



Resident Work Order Submission and Completion Process

Purpose: To provide a standardized procedure for residents to submit and track work orders, and for the maintenance team to efficiently complete work orders while maintaining communication with the resident and Cove Advisors.

Scope: This SOP applies to all residents of Tahoe Keys Property Owners Association (TKPOA) and the maintenance team responsible for completing work orders.

Procedure:

1. Resident Notices an Issue:
 - a. When a resident notices an issue within the TKPOA's Covenants, Conditions, and Restrictions (CC&R), they must submit a work order using one of the following methods:
 - i. Email workorders@tahoekeyspoa.org
 - ii. Complete the online Work Order Form available on the TKPOA website
 - iii. Come into the Pavilion to fill out a physical work order form for the maintenance coordinator to transcribe.
2. Maintenance Coordinator Receives Work Order:
 - a. Upon receiving a work order, the maintenance coordinator will call the resident to gather more information if needed.
 - b. The maintenance coordinator will provide educational material for future reference, including a flyer for work order instructions, a work order category reference sheet, and a one-sheet FAQ.
3. Work Order Input:
 - a. The maintenance coordinator will input the work order into the Connect system.
 - b. Connect will send an automated email to the resident, informing them that their work order is in the queue, and if it is in the coves, the Cove Advisors will be informed of the ticket as well.
4. Cove Advisor Approval (if needed):
 - a. If the work order is in a cove, approval from the Cove Advisor may be needed for categories 1 or 2 (reference the category sheet).
 - b. If approval is needed, the maintenance coordinator will reach out to the Cove Advisor for approval.
 - c. If the Cove Advisor does not approve, the maintenance coordinator will either reject or change the work order and inform the resident accordingly.

- d. If the Cove Advisor approves, the process will move to step 6.
5. Maintenance Team Inspection and Scheduling:
 - a. The maintenance team will inspect the work order and schedule an appointment to complete the work.
 - b. If the work can be completed during the first appointment, the work will be done, and a work order sheet will be given to the maintenance coordinator to update the Connect system.
 - c. If the work cannot be completed during the first appointment, the maintenance team will provide comments/feedback, and the maintenance coordinator will reach out to the resident to update them.
 - d. If scheduling is needed, the maintenance coordinator will update Connect and order materials, and the resident will be notified.
 - e. If a third-party vendor is needed, the maintenance coordinator will update Connect, contact vendors for bids, and update the schedule, and the resident will be notified.
 6. Day of Scheduling:
 - a. On the day of scheduling, the maintenance coordinator will reach out to the resident in the morning to give notification of the work order.
 - b. If any scheduling conflicts arise, the maintenance coordinator will reschedule and update Connect.
 - c. If the work order needs to be rescheduled, follow step 6 until the work is complete.
 7. Completion and Follow-Up:
 - a. When the work is completed, the maintenance team will provide a work order sheet to the office for updating within Connect, and the work order will be marked complete.
 - b. If the work order completion is not satisfactory to the resident, a new work order must be completed, and the process will be re-entered into the system as a category 3.
 - c. Follow the same SOP steps until satisfactory completion.