

Write the Annual Report

SOP# 108

ELEVATOR & AMUSEMENT DEVICE BUREAU
North Carolina Department of Labor



STANDARD OPERATING PROCEDURE MANUAL

1. PURPOSE and SCOPE

1.1. Purpose

This SOP establishes the procedure that the Back Office Manager uses to develop and distribute the Annual Report. This report is included in the NCDOL Annual Report and is used to provide information about the work of the bureau to the general public. This procedure has the following goal(s):

- Contribute to the NCDOL Annual Report;
- Communication with the public.

1.2. Scope

This procedure includes all of the work required to create and distribute the Annual Report.

1.3. Regulations

The following statutes, rules and/or codes must be followed while performing this SOP:

1.3.1. N/A

2. PERSONNEL RESPONSIBILITIES

The following is a list of each role who participates in the procedure and the overall responsibilities of each role.

Role	Responsibilities
Office Manager	<ul style="list-style-type: none">• Develop the report;• Distribute the report to Bureau Management.
Bureau Management	<ul style="list-style-type: none">• Review and approve the report.

3. HEALTH AND SAFETY ISSUES

The following health and safety issues may arise if this procedure is not followed correctly and in a timely manner. As available, related Health & Safety regulations and/or procedures are provided for each issue.

Potential Issue	Health & Safety Regulation / Procedure
N/A	

4. PROCEDURE

4.1. Trigger

This procedure is triggered on July 1 of each year.

4.2. Primary Procedure

- 4.2.1. Office Manager compiles all yearly data from months in Fiscal Year Report (found in the Performance Report Workbook) to create new charts.
- 4.2.2. Office Manager uses the Annual Report from the previous year (found in folder: My Documents\Annual Reports) to begin a new draft document.
 - 4.2.2.1. Note: Annual report includes both one and three year perspectives
 - 4.2.2.2. Office Manager removes data from the oldest year and enters data from the most recent year
- 4.2.3. Office Manager creates a separate Excel spreadsheet that contains the data and charts that will be “linked” to the annual report document.
- 4.2.4. Office Manager collects Amusement and Tramway yearly data (from office assistant responsible).
- 4.2.5. Office Manager collects Elevator yearly data (from office assistant responsible).
- 4.2.6. Office Manager collects accident data from office assistant responsible.
- 4.2.7. Office Manager compiles all information, charts, data percentages from year to year, etc. into Annual Report draft (Word Doc)
- 4.2.8. Office Manager distributes the draft Annual Report to Bureau Management and the Division Deputy Commissioner for review and comment
- 4.2.9. Office Manager updates the Annual Report per comments from Bureau Management and the Division Deputy Commissioner
- 4.2.10. Office Manager distributes the final Annual Report to Bureau Management, the Division Deputy Commissioner and NCDOL Communication Division.
 - 4.2.10.1. Note: The Annual Report for EADB is included in the NCDOL Annual Report
- 4.2.11. Office Manager sends the Annual Report to IT for post on the bureau's intranet page
- 4.2.12. NCDOL Communication Division includes the EADB report in the larger NCDOL report
- 4.2.13. End of procedure

5. CUSTOMER SERVICE REQUIREMENTS

The following table lists the customer service requirements that must be satisfied for each Customer of the procedure.

Customer	Requirements
Bureau Management Deputy Commissioner	Annual Report data are accurate and up to date; Annual Report has an appearance suitable for public consumption.
NCDOL Communication Division	Annual Report has an appearance suitable for public consumption.

6. DATA AND RECORD MANAGEMENT

6.1. Reports run as part of this procedure

6.1.1. N/A

6.2. Storage locations of saved materials

6.2.1. Raw content for the Annual Report file is kept on the Office Manager computer in:

My Documents\Annual Reports

6.2.2. The finished Annual Report is stored on the bureau intranet and also on the Office Manager computer in:

My Documents\Annual Reports

7. Glossary

A glossary of terms used in this SOP is available on the SOP website. It contains acronyms, abbreviations and special terms used in this document.