



Administration and Finance

Operations Detail: Facilities Planning & Management - 08

ADMINISTRATION & FINANCE | FACILITIES PLANNING & MANAGEMENT

Work Order Review & Completion

May 2023

1.0 PURPOSE

The purpose of work order review and completion is to ensure that tasks are handled efficiently, adhere to priority levels, and meet quality standards. The review process involves assessing potential risks associated with the task and implementing appropriate safety measures or contingency plans to mitigate any negative outcomes. This operations detail is in alignment with Campus Strategic Plan Initiative 5, Objective 5.

2.0 BACKGROUND

Work order review ensures that the details of the task are accurately recorded and that all necessary information, such as specifications, materials, and other instructions, are complete and readily available to the individuals responsible for completing the tasks. Work performed is subject to quality checks and inspections to ensure that the work meets the required specifications and complies with organizational standards, prior to the work order being completed.

3.0 OVERVIEW

Prior to execution, the work order undergoes a review and verification process. This involves confirming the accuracy and completeness of the information, ensuring that all necessary details are included, and checking for any potential errors or discrepancies. This guidance may change as procedures are developed to align with operational requirements for the department.

4.0 CITATIONS

[Cal Poly Pomona Strategic Plan 2017-2025](#)

[CSU Contracts and Procurement, Section II.H.6. Service Orders](#)

[SUAM Section XII, Construction Management for Public Works Contracts, 9701.02.02](#)

[FPM Customer Service Process, Operations Detail #11-05](#)

[Customer Service Center](#)

[Submit a Work Order](#)

5.0 PROCEDURES

Verification of Completion – Trades/Technicians

Before closing a work order, the team or individual responsible for the task must verify that all the required work have been completed according to the specified scope.

Trade staff (technicians) must account for all labor, parts, material, and other supplies used to perform a task. These charges are applied to the applicable work order by the assigned technician. Additionally, once the work is completed, the assigned technician is responsible for adding a finish date to the applicable task code and updating the work order status. The status of the work order should reflect the work status (e.g., in progress, finished, completed, pending invoice). Once the work has been completed, the status should reflect “completed/closed.”

Once a Trade completes their assigned task(s), the Trade Supervisor reviews the order to ensure that a task finished date has been applied to the task, charges are properly applied, and that the status field displays a status of either finished or cancelled.

Work Order Review and Completion – Customer Service Center

The customer service team should review the work order to ensure all required criteria is met. The staff must adhere to the following guidance when reviewing work orders for accuracy:

- Verify a finish date has been added to all open tasks.
- Confirm labor, parts and/or other charges have been applied to the work order.
- Confirm that the status of the work order reflects “finished” or “cancelled”.
- Verify a comment was left under the results field by Trade Supervisor/Lead, authorizing the work order to be closed.
- Report any issues to CSC Lead and/or the Customer Support & Workflow Manager that could impact customer service, workflow, or department operations.
- Respond to work order/status inquiries within 72 hours.
- Provide a monthly aging report to all trades, that detail work orders exceeding thirty (30), sixty (60), and ninety (90) days.

Work Order Identity Tab

A customer service team member must check *all highlighted fields* under the Identity tab to ensure all required fields are completed.

Request Field

Review the “Request” field for specific information to ensure the work order identity information coincides with the requested work. Contact the requestor or consult with the Customer Service Lead if clarification is needed.

Account Number/Chart Field String (CFS)

Review the “Account Number/CFS” field to ensure that the correct account number is displayed in the field. For base services, the account number should reflect five (5) digits (7XXXX). Expenditure type account numbers should reflect six (6) digits (6XXXXX) are applied in this field for premium services. The number for expenditure type should coincide with the requesting department, appropriate project, or as directed by the requestor.

Refer to the “Request” and “UDF” fields, or “Results” tab, for pertinent information regarding the “Account Number/CFS” field. Consult with the requestor, the Trade Supervisor/Lead that performed the work, or Customer Service Lead for clarification as needed. Ensuring the use of correct accounts numbers is critical to accurate expenditure reporting, budgeting, and accounting and will help avoid chargeback disputes.

Task Code Field

Prior to a completion date being added to a work order, a team member must verify a “completion/finish date” was applied to all open task codes. The task completion/finish date represents the date when the work was performed.

Status Field

Review the “Status” field to ensure that it displays the appropriate status that best describes the actual status of the work performed (e.g., “work pending,” “pending parts,” or “pending invoice,” “completed/closed,” or “cancelled”). If the requestor confirms that the work is no longer needed, the status of the work order should reflect “cancelled.”

If there is a delay in obtaining information or additional tasks are required, the “Status” field should coincide with the next action taken and additional shops/technicians should be scheduled to the work order.

Results Tab

Adding clear closure notes to the work order is essential. This helps in maintaining a record of the customers interaction, resolution, and any follow-up actions required.

The “Results” tab is used to record technician comments, detailing the work order history. These notations are essential to help other users understand the history of the work order. All notations should be captured under the “Results” tab.

Under the Results tab, there are two comment sections; the top section displays Technician comments, whereas the bottom section is for end-users to enter General Comments. The General Comments section is visible to the public and can be used to share work related information with the customer. The customer service team must review the comments to ensure that the information provided coincides with the original request.

Cost Tab

The “Cost” tab is used to review work order cost summaries and posting details. The customer service team must ensure the cost information coincides with the requested work, technicians’ comments, materials/parts used, and the labor performed. When work is performed, labor is to be posted to the work order prior to it being closed.

Proper documentation is essential for closing out work orders. This includes recording relevant information, such as the start and end dates of a task, resources used, and details of any changes made during the process. Linked documents should be reviewed to ensure that the documents match the pertinent information listed on the work order. Verify that the CFS listed on the work order is accurate. Additionally, if a cost estimate was provided in advance, an estimate approval should be linked to the work order.

If the cost entry does not coincide with the work performed, refer to the “Results” tab to check the work order comments for any special instructions. If no comments or special instruction are available within the “Results” tab, consult the appropriate Trade Supervisor to confirm the actual cost. If any information is missing (e.g., labor entry), contact the applicable technician and request the missing information.

Work Order Completion

Once a full review has been completed and the work order has been authorized to be closed, a customer service team member will change the status of the work order to “completed/closed” and add a completion date to the “Closed Date” field. Ensuring that the work order has completion dates is a critical component to tracking the workflow. Entering a completion date does not automatically change that status of the work order. Staff must remember to “Save” the edits to conclude the completion process.

Once a work order is closed, the work order can only be reopened within the same month by the Customer Service Lead or Workflow Manager

6.0 DEFINITIONS

Web TMA Identity Tab

Default view of the work order form, which contains customer information and task records.

Account Number/Chart field String (CFS)

Requesting parties account information. For base services, the account number should reflect five (5) digits (7XXXX). Whereas premium services/expenditure account numbers should reflect six (6) digits (6XXXX).

Results Tab

Default view of technician and general comments.

Costs tab

Default view of cost entries and labor summary.

7.0 CONTACTS

This operations detail is owned, administered, interpreted, and revised as necessary by [Facilities Planning & Management](#).

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8.0 REVISION TRACKING

Revision History

Revision Date	Revised by	Summary of Revision	Section(s) Revised
04/24/23	Jeffrey Beal Sr.	Initial Draft	All
05/17/23	Natalie Schroeder	Revised/Edited for Clarity	All

Review/Approval History

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08/01/23	Vanessa Garcia	Final Draft	All
01/16/24	Erica Stolz	Final Draft	All
02/01/24	Matthew Whinery	Final Draft	-