



**Method Statement**  
Helpdesk Services

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## **1 Objectives**

Project Co shall provide a comprehensive Helpdesk Service to facilitate the smooth running of the Board's operations on 24 hours a day 365(6) days per year basis. The Helpdesk Service shall be fully integrated with existing Board Policies and act as a communication hub for all facilities management matters. The Helpdesk Service shall:

- be effective, flexible and efficient in coping with varying demands;
- provide a high level of customer care to all Helpdesk Users;
- marshal resources to the maximum benefit to the Board;
- co-ordinate emergency responses in a proficient and professional manner; and
- provide a recording and reporting service for all facilities management requests.

The key customers for the Helpdesk service are patients, staff, authorised visitors, service providers, emergency services and approved sub-contractors employed by the Board.

It is agreed between the Parties that the Method Statements shall not apply during the Transition Periods.

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## 2 Management Supervision and Organisation Structure

The helpdesk service is co-located with the switchboard and security services and located near the staff entrance. The Helpdesk service shall provide cover by competent and trained staff during 24/7 365 days a year. The helpdesk will be covered on a shift basis and over a static shift pattern. During the night period the switchboard / helpdesk operator(s) will cover both functions. Switchboard staff will also be trained in Helpdesk duties.

Reporting to the Team leader (Front of House), Helpdesk Operatives will work a shift system covering each 24 hour period. Daily management responsibility for the service will rest with the Front of House Manager.

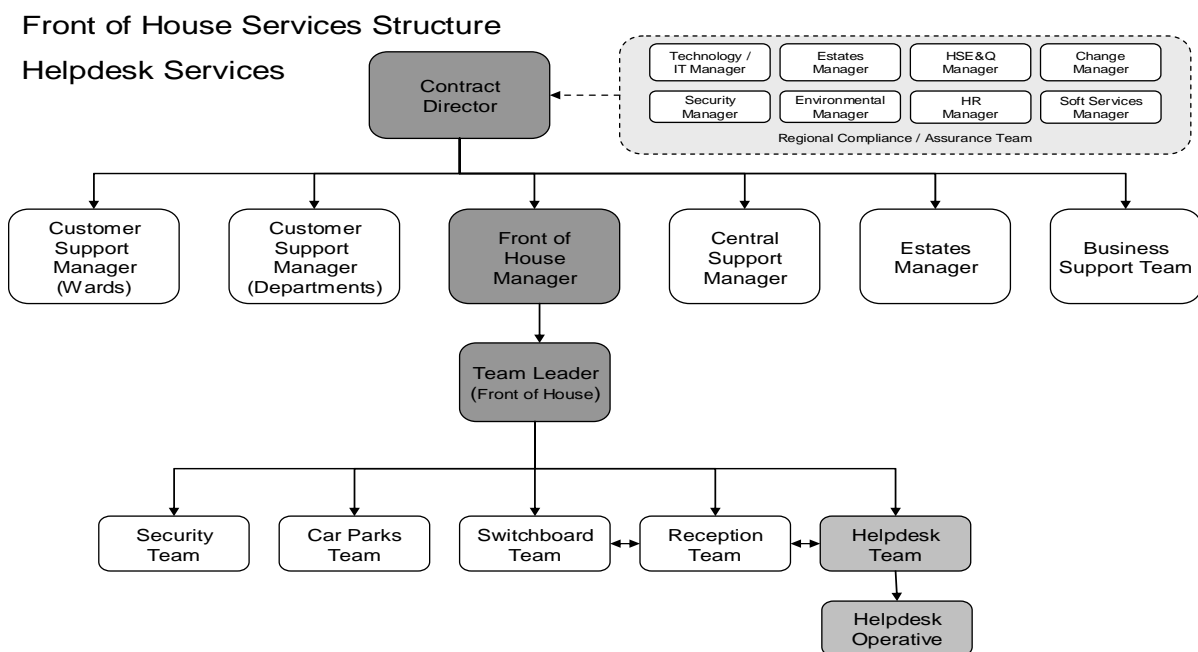
Daily team briefings shall take place so that all Staff are aware of any previous incidents, issues or alerts and a log book or similar system shall be used to ensure effective communication between shifts.

