

User Guide TC-09, Changing the Status of Transportation Work Orders

Overview

Any project that appears in a Five Year Plan (FYP) must be represented by a work order that contains a project description, justification, and prioritized score in the Service Asset and Maintenance Management System (SAMMS). It is the responsibility of the Regional Transportation Coordinator (RTC) to create these work orders for transportation projects and to appropriately maintain the Transportation Five Year Plan work order hierarchy in SAMMS, as well as maintain the correct work order status (approved, in progress, complete, closed, or canceled). Field station personnel cannot create nor can they edit deferred maintenance (DM) or construction (CI) work orders in SAMMS due to role restrictions. Regional Coordinators (including Facilities and Asset Management Coordinators) cannot close or cancel work orders that have an FP designation (DMFP or CFP sub-type). Instead, they must send a request to their national coordinator to do so. If requesting a status change for more than one work order, submit a comma-separated list of work order numbers. The national coordinator can then cut and paste the list into the appropriate field in SAMMS.

Work orders are asset-based. A work order only represents one, specific asset. If the work order is for a project that constructs a new asset, a new asset number must be requested by the RTC before a work order can be created in the Financial Business Management System (FBMS). (See User Guide TC-03, "Creating New Real Property Records for Transportation Assets" at <http://www.fws.gov/refuges/facilities/manuals-policies.html>.) Real property work orders are created in FBMS by creating, and then releasing, an FBMS-relevant work order in SAMMS. FBMS work orders must have a WBS (an individual "fund label" that identifies the project) entered before the system will allow the work order to be released. WBSes for projects are requested on the same form and in the same manner as asset numbers. (Refer to User Guide TC-05, "Creating Work Orders for Transportation Projects" at <http://www.fws.gov/refuges/facilities/manuals-policies.html>.)

Particulars

Once the funds have been released for the current fiscal year, the National Coordinator will change the status of the regional parent FYP work order in SAMMS from waiting approval (WAPPR) to approved (APPR). This will cascade the APPR status to the individual FYP work orders in the current year of the regional plan. Regional coordinators can then change the work orders' status to in progress (INPRG) as appropriate. When the status of an FBMS-relevant work order in SAMMS is changed to INPRG, a work order is created in FBMS with the same work order number as the SAMMS work order, only prefixed with an "F." It is this work order number that the regional coordinator supplies to the station for their use in Purchase Requests and time sheets for those actively working on the project, if the project resulted in the distribution of funds to the station.

Project work orders are changed first in SAMMS when the project is approved, which results in an action in FBMS. The process is reversed when the project is complete. Work orders must first be placed in completed (COMP) status in FBMS, if the work order is FBMS-relevant. Placing an FBMS-relevant work order in COMP or CLOSE status in SAMMS will not affect the status of the work order in FBMS. The FBMS work order status must be closed first. When a project is complete, change the status of the work order in FBMS to COMP; do not change it to CLOSE. Although the physical work on the project may be complete, there may still be costs that have not been settled and cannot settle if the work order is closed. Also, any active contracts cannot be modified or funds released if the work orders they cite have been closed. When an FBMS-relevant project is complete, change its status in FBMS to COMP. The status of the work order in SAMMS will then change to COMP. The work order in FBMS will remain in COMP status, able to collect costs, for 365 days. After one year, the work order status in FBMS will change automatically to CLOSE, changing the status of the work order in SAMMS, as well.

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Work orders for projects that are managed by FHWA, for which no funds come directly to FWS (and therefore have no counterpart work orders in FBMS), must be changed to COMP in SAMMS by the RTC. It is up to the RTC to enter the project cost manually in SAMMS under the "Actuals" tab of the work order. When all costs have been entered, the RTC must then request the national coordinator to change the status of the non-FBMS relevant work order in SAMMS to CLOSE. As a reminder, until the status of a DM work order has been changed from WAPPR, the amount of DM listed in the project as planned costs remains part of the DM backlog.