

Message from MaryHelen...

Work Orders 101: The work order process is the heart of how we go about doing our work throughout the district, and it has direct ramifications to you, the customer. What follows is a flow chart that explains what happens from the beginning to end of the work order process; **please share this with your staff.** To further help with the explanation, please note the highlight code provided as follows: **Yellow** = New or goal area **Green** = Special tip or note
Within the next 2 weeks you will receive an e-mail with a link to our Customer Service Survey! Please take time to participate and give us valuable feedback!

A work order is created

A pipe bursts, the heat goes out, some playground equipment breaks, so a work order needs to be generated. The process starts when a W/O is generated in SchoolDude. If you are unfamiliar with SchoolDude, ask the head custodian, site administrator, or call our office (x5200). Likewise, if you are unsure whether a given issue warrants a W/O, call our office for clarification. The head custodian, principal & office manager are authorized to create work orders. **When forming a work order, it needs to be specific as to the location and nature of the problem.** This helps our crews zero in on exactly the issue that needs to be addressed. We also recommend that once a W/O has been created, then **write down the W/O number or ask your head custodian for the number for future reference.**



Work order is assigned and given a priority

Once we receive a W/O via SchoolDude, a number of things take place in our department. First, it is assigned and given a "priority". **Our goal is to do so within 24 hours of receiving a W/O.** This means that W/O #12345 is assigned to John Doe, and designated at a high, medium, or other priority as follows:

Emergency: 2-4 hour response and mitigation time.

Safety: 1-3 day response/update time.

High: 1-7 day response/update time.

Medium: 1-30 day response/update time.

Low: 1-30 day response/Update time

Scheduled: Assigned a specific date.

Please note that "response" does not necessarily mean that is when it will be complete, although it certainly may be complete in that timeframe. For example, a pipe bursts (emergency priority) and it is shut off within 2-4 hours, but then re-prioritized as a high priority so parts can be found or a time to work on it without students/staff present.

Work order management - Status

A W/O is also given a "status". **Status is different than priority. Status simply refers to the current nature of the W/O.** Most of the time a W/O starts as "new" then "work in progress" and ends as "complete". A crew member comes to the site and it is a simple "come, see, do, finish" event. However, a number of things can happen that result in the change of the status of a W/O. Those different status labels include:

- New
- Work in progress
- On hold/waiting more information
- Waiting funding or resources
- Open/extended
- Forwarded/deferred/pending
- Declined/void/duplicate
- Parts on order
- Complete



Work order management - Communication

Any time the status of a W/O is changed (i.e. completed, declined, or waiting funding) an automated e-mail is generated by SchoolDude and sent to the person who originated the W/O. This is where site-based communication becomes important! If a principal tells a custodian to put in a work order, he/she does so, and a status is updated, then that custodian needs to be sure the requester (principal) is informed.

Crew members may also add comments to the "action taken" section of a W/O on SchoolDude. The priority or status may not have changed, but they may make a note such as, "Replaced ballast, but found another problem, will return to fix this week." **Please note that such comments are not automatically sent to requesters—it must be looked up on SchoolDude.**

A pilot group of our crew members are using iPads to do W/O status updates and actions taken in the field. It is our goal to move all our crews to fully computer-based and/or mobile W/O management.

Work order is completed

As a W/O is assigned, given status and priority, a mechanic receives an e-mail prompting work on the task. The mechanic assesses the work, gathers any needed equipment/parts, and completes the work order. Once complete, the mechanic enters "complete" in SchoolDude and turns in appropriate paperwork to the office.

Work order is completed

Once the W/O is done and given the status of "complete", an e-mail is sent to the person who originated the W/O. **It is our department goal to re-status a W/O as "Complete" within 24 hours of completing the work.** Our office verifies that the W/O is complete or follows up on it if it is not, and processes any material or labor costs.