The Helpdesk service can be accessed via the intranet, which will be promoted as the most efficient method of producing a service request. Users can also telephone, email and fax requests to the helpdesk.

Facility Management requests are received, recorded and issued to each Team Leader by Helpdesk Staff. The relevant Services have responsibility for issuing these tasks and providing, response, rectification times and any other data necessary to demonstrate performance back to the Helpdesk. This data is providing electronically and seamlessly into the Computer Aided Facilities Management System (CAFM).

All voice calls received into the Helpdesk will be recorded for training purposes.

Helpdesk Services Organisational Chart – Figure A



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### **3 Scope**

The Helpdesk Service shall be provided only for the area within the Site boundary as designated by the Red Line Drawing in Attachment D to the Project Agreement.

The Helpdesk Service provides the day to day notification interface between the Board, Project Co and other Service Providers in relation to the following matters but not limited to:

- all queries and requests relating to the Services;
- the notification of faults and complaints from help desk users;
- requests for temporary changes to the delivery and scope of services or other Service Provider's service;
- all health and safety queries
- alarms and security systems including but not limited to:
  - fire;
  - boiler alarms;
  - medical gas alarms;
  - Site and intruder alarms;
  - refrigeration equipment alarms; and
  - BMS alarms;
- notification of emergencies including co-ordination and logging of FM activities and staff during a major incident or infrastructure failure;
- the issue of instructions and notices by the Board and the other Service Providers in relation to this Agreement;
- reporting of ad hoc requests;
- request for information relating to the operation of the Helpdesk Service; and
- update of progress regarding any fault notified to the Helpdesk

Project Co helpdesk service shall comprise a manned facility receiving, logging, reporting and responding appropriately to direct verbal, telephone, letter, facsimile, e-mail and other legal communications and liaising with all users on the progress of work.

It is recognised that the Helpdesk Service may co-ordinate response through secondary specific Service personnel. However at all times the central Helpdesk Service shall be fully responsible for managing and co-ordinating the responses and shall be the single point of contact for the Board.

Helpdesk service to act as a single point of contact for all facilities management services requests and equipment repairs. This shall include forwarding calls onto relevant Board Departments (i.e. Medical Physics or third party equipment maintenance company procured by the Board) where applicable.

The Board IT department are responsible for capturing and reporting the Board IT fault reporting.

Helpdesk is responsible for logging and prioritising service requests into the CAFM system, providing the users with a unique task reference number and notifying the agreed services. The helpdesk is not responsible for the allocation, response and completion of FM service tasks. This is the responsibility of the relevant FM service teams. The Helpdesk System (a module of CAFM system) processes and holds the information relating to a service request. This information is

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accessed by the Services and working from a service specific allocation of requests the services will confirm the priority of the request and deliver the Service accordingly

On phoning the Helpdesk the service user shall be greeted by an operator who will give the user the choice of logging a new helpdesk task or receiving information relating to a 'live' task'. Should the service user select the receiving information relating to a 'live' task' the call will be routed to the services. The Services shall give the users progress on their 'live' tasks. The Helpdesk shall collate all the information within the CAFM and produce reports to demonstrate that the Response, Rectify and all other aspects required for reporting are captured and available for examination by the Board Representative.

Wireless Technology shall be used to track the geographical location of the PDA/Equivalent. This shall be capable of 2-way data and voice communication. The geographical location of the PDA/Equivalent shall be used as a means of matching the nearest Project Co staff to service tasks, with the aim of improving response times.

The Helpdesk System shall identify and list the tasks by service and time criticality.

At the main entrance there shall be a helpdesk kiosk which shall enable members of the public to contact the Helpdesk to report faults, cleaning concerns or request portering assistance.

