| **Status** | **Typical Interpretation** | **Is It Open?** | **Typical Scenario** |
| --- | --- | --- | --- |
| **New Request** | New work orders are initially set to this status. Generally, they have not been assigned to someone for the work to be completed. Typically, there is not an action taken on the job yet. | Yes | First stages. We are not 100% sure who will do the job or if we will perform it. |
| **Work in Progress** | Any work order assigned or scheduled to be completed. Typically at this stage, the work Order has been reviewed and assigned to a Technician for corrective repair. | Yes | We are on the job. |
| **Complete** | A complete status signifies that all actual, physical work has been performed. Transactions such as purchases or labor may not be fully captured on the work order yet, but this will alert personnel that the work has been done. | No | **The job is done. This means the work is done but before we change the status to closed we have the paperwork side to be complete before closing.**  **EVERY work order MUST have each of the fields below are assigned when creating, processing, completing, and or closing work orders!!**   * **Appropriate Status** * **Location** * **Description**  * **Assigned to** * **Purpose Code** * **Craft** * **Labor transaction must be added before closing all work orders.** * **Purchase transaction must be added before closing all work orders.** * **Issue transaction must be added before closing all work orders.** |
| **Closed** | Both physical work *and* administrative documentation is concluded. Once all transactions and notes are added into the work order, or if corrective action has been verified, this is often when work is “closed”. Once a work order is closed, no more transactions can be added unless you reverse the status back to “Complete” in order to capture new entries for labor, materials, etc. ONLY supervisors or coordinators should close work orders after they verify that all required information has been entered on each work order by the assigned technician and clerk when helper labor transactions are needed. | No | **The job and any documentation about the job is done. All work has been completed, all required fields have been assigned, and all required transactions have been added.** |
| **Pending** | The job will be done, but not until resources are ready. PM work orders often initially have a status of “Pending”. | Yes | **It is in the hopper, but more pressing needs have to be attended to first. If you assign a work order to pending you MUST assign a target completion date to the work order before saving. If the work is not completed by the target completion date supervisors should update the target completion date for when the work will be complete. If the target completion date arrives without the work order being complete or closed the work order status will be switched back to work in progress by the director/assistant director. Use the Journal note feature to create a new note, add a reasonable date to remind you and ensure the correct email address is entered to receive the reminder.** |
| **Open Extended** | Any work order that you want to keep open for an extended amount of time. This can be used to keep track of labor hours for a general task done daily or for seasonal work (e.g., snow removal, grass cutting) | Yes | **There is no need to create work orders for every day if I am tracking labor, so keep it simple with an open job for several weeks or months. Journal Notes are helpful for any additional documentation by date. Work orders that have been open > 90 days will be assigned to this status. Supervisors should review these work orders and change the status to pending and add a target completion date.** |
| **Parts on Order** | The work order is waiting for the arrival of parts before continuing. | Yes | **We will be on the job when supplies arrive. It is handy to use the Action Taken field to let everyone know when supplies are expected. As soon as the part arrives the technician/supervisor should change the status of the work order to work in progress until the work has been completed at which point the status should be changed to complete. Use the Journal note feature to create a new note, add a reasonable date to remind you and ensure the correct email address is entered to receive the reminder.** |
| **On Hold** | Work is paused (besides waiting for parts or waiting on more information), perhaps due to coordinating resources. | Yes | **We are not ready yet, but do expect to perform the job. If you assign a work order to On Hold you MUST assign a target completion date to the work order before saving. If the work is not completed by the target completion date supervisors should update the target completion date for when the work will be complete. If the target completion date arrives without the work order being complete or closed the work order status will be switched back to work in progress by the director / assistant director. Use the Journal note feature to create a new note, add a reasonable date to remind you and ensure the correct email address is entered to receive the reminder.** |
| **Waiting More Information** | If you are waiting for more information from the requester or another person before proceeding the completion of work. | Yes | The work description was not clear or there are circumstances that need clarification. Only use this status if we are waiting for information from outside our department. For instance from campus or administration. This status should be reserved for use by coordinators and directors. Use the **Journal note** feature to create a new note, add a reasonable date to remind you and ensure the correct email address is entered to receive the reminder. |
| **Waiting Funding** | This request is waiting for monies or funding to become available before work can begin. | Yes | If we get the funds, we will do the job, but it is not certain at the moment. This status should be reserved for use by coordinators and directors. Use the **Journal note** feature to create a new note, add a reasonable date to remind you and ensure the correct email address is entered to receive the reminder. |
| **Deferred** | This status is used to show that a work request has been recognized, but is waiting to be performed at a later date. | Yes | We are identifying the need, but it must be on the backlog until a confirmation or a denial is given. This status should be reserved for use by coordinators and directors. Use the **Journal note** feature to create a new note, add a reasonable date to remind you and ensure the correct email address is entered to receive the reminder. |
| **Forwarded** | Show work orders forwarded to another department. This is often used to route work from facilities to IT (a copy can be automatically replicated to SchoolDude’s [Incident solution for technology work tracking](https://www.schooldude.com/solutions/overview/technology)). This can be done when a work request is mistakenly entered to the wrong department. | Yes | This was submitted to the wrong department and we have forwarded it to the correct one. Example: electricians did perform work on telephones years ago until IT added VOIP and they now coordinate telephone communications. We do not use this status! Leave status as Work in Progress and reassign the work order to the appropriate craft and technician so the work can be completed. |
| **Declined** | Work orders that will not be done. They may be declined by a site administrator or by a person in the maintenance department. | No | We do not have the resources or that is outside of our typical scope. Work orders that are declined are work orders that Maintenance does not perform. Declined work order should **not** have labor transactions, issue transactions, or purchase transactions. If we have any of these three transactions then the work order should be switched to the status closed not declined. When a work order is declined for any reason a “new message” should be sent from the work order to the requester providing an explanation why the work order is being declined. |
| **Duplicate Request** | A previously requested work order already exists. | No | We know about it and it has been documented elsewhere already. This status should be only used when multiple work request have been submitted for the same work. If Maintenance & Custodial staff and the campus submits work orders for the same work the campus work order should be left open to perform the needed work. When changing the status to duplicate request the work order number that remains open to perform the work should be entered in the action taken section of the work order that the status is changed to duplicate request. |
| **Void** | Work orders you would like to ignore and not appear in reports unless specifically requested. You cannot delete a work order, so you may want to “void” them, or overwrite the work order content with work you actually do intend to perform. | No | Ignore this, I was testing what a work order would look like. The status of the work order should only be changed to void if an employee in the Maintenance & Custodial Department submitted the work order and that same employee decides the work order is not needed. This status should be used sparingly. For work orders submitted by the campus that are not going to be addressed we should use declined and follow directions given above for declined work orders. (The reason is that when a work order submitted by the campus status is changed to Void there is no communication with the campus to tell them why we are voiding the work order.) |