PURPOSE

The purpose of this training guide is to teach you how to use the Move-in Related Work Order Report.

BACKGROUND

This report will show you the repairs that our residents are reporting upon move-in. It's crucial to identify any potential repair trends and relay those back to the maintenance folks who participated in the turnover process so that these can be proactively addressed in the future.

The frequency in which you pull this report is up to you. However, at a minimum it's recommended that your review this monthly.

REPORT LOCATION

To locate the report, change your role to **Reporting.**

- From the left-side menu, select **Maintenance**>**Custom Maintenance Analytics**>**Work Orders After Move-in**
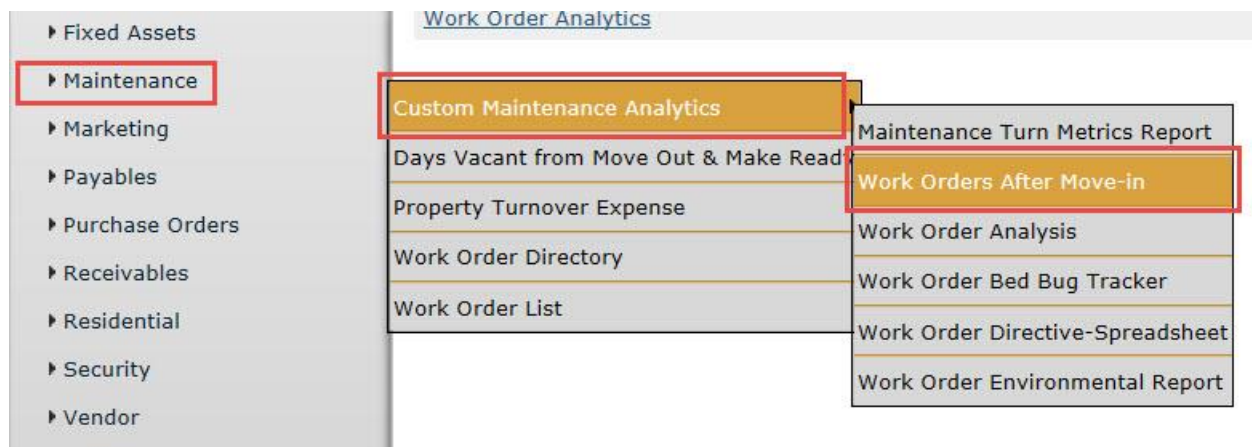
You'll be taken to the **Essex – Post Move-in Work Orders** screen, which provides you with several filter options:

1. **Property** – Verify that the property's Yardi code is correct. If you're an RPM, enter your regional code to see all of your properties.

2. **Move-in Dates** – Enter the move-in date range for the turns that you want to investigate.
   a. **Please note that the "Maximum Move-in Date" must be at least "30" days prior to today's date. For example, if today's date is Nov. 1st and you want to investigate the work orders submitted during October, the maximum Move-In Date should be September 30.**

3. **Starting # of Days after Move-in** – **This field will default to the first day of occupancy and can be left blank.** However, if you'd like to capture work orders submitted prior to a move-in, then enter the number of days before move-in as a negative number.
   a. For example, if you typically walk the units "5" days before a move-in occurs and create work orders, enter "-5" in this field to capture those work orders.

4. **Ending # of Days after Move-in** – Enter "30" to generate a report that pulls any work orders submitted within the first "30" days of occupancy.

5. **Priority/Category** – Leave these blank unless you want to investigate specific categories, such as Low (Routine Maintenance) in Priority and Carpentry in Category.

6. After completing all necessary fields on this screen, click the **Submit** button. A completed example can be found below.

WORK ORDER REPORT

Upon clicking the **Submit** button, you'll be directed to a list of work orders related to the move-in date range that was previously entered. You can read through the columns or click a WO Number to investigate.

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Below is a breakdown of the different columns you'll see within the report and what you can expect to find within each of them.

Column Name	Description
Move-in Date	The dates of move-in that was entered in the date range
WO Number	Work Order Number
WO Status	The Work Order's current status
WO Priority	The Work Order's priority
WO Category	Category
WO Sub-Category	Sub-Category
Call Date	The original creation date of the work order
Days After Move-in	The number of days after or before the move-in date in which the work order was created
Problem Description	The original description of the repair, described by the resident
Tech Notes	Completion details supplied by the technician
Cost	If cost was added to the work order, the total would appear here

TIPS TO GET THE MOST OUT OF THIS REPORT

Visibility into our move-in related repairs provides an incredible opportunity to make a meaningful impact on the first impressions we deliver to our new residents. Below are a few tips for how to use this information:

- ✓ Schedule monthly meetings to review the previous month's work orders. As you read through the descriptions, have conversations about whether we could have avoided any of them. If you see a few leaking sinks, perhaps those should be checked a little more diligently.

- ✓ You may find common work orders for mailbox keys that should have been delivered upon move-in, not through a work order after the resident moved in and realized that they didn't have one.

- ✓ There may be several work orders from residents asking us to show them how to use something in the apartment, such as the thermostat or an appliance. This type of information could be relayed at the move-in orientation. A proactive approach conveys professionalism.

- ✓ As an RPM you could run this report for a newly developed property to determine if there is a deficiency that should be brought to that builder's attention, especially if there are still phases in production.