The latest version of the CAFM system incorporates a user friendly front end which allows customers to interface with the Helpdesk through the intranet. The front end screen will be user defined to specifically meet the requirements of the Site.

The reporting mechanism for verbal requests to Project Co staff through to helpdesk will differ across the services and in different areas as follows:

**Front of House Services:**

- **Reception Services**

Reception Operatives would acknowledge the verbal request from members of the public for other FM services. These shall be accepted and reported to the Helpdesk for response and rectification.

- **Security Services**

Security Operatives would acknowledge the verbal request and where necessary and practicable carry out the response and rectification and thereafter register the request with the Helpdesk. Where the task does not require an immediate response the operative will request that the task request be registered with the Helpdesk by the requestor in the normal way.

- **Car Park Services**

Car Park Operatives would acknowledge the verbal request and where necessary and practicable carry out the response and rectification and thereafter register the request with the Helpdesk. Where the task does not require an immediate response the operative will request that the task request be registered with the Helpdesk by the requestor in the normal way.

- **Switchboard Services – N/A**

- **Helpdesk Services – N/A**

**Customer Support Services:**

- **Domestic Services**

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Domestic Operatives would acknowledge the verbal request and where necessary and practicable carry out the response and rectification and thereafter register the request with the Helpdesk. Where the task does not require an immediate response or the task falls out with their area of responsibility the operative shall request that the task request be registered with the Helpdesk by the requestor in the normal way.

- **Housekeeping Services**

Housekeeping Operatives would acknowledge the verbal request and where necessary and practicable carry out the response and rectification and thereafter register the request with the Helpdesk. Where the task does not require an immediate response or the task falls out with their area of responsibility the operative shall request that the task request be registered with the Helpdesk by the requestor in the normal way.

**Central Support Services:**

- **Portering Services**

Portering Operatives would acknowledge the verbal request and call the Helpdesk on their PDA/Equivalent before undertaking the request. The request shall be logged into the Helpdesk and the Porter shall be advised whether to undertake the task or not. Where the Porter is advised to undertake the task the Porter shall be allocated against the task and begin the task immediately. Where the task does not require an immediate response the operative will request that the task request be registered with the Helpdesk by the requestor in the normal way. Where the task is for an uplift of waste from the FM waste disposal hold the operative will request that the task request be registered with the Helpdesk by the requestor in the normal way.

- **Linen Services**

Linen Operatives would acknowledge the verbal request and call the Helpdesk on their PDA/Equivalent before undertaking the request. The request shall be logged into the Helpdesk and the Linen shall be advised whether to undertake the task or not. Where the Linen Operative is advised to undertake the task the Linen Operative shall be allocated against the task and begin the task immediately. Where the task does not require an immediate response the operative will request that the task request be registered with the Helpdesk by the requestor in the normal way. Where the task is for an uplift of a linen container from the FM hub the operative will request that the task request be registered with the Helpdesk by the requestor in the normal way.

- **Waste Management Services – N/A**

- **Catering Services - N/A**

**Asset Management Services:**

- **Estates Services**

Estates Operatives would acknowledge the verbal request and where necessary and practicable carry out the response and rectification and thereafter register the request with the Helpdesk. Where the task does not require an immediate response the operative will request that the task request be registered with the Helpdesk by the requestor in the normal way.

Sub-contracted Operatives would also acknowledge a verbal request but would be required to contact Project Co Estates Management prior to carrying out any works except where there is a requirement to make safe in which case they would report the task immediately upon completion to Project Co Estates Management.

- **Grounds and Garden Services**

Estates Operatives would acknowledge the verbal request and where necessary and practicable carry out the response and rectification and thereafter register the request with the Helpdesk. Where the

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task does not require an immediate response the operative will request that the task request be registered with the Helpdesk by the requestor in the normal way.

Sub-contracted Operatives would also acknowledge a verbal request but would be required to contact Project Co Estates Management prior to carrying out any works except where there is a requirement to make safe in which case they would report the task immediately upon completion to Project Co Estates Management.

