

AUDIT THIS!

Participant Guide



SAFETY

Emergency Action Plan

Every district is required to have a completed LMH Emergency Action Plan (EAP) in a binder. All Team Members working at the district must review the EAP and sign the Emergency Action Plan Checklist every 12 months. New Team Members to the district must review the EAP and sign the checklist within 30 days of beginning employment at the district.

Emergency Action Plan Review Checklist

The Emergency Action Plan must be reviewed every twelve months by all employees using this checklist. New and transferred employees must sign the Emergency Action Plan Checklist within 30 days of their start date. Signed checklists must be stored in the Emergency Action Plan binder. Blank checklists may be found in the Policy Manual. Previous versions of the Emergency Action Plan and Emergency Action Plan Checklist must be maintained on site.

- _____ Fire extinguishers or other fire protection equipment are available in all appropriate areas of the district. All employees know where the equipment is located.
- _____ All employees know the designated location to meet within the community in case the office is not available.
- _____ The Community Emergency Binder is in place using the Lincoln Military Housing Emergency Action Plan Template. All employees know where the binder is located. The following items must be included in the binder:
 - _____ Emergency contact phone forms – includes 4 forms (updated and current)
 - Forms also posted in an employee-frequented area
 - Employees given copies to keep at home
 - _____ Site map color-coded for easy reference of emergency shut off valves to all utilities, fire safety and prevention elements, drainage locations, emergency routes, emergency supplies and any other relevant systems. See Emergency Site Map in the Emergency Action Plan Template for a more detailed list.
 - A copy of a color-coded site map should also be in a central location accessible by all employees
 - _____ Local/state emergency evacuation routes (primary and secondary)
 - A copy of emergency evacuation routes should also be displayed in a central location accessible by all employees.
- _____ Emergency and PPE Supplies are in place and stocked with all items outlined in the Emergency and PPE Supplies List.
 - Are there two sets of Emergency and PPE Supplies if the office and maintenance shop are in two separate locations?
 - Is there a plan in place to inventory & stock supplies quarterly, as necessary?
- _____ EAP emergency events (i.e. fire, flood) protocols were reviewed by and discussed with all district staff.

_____	Manager's Signature	_____	Print Name	_____	Date
_____	Signature	_____	Print Name	_____	Date
_____	Signature	_____	Print Name	_____	Date
_____	Signature	_____	Print Name	_____	Date

SAFETY

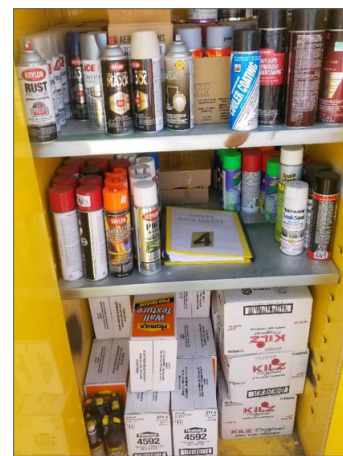
Safety Data Sheet Binder

A Safety Data Sheet binder must be in place with a current inventory list. A current SDS must be in the binder for all chemicals at the district.



Chemical Storage

All chemicals must have the original label or be legibly labeled with the chemical name and hazard warnings. Flammable chemicals must be stored in a locked, non-flammable cabinet.



Fire Extinguisher

All common areas must be equipped with a five-pound ABC class fire extinguisher. The inspection must be current.



Chemical Storage

Spray bottles and containers must be properly labeled and stored in secondary containments after being opened.



SAFETY

First Aid Kit

The first aid kit must be fully stocked.
The first aid kit must be inventoried
at least once a year and have expired
supplies replaced.



Equipment

Report any unsafe equipment,
conditions, and/or missing safety
supplies.



NOTES

SERVICE REQUESTS

Work Performed

The work performed must be documented on Service Requests in YARDI. Do not close the ticket until all work is completed. If the work will not be completed for any reason, update it to review/cancel status in YARDI.



Response Times

Response times must be documented in YARDI. Service Requests must be responded to within these required time frames:

Emergency

1 Hour (in-person)

Urgent

4 Hours (in-person)

Routine

**Before the end of the next business day
(via phone or by visiting the home)**

NOTE: Policies change from time to time. It is important to watch for policy update emails that explain changes and additions made to our policy. For a list of the policy updates made in the last year, follow the path below:

Knowledge Center>Online Policy Manuals>Forms Manual>Policy 1841 - Policy Updates

SERVICE REQUESTS: *Carve Outs*

Pending Appointment

Service Requests carved out to Pending Appointment must meet the following criteria:

- When an appointment is requested by the resident and is after the next business day
- If there is No Permission to Enter the home, it can be carved out to Appointment only after one documented attempt to the door has been made before the end of the next business day
- Minors are home alone or unsecured animals are found and the resident is contacted before the end of the next business day and the resident requests an appointment
- The appointment Date and Time must be entered in YARDI

NOTE: Three attempts to contact the resident on different days must be documented before updating the “Pending Appointment” carve out to Review/Cancel status.

