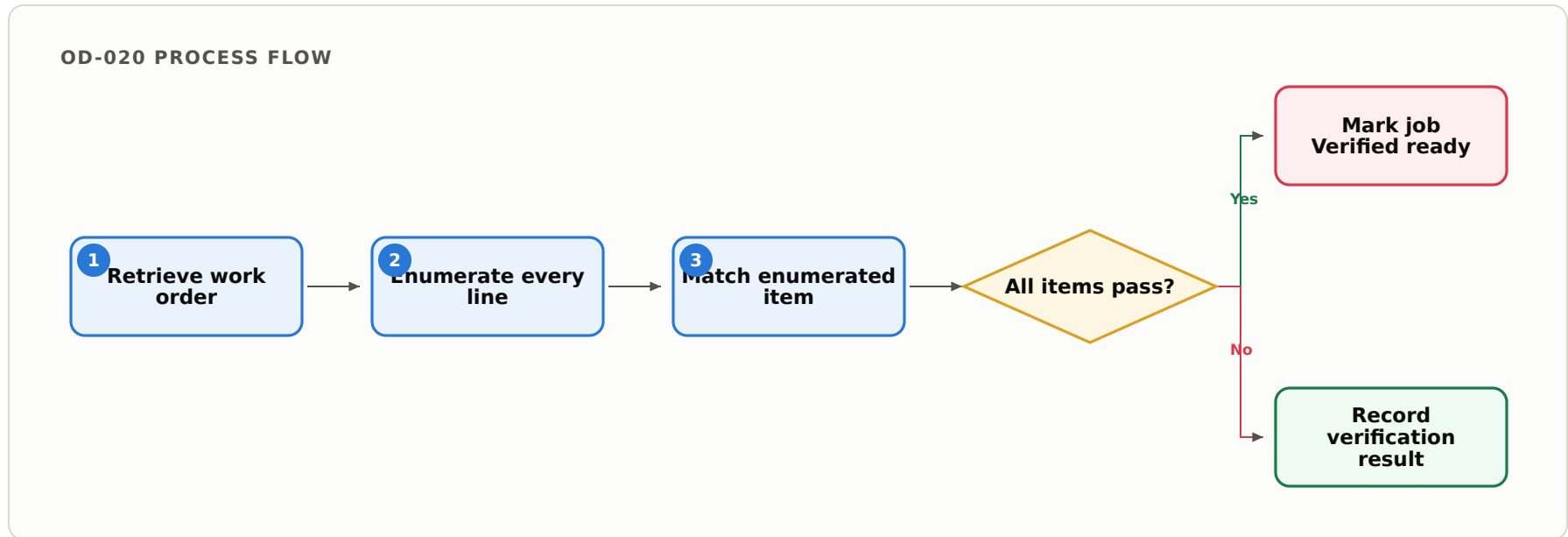
4. Required PPE & Lockout/Tagout

- Standard facility PPE only; where the service line handles physical materials (e.g., recovered materials, septic field/vehicle work, mail parcels), apply the PPE required by that line's job hazard rules (gloves, hi-vis, eye protection as applicable).
- Not applicable — no hazardous energy involved in the verification activity itself.

5. Regulatory References

- None sector-specific to completion verification across all archetype members; internal quality policy and the governing client service agreement / SLA apply.
- General applicable frameworks: OSHA 29 CFR 1904 (recordkeeping) and 29 CFR 1910 (general duty) where the facility performs physical work; FTC Section 5 (15 U.S.C. §45) on accurate representation of completed work; contract-law obligations under the client agreement. Member-specific examples where applicable: e.g., USPS DMM handling standards for mail centers, TCPA/TSR for contact centers.
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

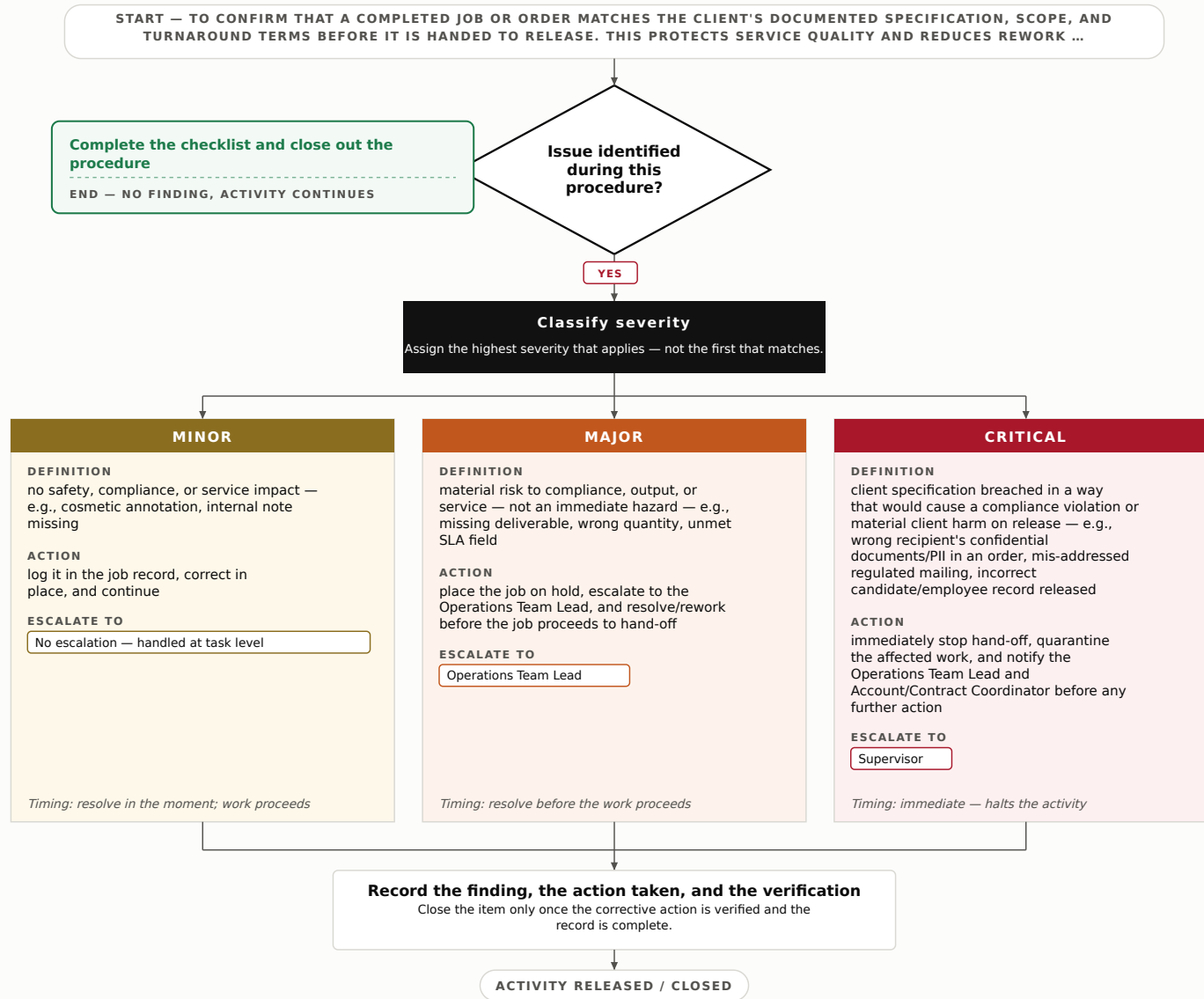
6. Process Flow



7. Step-by-Step Procedure

1. Retrieve the work order and the client specification of record from the job tracking system; confirm the job ID matches the physical/digital deliverable set.
2. Enumerate every line item, deliverable, and special instruction on the order (page counts, copies, envelopes/parcels, call dispositions, candidate slates, processed loads, service tickets — as applicable to the service line).
3. Match each enumerated item against what was actually produced; mark present/absent.
4. Verify accuracy: quantities, addressing/routing, formatting, client-required fields, and any tolerance stated in the spec.
5. Confirm turnaround/SLA timestamps are within committed window; note any late or partial completion.
6. Identify and classify any gap using the Decision Tree in Section 8; route per its branches.
7. When all items pass, mark the job "Verified — ready for release" and stage it for hand-off (formal release under QC-013).
8. Record the verification result, verifier initials, timestamp, and any findings in the job record and the Inspection Checklist below.

8. Decision Tree

Decision Tree — Job / Order Completion Verification**READING THIS TREE**

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Job ID on deliverable set matches the work order and client specification of record.
- Every ordered line item is accounted for (present/absent recorded for each).
- Accuracy and SLA/turnaround terms verified against the spec.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Job ID matches work order and client spec		
All ordered line items/deliverables present		
Quantities and client-required fields accurate		
Addressing/routing/disposition correct		
Turnaround/SLA window met		
All flagged gaps resolved or on documented hold		
Verification result and initials recorded in job record		

11. KPIs

- Completion-verification accuracy (jobs passing downstream release without defect): $\geq 99\%$.
- Verification cycle time per job: ≤ 25 minutes average.
- Critical findings escaping verification (reaching release): 0 per month.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for ADMIN_SUPPORT_SERVICES.	Archetype Content Team

OD-021 — Delivery / Service Turnover

Estimated completion time: 15-45 minutes per turnover

Provided for general informational and operational purposes as part of the Admin Support Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

This procedure defines how an Operations team formally releases a completed deliverable or service — a finished document package, processed material batch, staffed contract, contact-center campaign, or completed field service — to the client or the next receiving party, so that the handoff is authorized, complete, and traceable. It ensures the finished work meets the agreed scope of work before responsibility transfers.

2. Scope

Covers the final verification, authorization, and formal handover of completed work product to the client or downstream channel across all archetype service lines. Excludes loading and dispatch logistics, which are covered under SH-014, and capture of proof-of-delivery records, which is covered under SH-024.

3. Responsibilities

- Operations Coordinator — assembles the finished deliverable, confirms it against the work order/scope, and initiates the turnover.
- Operations Supervisor — verifies completeness and authorizes release to the client or next party.
- Client Services Representative — confirms client identity/authorization to receive and communicates the turnover to the receiving party.

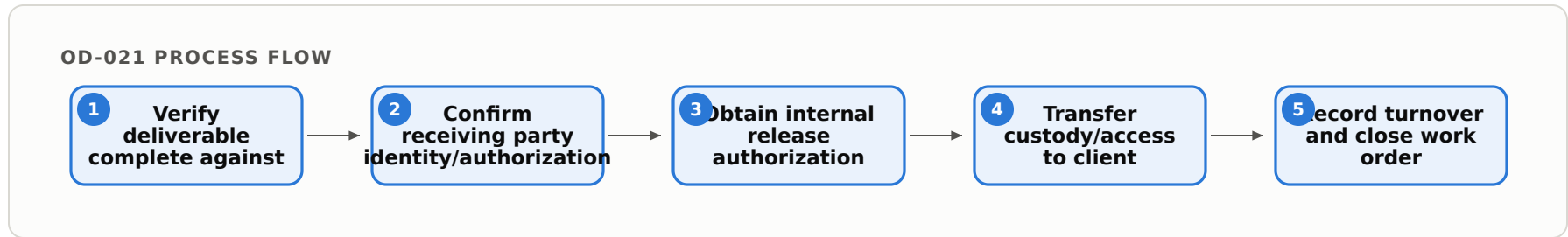
4. Required PPE & Lockout/Tagout

- Standard facility PPE only for office-based turnover; where the service line performs field or facility work (e.g., materials recovery, septic/facilities support), use the PPE specified for that work area (gloves, hi-vis, eye protection).
- Not applicable — no hazardous energy is controlled during service turnover; any equipment lockout belongs to the operating procedure, not this handoff.