- **Pest Control Services**

This service will primarily be provided through the Estates Service by way of a Sub-contract. In the majority of occasions that these personnel would be on-site it will be in response to a specific reactive call-out or to carry out planned maintenance activities instructed by Project Co Estates Management. The likelihood of those operatives receiving a verbal request is low. However in the event they would acknowledge a verbal request but would be required to contact Project Co Estates Management prior to carrying out any works except where there is a requirement to make safe in which case they would report the task immediately upon completion to Project Co Estates Management.

Estates Operatives providing first line response to a pest control request would acknowledge the verbal request and where necessary and practicable carry out the response and rectification and thereafter register the request with the Helpdesk. Where the task does not require an immediate response the operative will request that the task request be registered with the Helpdesk by the requestor in the normal way.

- **Utility Services**

Estates Operatives would acknowledge the verbal request and where necessary and practicable carry out the response and rectification and thereafter register the request with the Helpdesk. Where the task does not require an immediate response the operative will request that the task request be registered with the Helpdesk by the requestor in the normal way.

Sub-contracted Operatives would also acknowledge a verbal request but would require to contact Project Co Estates Management prior to carrying out any works except where there is a requirement to make safe in which case they would report the task immediately upon completion to Project Co Estates Management.

## **4 Work Schedules and Procedures**

### **4.1 General**

SP01a                      Project Co shall 4-months prior to service commencement, produce and publish a user manual and a service procedure to the Board. The procedures will set out how the FM service users contact the helpdesk to request service tasks. Specifically the information that will be required in order to process a task and the response time allocated to the service task. This will then be summarised and placed into a user instruction manual, which will be available electronically for distribution through the Board's intranet.

SP01b                      Project Co shall produce prior to service commencement operating procedures that give clear instructions to the helpdesk staff on all matters relating to the operation of the helpdesk service. Included in these procedures will be emergency procedures and a manual system to operate



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in the event of an electronic failure of the CAFM system. These procedures will be kept up to date by Project Co with any agreed changes that may occur from time to time. Any changes shall be communicated to the service Users through the Board's intranet and through alert messages on the Helpdesk screen accessed by the service users.

- SP01c Project Co will provide all personnel with an introduction to the Helpdesk when they present themselves to Security to collect their ID/pass. A quick reference guide to the Helpdesk will also be made available at this stage.
- SP02 Project Co staff induction will include a section dedicated to the importance and operation of the helpdesk system. This will form part of the staff overall staff training plan as specified in General Services. This will ensure that Project Co staff have sufficient knowledge to enable them to process a service request and to ensure FM staff understand the importance of capturing of helpdesk activity, including the response, rectify time and other aspects required to complete helpdesk tasks.
- SP03 Prior to service commencement Project Co shall agree a protocol setting out service requests, event categorisation and call logging. This will be agreed between the Front of House Manager and the Board Representative and will ensure that helpdesk operators and service users have a clearly defined and consistent approach to the service.
- SP04 Project Co through their Front of House Manager shall train all Helpdesk staff of the differences in terms of clinical designation, i.e. high-risk areas and high-risk events and the impact of events dependant on type of area.
- SP05 Project Co through their Front of House Manager and other Service Managers shall provide training to Helpdesk staff. The training will ensure Helpdesk staff have a good level of knowledge pertaining to service requests. Feedback from the Service Managers shall be used to improve the level of information gleaned by the Helpdesk staff through interaction with the service users. Staff will, at all times, comply with Project Co's and the Board's Code of Conduct
- SP06 Project Co shall record all requests and events received to the Helpdesk. In order for a service request to be processed and completed information will need to be input and captured within the CAFM system as detailed in the Part 14 Helpdesk Service Specific Specification:
- SP07 Project Co shall produce activity reports each month for each of the relevant services in the agreed format. This report will include each service request and or event reported to the Helpdesk.
- SP08 At the time of a service request being generated Project Co shall inform the user of the response time and proposed course of action. This will be achieved verbally or electronically depending of method of request.
- SP09 Project Co shall through the Computer Aided Facilities Management

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(CAFM) system capture the response, remedy and completion times from each FM service task 'real-time' through an interface with the PDA/Equivalent. This information shall be held in the Helpdesk system and shown in the Monthly report as detailed in General Services.

