

Work Reclassification Decision Tree

Four levers. Every aged work order goes through one. No exceptions, no "we'll come back to it."

Companion to: *Fix the System*, Chapter 17. **Who uses it:** the planner, reliability engineer, and maintenance supervisor at the weekly triage meeting. **When:** for every WO older than 60 days, at every weekly backlog review. **Why this exists:** aged work orders do not disposition themselves. Without a forcing decision tree, they sit in the backlog indefinitely, consume planner attention on re-prioritization that never gets done, and erode the plant's sense of what is actually ready to execute.

Start here

You are holding an aged work order. It is more than 60 days old. Walk it through the five questions below in order. The first YES answer determines the disposition.

Question 1 — Is the originating condition still present?

Check the asset. Check the operator's notes. Check with the tech who last touched it.

- **NO** — the condition has self-resolved, been superseded by a later WO, or the asset is out of service:

-> **KILL.** Log the reason in the kill log. Close the WO with disposition code "condition resolved" or "superseded by WO #____" or "asset retired."

- **YES** — the condition is still present or the work is still valid:

-> Proceed to Question 2.

Question 2 — Is this WO a duplicate of, or fully contained by, a newer WO?

Search the CMMS for open WOs on the same asset, same failure code, same system.

- **YES** — a newer WO covers the same work:

-> **KILL.** Close with disposition code "duplicate of WO #____."

- **NO** — this WO addresses unique work:

-> Proceed to Question 3.

Question 3 — Is the work blocked by something the planner cannot resolve?

Typical blockers: parts unavailable with no substitute, contractor authorization pending, capital funding pending, plant access conflict, engineering decision pending, operations schedule conflict.

- **YES** — and the blocker has been in place for 30+ days:

-> **ESCALATE**. Route to plant manager same day with a one-paragraph summary: what the work is, why it is critical, what is blocking, what decision is needed. Log as escalated and set a 14-day follow-up date.

- **YES** — but the blocker is recent (<30 days) and the planner has a path to resolve:

-> **KEEP**. Assign to the planner for active resolution. Set a 30-day re-review date.

- **NO blocker** — the work is just unscheduled:

-> Proceed to Question 4.

Question 4 — Is this work a current-quarter priority?

Check against the quarterly work plan, the plant manager's KPI commitments, and the asset criticality (A/B/C).

Priority anchors:

- **A-class asset** -> this quarter priority by default.
- **B-class asset** -> this quarter priority if the condition has progressed.
- **C-class asset** -> usually deferrable.

- **YES** — this quarter priority:

-> **KEEP**. Schedule inside the next 4 weeks. If it cannot be scheduled inside 4 weeks despite being this-quarter priority, the blocker is a capacity issue — escalate per the Day 14-21 capacity decision (see Chapter 17).

- **NO** — not this quarter's priority:

-> Proceed to Question 5.

Question 5 — When should this work be re-reviewed?

Assign a re-review date based on the work's decay profile.

- **30 days** for conditions that may worsen (most corrective work, most A-class inspections)
- **60 days** for steady-state procedure work (PM enhancements, documentation updates)
- **90 days** for low-urgency improvements and C-class work

-> **DEFER** with the assigned re-review date. Move the WO to the deferred list with the re-review calendared. On the re-review date, the WO re-enters triage at Question 1.

IMPORTANT: A DEFER without a re-review date is indistinguishable from a forgotten kill. Every defer has a date.

Disposition summary — log each aged WO

WO #	Asset	Age (days)	Q1	Q2	Q3	Q4	Q5	Disposition	Reason / Re-re-view date

(Answer Y/N for each question reached; record final disposition and reason.)

What to avoid

- **"Maybe next month" as a disposition.** That is a DEFER without a date. Unacceptable. Every defer has a date.
- **Refusing to KILL valid-looking work.** If the condition is gone, the work is gone. The paper stays in the log for the pattern analysis, but the WO closes.
- **Escalating without a one-paragraph summary.** Escalations without context get ignored. Write the paragraph.
- **Skipping questions.** Every aged WO walks the five questions in order. Walking out of order leads to inconsistent triage and re-work.
- **Running the tree on current (<60 day) WOs.** This tree is for aged work. Current work is governed by the normal scheduling process, not by triage.

End of decision tree. Print. Laminate. Use weekly.