Maintenance Visit Board

WORKSHEET / Type in the shaded boxes or print a fresh copy.

Take one service period. Separate completed visits from future bookings and identify the commitments still missing from the calendar.

01 Work through the example

	Example	Your case
Visits promised	**18**	
Visits completed	**7**	
Future visits booked	**8**	

Calculation: starting count minus both outcome groups

Visits needing a slot

Completed and future booked visits must describe different visits in the same period.

02 Make a handoff note

Agreement or route

Customer to contact

Scheduling owner

Maintenance Visit Board

PRACTICE TEST / Use the example values on page 1.

1. With the example values, what is the visits needing a slot?

- 11
- 3
- 6

2. If "Future visits booked" changes from 8 to 9, with the other example values unchanged, what is the new result?

- 9
- 2
- 3

3. Which action makes the most sense for this example?

- Count a completed visit again as a future booking.
- Close the record and skip the next review.
- Assign a booking owner to the outstanding visits.

What helped you, or what would you change?

Check your answers in Practice-and-Test.html for a score and an explanation of each answer. The PDF stores your selections when saved in a compatible PDF reader.