Pending Vendor

Service Requests carved out to Pending Vendor must meet the following criteria:

- If a vendor is completing the work, the Service Request must be carved out to Vendor
- For work under warranty with no invoice, document the Service Request as “warranty work” in YARDI and upload documentation supporting the warranty work, such as a vendor Work Order

NOTES

SERVICE REQUESTS: *Carved Out*

Pending Parts

Service Requests carved out to Pending Parts must meet the following criteria:

- Parts necessary to complete the work are not listed in the maintenance supply catalog or available in a maintenance supply warehouse, such as Home Depot or Lowes
 - This is often used for custom made items. The District must be able to provide an invoice for the special ordered part. For all Service Requests carved out to Pending Parts the District must be able to provide an invoice for the “special order” or documentation that the part was on backorder

The screenshot displays a web application interface for managing work orders. The 'Work Order' section on the left contains the following fields:

- Status: Scheduled (selected from dropdown)
- Reason: Web
- Property: 63433
- Unit: 0399
- Location: 399 El Bosquecillo, Camarillo CA, 93010
- Bill To: m0440161
- Asset: (empty)

The 'Functions' section on the right contains the following fields:

- Vendor: (empty)
- Expense Type: (empty)
- Template: (empty)
- Priority: 09 - Make Ready
- Category: Common Area
- SubCategory: Landscape
- Resolution: (empty)
- Due Date & Time: (empty)

NOTES

WATER INTRUSION FOLLOW UP

Every service call for water intrusion inside a home is considered an emergency ticket. Once the work is completed, send the Water intrusion Follow-Up Letter to the resident.

Every water intrusion SR must have a minimum of two follow-up visits. Three follow-up visits are required in every instance where moisture has come into contact with cellulose materials.



Follow-up visits must be completed by the dates designated in YARDI.



Second and third Follow-Up visits may be completed up to three days prior to the YARDI due date.



During a follow -up visit, if the initial leak is found in need of additional repair, open a new Service Request and start the process over from the beginning.



The remaining follow-ups are updated to Review/Cancel. If any of the follow-up visits are deemed unnecessary, for example, the work was not related to water intrusion, the follow-up visits are updated to Review/Cancel status in YARDI.



Helpful Tip

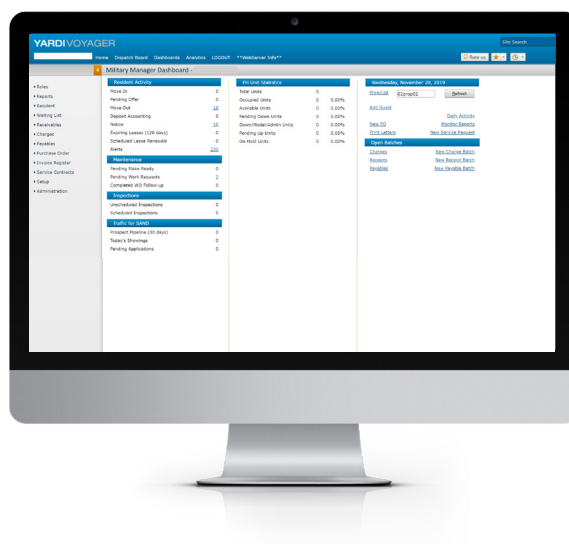
Why is it important to update unnecessary water intrusion tickets to Review/Cancel rather than completing them in YARDI? _____

MAKE READY

All work necessary to complete the Make Ready must be entered in YARDI as a Make Ready Step. At a minimum, all make readies require the Maintenance, Cleaning, and Quality Control Inspection Steps.

Complete all Make Ready Steps, then check the “Make Unit Ready” box on the Make Ready Dashboard in YARDI.

A Make Ready and Preventative Maintenance Checklist must be completed and uploaded to the QC Inspection Work Order ticket.



NOTE: If additional work needs to be done after the home has been made ready, you will need to create a 09-Make Ready priority Service Request. This priority is only used for vacant homes.

A QC must be completed again before move in if the last inspection was more than seven days ago. The new inspection must be documented to include the inspector's name, date, and time.

Do not create a new QC Make Ready Step in YARDI. Creating a new QC Make Ready Step will cause the make ready to be missed. Instead, create an 09- Make Ready Service Request.

