

**PURPOSE**

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

**BACKGROUND**

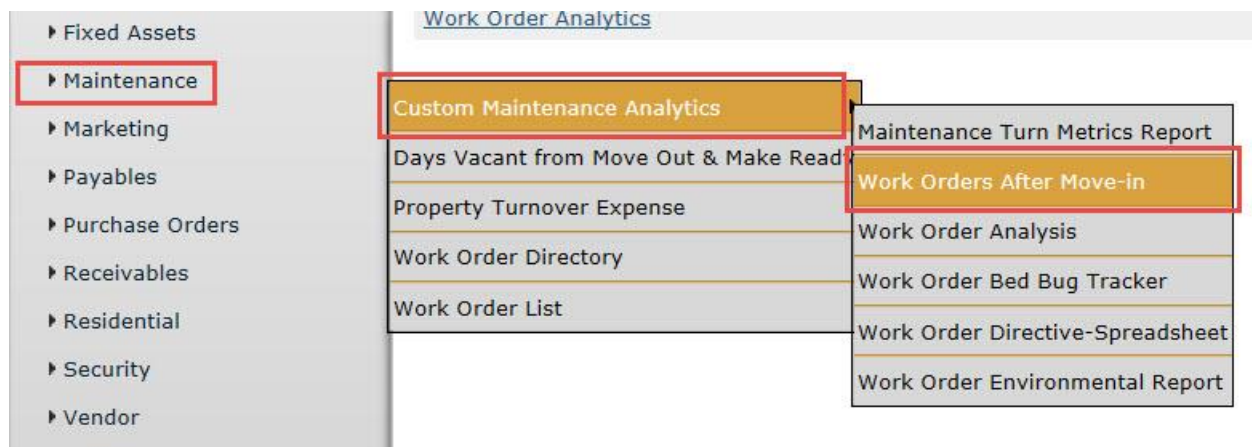
This report will show you the repairs that our residents are reporting upon move-in. It's crucial to identify any potential repair trends and relay those back to the maintenance folks who participated in the turnover process so that these can be proactively addressed in the future.

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. 1<sup>st</sup> 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.

The screenshot shows the 'Essex - Post Move-in Work Orders' screen. The interface includes a navigation menu on the left with categories like Roles, Inquiry, Analytics, Collections, Commercial, Construction, Financial, Fixed Assets, Maintenance, Marketing, Payables, and Purchase Orders. The main form area contains the following fields and controls:

- 1 Property:** A text input field containing '003' and a dropdown menu showing 'Cedar Terrace'.
- 2 Move-In Dates:** Two date pickers. The first is set to '08/30/2017' and the second to '09/30/2017'. A red box highlights the second date picker with the label 'Maximum Move-in Date'.
- 3 Starting # of Days after Move-in:** An empty text input field.
- 4 Ending # of Days after Move-in:** A text input field containing '30'.
- 5 Priority:** A dropdown menu with options: Appointment, CMS, and Emergency.
- Category:** A dropdown menu with options: Alarm System, Amenities, and Appliance.
- Destination:** A dropdown menu with 'Screen' selected.
- 6 Submit:** A button labeled 'Submit' at the bottom of the form, along with 'Clear' and 'Help' buttons.

**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.

Home Prorate Calculator Logout

Excel PDF

**Essex - Post Move-in Work Orders**  
Property=003 AND Move-In Dates=08/26/2017-09/26/2017 AND Ending # of Days after Move-in=30