5. Regulatory References

- 29 CFR 1904 (OSHA recordkeeping of any work-related incident during handoff) — applicable to all employers.
- FTC Act §5, 15 U.S.C. §45 (fair/accurate representation of completed services to the client) — applicable to all commercial members.
- Contractual scope-of-work / service-level agreement and internal client-authorization policy govern the release itself; member-specific regimes may add requirements (e.g., 40 CFR waste-transfer records for recovery/septic lines; TSR 16 CFR 310 for contact-center campaigns; state PEO/staffing licensing for personnel turnover).
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

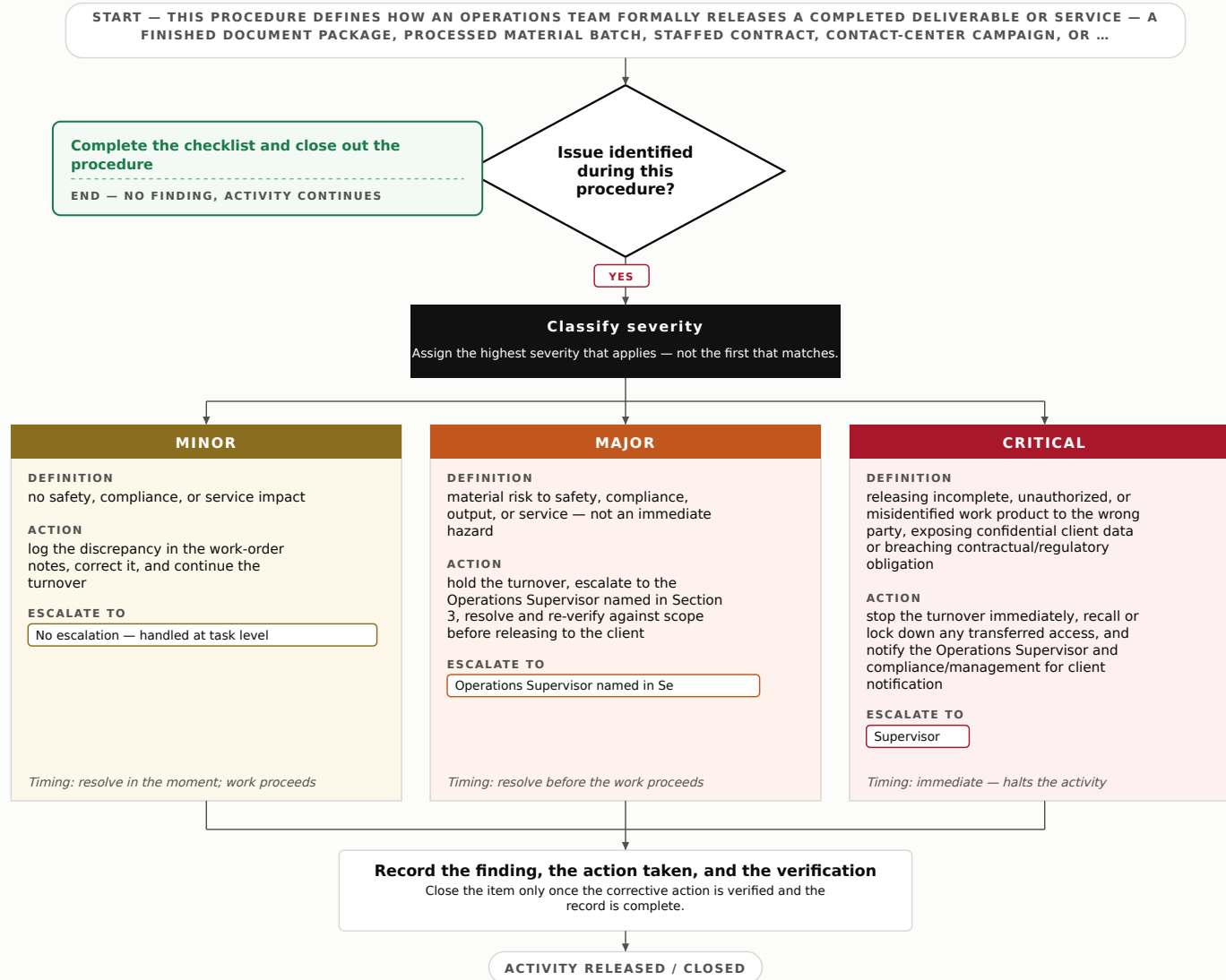
6. Process Flow



7. Step-by-Step Procedure

1. Retrieve the work order and confirm the deliverable status is "ready for turnover" with all internal quality checkpoints signed off.
2. Reconcile the finished work against the scope of work line by line — document set, processed batch, staffing roster, campaign results, or completed service log — and confirm nothing agreed is outstanding.
3. Confirm the receiving party and their authorization to receive (named client contact, downstream office-equipment channel per 423420, or authorized agent); verify identity per client-authorization policy.
4. Have the Operations Supervisor authorize release; do not transfer custody without recorded authorization.
5. Execute the transfer: hand over physical deliverables, grant client access to completed digital work product, or formally activate the staffed/serviced contract to the receiving party.
6. Communicate turnover to the client contact, including any conditions, warranty terms, or follow-up windows.
7. Confirm handoff to logistics per SH-014 and proof-of-delivery capture per SH-024 where those apply — do not perform their steps here.
8. Record the turnover in the work-order system (date, time, deliverable ID, receiving party, authorizing supervisor) and close the work order.

8. Decision Tree

Decision Tree — Delivery / Service Turnover**READING THIS TREE**■ **No finding**

Activity stands. Complete the checklist and continue.

■ **Minor**

Handled in place at task level; no escalation.

■ **Major**

Supervisory decision required before the next stage.

■ **Critical**

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Deliverable reconciled line-by-line against the signed scope of work.
- Receiving party identity and authorization to receive confirmed and recorded.
- Supervisor release authorization captured before any custody transfer.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Work order marked ready; internal QC signed off		
Deliverable matches scope of work in full		
Receiving party identity/authorization verified		
Supervisor release authorization recorded		
Confidential/client data handled per policy		
Turnover logged with date, time, and receiving party		
SH-014 / SH-024 handoffs acknowledged where applicable		

11. KPIs

- On-time turnover against agreed date: $\geq 97\%$
- Turnovers released with complete recorded authorization: 100%
- Post-turnover client rejections / rework due to incompleteness: $\leq 2\%$

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for ADMIN_SUPPORT_SERVICES.	Archetype Content Team

OD-022 — Customer Communication & Status Notification

Estimated completion time: 10-30 minutes per notification cycle; ongoing across the engagement lifecycle.

Provided for general informational and operational purposes as part of the Admin Support Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To ensure every client receives timely, accurate, and documented updates on the status, changes, and completion of their engagement, so that expectations stay aligned and no service milestone passes without acknowledgment. This protects the service relationship common to all admin-support operations that work on behalf of external clients.

2. Scope

Covers all outbound status touchpoints — acknowledgments, in-progress updates, change notifications, and completion/turnover notices — across any channel (phone, email, portal, secure messaging) used by the operation. Excludes complaint intake, which is covered under OD-023, and quality complaint investigation, which is covered under QC-021.

3. Responsibilities

- Client Service Coordinator — issues status updates, logs each contact, and confirms client receipt within the notification window.
- Operations Supervisor — approves change notifications and completion notices, and resolves escalations raised during this procedure.
- Records/Compliance Lead — verifies consent, channel authorization, and retention of communication records against internal policy and applicable disclosure rules.

4. Required PPE & Lockout/Tagout

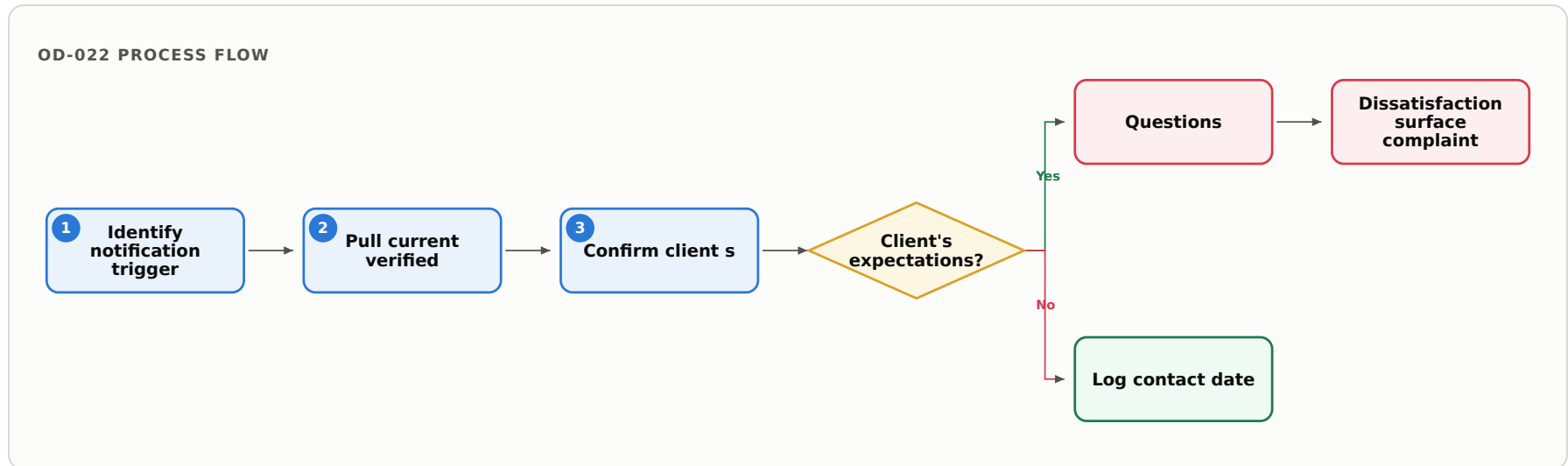
- Standard facility PPE only; where a service line performs field or facility work (e.g., collection routes, materials handling), apply that line's PPE when a status touchpoint occurs on site.
- Not applicable — no hazardous energy involved in this communication task.

5. Regulatory References

- Telephone Consumer Protection Act (TCPA), 47 U.S.C. §227 and 47 CFR 64.1200 (consent and timing for telephone/text contact).
- FTC Act §5, 15 U.S.C. §45 (prohibition on unfair or deceptive representations in customer communications).
- CAN-SPAM Act, 15 U.S.C. §7701 et seq. (identification and opt-out in commercial email).
- Applicable state data-breach/notification and record-retention statutes governing customer information (e.g., state UDAP and privacy laws) as applicable to the service line.

- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

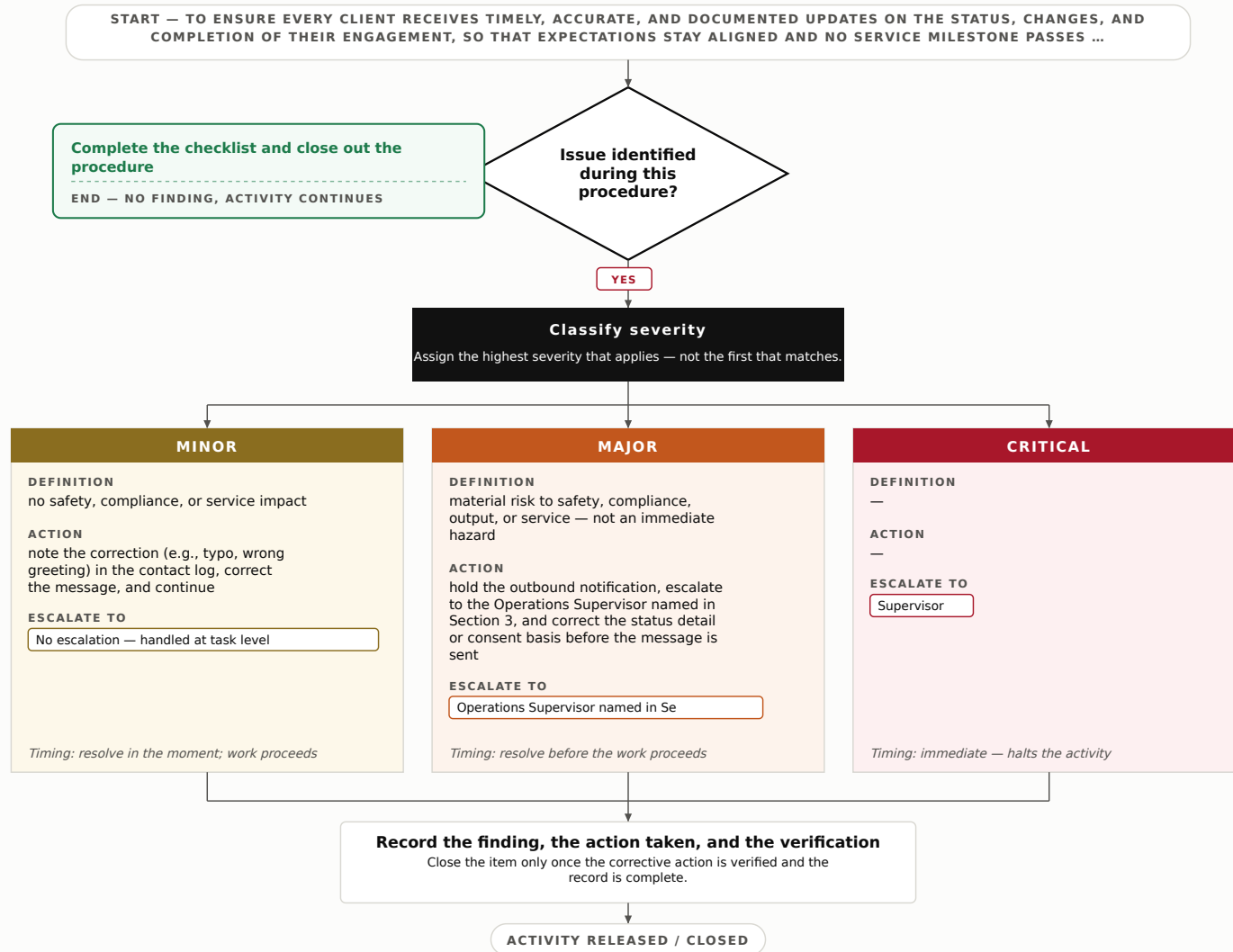


7. Step-by-Step Procedure

1. Identify the notification trigger: engagement start, status milestone, scope/timeline change, delay, or completion of the deliverable/service.
2. Pull the current, verified status from the work record or job ticket — never report status from memory or assumption.
3. Confirm the client's authorized contact and consented channel(s) on file; select the channel the client has approved.
4. Draft the message using the approved template for the trigger type, stating what is done, what is pending, any change and its cause, and next expected touchpoint.
5. For change notifications and completion/turnover notices, route to the Operations Supervisor for approval before release.
6. Issue the notification within the defined window; request and capture acknowledgment of receipt where the channel allows.
7. If the client's expectations, questions, or dissatisfaction surface a complaint, hand off to OD-023 — do not resolve it within this procedure.
8. Log the contact (date, time, channel, content summary, sender, receipt status) in the communication record and archive per retention policy.

8. Decision Tree

Decision Tree — Customer Communication & Status Notification



READING THIS TREE

No finding

Activity stands. Complete the checklist and continue.

Minor

Handled in place at task level; no escalation.

Major

Supervisory decision required before the next stage.

Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Status detail in the message matches the verified work record before release.
- Channel and timing comply with the client's consent on file.
- Change and completion notices carry Supervisor approval prior to issue.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Notification trigger correctly identified		
Status reported matches verified work record		
Client contact and channel consent confirmed		
Approved template used for trigger type		
Change/completion notice Supervisor-approved		
Receipt/acknowledgment captured where available		
Contact logged and archived per retention policy		

11. KPIs

- On-time notification rate (within defined window): $\geq 95\%$.
- Status accuracy (no correction/retraction required): $\geq 98\%$.
- Communication records logged and archived: 100%.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for ADMIN_SUPPORT_SERVICES.	Archetype Content Team

OD-023 — Customer Feedback & Complaint Intake

Estimated completion time: 10-25 minutes per intake event

Provided for general informational and operational purposes as part of the Admin Support Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To capture, log, and route inbound customer feedback and complaints promptly and completely, so that every contact is recorded in a traceable record and directed to the correct owner without loss or delay.

2. Scope

Covers receipt of feedback and complaints across all channels (phone, email, web form, mail, walk-in), classification, logging in the ticketing/CRM system, acknowledgement to the customer, and routing to the responsible team. Excludes quality complaint investigation, which is covered under QC-021, and corrective action, which is covered under QC-019.

3. Responsibilities

- Intake Agent — receives the contact, records the complaint, issues acknowledgement, and creates the ticket.
- Operations Coordinator — reviews classification, assigns routing, and monitors open intake tickets for aging.
- Operations Supervisor — verifies intake completeness, resolves escalations, and owns the intake log of record.

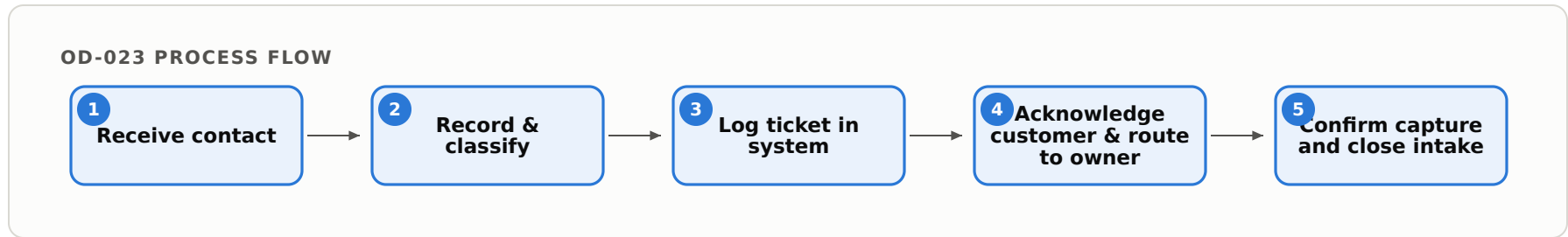
4. Required PPE & Lockout/Tagout

- Standard facility PPE; no additional PPE required for administrative intake. Where the service line operates field or facility floor areas (e.g., recovery floor, septic service yard), agents entering those areas follow that area's posted PPE rules.
- Not applicable — no hazardous energy involved.

5. Regulatory References

- FTC Act §5 (15 U.S.C. §45) — unfair or deceptive acts/practices, governing accurate handling and response to consumer complaints.
- State record-retention and consumer-protection statutes applicable to the facility (e.g., state UDAP laws); where calls are recorded, applicable federal/state one- or two-party consent recording laws.
- Internal policy applies to complaint-log format, acknowledgement timing, and data-handling of customer contact information.
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow



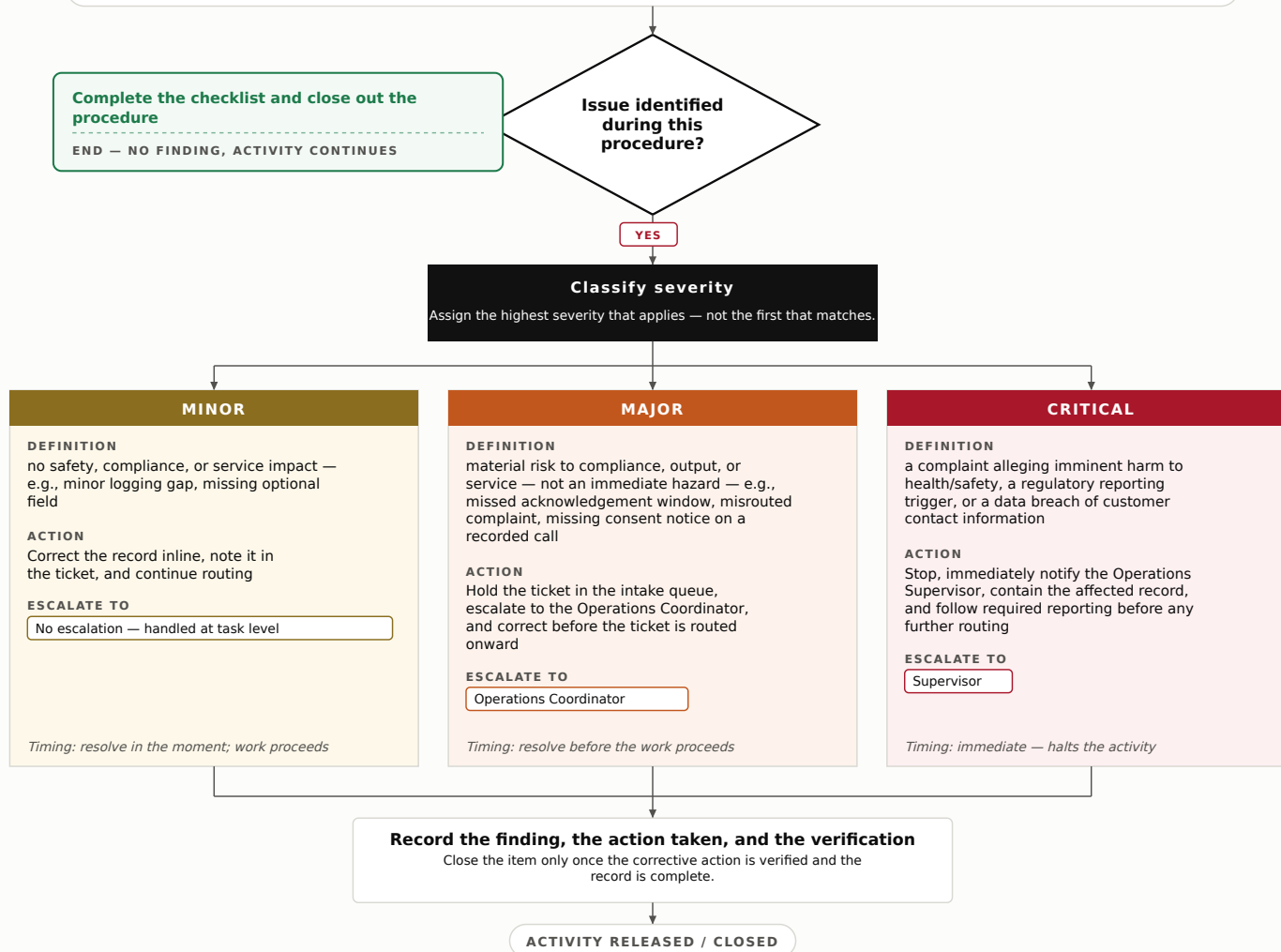
7. Step-by-Step Procedure

1. Receive the contact through its channel (phone, email, web form, mail, or walk-in) and confirm you have the customer's name, contact detail, and account/reference where available.
2. Confirm any channel-specific disclosures apply — where calls are recorded, ensure the recording notice was delivered per applicable consent law.
3. Capture the complaint or feedback verbatim in the intake field; do not paraphrase the customer's core statement.
4. Classify the contact type (feedback, service complaint, billing, safety concern) and assign a severity per Section 8.
5. Create the ticket in the ticketing/CRM system, attach any documents or message threads, and assign a unique reference number.
6. Issue an acknowledgement to the customer with the reference number and expected next-contact window.
7. Route the ticket to the responsible owner (e.g., QC-021 for quality complaint investigation) without attempting to investigate or resolve the underlying issue in this procedure.
8. Record all actions, timestamps, and routing destination in the intake log and complete the checklist.