## **4.2 Reporting**

- SP10 At the end of each month within a determined period Project Co will produce a Monthly Helpdesk Report. The report content shall be agreed between the Project Co Management and the Board Representative. The Computer Aided Facility Management System (CAFM) will be able to report on information as detailed in Part 14 Helpdesk Service Specific Specification.
- SP11 The Helpdesk System will not allow changes to any service requests, once committed to the system, unless through prior agreement with the Board Representative. The Helpdesk System will highlight any service requests which have been changed after commitment to the system, together with the identity of the user making the change and the identity of the person requesting the change. In all cases where there are agreed changes these will be highlighted within the monthly report produced by Project Co.
- SP12 Project Co shall provide access at all times to the Board Representative to the records pertaining to the Helpdesk service. This access shall be through read only access.
- SP13 At all times, 24/7 365(6) days per year, the Helpdesk service shall be available to the users of the Site. The helpdesk will be permanently manned
- SP14 During an emergency Helpdesk staff shall assist the Board as necessary with raising alarms, reporting incidents by telephone to internal and external authorities. Helpdesk staff shall also complete an incident log to capture the sequence and record of events. During a disaster/emergency response Project Co shall receive exemption as defined in clauses 8.6 and 8.7 in the Project Agreement (Excusing Cause).
- SP15 An operator shall answer all telephone calls within the agreed timescales, offering the user a choice of logging a new helpdesk request or receiving information relating to a "live task". A dedicated emergency line and phone will be located within the helpdesk and staffed to ensure all calls are answered within 5-seconds in the event of a site incident. The switchboard and logger software will record the length of time any callers has to wait to be answered. The specifics around a site incident and the necessary procedures will be set out with the emergency procedures agreed between the Front of House Manager and the Board representative.
- SP16 Using the unique request reference number the Board staff will be able to access the CAFM system in order to gain a live and current status of their

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service request or event. Where unforeseen or unexpected problems occur, the Helpdesk staff or the FM service staff will notify the helpdesk user of status.

- SP17 Project Co staff working within the Helpdesk Service will receive instruction on matters relating to confidentiality by the Front of House Manager. Any breaches of confidentiality shall be investigated by the Front of House Manager and appropriate disciplinary action taken where necessary. The user shall be notified of the result of a complaint in line with the process outlined in the compliments and complaints procedure.
- SP18a Each Quarter Project Co through their Customer Support Managers shall issue customer satisfaction surveys to each ward and department. The format of the customer satisfaction surveys shall be agreed between the Front of House Manager and the Board representative. This will be achieved prior to the first Quarter of full service commencement.
- SP18b Project co shall maintain customer satisfaction at 90% or above. This will be achieved through designing a user friendly helpdesk screen which is accessible by the Board staff through the intranet, providing a responsive, helpful and user friendly service by providing Helpdesk Staff with customer care training.
- SP18c Where the service scores 89% or less from the quarterly customer service survey Project Co through their Front of House Manager shall produce and implement an action plan. The action plan shall be agreed between the Front of House Manager and the Board Representative together with the timescales for implementation.
- SP19 Project Co staff working in the Helpdesk shall receive customer care training. This training shall cover the staff attitude, manner, helpfulness and politeness. Staff will also be monitored by the Helpdesk Team Leader and receive feedback on their level of customer care skills. Where there are deficiencies detected these will be addressed through further customer care training.
- SP20 During the recruitment process Project Co staff working within the Helpdesk service shall be assessed to ensure they are able to speak the English language clearly. Project Co monitor staff use of English and address any concerns through customer care training.
- SP21 The Front of House Manager has responsibility for producing contingencies for the Helpdesk service. These plans will be produced prior to service commencement and include infrastructure failure, equipment failure, and human resource issues and take account of the Boards contingency arrangements, i.e. incident control room, press office, catering, linen and other arrangements to be agreed. The contingency plan will be held within the Helpdesk service area and be accessible to all Helpdesk staff and Project Co Managers at all times.

