Incoming Work Triage Rubric

Every incoming work order goes through the four-question test at intake. The maintenance group classifies, not the originator. The rule is load-bearing. The plant manager has signed it.

Companion to: *Fix the System*, Chapter 18. **Who uses it:** the planner or maintenance supervisor receiving incoming WOs. Shift supervisors reference it when challenging an inflated priority call. **When:** every incoming WO, every shift, every day — forever. This is not a 90-day install. It is a permanent discipline. **Why this exists:** plants accept reactive rates above 40% because the classification discipline has decayed. Operators call work reactive; maintenance accepts the call; the percentage stops meaning anything. The rubric restores the distinction between true emergency and pseudo-emergency.

Who classifies

The planner or maintenance supervisor classifies every incoming WO against the four-question rubric below. The originator (operator, production supervisor, or engineer) can flag urgency and explain context — they do NOT set the classification.

If the originator disputes the classification: the WO still enters the system at the rubric-assessed priority. The dispute goes to the maintenance supervisor for review within 24 hours. The maintenance supervisor can overturn the initial classification but must document why. Patterns of dispute feed into the weekly metric share.

The four-question rubric

Walk every incoming WO through these four questions, in order.

Q1 — Immediate safety or environmental danger?

Does this failure put the plant, a production line, or a person in immediate physical danger? Active leak of hazardous material? Structural integrity compromised? Fire/explosion risk? Exposed electrical?

- **YES** -> **TRUE EMERGENCY.** Stop here. Route to break-in (Chapter 10 process). Document the specific hazard.
- **NO** -> Continue to Q2.

Q2 — Operation stopped, no duplicate capacity?

Is this failure preventing a production line or critical plant function from running right now, AND is there no duplicate capacity to absorb the loss?

A line stopping with a backup line available is NOT a Q2 yes. A line stopping with no backup IS a Q2 yes.

- **YES** -> **TRUE EMERGENCY.** Route to break-in. Document the operational impact.
- **NO** -> Continue to Q3.

Q3 — 48-hour exposure?

If this work waited 48 hours, would it cause safety, environmental, or regulatory exposure? Would it violate a permit condition? Would it cause an inspection finding? Would it cause a customer-spec breach?

- **YES** -> **TRUE EMERGENCY.** Route to break-in. Document the exposure reference (permit number, spec number, regulatory citation).
- **NO** -> Continue to Q4.

Q4 — Detectable 7+ days ago?

Was this condition detectable 7 or more days ago via inspection, condition-monitoring data, operator observation, or PM task?

- **YES** -> **PREVENTABLE REACTIVE.** If Q1-Q3 all returned no, treat as a normal priority WO but flag it for the PM/CBM feedback loop (the condition should have been caught earlier).
- **NO** -> **PSEUDO-EMERGENCY.** Not reactive. Enters the normal backlog and gets scheduled by priority.

Classification disposition

Outcome	Disposition
YES to Q1	TRUE EMERGENCY — safety/environmental
YES to Q2	TRUE EMERGENCY — operation-stopping
YES to Q3	TRUE EMERGENCY — 48h exposure
YES to Q4 only (Q1-3 all no)	PREVENTABLE REACTIVE — schedule normally, feed back to PM/CBM
NO to all four	PSEUDO-EMERGENCY — not urgent, enters backlog
Operator-environment request (sanitation, setup, production flow)	OPERATOR-ENVIRONMENT — separate classification, not counted as reactive

---

What counts as reactive work

For the plant-wide percentage:

Reactive hours = hours from TRUE EMERGENCY + PREVENTABLE REACTIVE + PSEUDO-EMERGENCY + OPERATOR-ENVIRONMENT work orders.

Planned hours = hours from PM, planned corrective, project, and scheduled inspection work.

Reactive % = Reactive hours / (Reactive hours + Planned hours)

Target: <=20%. Action threshold: >40%.

Red flags at intake (override triggers)

Some incoming WOs bypass the rubric and go straight to break-in by policy:

- **Personal injury** involved or imminent
- **Regulatory inspector** on site or expected within 48h
- **Customer audit** on site or expected within 24h
- **Plant manager direct order** (documented)
- **Emergency response team** activation (fire brigade, spill response)

Anything else runs through Q1-Q4. No exceptions.

Sign-off and enforcement

Plant manager signature on this rubric as plant policy:

Name: ______________________ Signature: ______________________ Date: ______________________

Review cadence: this rubric is reviewed quarterly at the maintenance leadership meeting. Changes require plant-manager signature.

What to avoid

- **Letting the originator decide priority.** The operator flags urgency; the maintenance group decides. The rule holds only if it is enforced.
- **Skipping Q4.** The preventable reactive bucket is where the PM/CBM feedback loop lives. Without Q4, the top cause stays invisible.
- **Classifying by gut feel when the operator is senior.** Seniority does not change the rubric. A 25-year operator and a new hire both go through the four questions.
- **Accepting "this line always has emergencies" as an answer.** A line with persistent emergencies has a specific diagnostic signal — it is running above its PM-plus-CBM capacity on a specific failure mode. That is a Playbook 4 zone target, not a permanent condition.
- **Letting the rubric drift into discretion.** The questions are binary. If you find yourself adding "it depends" categories, the discipline is slipping.

End of rubric. Laminate. Post. Enforce.