8. Decision Tree

Decision Tree — Customer Feedback & Complaint Intake

START — TO CAPTURE, LOG, AND ROUTE INBOUND CUSTOMER FEEDBACK AND COMPLAINTS PROMPTLY AND COMPLETELY, SO THAT EVERY CONTACT IS RECORDED IN A TRACEABLE RECORD AND DIRECTED TO THE CORRECT OWNER WITHOUT LOSS OR DELAY

**READING THIS TREE**

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Verify every contact received in the period has a corresponding logged ticket with a unique reference.
- Verify complaint text is captured verbatim and classification/severity is assigned.
- Verify acknowledgement was issued within the standard window and routing owner is recorded.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Customer identity and contact detail captured		
Complaint/feedback text recorded verbatim		
Channel disclosure/consent handled where required		
Ticket created with unique reference number		
Classification and severity assigned		
Acknowledgement issued to customer		
Routing owner recorded (no investigation performed here)		

11. KPIs

- Acknowledgement issued within target window: $\geq 95\%$ of contacts within 1 business day.
- Intake logging accuracy (complete, verbatim, correctly routed): $\geq 98\%$.
- Unlogged or misrouted contacts: $\leq 1\%$ of total contacts per month.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for ADMIN_SUPPORT_SERVICES.	Archetype Content Team

Phase 5 — Oversight & continuity

OD-024 — Operational Incident Reporting & Response

Estimated completion time: 20–45 minutes per incident (initial report and classification); follow-up resolution varies by severity.

Provided for general informational and operational purposes as part of the Admin Support Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To ensure every operational incident and near-miss — a service-delivery failure, missed deadline, misrouted client material, data-handling error, or client-facing process breakdown — is reported, classified by consequence, and resolved consistently so that recurring operational risks are contained before they reach the client.

2. Scope

Covers reporting, classification, containment, and resolution of operational incidents and near-misses arising in the delivery of administrative, contact-center, document, mail, recovery, and facilities-support services. Excludes workplace safety incident reporting (injury, exposure, environmental release), covered under SD-018, and equipment breakdown, covered under MD-009.

3. Responsibilities

- Operations Coordinator — receives and logs incident reports, performs initial classification, and initiates containment of the affected work.
- Shift/Operations Supervisor — validates classification, owns Major-incident resolution, and authorizes client notification where required.
- Compliance/Records Lead — reviews incidents involving client data, confidential material, or regulatory obligations and manages retention of the incident record.

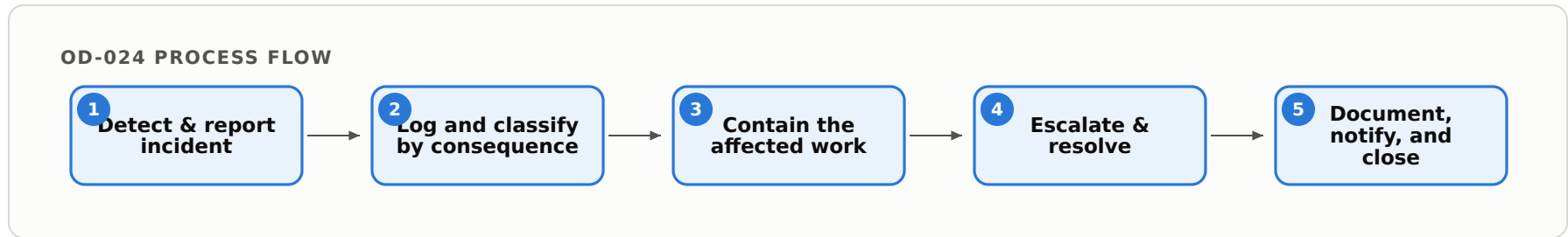
4. Required PPE & Lockout/Tagout

- Standard facility PPE only where the incident occurs on an operating floor (e.g., recovery or mail-processing lines); none required for administrative or contact-center incident handling.
- Not applicable — no hazardous energy involved in incident reporting and response.

5. Regulatory References

- None sector-specific to incident reporting across the full archetype; internal Operations policy is the governing basis. Applicable examples where the service line handles the relevant data or work: FTC Act §5 (unfair/deceptive practices, 15 U.S.C. §45); applicable state data-breach notification statutes where client personal data is involved; e.g., 39 U.S.C. / 39 CFR for private mail-center consignment errors; e.g., contractual client SLA and confidentiality terms. Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

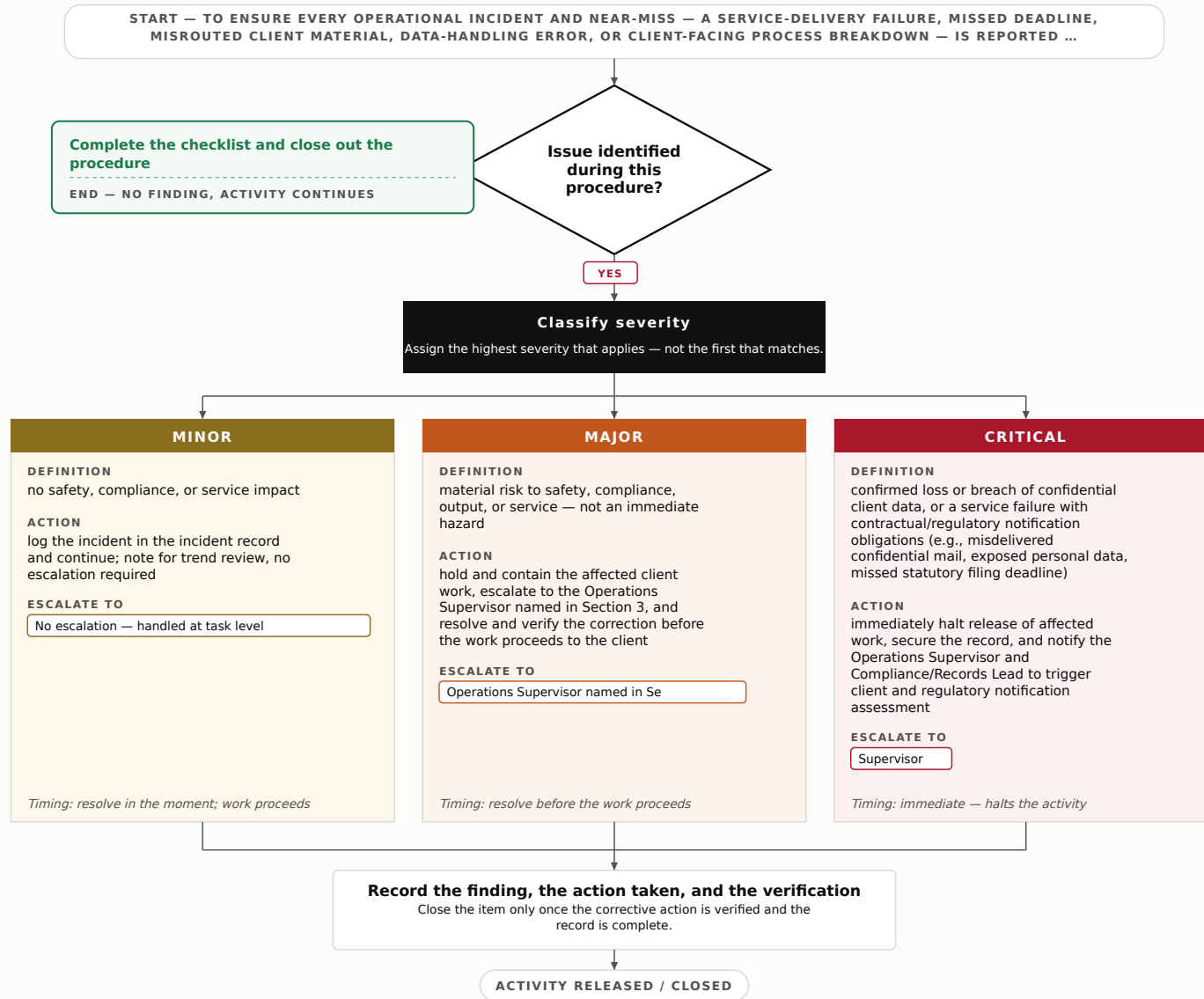
6. Process Flow



7. Step-by-Step Procedure

1. Any staff member who observes an operational incident or near-miss reports it to the Operations Coordinator immediately, in writing where possible (ticket, email, or incident form).
2. Operations Coordinator opens an incident record capturing date/time, service line, client (if any), description, and whether client-facing work or data was affected.
3. Classify the incident by consequence using Section 8 (Minor / Major / Critical); note near-misses separately as "no impact — potential."
4. Contain the affected work: hold the impacted client file, batch, mail piece, call queue, or record so no further action proceeds on the affected item until reviewed.
5. Escalate per classification — Minor stays with the Coordinator; Major goes to the Operations Supervisor; Critical and any client-data event pull in the Compliance/Records Lead.
6. Determine and apply the correction; where client-facing output was affected, verify the corrected work before it is released or resubmitted.
7. Determine client-notification obligation (SLA, contract, or statutory) and, where required, issue notification through the authorized role.
8. Complete the incident record with root cause, corrective action, and closure; retain per internal retention policy and route recurring patterns to the Supervisor for trend review.

8. Decision Tree

Decision Tree — Operational Incident Reporting & Response**READING THIS TREE**

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every reported incident has a classification and an assigned owner within one shift.
- Affected client work is confirmed contained before any correction begins.
- Corrected client-facing output is re-verified before release or resubmission.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Incident logged with date/time, service line, and description		
Severity classified per Section 8		
Affected client work held/contained		
Escalation routed to correct role		
Client-notification obligation assessed		
Root cause and corrective action recorded		
Record retained per internal policy		

11. KPIs

- Incidents logged within one shift of detection: $\geq 98\%$
- Major/Critical incidents resolved within contractual SLA: $\geq 95\%$
- Near-misses captured relative to incidents (leading-indicator ratio): ≥ 1 near-miss logged per resolved incident

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for ADMIN_SUPPORT_SERVICES.	Archetype Content Team

OD-025 — Emergency & Business Continuity Readiness Check

Estimated completion time: 2-4 hours

Provided for general informational and operational purposes as part of the Admin Support Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

This procedure verifies that the operation can absorb a service disruption — loss of facility access, telecom/network outage, or key-staff unavailability — and resume delivery of client-facing services (call handling, mail processing, document preparation, staffing coordination, or facility/field service dispatch) within committed recovery targets. It confirms readiness, not response.

2. Scope

Covers the periodic readiness check of the operation's business continuity plan (BCP): documentation currency, contact-tree accuracy, alternate-site/remote-work readiness, and recovery-time verification for client service lines. Excludes live emergency drills and incident response (see SD-015, SD-016) and backup power systems (see ED-027); those procedures are authored in their owning modules and are only referenced here for hand-off.

3. Responsibilities

- Operations Supervisor — owns this readiness check, schedules it, and signs off completion.
- Continuity Coordinator — maintains the BCP document, contact tree, and recovery-time objectives; performs the verification steps.
- IT/Systems Lead — confirms recoverability of client data, communications routing, and workstation/hardware failover paths.

4. Required PPE & Lockout/Tagout

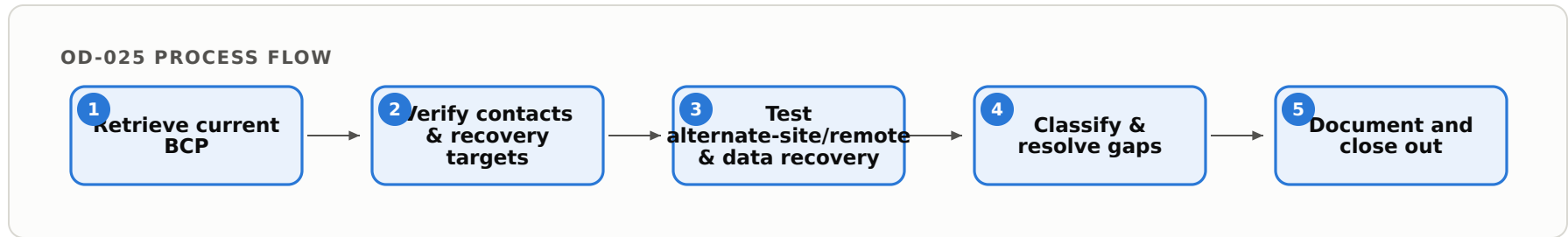
- Standard facility PPE; none specific to this administrative task. Where the service line operates in a field or facility environment, follow that site's general PPE rules during any walk-through.
- Not applicable — no hazardous energy involved.

