

POLICY SUMMARY

SOP 3.2 — Work Orders

Process Name:	Work Orders
SOP Category:	Maintenance
SOP Reference:	3.2
Roles Involved:	CC, AM, OSM, Maintenance Technician (MT)
Last Updated:	June 2026

1 WHAT OUTCOME CC EXPECTS

- Every resident who submits a work order is communicated with within 24 hours of submission.
- Work is completed as quickly as possible — the standard target is within 72 hours.
- Residents feel heard, informed, and well-served throughout the maintenance process.
- Work order KPIs are tracked, reported monthly by AM, and reviewed quarterly by CC to hold onsite teams accountable to response and completion standards.

2 WHAT MUST BE DONE — BY WHO

- **Resident:** Submits a work order via the AppFolio resident portal.
- **OSM / MT:** Responds to the resident within 24 hours of submission — acknowledging receipt and providing an estimated completion timeframe.
- **OSM / MT:** Completes the work within 72 hours wherever possible. Updates the work order status in AppFolio throughout the process.
- **OSM / MT:** If work cannot be completed within 72 hours, documents the reason in AppFolio and communicates a revised timeline to the resident.
- **OSM / MT:** Closes the work order in AppFolio upon completion with notes describing the work performed and the date completed.
- **AM:** Reviews work order KPIs monthly using the AppFolio work orders completed report. Follows up with OSM on any properties with low completion rates or delayed responses.

3 WHAT EVIDENCE MUST EXIST

- Work orders entered, status-updated, and closed in AppFolio with completion notes for every request.
- 24-hour response documented in AppFolio — status update or resident communication logged within one business day of submission.
- Completion notes on every closed work order indicating what was done, who performed the work, and the date completed.
- For any work order exceeding 72 hours: delay reason documented in AppFolio and resident communication on revised timeline noted.

4 HOW THE AM VERIFIES IT

- **AM** reviews the AppFolio work orders completed report monthly to assess response rate (24-hour) and completion rate (72-hour) across all properties.

- **AM** follows up directly with any OSM whose property is below the expected completion rate or showing delayed responses.
- **AM** confirms that work orders are being closed with notes and that residents are receiving timely communication.

5 WHAT CC AUDITS

- CC reviews work order KPIs quarterly as part of the financial review.
- Primary metric: percentage of work orders completed on time (within 72 hours) across the portfolio.
- Secondary metric: percentage of work orders responded to within 24 hours.
- Properties consistently below the benchmark are flagged and AM is required to present a corrective action plan.

Supporting Tools

Platform: AppFolio — Maintenance → Work Orders / Work Orders Completed report

QRG / Walkthrough: SOP 3.2 — Work Order Input Snip by Snip (see Google Drive)

KPI Report: AppFolio Work Orders Completed — reviewed monthly by AM, reported quarterly to CC

Training Video: [Loom link — add when recorded]

POLICY SUMMARY

SOP 3.2 — Defined Terms & Additional Notes

Defined Terms

Work Order:	A maintenance service request submitted by a resident through the AppFolio resident portal, or entered directly by onsite staff on the resident's behalf. Every request must be logged in AppFolio regardless of size or urgency.
24-Hour Response Standard:	The requirement that onsite staff acknowledge every work order within 24 hours of submission. Acknowledgment includes confirming receipt and providing the resident with an estimated completion timeframe.
72-Hour Completion Standard:	The target timeframe for completing maintenance work from the time the work order is submitted. Work orders not completable within 72 hours require a documented reason in AppFolio and updated communication to the resident.
Completion Notes:	Documentation entered in AppFolio when a work order is closed. Must describe what work was performed, who completed it, and the date it was finished. Required on every closed work order.
Work Order KPI:	The AppFolio key performance indicator tracking work order response rate, completion rate, and time-to-close across properties. Reviewed monthly by AM and reported to CC quarterly at the financial review.
Resident Portal:	The AppFolio online platform through which residents submit maintenance requests, communicate with the property team, and access their account. The primary intake channel for all work orders.

Additional Context / Notes

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Version History

Version	Date	Updated By	Summary of Changes