

## Handout #4 Planning check list

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### Work order planning checklist - Part 1 - all work orders

No.	Description
1	Is the equipment number correct?
2	Is this a duplicated work order?
3	Should this be a "small job"?
4	Is the work "scopable"?
5	Are the "problem" and "action" descriptions accurate and professional?
6	Is the work location clearly identified?
7	Is the work order coding correct?
8	Is there a standard work order for this job?
9	Do the work order tasks clearly describe each step of the job?
10	Are all materials required for the work included in the work order?
11	Have the possible causes of the problem been studied and is this reflected in the work scope?
12	Is the location of each item of material clearly identified?
13	Is there a work kit, and does the work order show this?
14	Are all necessary drawings, sketches, photographs, repair instructions, etc, included in the WO package?
15	Are all applicable standards attached?
16	Are all safety issues adequately covered?
17	Are all safety materials included in the materials list?
18	Are any safety permits required?
19	Are there any code or regulatory permits or documentation required for the work?
20	Are environmental issues adequately covered?
21	Is Engineering assistance required?
22	Are all trades or skills required to complete the work included on the work order?
23	Have other planners been copied as necessary?
24	Is there any other work that may conflict with this job?
25	Are there other work orders in the backlog that should be done in conjunction with, or will be affected by this work order?
26	Has the equipment history been checked and is relevant history included in the work order package?
27	Is the feedback expected from the tradesperson who will do the work explained?
28	Should this work order be filed as a standard work order?

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### Work order planning checklist - Part 2 - some work orders

No.	Description
29	Is cleanup after completion included as a task?
30	Is a child work order required for shutdown preparation work?
31	Is a child work order required for post-shutdown work?
32	Are there instructions for the inspection, repair or disposal of components removed from the equipment?
33	If a repair-or-replace decision is required during the job, is the responsibility for this defined?
34	If components may be re-used after inspection, is the acceptable standard described?
35	Are inspection points defined?
36	Are other safety resources required?
37	Do new or removed parts required match-marking and numbering?
38	Are all supplies included in the material list?
39	Are the required tools and equipment listed on the WO?
40	Are the arrangements for obtaining special equipment specified?
41	Is the process for returning rental and other equipment specified?
42	Have arrangements been made to clean the job site before the work starts?
43	Have arrangements been made for scrap removal?
44	Have all opportunities for maximizing preparation work to minimize shutdown time been included?
45	Are the names of contact people for this job included (support trades, engineers, etc)