5. Regulatory References

- None sector-specific govern business continuity for every member of this archetype; internal BCP policy is the governing frame. Applicable general obligations include OSHA 29 CFR 1910.38 (Emergency Action Plans) where an employer maintains one, and contractual/records obligations where personal data is held (e.g., state data-breach notification statutes for members handling client PII, or client-contract SLA/recovery clauses).

Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

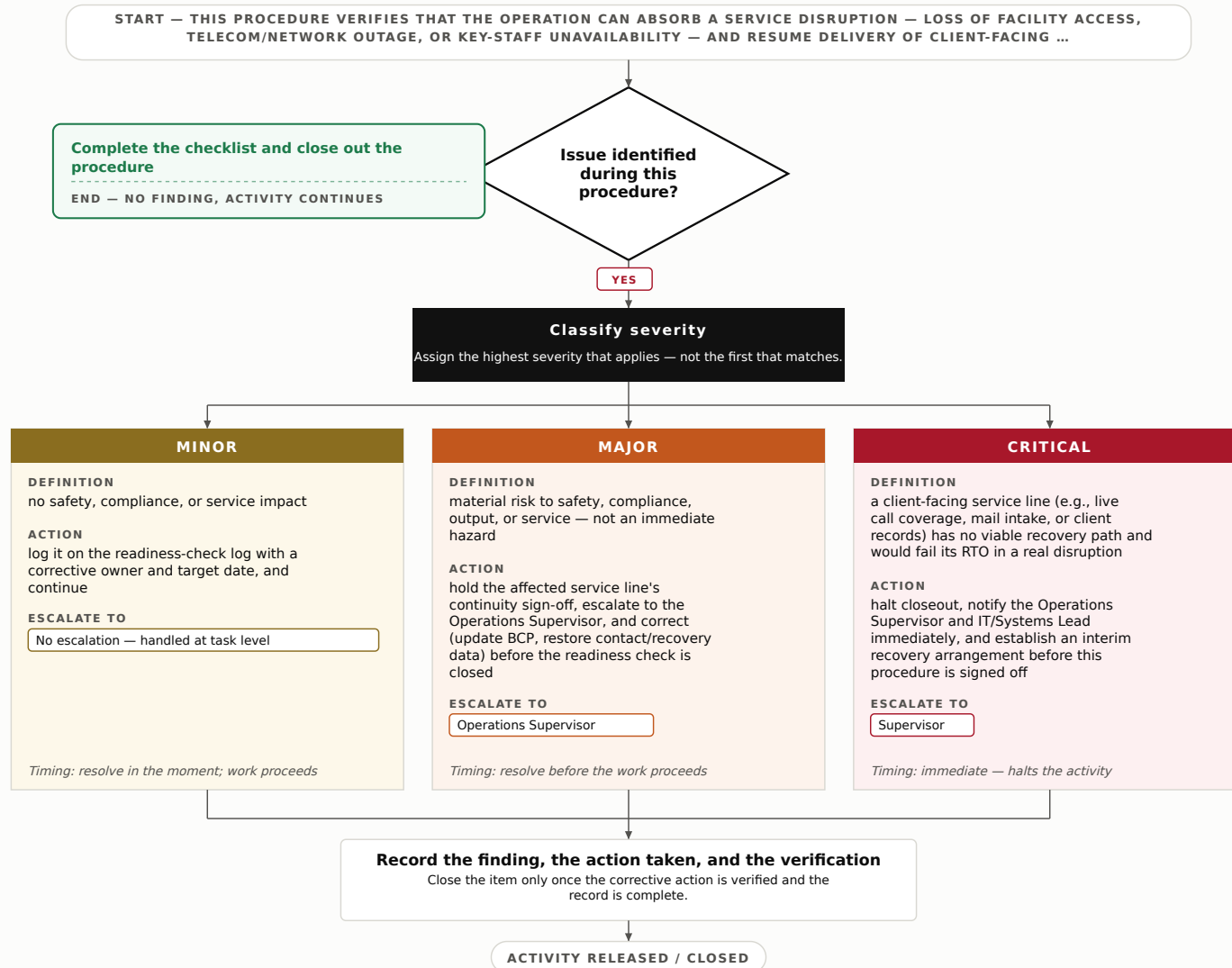


7. Step-by-Step Procedure

1. Retrieve the controlled copy of the current BCP and confirm its revision date is within the review interval (default 12 months or since last material change).
2. Verify the emergency contact tree: confirm names, roles, phone/email, and after-hours reach for all key staff, client escalation contacts, and critical vendors are current and reachable on a spot-check basis.
3. Confirm each client-facing service line has a documented Recovery Time Objective (RTO) and a named alternate delivery method (remote workstations, call-forwarding/answering overflow, mail-hold routing, or alternate site).
4. With the IT/Systems Lead, verify that client data and work-in-progress records are recoverable — backups are current, restorable, and stored off the primary location; confirm communications (inbound calls, ticket queues, mail intake logs) can be re-routed.
5. Confirm replacement or loaner workstation/hardware sourcing paths are documented, including procurement lead time from suppliers (334111 Electronic Computer Manufacturing) and office-equipment channels (423420).
6. Walk the alternate-work readiness: confirm remote-access credentials, VPN, and licensing allow staff to resume covered work from an alternate location.
7. Classify any gap found per the Decision Tree; hold and resolve gaps affecting Critical service lines before closing.
8. Record all findings, resolutions, and the verified BCP revision on the readiness-check log and obtain supervisor verification.

8. Decision Tree

Decision Tree — Emergency & Business Continuity Readiness Check



READING THIS TREE

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- BCP revision date is current and the document is the controlled copy.
- Contact tree spot-check confirms reachability of key staff, client escalation, and critical vendors.
- Each client service line has a documented, tested RTO and alternate delivery method.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
BCP revision within review interval and controlled copy in use		
Emergency contact tree verified reachable (spot-check)		
Every client service line has documented RTO + alternate method		
Client data/records backups current and restorable off-site		
Communications (calls, queues, mail intake) re-routable		
Alternate/remote-work access and licensing confirmed		
Replacement hardware sourcing path documented		

11. KPIs

- BCP currency: 100% of readiness checks against a BCP revised within 12 months.
- Contact-tree accuracy: $\geq 98\%$ of spot-checked contacts verified reachable.
- Critical findings resolved before closeout: 100%.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for ADMIN_SUPPORT_SERVICES.	Archetype Content Team

OD-026 — Regulatory, License & Permit Currency Verification

Estimated completion time: 2-4 hours per verification cycle (per entity/jurisdiction)

Provided for general informational and operational purposes as part of the Admin Support Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To confirm that every operating license, permit, and business registration the service line depends on is current, valid, and in good standing — so the organization does not deliver customer-facing work under a lapsed, suspended, or misfiled authorization.

2. Scope

Covers the identification, currency verification, and renewal tracking of business operating licenses, occupational/professional registrations, jurisdictional permits, and regulatory registrations held by the operation. Excludes safety regulatory compliance, which is covered under SD-028, and permit-to-work authorizations, which are covered under MD-007.

3. Responsibilities

- Operations Compliance Coordinator — maintains the license/permit register, runs the currency verification, and initiates renewals before expiry.
- Operations Supervisor — reviews findings, authorizes hold on affected service lines, and escalates lapses to management.
- Records Administrator — files verified certificates, confirmation numbers, and correspondence to the retention system and controls access.

4. Required PPE & Lockout/Tagout

- Standard facility PPE (none specific to this task; it is a records/desk-based procedure).
- Not applicable — no hazardous energy involved.

5. Regulatory References

- Internal policy is the governing frame; no single sector-specific licensing statute applies to every member of this archetype. Applicable general obligations include state and local business-registration/entity-standing requirements (e.g., Secretary of State annual report/registered-agent filings) and jurisdictional business-license/occupational-permit rules that vary by service line (e.g., septic/hauling permits, PEO registration, private mail center CMRA registration with USPS, telemarketing/contact-center registrations). Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

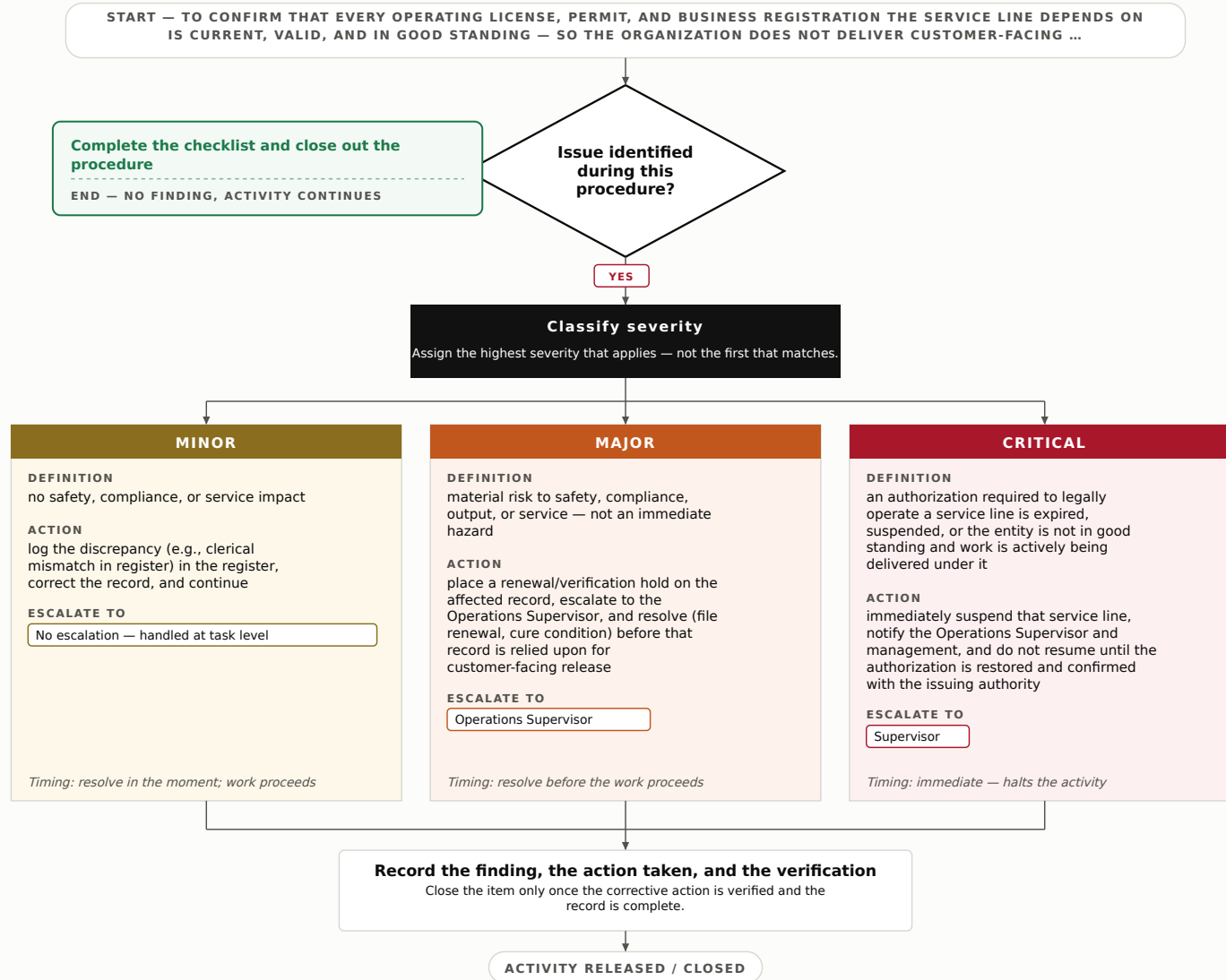


7. Step-by-Step Procedure

1. Open the master license/permit register and confirm it lists every authorization by entity, jurisdiction, issuing authority, number, issue date, and expiry/renewal date.
2. For each service line the operation runs, confirm the register reflects current operations (add newly required registrations; flag authorizations for discontinued lines).
3. Retrieve the authoritative status for each entry directly from the issuing authority's system of record (state/local portal, agency verification page, or written confirmation) — not from an internal copy.
4. Compare the authority's recorded status, holder name, and expiry against the register; note any discrepancy, pending renewal, or "not in good standing" flag.
5. For any authorization expiring within the renewal lead time defined by its issuing authority, initiate the renewal filing and record the confirmation/submission number.
6. Verify that any conditions attached to an authorization (bond, insurance proof, registered agent, fee payment) are satisfied and current.
7. Classify each finding per Section 8 and route accordingly; hold affected service lines where required.
8. Record all results, confirmation numbers, and supporting certificates in the retention system, update next-review dates, and obtain supervisor verification.

