PROCESSING SHOP REPORTS, SPECIAL INSPECTION REPORTS WITHOUT NC NUMBERS AND AUDITS
BSB 0104-09
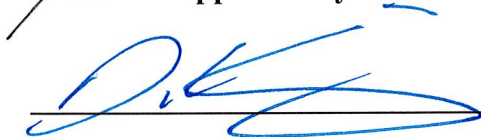
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BOILER SAFETY BUREAU

STANDARD OPERATING PROCEDURE MANUAL

Division/Bureau: Standards and Inspections/Boiler
Document Name: Boiler Policy 0104-09
Adoption date: 06/16/2008
Revision date: *01/23/2023*
Revision: *5*
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1.0   PURPOSE

To provide instruction to Boiler Safety Bureau (BSB or Bureau) support staff on the proper method for processing the invoicing for shop reports, special inspection reports without NC numbers and audits.

2.0   SCOPE

This procedure is applicable to processing electronic reports submitted by state inspectors for shop reports, special inspection reports without NC numbers and audits. These types of reports are invoiced in *the BSB inspection database*, using the ad hoc invoice option.

Special inspection reports which do reference an object with an NC number are covered under BSB 0104-10.

3.0   PERSONNEL RESPONSIBILITIES

3.1   The Bureau Chief – BSB has the overall responsibility for implementation of this procedure.

3.2   The Boiler Safety Bureau Assistant Bureau Chief has day-to-day responsibility for ensuring Bureau support staff work in accordance with this procedure.

3.3   Bureau support staff are responsible for cognizance, understanding and strict adherence to this procedure when processing shop reports, special inspection reports without NC numbers and audits.

4.0   HEALTH and SAFETY ISSUES

Not applicable.

5.0   PROCDEURE

Special requirements:

- Ad hoc invoices must be entered into *the BSB inspection database* as soon as an electronic report is received. Electronic reports must not be allowed to accumulate and entered in batches.

Enter these reports using the following procedure:

5.1   Log on to *the BSB inspection database*:

5.1.1   Go to *BSB inspection database via internet browser.*

5.1.2   For **User ID** enter the NCDOL email account of the user.

5.1.3   For **Password** enter the password of the user.

5.2   On the home page, choose **Accounting > Add Invoice.**

5.3   On the **Add/Edit Invoice** page, click the **Edit** hyperlink after **Billed To.**

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5.4   On the **Get Bill To** screen, always set the **Bill To Type** to **Contact**.

5.5   Query for the correct contact on the **Get Bill To** screen using appropriate demographic data for the location in question.

5.6   From the resulting list, **Choose** the appropriate contact.

5.7   If the appropriate contact cannot be found, add a contact:

    5.7.1   Find the appropriate location using **BPV > Work Planning**.

    5.7.2   On the **View/Edit Location Details** page, choose **Add a Contact** from the **What do you want to do (WDYWTD)** menu on the left side of the screen.

5.8   Fill in the invoice data (after returning to the **Add/Edit Invoice** page using Steps 5.2 through 5.6, if necessary, after adding a new contact):

    5.8.1   Type in the purchase order (PO) number:

        1.   For shop inspections, the format for a PO number is:
        AD HOC—SHOP—10

            1.   The numeral at the end is the district number of the submitting inspector.

            2.   Capitalize the entry and use hyphens between words, as in the example.

        2.   For special inspections that do not reference an object with an NC number, the format for the PO number is:
        AD HOC—SPECIAL INSPECTION—KINNEY

            1.   Enter the last name of the submitter (which is almost always a supervisor for specials and for audits) instead of the district number.

            2.   Use the same conventions as for special inspections in Section 5.8.1.1.2, above.

        3.   For audits, the format for a PO number is:
        AD HOC—AUDIT—DAVIS

            1.   Use the same conventions as for special inspections in Section 5.8.1.1.2, above.

    5.8.2   Add additional information on the **Memo** line of the invoice as required by the customer.

    5.8.3   Set the date in the **Date** field, preferably by using the calendar tool.

    5.8.4   Set the **Fee** using the pulldown.

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5.8.5 Enter the appropriate comment under **Description**.

    1.   Enter any additional fees for per diem expenses in this column with explanations.

5.8.6 Leave **Qty** as 1.

5.8.7 Set the appropriate **Amount** to be the sum of the **Fee** column and any additional per diem fees entered in the **Description** column.

5.8.8 Note: Each line item is dedicated to a single day. When complete, choose **Save and Continue** under **WDYWTD**.

5.9 At this point, the system will supply a unique invoice number following the **Invoice Number** label.

5.10 On the original hardcopy report submitted by the inspector:

5.10.1 Write the system-supplied invoice number.

5.10.2 Enter the date the invoice was entered into JO.

5.11 At the bottom of the **Add/Edit Invoice** screen, click the **Submit** button.

5.12 Place a hard copy of the electronic report in a suspense file under the appropriate month.

6.0 CUSTOMER SERVICE REQUIREMENTS

The purpose of following this procedure is to provide the customer, be it the public, employees of the Bureau, or other state agencies, with the most efficient service, information, training, and assistance possible.

7.0   *DATA and RECORD MANAGEMENT*

Records shall be maintained in accordance with the Functional Schedule for North Carolina State Agencies as adopted by State Archives, a Division of the North Carolina Department of Natural and Cultural Resources.

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