

SOP Template: Work Order Creation and Assignment Guidelines

This SOP provides comprehensive **work order creation and assignment guidelines**, detailing the standardized process for generating, prioritizing, and assigning work orders to ensure efficient task management. It covers steps for accurate work order documentation, criteria for task prioritization, clear roles and responsibilities for assignment, communication protocols, and follow-up procedures to monitor progress and completion. The objective is to optimize workflow, maximize resource utilization, and enhance operational productivity through systematic work order management.

1. Purpose

To establish standard procedures for the generation, prioritization, documentation, assignment, and monitoring of work orders for effective and efficient task management.

2. Scope

This SOP applies to all personnel involved in originating, processing, and managing work orders within the organization.

3. Definitions

- **Work Order:** An official request to perform a task or service.
- **Requester:** The person initiating the work order.
- **Assignee:** The person or team assigned to complete the work order.
- **Priority Levels:** Categories that determine the urgency of a work order (e.g., Critical, High, Medium, Low).

4. Work Order Creation Process

1. **Initiation:**
 - Requester completes the Work Order Request Form (electronic or paper-based).
2. **Documentation:**
 - Include accurate descriptions, location, requested date, and any supporting documentation or media.
3. **Submission:**
 - Submit the completed request to the designated intake coordinator, supervisor, or via automated system.

5. Prioritization Criteria

Work orders are prioritized based on impact, urgency, and resource availability:

Priority	Description	Response Time
Critical	Impacts safety or key operations; requires immediate action.	Within 2 hours
High	Major impact but not immediately hazardous or disruptive.	Same business day
Medium	Moderate impact; standard operational tasks.	Within 2 business days
Low	Minor or routine requests with minimal impact.	Within 5 business days

6. Assignment Process

1. **Review:** Designated authority reviews the submitted work order for completeness and accuracy.
2. **Assignment:** Assign the work order to an individual or team based on skill set, workload, and schedule.
3. **Role Clarification:** Confirm all parties understand their responsibilities and deadlines.

7. Communication Protocol

- Notifying the assignee(s) of the new work order assignment via official communication channel (e.g., email, system notification).
- Providing the requester with the status of their work order upon completion of each stage.
- Escalating urgent or blocked work orders to supervisory personnel quickly.

8. Monitoring and Follow-up

1. **Status Updates:** Assigned personnel provide regular updates on progress using the tracking system.
2. **Completion Verification:** Supervisor or coordinator reviews completed work to ensure requirements are met.
3. **Closure:** Officially close the work order in the system, documenting outcomes and lessons learned (if any).

9. Roles and Responsibilities

Role	Responsibilities
Requester	Initiate work order, provide details and supporting documentation.
Intake Coordinator / Supervisor	Review, prioritize, and assign work orders. Ensure compliance with SOP.
Assignee	Execute assigned tasks, provide updates, and close out work orders as specified.

10. Revision History

Version	Date	Description of Change	Approved By
1.0	2024-06-20	Initial version	SOP Committee