Overview:
If a work order is assigned the work type C (Bill on Completion) or M (Bill Monthly), the work order must be reviewed by the requesting department’s financial contact before moving forward in the triage process. This process automates the messaging and cancellation functions related to billable work orders.

When to use this process:
This step should be done before it is sent to EHS for review (if EHS review is necessary) and before it is placed in 500 – DISPATCHED status. Use this process only for work orders that are BILLABLE.

Steps:
1. Click on the CHANGE STATUS button which is located in the ribbon at the top of the work order screen.

2. The CHANGE STATUS window should appear on the work order screen. Click on the down arrow next to the NEW STATUS field to display the list of available statuses.

3. After clicking on the down arrow, a list of statuses should appear. Select the 130 – BILLABLE WO – SENT TO FIN CONTACT FOR REVIEW status from the list.
4. Once the status has been selected, click the OK button at the bottom of the **CHANGE STATUS** window. The **CHANGE STATUS** window will disappear from the screen and the status of the work order should now display **130– FC REVIEW**.

![Image of Maximo interface showing status change]

5. After the status is changed, Maximo will automatically send two emails:
   a. The first email will go to the **financial contact**. The email will contain the work order details and instructions on how to approve or deny the request.
   b. The second email will go to the **requester**. It will let the requester know that FS has reached out to their financial contact for approval and that the financial contact has 14 days to respond or the work order will be cancelled automatically by FS.

6. The work order will appear in the **SENT TO FIN CONTACT FOR REVIEW** portal on your start center. It will remain in this portal until the **financial contact** responds back to Work Management with their decision, or after 14 days of no change in status. The response from the **financial contact** will be directed to the main work management email box (**FSWM@KU.EDU**).
7. If the financial contact responds, you should go into the work order and change its status depending on the response that is received:
   a. **If the financial contact approves the charges:**
      Change the status of the work order to **131-BILLABLE WO, FIN CONTACT ACCEPTS CHARGES**.
      Maximo will automatically send an email to the **requester** informing them that their **financial contact** has approved the work order, and that their request will move forward in the triage process.  
      **At this point, the FC Review Process is complete and you can move forward with the final steps of processing the work order.**
   
   b. **If the financial contact denies the charges:**
      Change the status of the work order to **132 – FC REJECTS CHARGES**.
      Maximo will automatically **CANCEL** the work order and send two emails:
      - The first email will go to the **financial contact** confirming the receipt of their rejection email.
      - The second email will be sent to the **requester** to inform them that their financial contact has rejected their work request and to contact their financial contact if they have any questions.
      **At this point, the process is complete and no further action is required by work management.**
8. If no changes are made to the work order status after 7 days, Maximo will send a reminder email message to the **financial contact** to let them know they have 7 more days to respond or the work order will be automatically cancelled in Maximo. If no status change occurs after 7 more days, Maximo will automatically cancel the work order and the system will automatically send an email to the **requester** informing them that the financial contact did not respond within the 14 day window and their work order has been cancelled in the system.

--END--

Last Updated: 9/4/2012