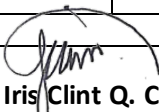
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Prepared and Reviewed by:  Iris Clint Q. Caro Technical Service Department Director			Approved by:  Kathleen D. Reyes, MHM, DBA Chief Operating Officer	

1. PURPOSE

This policy establishes guidelines and procedures for field service engineers (FSEs) and Product Application Specialists (PAS) to ensure the proper, safe, and efficient installation of medical equipment and the effective training of end users at various healthcare facilities.

2. SCOPE

This policy applies to all field service engineers, application specialists and coordinators involved in the installation, setup, initial testing, and end-user training of medical equipment at client sites.

3. ACCOUNTABILITY

- 3.1. **Service Coordinator** – process requests and prepare the necessary documents and materials needed during the installation of medical equipment.
- 3.2. **Equipment Coordinator** – ensures the availability, delivery and physical quality of the needed equipment
- 3.3. **Service Engineer** – conducts site visit, testing, installation, commissioning and calibration of medical equipment
- 3.4. **Product Application Specialist** – conduct end user's training, method validation and provide assistance during the training process
- 3.5. **Service Engineer/PAS Team Leader** – monitors the status and progress of the installation and provide assistance when needed
- 3.6. **Service Supervisor** – monitors the overall status and progress of the installation
- 3.7. **Medical Sales Representative** – monitors and oversees the progress of the installation

4. POLICY

4.1. General

- 4.1.1. All installations should be executed with prior approval from Medical Sales Representative (MSR) and District Sales Manager (DSM) in-charge of the account. MSRs should secure approval from their respective heads.
- 4.1.2. All analyzers, medical equipment and devices should be installed by the assigned service engineer/s with proper care and should be in accordance to the installation procedure provided by the manufacturer.
- 4.1.3. All service engineers, application specialists and technical team should exercise and observe safety and avoid unnecessary procedures that would lead to damage, malfunction and deterioration of any analyzers, medical equipment and devices during the installation process.
- 4.1.4. All engineers and application specialists should utilize the appropriate tools, instruments and devices necessary for the completion of the installation.
- 4.1.5. All needed documents needed should be prepared prior to the installation schedule. These documents include Pre-Installation Checklists, Installation Checklists, test reports, service reports, quick guides and handouts.

4.2. Pre-Installation Visit (PIV)

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- 4.2.1. Service Engineers must conduct a pre-installation assessment to verify site readiness, including physical space, electrical power, and network requirements.
- 4.2.2. In the event of civil work requirement is needed prior to delivery and installation of machine, the Service Engineer must identify the area of concern and report it to his superior for proper rectification and action. The service engineer in-charge must report this also to the MSR assigned.
- 4.2.3. A pre installation checklist must be accomplished necessary for documentation and installation planning.
- 4.2.4. Pre installation visit status must be reported to the Service Supervisor and Medical Sales Representative (MSR) assigned in the area.

4.3. Equipment Availability

- 4.3.1. Medical Sales Representative must accomplish an installation request form duly approved by his/her superior and must be submitted to the Sales Order team once approved.
- 4.3.2. Equipment coordinator must secure the availability of the needed equipment and must submit a purchase requisition if not available or secure a stock transfer request if the needed equipment is available in the other branch.


4.4. Equipment Preparation

- 4.4.1. All equipment must be tested prior to delivery and installation to ensure equipment functionality once on-site. The service engineer assigned must test the machine in accordance to manufacturers standard on testing and checking of the equipment.
- 4.4.2. Product Application Specialist may conduct a quality testing and sample processing if necessary, given that all reagents, consumables and accessories needed for testing is available.
- 4.4.3. Service Engineer or Product Application Specialist must report the status of the machine if it is ready for delivery.
- 4.4.4. A duly accomplished testing report must be filled up and submitted to the service coordinator for proper filing.

4.5. Communications

- 4.5.1. MSR in-charge should be aware of the installation that will take place in his/her respective account.
- 4.5.2. MSR should secure the necessary documents needed for the installation such as DR, Sales Invoice, gate pass needed for the ingress of the equipment and other necessary permits.
- 4.5.3. MSR should endorse to the Service Engineer Supervisor and Service Coordinator the installation schedule and any related information essential to the success of the installation
- 4.5.4. Service Supervisor should report or inform the MSR of any conflict of schedules that will arise with regards to the date of installations

5. PROCEDURE

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- 5.1. A duly signed and approved request form (ORF, Demo Request) should be submitted to the Sales Order team and to Service Department thru the Service Coordinator, Equipment Coordinator and Service Supervisor.
- 5.2. The equipment coordinator will then check the availability of the equipment. If the equipment is available, this will be tagged and reserved by inputting the serial number/lot number to the Sales Order Form. If the equipment is not available, a stock transfer is initiated if the machine is available in the other branch or an RFP should be initiated if no stock is available considering the deadline and urgency of the needed equipment.
- 5.3. The Service Engineer assigned by the Service Supervisor will then check the functionality of the machine prior to installation. An inspection should be done with regards to the delivery worthiness of the machine with no noted defects and/or signs of deformity. Any noted defects should be reported to the equipment coordinator for proper processing. If it passes the quality check, the assigned engineer should report and inform to the equipment coordinator to prepare for the delivery process.
- 5.4. If needed, a testing will be done by the assigned PAS for quality checking and validation of machine functionality. If it passes the quality check, the PAS should report and inform to the equipment coordinator to prepare for the delivery process.
- 5.5. The equipment coordinator will schedule the delivery and coordinate to Logistic Department for the vehicle needed. A third party trucking may be utilized if no available vehicle is advised taking into consideration the urgency of the delivery. The MSR assigned should also be notified to advise the account regarding the incoming delivery.
- 5.6. The installation will then proceed once the equipment is successfully delivered. The installation maybe a scheduled installation or on the spot installation.
- 5.7. The service engineer assigned will unpack and inspect the equipment for any signs of damage during transit. If damages were found, this should be reported to the equipment coordinator for proper processing.
- 5.8. The service engineer will position the equipment based on the PIV conducted and as per clients specification to ensure stability and safety.
- 5.9. Initialization and testing should be done after the setting up process. This will ensure the machine functionality after the setting up process. Functionality checks should be done based on manufacturer's specification and procedures.
- 5.10. A product demonstration and training to the end users will follow which will be conducted by the assigned PAS.
- 5.11. Validation and verification may be conducted upon the request of the end user.

6. REFERENCE DOCUMENTS

- 6.1. BMI-PP-HRD-001 - Code of Conduct

7. FORMS

- 7.1. FORM-TSD-001 – Service Request Form
- 7.2. FORM-SLS-001 – Demo Request Form

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7.3. FORM-SLS-004 – Machine Evaluation Form

8. AMENDMENT CLAUSE

8.1. Management reserves right to change, amend, or further improve this policy, in accordance to the provisions of the law, from time to time as it may deem necessary.