

**Title:** Key Control Process  
**Department:** Engineering Services (Work Control Center & Lock Shop)  
**Effective Date:** June 1, 2025

## **PURPOSE**

This SOP outlines the standardized process for submitting, processing, fulfilling, and closing key and access card requests using the MetaBIM Key Control Module.

## **RESPONSIBILITY**

### Customer

- Submit Key Requests via MetaBIM.
- Submit Chargeback.
- Get or provide approvals
- Await notification for pickup.

### Work Control Center (WCC)

- Review submitted key requests.
- Ensure chargeback and approvals are complete.
- Create a Work Order (WO).
- Forward request to Lock Shop.
- Notify the customer of key/access card availability.
- Close Key Request (KR) and process Work Order for billing.
- Coordinate with Finance for WO closure.

### Lock Shop

- Review and verify submitted Key Requests.
- Fulfill access request
- Add Key Systems in KR
- Deliver completed requests to WCC.

## **SCOPE**

This procedure applies to all personnel involved in the key/access card request process, including Customers, Physical Plant Management (PPM), Work Control Center (WCC), and the Lock Shop.

## **PROCEDURES**

### **1. Submission and Initial Processing (Customer & WCC)**

- 1.1. **Customer** submits the Key Request via MetaBIM.
- 1.2. Upon submission in MetaBIM, requests are automatically placed in the **Key Request Module with the “Approvals Pending” status** for intake.

### 1.3. **WCC Initial Review:**

The designated intake coordinator checks for:

- 1.3.1. Complete requester and key holder information
- 1.3.2. Proper departmental authorization
- 1.3.3. Valid room/building identifiers
- 1.3.4. Justification for access (especially for exterior and master keys), if noted
- 1.3.5. Chargeback number

1.4. If approvals are pending →, mark them as **Approvals Pending**.

1.5. If a chargeback is pending →, mark it as **Chargeback Pending**.

1.6. Once approvals are complete:

- 1.6.1. WCC creates a **Work Order** for the request,
- 1.6.2. Link the Work Order in the KR. The KR # is displayed in the Work Order under Work Order Outline.
- 1.6.3. KR status is changed to **Lock Shop Processing**.
- 1.6.4. Multiple KR's can be associated with a single chargeback, and WO—ensure numbers match. Enter KR #s in the description of WO if there is more than one per WO.

## 2. **Lock Shop Fulfillment**

2.1. **Lock Shop** logs into MetaBIM and locates the KR as noted in the Work Order or under the **Lock Shop Processing** phase in the KR module.

2.2. Review:

- 2.2.1. PERSONA for access.
- 2.2.2. Omni for access.
- 2.2.3. Existing access details in MetaBIM.

2.3. Complete request:

- 2.3.1. Update approval/access as needed.
- 2.3.2. Fulfill request
- 2.3.3. Add Keys Systems > click **Add** next to **Key Solutions** and search
  - 2.3.3.1. Update the Sourcing
  - 2.3.3.2. Copy / Card
  - 2.3.3.3. Start Date
- 2.3.4. Change KR status to **En Route to WCC**.
- 2.3.5. Change WO status to **Shop Complete** or **Shop Verified**.
- 2.3.6. For non-physical pickups, mark KR as **Completed**.

## 3. **Key/Card Pickup and Request Closure (WCC)**

3.1. Upon receiving keys/cards from the Lock Shop:

- 3.1.1. Change KR status from **En Route** to **Issue Keys > Ready for Pickup**.

3.2. The system notifies the **Customer** for pickup.

3.2.1. When the customer arrives:

- 3.2.1.1. Verify the customer is on the contact list of KR.
  - 3.2.1.1.1. Photo ID is required.
  - 3.2.1.1.2. Individuals who can pick up keys are the key holder, the pickup, the requester, and the approver. They must be added to the contact list ahead of time.

- 3.2.1.2. Change KR status to **Issue Keys > Capture Signature**.
- 3.2.1.3. Have the customer sign via tablet/iPad using **Express Key Pickup**
  - 3.2.1.3.1. The customer may search using the four options:
    - 3.2.1.3.1.1. Enter Name
    - 3.2.1.3.1.2. Employee ID
    - 3.2.1.3.1.3. Email Address
    - 3.2.1.3.1.4. Key Request Number
  - 3.2.1.3.2. When signing, the individual selects the Signer and then proceeds to capture a signature. See Appendix B.
- 3.2.2. After signature:
  - 3.2.2.1. Mark KR as **Complete**.
  - 3.2.2.2. Process the WO for billing.
  - 3.2.2.3. Finance will close the WO.

**NOTES**

- All key/card requests must go through the **MetaBIM Key Control Module**.
- Paper forms (250/251/KLS) are no longer accepted.
- Communication between **WCC** and **Lock Shop** is essential for real-time updates and status changes.

**REFERENCES**

PPM SOP 18-2006 Lock Key Access Control  
PPM-SOP-25-2017 Billable Work Orders Chargebacks  
PPM-SOP-25-2013 General MetaBIM  
CSU Information Security Policy and Standards: [Electronic and Digital Signatures](#)

**APPROVED**



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Date

## APPENDIX

- A. General Key Request Workflow



