



Maintenance Request Intake and Dispatch SOP

Capture a request, escalate urgent concerns and dispatch work with enough context to avoid a failed visit.

Library resource updated 2026-10-28. Assign your own approved document version and effective date.

Document control

Organization and site _____

Document ID and approved version _____ **Effective date** _____

Process owner Service coordinator **Assigned person** _____

Reviewer and approver _____ **Next review** _____

Purpose and boundary

Move a reported maintenance issue into an owned work request without losing access constraints, urgency or the next communication commitment.

Administrative intake and dispatch only, from a report to an acknowledged assignment. Excludes technical diagnosis, repair methods, legal entry notices and emergency-response instructions.

Responsibilities and preparation

- Intake operator: records the report without unsupported diagnosis.
- Coordinator: assigns priority using the approved escalation matrix.
- Assigned technician: accepts the visit scope or returns it for clarification.

Have ready Work request log; Approved emergency and escalation matrix; Authorized contact directory and scheduling system

Adapt before use

- Insert the organization's emergency route and availability.
- Define priority categories and response targets.
- Set access authorization and jurisdiction-specific entry requirements.
- Specify what personal information may be collected and retained.

Pilot the adapted method with authorized personnel. Resolve gaps and record approval before independent use. This resource is not a certification or technical authorization.

Worked example

Example only: A caller reports an intermittent ceiling drip. Intake records the caller's description and follows the approved urgency matrix. The coordinator confirms authorized access, assigns a qualified technician and promises an update at the agreed time. The request remains open after dispatch.

METHOD / FIRST ACTIONS

Procedure steps 1 to 4

01 Open one request record

Record site reference, reported symptom, contact channel and received time. Search for an existing open request for the same issue before creating another assignment.

Acceptance check: One reference identifies the active issue or links duplicates.

Record: Request ID, reported description and existing reference.

02 Apply the urgency screen

Use the organization's approved escalation matrix. If the report suggests immediate danger, direct the reporter through the local emergency route and notify the designated contact; do not troubleshoot remotely.

Acceptance check: Urgent concerns are escalated through the approved route.

Record: Reported concern, escalation recipient and time.

03 Clarify scope without diagnosing

Ask what was observed, when it started and what areas are affected. Label the reporter's words separately from confirmed findings. Request photos only if safe and permitted.

Acceptance check: The request distinguishes reported symptoms from confirmed facts.

Record: Symptom, affected area and permitted attachment reference.

04 Verify access constraints

Check an authorized site contact, availability and the applicable entry process. Store credentials only in the approved secure system, never in a reusable SOP or public photo.

Acceptance check: Dispatch has an authorized access plan.

Record: Contact reference, access window and process reference.



Complete the procedure

05 Assign owner and visit window

Choose a technician or approved contractor within their authorized scope. Include symptoms, priority, access constraints and any relevant record of previous visits.

Acceptance check: Assignee has enough information to accept or reject the scope.

Record: Assignee, priority, visit window and scope.

06 Obtain dispatch acknowledgment

Ask the assignee to accept the request. If there is no acknowledgment within the internal target, use the backup dispatch route rather than treating a sent message as acceptance.

Acceptance check: A named assignee has accepted responsibility.

Record: Acknowledgment time or escalation trail.

07 Confirm the next update

Tell the requester the visit window or the next update time. Keep the issue open until the separate completion process has verified the outcome.

Acceptance check: Requester has an accurate next step and the job is not closed early.

Record: Message time, promised update and current status.

Exceptions and escalation

Duplicate reports arrive

Link them to the active request while preserving each relevant contact update.

No authorized access can be arranged

Keep the job blocked, assign an access owner and communicate a new update time.

The requested work exceeds the assignee's authorization

Return it to the coordinator for a qualified assignment; do not broaden the SOP into a repair instruction.



Working record and review

Complete this record for an actual use. Keep supporting evidence in your approved system; exclude passwords, access codes and unnecessary personal details.

RECORD FIELD	ENTRY
Job or session reference	
Date and location	
Outcome and limitations	
Open action and next owner	
Target date and recheck result	
Prepared and reviewed by	

Final checks

- Priority comes from the approved matrix, not a guessed diagnosis.
- No assigned job lacks acknowledgment or an escalation owner.
- Dispatch status is separate from technical completion.

Show the approved method

- Record a dummy request from intake through acknowledgment.
- Explain which fields are reported facts and which are confirmed.
- Use fictional site and contact details; hide credentials and personal data.

Record with permission, use dummy records and remove private details. Review any generated draft against the demonstration before team use. Check current access and video limits at vid2sop.com.

Template source: <https://vid2sop.com/sop-templates/maintenance-request-intake-sop/>

Background references provide context, not endorsement: <https://www.getmaintainx.com/work-order-templates>

Use: adapt for your organization's internal operations, including paid service delivery. Do not resell unmodified library files as a competing template product. Brand and document layout refreshed; procedure text unchanged.