8. Decision Tree

Decision Tree — Regulatory, License & Permit Currency Verification



READING THIS TREE

No finding

Activity stands. Complete the checklist and continue.

Minor

Handled in place at task level; no escalation.

Major

Supervisory decision required before the next stage.

Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every active service line maps to at least one verified, current authorization in the register.
- Each currency status was confirmed against the issuing authority's system of record, not an internal copy.
- All attached conditions (bond, insurance, registered agent, fees) are confirmed satisfied.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Register lists all authorizations with issuer, number, and expiry		
Each active service line matched to a current authorization		
Status confirmed via issuing authority system of record		
Holder name/entity matches authority record		
Renewals within lead time initiated with confirmation number		
Attached conditions (bond/insurance/agent/fees) current		
Certificates and confirmations filed to retention system		

11. KPIs

- License/permit currency rate: 100% of active-service authorizations current at time of review.
- Renewal timeliness: 100% of renewals filed before expiry (≥ 30 days lead where authority permits).
- Verification accuracy: $\leq 2\%$ register-to-authority discrepancy rate per cycle.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for ADMIN_SUPPORT_SERVICES.	Archetype Content Team

OD-027 — Operational Risk Review

Estimated completion time: 3-5 hours per review cycle (quarterly)

Provided for general informational and operational purposes as part of the Admin Support Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

This procedure establishes a periodic review of operational risks and controls across the service lines run by an admin support operation — client intake, data/document handling, contact-center or dispatch workflows, and vendor-dependent processes — so that control gaps are identified and remediated before they disrupt service delivery or client obligations.

2. Scope

Covers the scheduled identification, scoring, and control-review of operational risks affecting service continuity, client data integrity, and contractual performance within Operations. Excludes safety hazard/risk assessment, which is covered under SD-004, and quality preventive action, which is covered under QC-020.

3. Responsibilities

- Operations Manager — owns the risk register, sets review cadence, approves control-remediation actions, and signs off closure.
- Team Lead / Supervisor — supplies process-level risk input from each service line, verifies that named controls are actually in place, and tracks remediation to completion.
- Compliance/Records Coordinator — validates regulatory and client-contract obligations against identified risks and maintains review records for the retention period.

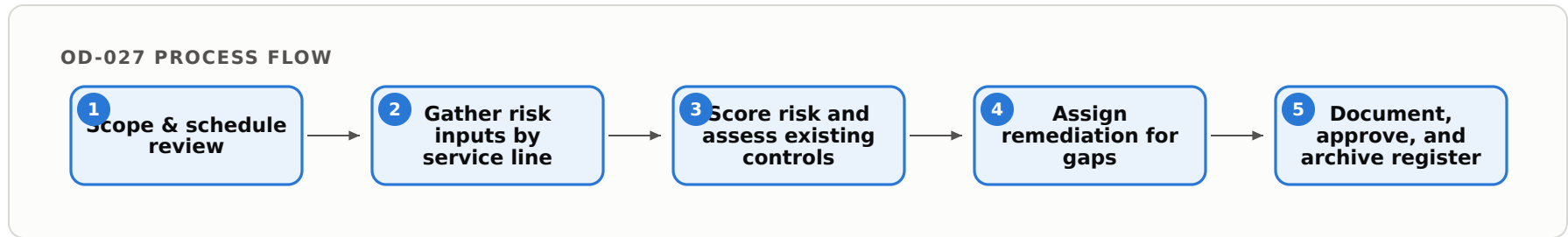
4. Required PPE & Lockout/Tagout

- Standard facility PPE only; this is an administrative review task with no material handling.
- Not applicable — no hazardous energy involved.

5. Regulatory References

- None sector-specific governs operational risk review across the full span; internal risk-management policy applies. Applicable frameworks referenced as controls include: general recordkeeping/employer obligations under 29 CFR 1904 (where applicable), FTC data-security expectations under 16 CFR Part 314 (Safeguards Rule) where client financial data is handled (e.g., document preparation, PEO payroll), and contractual/client-mandated control requirements. Member-specific regimes (e.g., USPS requirements for private mail centers, state contact-center registration for telemarketing bureaus) may appear as risk inputs but do not govern this procedure. Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

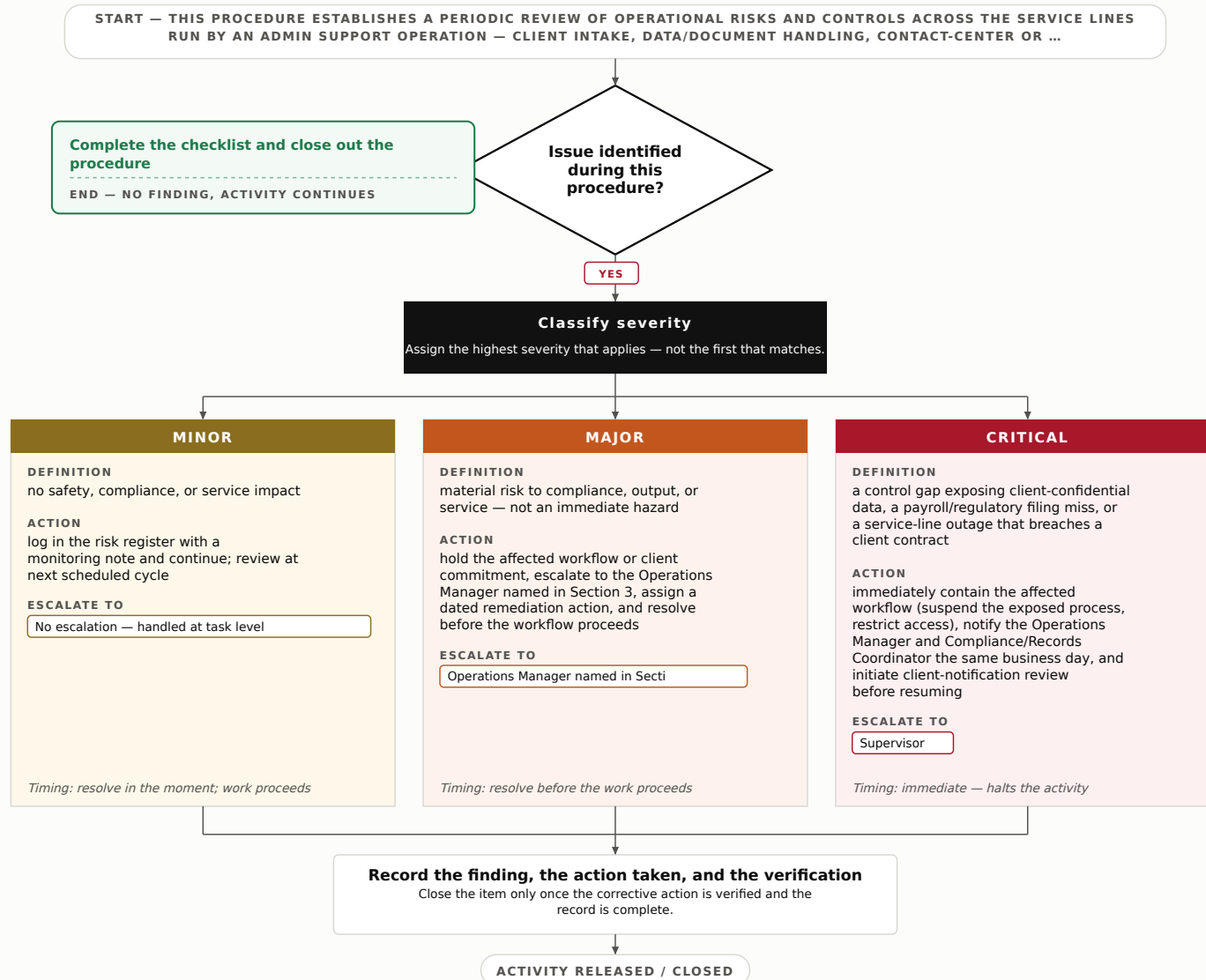


7. Step-by-Step Procedure

1. Confirm review scope and cadence; pull the current operational risk register and the prior cycle's open items.
2. Request risk inputs from each Team Lead covering their service line — intake accuracy, data/document confidentiality, staffing coverage, vendor/system dependency, and turnaround commitments.
3. For each identified risk, record likelihood and impact on service, compliance, and client obligations; assign a severity per the Section 8 tiers.
4. Map each risk to its existing control (procedure, access restriction, backup, dual-check, vendor SLA) and mark whether the control is present, partial, or absent.
5. For any partial or absent control, log a remediation action with an owner and due date; hold the associated workflow where a Critical gap exists.
6. Verify closure of prior-cycle items; re-score any that recurred.
7. Route the completed register to the Operations Manager for approval of remediation actions.
8. Archive the signed register and update the master risk log; record the review date and next-due date.

8. Decision Tree

Decision Tree — Operational Risk Review



READING THIS TREE

■ **No finding**

Activity stands. Complete the checklist and continue.

■ **Minor**

Handled in place at task level; no escalation.

■ **Major**

Supervisory decision required before the next stage.

■ **Critical**

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every service line has submitted risk input for the cycle.
- Each risk is mapped to a named control with a present/partial/absent status.
- All prior-cycle open items are resolved or carried with justification.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Current risk register located and prior open items pulled		
Risk inputs received from all active service lines		
Each risk scored for likelihood and impact		
Every risk mapped to an existing control with status		
Remediation actions have owner and due date		
Register approved and signed by Operations Manager		
Archived record and next-due date recorded		

11. KPIs

- On-time review completion vs. scheduled cadence: $\geq 95\%$.
- Open remediation items overdue at cycle close: 0.
- Recurring (repeat) Critical findings across consecutive cycles: 0.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for ADMIN_SUPPORT_SERVICES.	Archetype Content Team

Phase 6 — Performance, records & close

OD-028 — Operational KPI Review

Estimated completion time: 45-90 minutes per review cycle

Provided for general informational and operational purposes as part of the Admin Support Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

This procedure defines how the Operations department reviews operating performance against defined targets — throughput, turnaround, service-level attainment, and resource utilization — so that operational drift is detected and corrected early. It gives every service line a consistent method for comparing actual results to committed targets.

2. Scope

Covers the periodic review of operations-level performance measures across the service lines run by this archetype (contact-center handling, document/mail processing, facilities and field service dispatch, recovery-throughput, and administrative work queues). Excludes department-specific KPI reviews owned elsewhere: marketing/demand measures (MD-030), quality-conformance measures (QC-030), and sales-pipeline measures (SD-030); this module's scope is operations measures only.

3. Responsibilities

- Operations Supervisor — owns the review, confirms data sources, signs off, and initiates corrective action on off-target measures.
- Operations Analyst / Data Coordinator — compiles the measure set from source systems, verifies data integrity, and prepares the variance summary.
- Team/Shift Lead — validates line-level figures, explains variances for their queue or service line, and executes agreed corrections.

4. Required PPE & Lockout/Tagout

- Standard facility PPE only; no additional PPE required for this data-review task. Where the review is conducted on an operations floor (e.g., recovery-sort line, facilities work area), observe the PPE rules already posted for that area.
- Not applicable — no hazardous energy involved; this is an administrative review of performance data.

