
Sliding Door Roller Adjustment - Field Operations Standard Operating Procedure

1.0 Objective & Scope

The objective of this procedure is to ensure that sliding door roller adjustments are performed safely, efficiently, and to the manufacturer's specifications, restoring smooth door operation and preventing damage to the door or track. This SOP applies to all field technicians performing sliding door roller adjustments on residential and light commercial installations. The Lead Installer is responsible for executing the adjustment and obtaining customer sign-off.

Scope includes pre-adjustment inspection, roller adjustment, post-adjustment testing, and documentation. This procedure does not cover full door replacement or track replacement.

2.0 Required Equipment & Tools

- Phillips #2 and flathead screwdrivers
- Allen key set (metric and imperial)
- Adjustable wrench (6-inch or 8-inch)
- Torx bit set (T15, T20, T25)
- Silicone spray lubricant (non-staining)
- Clean lint-free cloth
- Flashlight or headlamp
- Mobile tablet with SiteQueue application installed
- Digital camera or tablet camera for documentation
- Personal protective equipment (PPE): safety glasses, cut-resistant gloves, steel-toed boots

3.0 Site Safety & Hazard Assessment

- Wear safety glasses at all times to protect against debris or spring tension release.
- Use cut-resistant gloves when handling metal rollers or adjusting hardware.
- Ensure the work area is clear of tripping hazards (tools, cords, debris).
- Verify the door is stable and will not fall off the track during adjustment. If the door is loose or damaged, secure it with temporary blocking.
- Be aware of pinch points between the door and frame, and between the door and track.
- If working at height (e.g., second-story sliding door), use a stable ladder or platform and follow fall protection protocols.
- Conduct a 360-degree site walk-around to identify hazards such as uneven flooring, wet surfaces, or obstacles.

4.0 Step-by-Step Execution Procedure

1. Introduce yourself to the customer or site contact, explain the scope of work, and confirm access to the door area.

2. Inspect the sliding door and track for visible damage, debris, or obstructions. Note any pre-existing conditions (scratches, dents, misalignment) and document with photos in SiteQueue.
3. Lay down floor protection (e.g., Ram Board or drop cloth) from the entryway to the work area to prevent damage to flooring.
4. Remove the sliding door from the track by lifting it upward and tilting the bottom outward. Place the door on a padded surface (e.g., moving blanket) to avoid scratching.
5. Inspect the rollers for wear, damage, or debris. Clean the rollers and track with a lint-free cloth. Apply silicone spray lubricant to the track and roller bearings as needed.
6. Using the appropriate screwdriver or Allen key, adjust the roller height adjustment screws (typically located on the bottom edge of the door). Turn clockwise to raise the door, counterclockwise to lower it. Adjust both rollers evenly to ensure level operation.
7. Reinstall the door by tilting the top into the track, then lowering the bottom rollers into the track. Ensure the door is seated properly and slides freely.
8. Test the door operation by sliding it fully open and closed multiple times. Check for smooth movement, binding, or scraping. Verify the door aligns with the frame and latches properly.
9. If the door still does not operate smoothly, repeat the adjustment process or inspect for track damage, bent rollers, or worn components that may require replacement.
10. Clean the work area, remove floor protection, and dispose of any debris. Wipe down the door and track to remove fingerprints or lubricant residue.

5.0 Verification, Sign-off & Reporting

1. Demonstrate the door operation to the customer, explaining the adjustment performed and any care instructions (e.g., periodic lubrication, avoiding excessive force).
2. Capture before and after photos of the door, track, and adjustment area using the SiteQueue app. Include a photo of the door in the open and closed position.
3. Obtain the customer's digital signature in SiteQueue confirming satisfaction with the adjustment and acknowledging completion of work.
4. Complete the service ticket in SiteQueue, including notes on the adjustment performed, any parts used, and any follow-up recommendations.
5. Upload all documentation (photos, signature, notes) to the job record and close the ticket. Notify dispatch or the office of completion.

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