

# California WDO Form

This document reviews the requirements and process for the CA WDO form, including the following:

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For the latest detailed information, please visit the [CA Structural Pest Control Board website](#). For additional resources, please visit [PestPac University](#).

## Printer Setup and Lookup Tables

### Printer Setup: Report Defaults (CA WDO)

Under *Printer Setup > Reports*, the following defaults are available for the CA WDO:

- **Use CA WDO:** must be checked to use the report
  - **Number of Findings:** maximum number of findings shown on the form
- **11-Point Grid:** option must be checked to show; when any of the 11 points are checked, this opens a section under Description of Findings for that checked area
- **Consolidated Service Orders:** allows for a consolidated service order to be created from the WDO for the recommended services
  - A *Service Order* button will appear, which when clicked, will create a Service Order for all recommended services.
  - If the box for a Separated Report is checked, two buttons will appear: *Section I* and *Sections II & III*. Each button will only show the recommended services for the relevant section(s).
- **Additional Notes:** open an additional notes field for each of the 11 points that are checked
- **State Disclaimer:** adds a fourth page with the state disclaimer (note that information for the county health department and agricultural commissioner must be populated in the CA Counties lookup table to work)



- **Show Price Totals:** allows you to show / hide the block of price totals that appears after the Findings and Recommendations
- **Company Logo:** enables use of the company logo on the report
  - **Use Branch Logo:** enables use of a branch logo on the report

### Lookup Table: Form Comments

There are seven different sections in the Form Comments lookup table, each of which allows comments to be pulled into the WDO in those corresponding sections:

- Areas
- Disclaimers
- Findings\*
- General Comments
- Price Notes
- Recommendations
- Tag

\* For the Findings portion, please note the following:

- **Comment:** represents the choice code from which the user will pick
- **Description:** must enter this information to appear on CA WDO form
- **Section (I, II, or III) radio button:** associates the comment with a section
- **Applies to checkboxes:** select which finding(s) apply to the comment

## WDO Page 1

### FIELDS THAT POPULATE

Fields that populate in the WDO include the following:

- Report Number (editable field)
- Building #, Street, City, Zip (location address)
- Inspection Date (work date from attached Service Order)
- Licensee Info (company information)
- Ordered By (location address)
- Property Owner and/or Party of Interest (Bill-to information)
- Additional Information for Field Worksheet (pulled if attached to a Service Order)



## REPORT DEFINITIONS

**Complete Report:** a report of an inspection that includes all visible and accessible portions of a structure

**Limited Report:** a report for only part of a structure that should include

- Include diagram of the area inspected and indicate which portions of the structure were inspected
- Include recommendation for further inspection of the entire structure and the name of the person or agency requesting a limited report

**Supplemental Report:** a report for an inspection performed on inaccessible areas that have been made accessible as recommended on a previous report

- Should indicate the absence / presence of wood-destroying pests or organisms or conditions conducive thereto
- Can also be used to correct, add, or modify information in a previous report; a licensed operator or field representative should refer to the original report in such a manner to identify it clearly

**Reinspection Report:** a report on the inspections of item(s) completed as recommended on an original report or subsequent report(s)

- Areas re-inspected can be limited to the items requested by the person ordering the original inspection report
- Licensed operator or field representative should refer to the original report in such a manner to identify it clearly

**Corrected Report:** a report created any time something needs to be fixed or corrected after the original report is sent (e.g., changing a price or adding something to a diagram)

## ADDITIONAL FIELDS

**General Description:** can either pull from Form Comments lookup table under the General Comments section (by clicking the blue *General Description* link) or act as an open text field

**Inspection Tag Posted:** can either pull from the Form Comments lookup table under the Tags section (by clicking the blue *Inspection Tag Posted* link) or act as an open text field

**Checkboxes:** linked to the *Findings and Recommendations* sections

- Subterranean Termites
- Drywood Termites
- Fungus / Dryrot



- Other Findings
- Further Inspection

**Diagram:** must be uploaded to the Documents section of the account before it can be added to the report by clicking the *Attach Diagram* link (able to change, remove, or open)

**Tech Signature:** technician's name and license number pulls in from the tech info that was entered at the top of the first page, with the signature line remaining blank

- Electronic signatures can be added based on license #
- Autofill feature available so that the signature pulls from the Employees lookup table and populates when the report is generated

## WDO Page 2

### ADDITIONAL FIELDS

**General Comments:** can either pull from Form Comments lookup table under the General Comments section (by clicking the *Choices* button) or act as an open text field

**11-Point Grid:** option must be checked in the Printer Setup under Report Defaults; when any of the points are checked, a section opens under Description of Findings for that checked area (can pull from Form Comments lookup table or act as open text field)

## WDO Page 3

### FINDINGS AND RECOMMENDATIONS

As a result of checking the boxes above, each section (assigned a corresponding number and letter) will contain what the tech found and what is recommended to fix the problem. For example:

- 3A) FOUNDATIONS
  - First Finding
  - Recommendations for 1st finding
- 3B) FOUNDATIONS
  - Second Finding
  - Recommendations for 2nd finding

There is a link to add / remove findings at the bottom of each section.

You can also attach a document or photo to each Finding with the *Attach Picture* link. The file must already be uploaded as a Location Document to be attached to the report.



**Separated Report:** checkbox allows for each finding to be entered under separate sections

- **Section I:** findings of visible evidence of infestation
- **Section II:** findings of conditions that could lead to infestation
- **Section III or (Unknown):** findings that need further inspection and do not fall into the Section I or II definition

**Additional Information for Completion Notice:** appears below each finding with recommended services

- **Price:** price for recommended service (field next to price that pulls from the Price Notes in the Form Comment lookup table)
- **Status:**
  - **Complete:** service was completed during inspection
  - **Not Complete:** service was not completed during inspection but offers an estimate for what it would cost if they did go back to complete it
  - **Secondary:** service that is not necessary but just a suggestion
  - **Partial:** service was partially completed
- **Service and Description:** pulls from the Service Code lookup table
- **Duration:** anticipated duration of the service

**Create Service Order Button:** appears if the *Consolidated Service Order* box in the Printer Setup lookup table is not checked; creates a Service Order for the service and price listed in *Additional Information for Completion Notice*

**Print Statement button:** allows for a statement showing all open invoices to be printed for this customer

## ADDITIONAL OPTIONS

**Report (PDF):** You can create a PDF document of the report to attach to an email to send it to the customer. Note: You must have Adobe Reader to use this feature.

**Field Worksheet:** The worksheet is for the tech to bring into the field and record findings. Information pulls from the *Additional Information for Field Worksheet*.

**Work Order Agreement:** The agreement is used to get permission to do recommended work on the property. If the WDO is marked as a Separated Report, the Work Order Agreement will also show Sections I, II, and III. Each section will show the price for each recommended service and the corresponding letter and number of the findings.

**Completion Notice:** This notice pulls the pricing from the report for completed, not completed, and secondary work. The letter/number codes for each Finding will also pull into this notice. The price for any work not completed is totaled as an Estimated Cost.



**Supplement:** This option will bring up a window showing all open service orders on the account. By selecting a service order, another WDO is created and attached to the service order you have chosen. When creating a supplemental report, the report will be given the same Report # as the one from which it originates but will be appended with an A, B, C, etc.

**Duplicate:** This link will create a duplicate of the original report.

REMEMBER: For additional setup, training, and usage resources, including live webinars and a robust video library, please visit [PestPac University](#).