5. Regulatory References

- None sector-specific to KPI review itself; internal operations policy is the governing basis. Applicable general obligations include recordkeeping and data-integrity duties under OSHA 29 CFR 1904 (injury/illness records, where the measure set draws on them), the FTC Act §5 (accuracy of performance representations used in customer-facing reporting), and general federal/state record-retention requirements for the underlying business records. Member-specific regimes may apply as examples (e.g., contact-center call-monitoring disclosure rules; DOT hours-of-service data

where a service line operates vehicles) but do not govern this procedure generally. Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

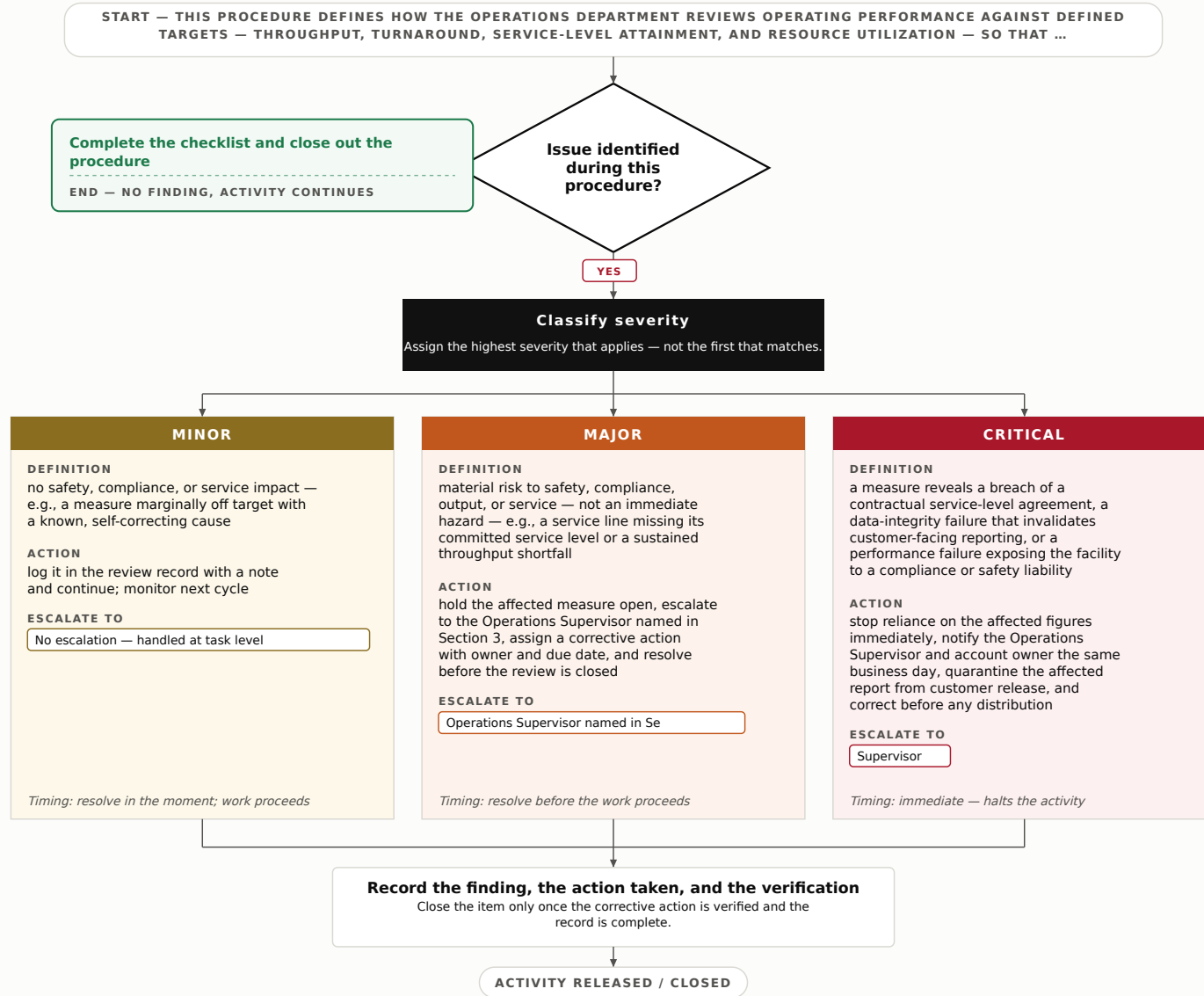


7. Step-by-Step Procedure

1. Confirm the active target set for the period (e.g., turnaround time, service-level attainment %, throughput per shift, utilization %, error/rework rate) and that each target is the currently approved value.
2. Pull actuals from source systems (workforce/queue platform, ticketing/dispatch system, or processing logs). Note the extraction timestamp and that the platform hardware/software is functioning per its supplier baseline.
3. Verify data integrity: check for missing intervals, duplicate records, and mismatched date ranges; reconcile totals against a second source where one exists.
4. Compute actual-to-target variance for each measure and express as absolute and percentage deviation.
5. Flag every measure outside its tolerance band and gather the line-level explanation from the responsible Team/Shift Lead.
6. Classify each flagged variance by severity using Section 8 and route accordingly.
7. Agree corrective actions with owners and due dates for all Major/Critical findings; confirm no Critical finding is left open.
8. Document the review — measures, actuals, variances, findings, actions, owners — and file it in the operations records repository with the review date.

8. Decision Tree

Decision Tree — Operational KPI Review



READING THIS TREE

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every target in the active set has a matched, timestamped actual from a verified source.
- Data-integrity check completed (no missing/duplicate intervals) before variances are computed.
- All flagged variances have a documented cause and assigned owner where Major/Critical.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Active target set confirmed as current-approved values		
Actuals extracted from verified source systems with timestamp		
Data-integrity check completed (no gaps/duplicates)		
Variances computed for every measure		
Off-target measures flagged and explained by responsible lead		
Corrective actions assigned with owners and due dates		
Review documented and filed in operations repository		

11. KPIs

- Review completed on schedule (each defined cycle): $\geq 95\%$ of cycles on time
- Data-integrity exceptions per review: ≤ 1
- Major/Critical findings closed by assigned due date: $\geq 90\%$

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for ADMIN_SUPPORT_SERVICES.	Archetype Content Team

OD-029 — Operational Records Retention & Documentation Audit

Estimated completion time: 2-4 hours per audit cycle (quarterly), scaling with record volume

Provided for general informational and operational purposes as part of the Admin Support Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To confirm that operational records generated in the course of client service delivery — service logs, intake/dispatch tickets, chain-of-custody manifests, call/contact records, and completed work confirmations — are complete, accurate, legible, and retained for the required period. This protects the operation from contract disputes, missed retention obligations, and loss of auditable proof of work performed.

2. Scope

Covers the audit, verification, and retention confirmation of operational service records held in physical files and in the document/records management system, across all active service lines. Excludes quality inspection records (see QC-029), safety records (see SD-029), and HR/personnel records (see HR-029); those retention regimes are owned by their respective modules and are referenced only where a hand-off is required.

3. Responsibilities

- Operations Records Coordinator — executes the audit, samples records, verifies completeness/accuracy against the retention schedule, and logs findings.
- Operations Supervisor — reviews findings, approves dispositions, and authorizes escalation of Major/Critical gaps.
- Records/Compliance Lead — maintains the master retention schedule, administers legal holds, and signs off on final disposition and destruction.

4. Required PPE & Lockout/Tagout

- Standard facility PPE; where the audit involves handling physical archive boxes or working in field/storage areas, use gloves and observe safe lifting practices.
- Not applicable — no hazardous energy involved.

5. Regulatory References

- IRS record retention guidance for business books and records (26 CFR 1.6001-1) — applicable to all business members.
- Federal recordkeeping obligations under the Fair Labor Standards Act payroll/records provisions (29 CFR 516) where the entity is an employer.
- State record retention statutes and any client-contract or statute-of-limitations-driven retention terms (e.g., document-service or contact-center client agreements specifying retention periods).
- None additional sector-wide; where no sector-specific standard governs a record class, internal Records Retention Policy applies.

- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

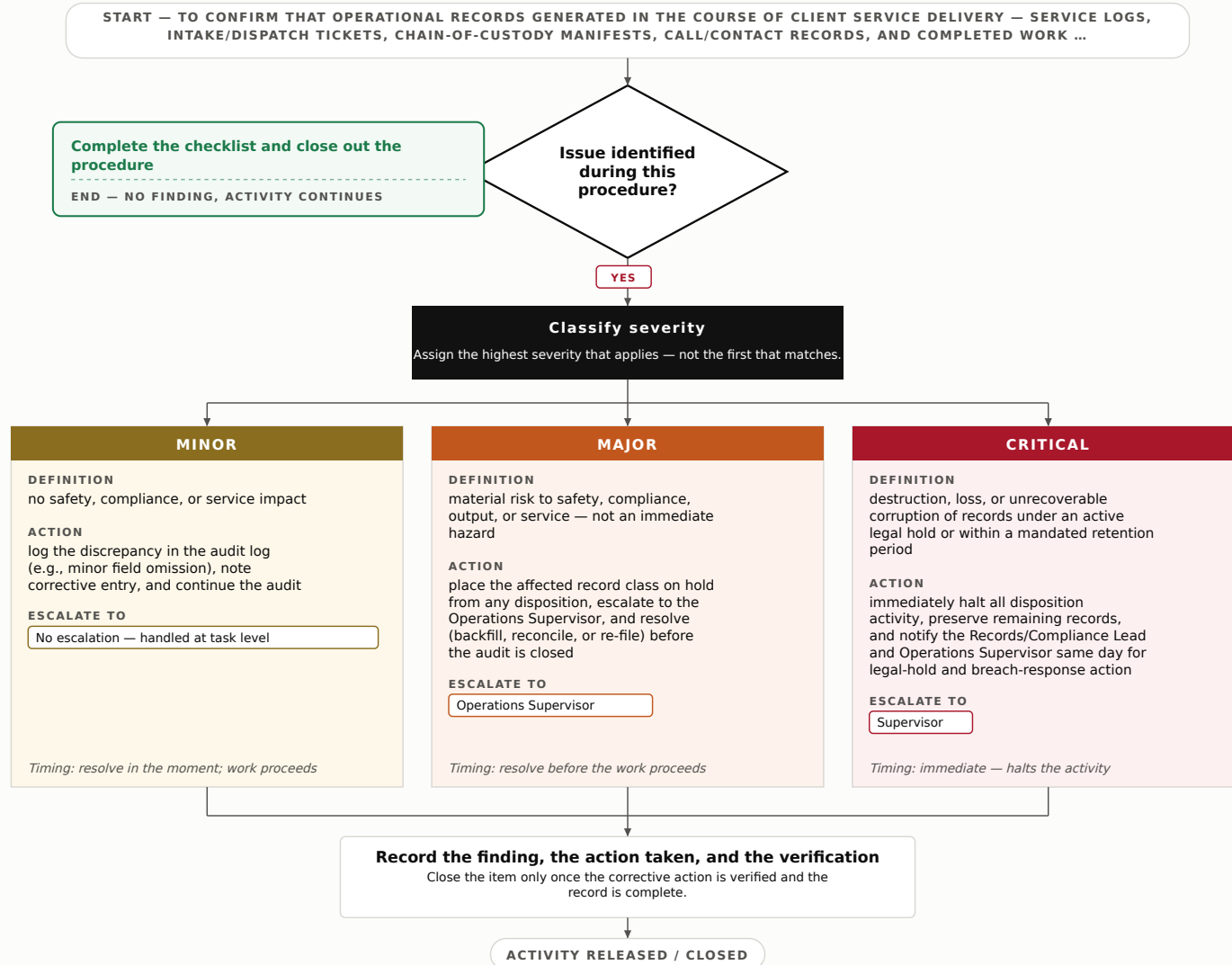


7. Step-by-Step Procedure

1. Open the master retention schedule and list all operational record classes in scope for this cycle (service tickets, dispatch/route logs, contact/call records, chain-of-custody manifests, client work confirmations).
2. For each class, determine the required retention period and any active legal hold flagged by the Records/Compliance Lead.
3. Draw a representative sample from each class across both physical files and the records management system (minimum 10% or 25 records per class, whichever is greater).
4. Verify each sampled record is complete (all required fields populated), accurate (matches the source service event), legible, and correctly dated.
5. Confirm each record is retained in the correct location and has not been prematurely destroyed or aged out ahead of schedule.
6. Check that records past their retention date without a legal hold are queued for controlled disposition, not retained indefinitely.
7. Classify any discrepancy using the Decision Tree; hold affected record classes from disposition until resolved.
8. Document all findings, dispositions, and sign-offs in the audit log and obtain Supervisor verification.