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**4.3 Work Schedules**

Prior to service commencement Project Co shall meet with the Board Representative to agree any scheduling of services. This information shall be consolidated and issued. The frequency and timings of all scheduling shall be based around the parameters set out in schedule 14, the Service Level Specifications.

## **5 Quality Standards**

Project Co shall ensure that the delivery of the Helpdesk Service shall meet the requirements of the Service Specific Specification and associated documents. The delivery shall be monitored and recorded in accordance with the Performance Parameters and any deviation from the required standard of service shall be rectified as soon as it becomes apparent.

These will be backed up by Project Co's Quality Systems.

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## 6 Contingency Plans

An indicative contingency plan has been provided below. Service Specific contingency plans will be developed in conjunction with the Board and will be completed 3 months prior to Service Commencement for each individual service mobilisation.

<p><b>Communication Failure – FM Staff handheld device</b></p>	<p>Helpdesk determine that FM staff are unable to communicate with the CAFM system</p>	<p>Notify Estates and Project Co IT department of failure. Ask for status periodically in order to assist with forward planning.</p> <p>Notify all FM Services of the failure and advise that the contact for distribution of FM tasks is via designated telephone lines, as assigned within the helpdesk procedures.</p> <p>Advise all FM Services that the recording of response and rectification times should be done manually by the FM staff on arrival at the ward or department and also where rectification times are required. This data shall be placed into the CAFM retrospectively.</p> <p>Inform all wards and departments of the system failure and that the automated precise status of jobs will be unavailable until resolution of the failure. Manual status can be determined by the Helpdesk telephoning the FM Service and asking for an update and relaying this detail back to the ward or department concerned.</p> <p>Notify wards, departments and FM Services when the issue has been resolved and the Helpdesk has returned to normal operational status.</p>	<p>Individual handheld devices are checked and are functioning.</p> <p>System has UPS back up.</p> <p>Dual server to increase resilience.</p>
<p>Total CAFM System failure.</p>	<p>Helpdesk system operators evoke on discovery that the Helpdesk System is not functioning.</p>	<p>Helpdesk Operators record customer calls via the telephone, email or fax into manual system. In every case the users will be provided with a unique helpdesk number.</p> <p>Notify all FM Services of the failure and advise that the contact for distribution of FM tasks is via designated telephone lines, as assigned within the helpdesk procedures.</p> <p>Advise all FM Services that the recording of response and rectification times should be done manually (using notepads) by the FM staff on arrival at the ward or department and also where rectification times are required. This data shall be placed into the CAFM retrospectively.</p> <p>Liaise with Board and FM Heads of Department where there is an impact to service delivery or there is a safety risk.</p> <p>re-organize switchboard and helpdesk staffing ratios to cope with the increase in work flow through the telephone system.</p> <p>Notify wards, departments and FM Services when the issue has been resolved and the Helpdesk has returned to normal operational status.</p>	<p>Individual PC's are functioning.</p> <p>Data network is functioning.</p> <p>UPS System is fitted.</p> <p>Dual server installed to provide increased resilience.</p>

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Name/title of staff member authorized to invoke plan: CCTV Operator/ Materials Management Staff/ Central Support Management Team			
Criteria for returning to normal service: Confirmation from the Attending Staff that the system has now returned to normal functionality.			
Procedures for returning to normal service: Inform Board Representative and FM Heads of Department.			
Protocol References: Helpdesk action card Ref. Estates Incident Action Plan Ref. Security action card Ref. Portering action card Ref. Car Park Management action card Ref. Incident Report Record			