WO Transfer vs. PHS Assistance

(Is your shop responsible for the WO?)

Scenario 1 – Work order promoted to the wrong Shop. (No work done by the first shop.)
The new shop is responsible for the WO.
- Change Reference Data Shop at the WO level to the correct shop
- Change Phase shop to the correct shop
- Leave WO status as OPEN
- Leave Phase status as OPEN
- New shop is responsible for the WO

Scenario 2 – Work order promoted to a Shop. Shop investigates and <u>does not</u> perform work. Shop determines the whole job needs to be performed by a specialty shop.
Responsibility for the WO is transferred to the specialty shop.
- Initial shop investigates the work and makes determination.
- Technician sets status to REQ ASSISTANCE
- Initial shop emails the specialty shop from the WO screen to document asking for approval to transfer responsibility.
- Specialty Shop emails initial shop from the WO screen to document acceptance or rejection.
- If accepted, initial shop
  - o Creates Phase 002 and assigns it to the Specialty Shop
  - o Changes the Reference Data Shop at the WO level to the Specialty Shop
  - o Changes Phase 001 status to PHS COMPLETE
  - o Specialty shop becomes Responsible for the whole WO

Scenario 3 – Work order promoted to a Shop. Shop investigates and performs work. Shop determines the job <u>needs assistance</u> from another shop.
Initial shop is responsible for the WO.
- Initial shop investigates and performs some work.
- Technician sets status to REQ ASSISTANCE
- Initial shop needs assistance from secondary shop.
- Initial shop emails the secondary shop from the WO screen to document asking for assistance.
- Secondary Shop emails Initial shop from the WO screen to document acceptance or rejection.
- If accepted, initial shop creates Phase 002 and assigns it to the Specialty Shop with updated description
- Secondary shop assigns their technicians to their phase
- When secondary shop completes their phase, they set the status to PHS COMPLETE. From the WO screen, Secondary shop emails initial shop documenting completion.
- Reference Data shop at the WO level DOES NOT change
- **Initial shop is responsible for completing the WO level status upon completion of whole WO.**