

Field work plans

Another Check-In · S01

Before the demonstration

Bertrand Hope

- Your assigned responsibility
- The correct training record
- Evidence of the result

Today's outcome

A submitted plan and pending change request are identifiable without claiming approval.

A draft period

Bertland Hope

- Open Work > My Itinerary and create a dated draft period with a title

In this step

Start with the dates and purpose of the planned work. A draft gives you time to check the plan before requesting review. It does not authorize the proposed trip or imply that a reviewer has seen it.

A planned stop

Bertrand Hope

- Add a stop with date, arrival/departure, sequence, expected location and purpose
- departure must follow arrival

In this step

Check the stop date, sequence and expected arrival and departure. Departure must follow arrival. The expected location and purpose help the reviewer judge whether the plan describes the intended work.

Location proposals

Bertrand Hope

- If needed create a private location proposal with valid pin/radius, inspect its status and duplicate suggestions

In this step

A private proposal lets you describe a place that is not yet in the shared location list. Check its pin and radius and review possible duplicates. Proposing a place does not automatically make it an approved master location.

Submission and review

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- Submit the nonempty period and confirm awaiting review
- approved/rejected records are locked and returned records can be revised

In this step

Submit only when the period contains the required stops. Read the resulting state. Returned work can be revised, while approved or rejected records have different editing restrictions. A submission confirmation is not an approval.

Changes to approved work

Bertrand Hope

- For a changed approved assignment, use Itinerary Changes, select the relevant entry and request a reasoned deviation
- await a reviewer

In this step

Explain the requested deviation and select the affected entry. Keep the approved plan as the reference until an authorized reviewer decides the change. A changed operational need should leave a visible request and decision history.

Common problems

Berland Hope

- Assuming a private proposal is an organization location
- submitting an empty period
- choosing a wrong first linked staff ID
- treating a request as approval

A useful support report

The task and record
The expected result
The actual message
The authorized next step

Guided practice

Berland Hope

- Create a two-stop training itinerary, submit it and request a change to a separate prepared approved stop
- Explain the difference between draft, submitted and approved

Evidence to show

The correct training case

The result or permitted decision

Your explanation of the next step

Practice debrief

Bertrand Hope

- Correct context and permitted action
- A result you can trace
- A clear next step if blocked

Expected result

A submitted plan and pending change request are identifiable without claiming approval.