Region	Divisional Manager	Regional Manager	Property Name	Property Code	Unit	Move-in Date	WO Number	WO Status	WO Priority	WO Category	WO Sub-Category	Call Date	Days After Move-In	Problem Description
Seattle Metro	Shawnee Tharp	Melissa Downs	Cedar Terrace	003	01115	09/12/2017	2169815	Work Completed	Low (routine maint.)			09/23/2017	11	the dishwasher, seer
Seattle Metro	Shawnee Tharp	Melissa Downs	Cedar Terrace	003	01117	08/26/2017	2146577	Work Completed	Low (routine maint.)	Carpentry	Door	09/05/2017	10	The closet doors nee
Seattle Metro	Shawnee Tharp	Melissa Downs	Cedar Terrace	003	01117	08/26/2017	2137604	Work Completed	Low (routine maint.)	Carpentry	Door	08/29/2017	3	The Water Heater Cl
Seattle Metro	Shawnee Tharp	Melissa Downs	Cedar Terrace	003	01117	08/26/2017	2138093	Work Completed	Low (routine maint.)	Appliance	Dishwasher	08/30/2017	4	The "cap" for the dis
Seattle Metro	Shawnee Tharp	Melissa Downs	Cedar Terrace	003	01117	08/26/2017	2138094	Work Completed	Low (routine maint.)	Carpentry	Other	08/30/2017	4	The 2nd bedroom ck
Seattle Metro	Shawnee Tharp	Melissa Downs	Cedar Terrace	003	01117	08/26/2017	2138097	Work Completed	Low (routine maint.)	Plumbing	Bath Tub	08/30/2017	4	The hallway bathtub
Seattle Metro	Shawnee Tharp	Melissa Downs	Cedar Terrace	003	01145	08/31/2017	2155627	Work Completed	Low (routine maint.)	Plumbing	Shower Valve(s)	09/11/2017	11	We bought a shower
Seattle Metro	Shawnee Tharp	Melissa Downs	Cedar Terrace	003	01145	08/31/2017	2173101	Work Completed	Low (routine maint.)	Plumbing	Toilet/Commode	09/25/2017	25	The flush is not pow
Seattle Metro	Shawnee Tharp	Melissa Downs	Cedar Terrace	003	01145	08/31/2017	2173103	Work Completed	Low (routine maint.)	Locks and Keys	Locks	09/25/2017	25	Main doors lock is to
Seattle Metro	Shawnee Tharp	Melissa Downs	Cedar Terrace	003	01148	09/09/2017	2161874	Work Completed	Low (routine maint.)	Carpentry	Kitchen Counter	09/16/2017	7	The kitchen bar top i
Seattle Metro	Shawnee Tharp	Melissa Downs	Cedar Terrace	003	01148	09/09/2017	2161876	Work Completed	Low (routine maint.)	Painting	Other	09/16/2017	7	There are stains insi
Seattle Metro	Shawnee Tharp	Melissa Downs	Cedar Terrace	003	01148	09/09/2017	2161878	Work Completed	Low (routine maint.)	Appliance	Range/Oven	09/16/2017	7	The light inside the c
Seattle Metro	Shawnee Tharp	Melissa Downs	Cedar Terrace	003	01148	09/09/2017	2161879	Work Completed	Low (routine maint.)	Locks and Keys	Other	09/16/2017	7	The door handle to t
Seattle Metro	Shawnee Tharp	Melissa Downs	Cedar Terrace	003	01148	09/09/2017	2161890	Work Completed	Low (routine maint.)	Plumbing	Bath Tub	09/16/2017	7	Please check the cau
Seattle Metro	Shawnee Tharp	Melissa Downs	Cedar Terrace	003	01148	09/09/2017	2161894	Work Completed	Low (routine maint.)	Plumbing	Bathroom Sink	09/16/2017	7	The resident was asl
Seattle Metro	Shawnee Tharp	Melissa Downs	Cedar Terrace	003	01148	09/09/2017	2161898	Work Completed	Low (routine maint.)	Pest Control	Ants	09/16/2017	7	The resident reporte
Seattle Metro	Shawnee Tharp	Melissa Downs	Cedar Terrace	003	01149	09/09/2017	2152894	Work Completed	Low (routine maint.)	Windows	Screen	09/09/2017	0	screen door wont st
Seattle Metro	Shawnee Tharp	Melissa Downs	Cedar Terrace	003	01149	09/09/2017	2152897	Work Completed	Medium			09/09/2017	0	no hot water
Seattle Metro	Shawnee Tharp	Melissa Downs	Cedar Terrace	003	01149	09/09/2017	2152902	Work Completed	Medium			09/09/2017	0	bathroom faucet lea
Seattle Metro	Shawnee Tharp	Melissa Downs	Cedar Terrace	003	01149	09/09/2017	2168917	Work Completed	Medium	Plumbing	Bath Tub	09/22/2017	13	Bath tub seems to h
Seattle Metro	Shawnee Tharp	Melissa Downs	Cedar Terrace	003	01149	09/09/2017	2168919	Work Completed	Medium	Plumbing	Toilet/Commode	09/22/2017	13	Toilet seat is loose o
Seattle Metro	Shawnee Tharp	Melissa Downs	Cedar Terrace	003	01152	09/26/2017	2187228	Work Completed	Urgent	Windows	Lock	10/07/2017	11	10/06/17-WF-The 2r

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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
<b>Move-in Date</b>	The dates of move-in that was entered in the date range
<b>WO Number</b>	Work Order Number
<b>WO Status</b>	The Work Order's current status
<b>WO Priority</b>	The Work Order's priority
<b>WO Category</b>	Category
<b>WO Sub-Category</b>	Sub-Category
<b>Call Date</b>	The original creation date of the work order
<b>Days After Move-in</b>	The number of days after or before the move-in date in which the work order was created
<b>Problem Description</b>	The original description of the repair, described by the resident
<b>Tech Notes</b>	Completion details supplied by the technician
<b>Cost</b>	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.

