WORK ORDER PROCESS

Customer Request becomes Work Order OPEN

If customer request is approved into Work Order and is an emergency, update Priority to EMERGENCY.

Add notes log to phase.

Customer notified Complete

Shop Work Survey sent at this time.

Work Order Statuses:
- Open
- On Hold
- Deferred
- Cancelled
- Closed

Phase Statuses:
- Open
- Estimate Needed (send e-mail to shop person)
- Assigned
- Contractor (contractor performing work)
- Work in Progress
- Await Materials
- Admin Hold
- Tech Hold
- Work Complete (send e-mail to contact)
- Unable to Repair (add reason to description and send e-mail to requestor)
- Await Invoice
- Warranty (tracks Clinic Building 1 warranty issues)
- Cancelled
- Closed

Priorities:
- 1-Emergency
- 2-High
- 3-Routine
- 4-Low

If WO is going to be awaiting materials for more than 72 hours or be open for more than 72 hours set status to WORK IN PROGRESS or AWAITING MATERIALS.

Estimate Process

NEEDED

RESCHEDULE
DEFERRED/ADMIN
HOLD/TECH HOLD/
UNABLE TO REPAIR/
AWAIT MATL/WORK
IN PROGRESS/
AWAITING INVOICE

Time Card/Daily Assignment/ External Charges Approved

Confirm Materials Labor is Charged to Work Order

Time Card Entry/ Update Phase Status WORK COMPLETE

Attach Asset/ Equipment to Work Order/WO Admin enters External Charge

Start Job WORK IN PROGRESS

External Charge

Confirm Release

Material Request Process

AWAIT MATL

Parts Needed?

Y

Retrieves/Reviews Work Order WORK IN PROGRESS

NO

Time Card Entry/ Rapid Time Card Entry (Multiple WO’s)

Y

Add shop person to phase.

Attach Contractor to Work Order CONTRACTOR

Deferred/ADMIN HOLD/TECH HOLD/ UNABLE TO REPAIR/ AWAIT MATL/WORK IN PROGRESS/ AWAITING INVOICE

Comments (notes log) put on Work Order and Work Order CLOSED

Deferral/ADMIN HOLD/TECH HOLD/ UNABLE TO REPAIR/ AWAIT MATL/WORK IN PROGRESS/ AWAITING INVOICE

If WO is going to be awaiting materials for more than 72 hours or be open for more than 72 hours set status to WORK IN PROGRESS or AWAITING MATERIALS.