8. Decision Tree

Decision Tree — Operational Records Retention & Documentation Audit



READING THIS TREE

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every in-scope record class is mapped to a current retention period before sampling begins.
- Sampled records verified for completeness, accuracy, and legibility against source events.
- Legal-hold status confirmed before any record is queued for disposition.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Retention schedule current and covers all in-scope record classes		
Sample drawn per required minimum from physical and system records		
Sampled records complete, accurate, and legible		
Records stored in correct location with intact chain of custody		
No records destroyed ahead of retention date or under legal hold		
Aged records correctly queued for controlled disposition		
Findings logged and dispositions signed off		

11. KPIs

- Record completeness rate across sampled classes $\geq 98\%$.
- Retention compliance (records held to correct schedule) = 100%.
- Audit cycle completed on schedule (quarterly) $\geq 95\%$ of cycles.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for ADMIN_SUPPORT_SERVICES.	Archetype Content Team

OD-030 — End-of-Shift / End-of-Day Operations Closeout

Estimated completion time: 20-45 minutes

Provided for general informational and operational purposes as part of the Admin Support Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To bring the operating period to an orderly, auditable close — securing client materials and workstations, reconciling the period's throughput against the day's records, documenting exceptions, and leaving the operation in a known state for the next period. This protects client confidentiality, preserves the audit trail, and prevents loss of work or property.

2. Scope

Covers the closeout of a shift or business day at an Admin Support Services operation: securing physical and electronic client materials, reconciling volume/queue/ledger records, backing up and locking systems, securing the premises or field kit, and logging exceptions. Excludes the start-of-period readiness routine (see OD-001) and the person-to-person transfer of active work to an incoming operator (shift handover — see OD-002).

3. Responsibilities

- Operations Lead (or Shift Supervisor) — owns the closeout, verifies reconciliation, signs off, and authorizes securing of the premises or field kit.
- Operations Associate — performs workstation, material, and system securing; completes the checklist rows assigned.
- Records/Compliance Coordinator — confirms retention, secure storage, and disposal of client materials meet policy and any client contractual terms.

4. Required PPE & Lockout/Tagout

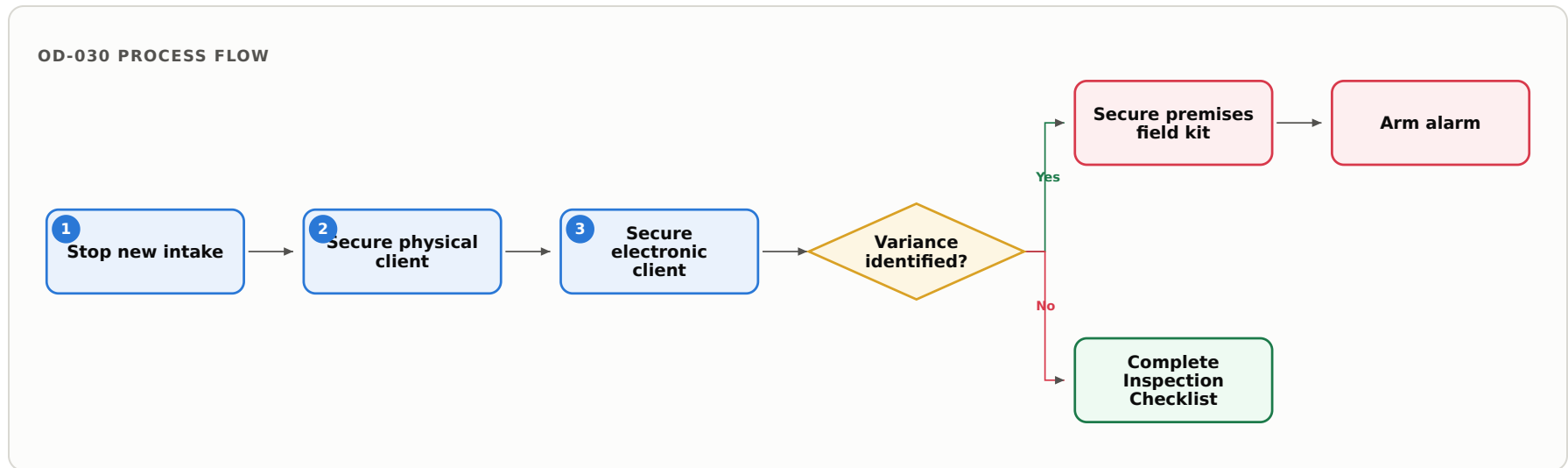
- Standard facility PPE; where the service line handles physical waste, recovered materials, or field/site work, wear the PPE specified for that line (gloves, hi-vis, and eye protection as applicable).
- Not applicable — no hazardous energy involved. Where the service line operates powered field equipment or vehicles, follow that line's shutdown/securing procedure before this closeout.

5. Regulatory References

- Internal Information Security & Records Retention Policy (governing frame — applies to every member).
- FTC Standards for Safeguarding Customer Information, 16 CFR Part 314 (Safeguards Rule) — where the operation handles nonpublic client/customer information.
- OSHA General Duty Clause, 29 U.S.C. §654(a)(1), and 29 CFR 1910.37 (exit routes) — premises securing without blocking egress.

- Client contractual data-handling terms; member-specific regimes apply only where relevant (e.g., TSR call records under 16 CFR Part 310 for contact centers; DOT/state manifest closeout for waste/septic field lines).
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

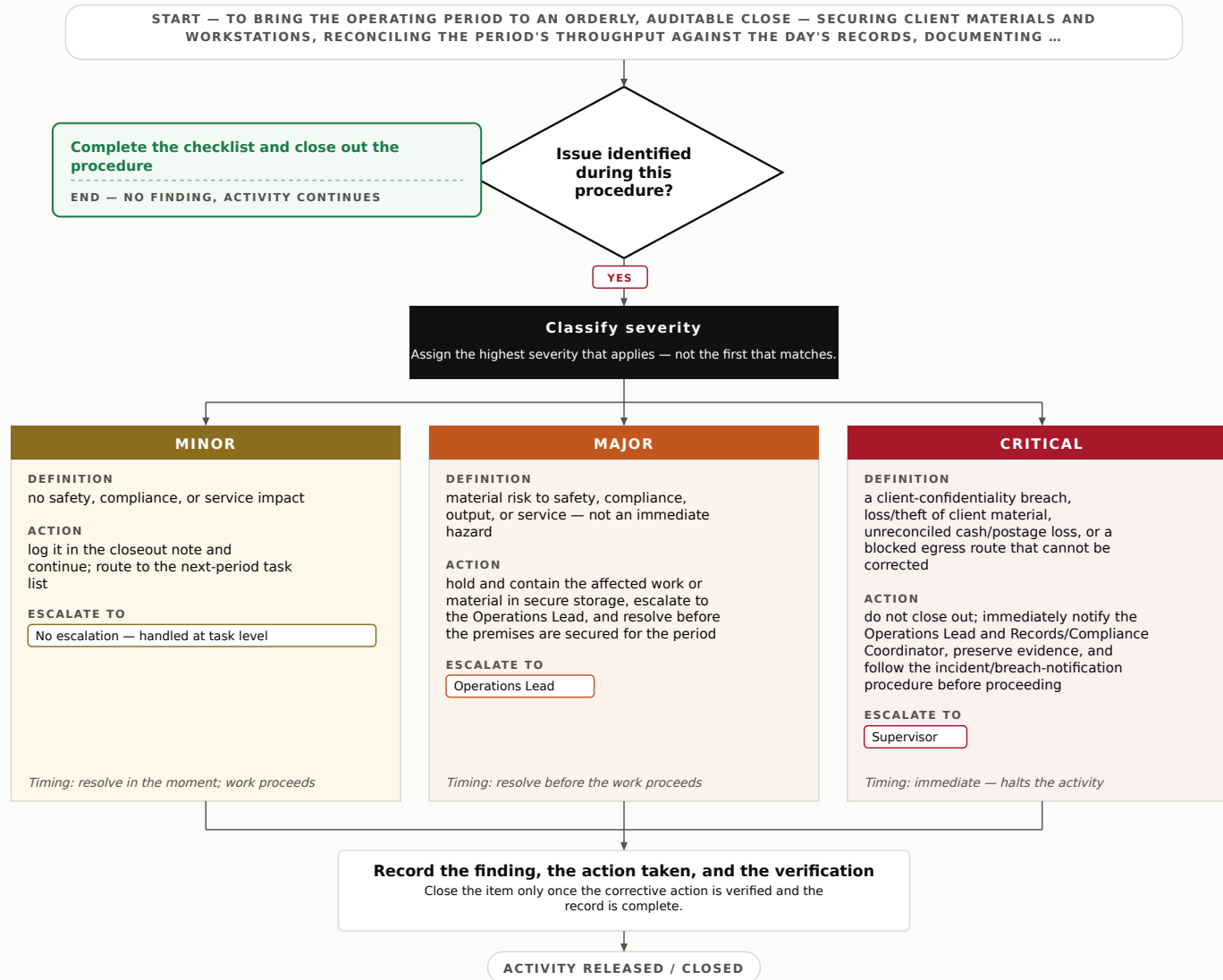
6. Process Flow



7. Step-by-Step Procedure

1. Stop new intake for the period; bring in-progress tasks to a documented stopping point and flag anything carried forward (do not perform the handover itself — see OD-002).
2. Secure physical client materials — files, mail, documents, media, recovered items — into locked storage; clear desks to a clean-desk state per policy.
3. Secure electronic client materials — close applications, save and file work products, and lock or log off all workstations and shared systems.
4. Reconcile the period's records: match completed volume (calls handled, pieces processed/mailed, documents prepared, loads/tickets, placements logged) against the day's queue, ledger, or work-order records; note any variance.
5. Reconcile any cash, postage, or client-billed transactions to receipts and the daily total; investigate discrepancies.
6. Run or confirm the scheduled system backup; verify it completed, and confirm hardware sourced from 334111 is powered down or left in its required standby state.
7. Secure the premises or field kit — lock doors, arm alarm, verify egress routes remain clear; where a field line operates, secure the vehicle and equipment.
8. Complete the Inspection Checklist and closeout log, record all exceptions, and obtain Operations Lead sign-off.

8. Decision Tree

Decision Tree — End-of-Shift / End-of-Day Operations Closeout**READING THIS TREE**■ **No finding**

Activity stands. Complete the checklist and continue.

■ **Minor**

Handled in place at task level; no escalation.

■ **Major**

Supervisory decision required before the next stage.

■ **Critical**

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- All client materials, physical and electronic, verified secured and no clean-desk violations remain.
- Period reconciliation completed with all variances explained or escalated.
- Backup confirmed complete and premises/field kit verified secured with egress clear.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Physical client materials locked; clean-desk state achieved		
All workstations/systems logged off or locked		
Period volume reconciled to queue/ledger/work-order records		
Cash/postage/billed transactions reconciled to receipts		
Scheduled backup confirmed complete		
Premises/field kit secured; alarm set; egress routes clear		
Exceptions logged and escalated as required		

11. KPIs

- Closeouts completed on time (before scheduled period end): $\geq 98\%$.
- Reconciliation variance resolved same period: 100% of Major/Critical items.
- Security exceptions (unsecured materials/systems found at open): 0 per period.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

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