

MAINTENANCE GUIDEBOOK I - MAINTENANCE PROGRAM

CHAPTER SEVEN - WORK ORDERS

SECTION A PROGRAM

The work-order system is the heart of any maintenance operation. It serves to identify the source, nature, and priority of work, the costs of labor and materials used, the time of performance, and other pertinent information. On the basis of work orders, the maintenance staff completes the tasks and the HA controls the flow of maintenance work, the related procurement, back charges to residents, and plans for future needs. The effectiveness of the work orders as a measure of demands, needs, and costs is dependent upon how completely and accurately they are filled out and how widely the work orders are used.

All maintenance work should be assigned through the work-order system. The effectiveness of an HA's work-order system is measured under PHMAP indicators #6 and #7. To receive an "A" rating for indicator #6, HAs must correct 99% of emergency items in a fiscal year within 24 hours, and outstanding work orders at the end of the fiscal year must not exceed 4% of work orders received during that fiscal year. To receive an "A" rating for indicator #7, components #3 and #4, unit and system deficiencies noted during annual inspections must be corrected within 25 days.

SECTION B SCHEDULE

The scheduling of work orders should be based on each HA's priorities. However, in general, they are as follows:

- #1 Emergency—Life-threatening, or extreme property damage;
- #2 Urgent—Major inconvenience to resident, property damage;
- #3 Vacancy Prep—Prepare unit for occupancy;
- #4 Routine—Resident or management request;
- #5 PM—Planned and seasonal maintenance;
- #6 Special Projects—Any type of deferred maintenance.

Service response times should be established by HA policy; the following can be used as a guideline:

- #1 Emergency—Immediate;
- #2 Urgent—Same day;
- #3 Vacancy Prep—Within 48 hours;
- #4 Routine—Within 72 hours;
- #5 PM—Within 120 hours;
- #6 Special Projects—Within 30 days.

Work orders should be scheduled and issued daily (except for preventive maintenance, which should be scheduled on a monthly basis as discussed in Chapter Five), using the following considerations:

- **Priorities**—Highest priorities should be scheduled first;
- **Location**—Work orders should be grouped by development or site to minimize travel time;
- **Time Required**—Estimate time required for each work order and arrange assignments accordingly.

Residents should be notified in advance of any scheduled work affecting them.

SECTION C WORK-ORDER SYSTEM

Work orders should be issued for all HA maintenance, including, but not limited to, grounds work, custodial work, vacancy turnaround work, routine repairs, deficiencies noted during inspections, and all PM work. The work orders should be logged in, assigned to a priority category, and coded for materials usage. In general the following procedure will apply:

1. WRITE THE WORK ORDER

The order is made on a three-part work-order form. (See sample in Appendix E.) One part is for maintenance records, one is to be given to the resident, and the third is for the unit files. Work orders should be logged on the Work Order Tracking Form. See Section D for the information which should be included in that form.

2. SCHEDULE THE WORK ORDER

Work orders should be scheduled on the basis of priorities (ranked from #1—Emergency to #6—Special Projects).

3. ASSIGN THE WORK ORDER

Individual work orders should be assigned by the Maintenance Supervisor or Foreman. The assigned mechanic will receive two copies of each work order, in the order in which they are to be completed, unless the work does not affect the property occupied by the resident. Upon completion, one is left with the resident and the other is placed in the unit file after review by the Supervisor.

4. PERFORM THE WORK

After ensuring that he or she has the needed supplies, materials, and equipment, the mechanic completes the work, keeping records of all time and materials used.

5. COMPLETE WORK ORDER

The mechanic completes the work order by describing the work performed, materials used, and the date and time completed. He or she also determines whether a resident charge is involved, then reviews the completed work order with the resident and requests the resident's signature (which may be refused). The mechanic leaves one copy of the completed work order with the resident, even if he or she refused to sign it.

6. RETURN COMPLETED WORK ORDER

Completed work orders are returned to the issuing office, where the resident charges are verified. If they are confirmed, appropriate steps are taken to apply them against the resident's account. It is also necessary to record the materials and supplies used and to return excess items to the stockroom.

7. LOG COMPLETED WORK ORDER, AND FILE

The completed work order will be logged on the Work Order Tracking Form and will be included in the file kept on each individual unit. A copy of the work order should be placed in the resident's file when the work affects a resident's unit.

8. REVIEW OF WORK ORDERS

The work orders should be reviewed on a regular basis to determine the amount of work completed, the work yet to be done, the actual hours expended in completing work items, and the supplies and materials consumed in completing work items. Careful and consistent review of these records enables management to control the progress being made, maintain adequate inventories, ensure accountability of maintenance persons, and make well-informed decisions.

SECTION D RECORDS

There are two primary forms used for the work-order system: the Work Order Form and the Work Order Tracking Form. The Work Order Form documents the request for and the completion of maintenance work. The Work Order Tracking Form documents the amount and status of work orders, including their receipt, completion, and those which are outstanding. This information is necessary to document PHMAP performance and prepare annual plans.

The format of work orders can vary, depending on the needs of individual HAs, but all should include the following information:

- Work order number;
- Source of request (resident, maintenance, management);
- Location (development, address, unit #);
- Project number;
- Dates (origination, assignment, work performed, completion, approval);
- Work order type (emergency, urgent, vacancy prep, routine, PM, special projects);
- Work description (requested/estimated, actual);
- Actual time and materials;
- Name of staff member or contractor who performed work;
- Resident (phone number, resident damages/charges, signature);
- Date and time emergency was abated.

The format of the Work Order Tracking Form can also vary, depending on individual needs, but at a minimum, the following information should be included:

- Authority's name;
- Month, year;
- Work-order numbers;
- Type of work and priority;
- Date work orders were received;
- Completion date and time;
- Days from receipt to completion;
- Hours from receipt of work request to completion for emergency WO's.

Samples of a Work Order Form and a Work Order Tracking Form are included in Appendix E. If necessary, additional monthly summaries or activity reports could be developed. Some examples would be Monthly Activity Summary, Individual Development Summary, and Vacancy Preparation Summary. Samples of these are also included in Appendix E for review.

END OF CHAPTER SEVEN