PREVENTATIVE MAINTENANCE

Every home must be inspected and findings documented on the Make Ready and Preventative Maintenance Checklist. Annual Inspections are created using the Inspections role in YARDI and assigned to technicians through the YARDI Inspections App. This priority may only be used for Preventative Maintenance or RECP home energy inspections. Inspections completed at make ready must have an Annual MR step.

The Make Ready and Preventative Maintenance Checklist Form must be attached to the o9-QC Inspection Work Order in YARDI. This can be done by taking pictures of the completed form and attaching to the Work Order using YARDI Mobile. If a necessary repair is noticed during a PM inspection a Service Request must be created and classified as routine, urgent, or emergency, not o8-Inspections.

HVAC - AIR DISTRIBUTION	N/A	X				Comments
Check appropriate box for each item	REPAIR	SAT	REPLACE			
Inspect Air Filter Housing & Seal						
Replace Air Filter						
Inspect for Dirt Accumulation:						
Grilles						
Registers						
Diffusers						
Trunk Branch Balancing Dampers						
Clean Air Return Grille						
Inspect Duct Work for Moisture or Biological Growth						
HVAC - CONTROLS & SAFETY	N/A	X				Comments
Check appropriate box for each item	REPAIR	SAT	REPLACE			
Thermostat Tight/Level						
Heat Working						
A/C Working						
Fan Working						
Drain Pan Safety Switch Working						
HVAC - EVAPORATOR COIL	N/A	X				Comments
Check appropriate box for each item	REPAIR	SAT	REPLACE			
Inspect Cabinet, Fasteners, & Panels						
Inspect/Clean Condensate Drain						
Inspect Drain Line & Pan for Biological Growth						
Inspect Secondary Drain Line						
Inspect Secondary Drain Pan						
Inspect Overflow Protection Devices						
Inspect for Proper Drain Flow						
Inspect for Evidence of Water in Secondary Drain Pan						
Inspect/Clean Coil Fins						
Inspect Refrigerant Line						
Insulation						
HVAC - CONDENSING UNIT	N/A	X				Comments
Check appropriate box for each item	REPAIR	SAT	REPLACE			
Inspect Cabinet, Fasteners, & Panels						
Inspect for Required Clearance						
Around Cabinet						
Inspect Refrigerant Line						
Insulation						
Diffusers						
Inspect/Clean Coil Fins						
HVAC - FURNACE	N/A	X				Comments
Check appropriate box for each item	REPAIR	SAT	REPLACE			
Replace Filter						
Clean Air Return Grille						
Inspect Venting is Secured						
Remove Dust from Burners						
Clean Flame Sensor						
Check Blower Motor						
HVAC - GAS BOILER	N/A	X				Comments
Check appropriate box for each item	REPAIR	SAT	REPLACE			
Inspect Burners for Contamination						
Test Main Burner Ignition						
Test Burners						
Inspect Combustion Chamber						
Inspect Burner & Flue						
HVAC - HYDRONIC LOOP	N/A	X				Comments
Check appropriate box for each item	REPAIR	SAT	REPLACE			
Inspect Water Pump						
Inspect Condensate						
HVAC - GEOTHERMAL AIR SIDE COIL	N/A	X				Comments
Check appropriate box for each item	REPAIR	SAT	REPLACE			
Inspect Coil Fins						
HVAC - GEOTHERMAL CONDENSATE	N/A	X				Comments
Check appropriate box for each item	REPAIR	SAT	REPLACE			
Inspect for Condensate Blowing from Coil Into Cabinet						
Inspect for Condensate Blowing from Coil Into Air Distribution System						
Inspect Condensate Drain Piping for Proper Operation						
Inspect Condensate Drain Traps						
HVAC - GEOTHERMAL WATER LOOP	N/A	X				Comments
Check appropriate box for each item	REPAIR	SAT	REPLACE			
Inspect Water Pump						
WATER HEATER (tank or tankless, circle one)	N/A	X				Comments (Depress of Warranty)
Check appropriate box for each item	REPAIR	SAT	REPLACE			
Water Heater Free of Leaks						
Check Straps						
Check Flue/Hood/Vent Pipe						
Check TP Valve & Discharge Line						
Discharge Line is CPVC/Copper						
Pipe Insulation Present						
Check Drain Pan						
Check Sediment Trap						
Check Supply Lines (water & gas)						
Check Water Heater Stand						
Check Electrical Lines						
Check Water Heater for Grounding						
Water Temperature Degrees @ WH						
Check Water Temperature @ Faucet						

Revised 08/17/2021

Preventative Maintenance Quiz

1. It's time to complete the district's annual fire extinguisher inspections, can the o8-Inspections priority be used to create the Work Orders? _____
2. List some other examples of work that can be entered using o8-Inspections: _____

[illegible]

