

### **Raising a Work Request Form (User)**

A User Work Request Form (WRF) (MOD Boats Form 1021) is raised by the User to:

- Make a firm commitment of work with the Contractor, under the cover of an existing Multi-TAF and within the financial cap agreed for User-raised tasks;
- Define the scope of work to be performed;
- Define the Required Delivery Date of the work;
- Restore defective platforms to their previous material state. It is not to be used for any capability enhancements.

A WRF is to be raised for each discrete package of work. However, it is recognised that where one boat has a number of small defects which require rectification in the same timescale, then the User may wish to raise one WRF to task all these defects. The WRF is expected to be used primarily for emergent activities, with planned activities continuing to be managed by DE&S.

The procedure to raise a User WRF is as follows:

1. User representative completes and signs Part A of MOD Boats Form 1021.  
Providing a unique reference number and a Required Delivery Date is key to enabling KPI reporting.
  - a. The Required Delivery Date defaults to 3 working days from the Task Start Date, as it is expected that most user-raised tasks will be able to be resolved quickly. However, this date can be over-written as required.
  - b. An electronic signature or auditable email trail is also acceptable authorisation.
2. The OM passes the completed MOD Boats Form 1020 to the Contractor.

On receiving a User WRF, the Contractor is expected to:

1. Attend at the boat's location (in usual circumstances), and perform an initial inspection of the boat against the scope of the WRF.
2. Either agree to the Required Delivery Date, or provide a justification as to why it should be amended.
  - a. Any decision to amend the Required Delivery Date is subject to the agreement of both the User and Contractor.
  - b. The Agreed Delivery Date only is to be used for KPI Reporting purposes.
3. Raise a Boat Upkeep Record (MOD Boats Form 2010B) and complete Part A.
4. Complete the Work Package as agreed with the User, and record the work performed on MOD Boats Form 2010E Part B.
5. Seek Authority acceptance of the work completed, and record this on MOD Boats Form 2010.



### **Raising a Standalone Task**

A Task Authorisation Form (TAF) (MOD Boats Form 1011) is raised by DE&S to:

- Obtain Project, Commercial and Financial Approval for planned and emergent expenditure related to a one-off activity which does not sit within the scope or approval of a Multi-TAF;
- Define the scope of work to be performed;
- Define the Required Delivery Date of the work;
- Inform the set-up of Purchase Orders (POs) on CP&F.

A TAF is generally to be used for one-off, ad-hoc activities (e.g. a PDS task). Regular planned and unplanned maintenance activities should usually be tasked via the Multi-TAF / WRF process.

The procedure to raise a TAF is as follows:

1. DE&S Operations Manager (OM) completes Parts A, B and C of MOD Boats Form 1011. Providing a unique reference number is key to enabling KPI reporting.
2. The OM passes the form to DE&S Project, Commercial and Finance staff with appropriate delegations. They either:
  - a. Approve the form, or;
  - b. Return the form to the OM with suggested revisions.
3. Following sign-off of the form by DE&S Project, Commercial and Finance, the OM passes the authorised form to the contractor, who acknowledges receipt and confirms that they are able to complete the scope of work detailed.
4. Simultaneously, the OM raises a requisition on CP&F for the value of the Multi-TAF (due to the limitations of CP&F, the value of the requisition should be set at '1' and the quantity set to the value of the Multi-TAF). This requisition will then be approved by Commercial, who will set up the SPO to allow invoices and receipts to be raised against the TAF.

On receiving a TAF, the Contractor is expected to:

1. Either agree to the Required Delivery Date, or provide a justification as to why it should be amended.
  - a. Any decision to amend the Required Delivery Date is subject to the agreement of both the User and Contractor.
  - b. The Agreed Delivery Date only is to be used for KPI Reporting purposes.
2. Raise (in most circumstances) a Non-Upkeep Task Record (MOD Boats Form 2020) and complete Part A.
3. Complete the Work Package as agreed with DE&S, and record the work performed on MOD Boats Form 2020 Part B.
4. Seek Authority acceptance of the work completed, and record this on MOD Boats Form 2020 Part C.



### **Agreeing Changes to Tasks**

There are a number of reasons why a task may need to be amended following its initial placement, including:

- Emergent and Additional work requiring an amendment to the scope of the task and/or the Agreed Delivery Date;
- Re-prioritisation of workload, by agreement with DE&S, requiring an amendment to the Agreed Delivery Date;
- Delays outside the control of the Contractor (e.g. a delay to engine deliveries, despite the Contractor working within the contractual timescales), requiring an amendment to the Agreed Delivery Date.

Any changes to tasks should only be implemented with the agreement of both DE&S and Industry. Therefore, if the Contractor identifies that a change is required, they should contact the DE&S OM responsible for that platform as soon as possible. Similarly, any change identified by DE&S should be communicated to the Contractor as soon as possible.

In order to maintain an audit trail, all changes should be agreed in writing.

This is particularly important where there are changes to the Agreed Delivery Date. Any changes to this date should be agreed in writing, after which point the Contractor may update the KPI Spreadsheet (Schedule 08) with the new Agreed Delivery Date. However, copies of any authorisation to amend this date should be retained, to allow an audit of the sheets to be conducted at the end of each month.