

ADDING AND REMOVING CMMS USERS

1. Purpose

- 1.1 To define CMMS users
- 1.2 To define the process for adding and removing CMMS users

2. Definitions

Acronym or Word	Definition
BC	British Columbia
BCBME	British Columbia Biomedical Engineering
BCCSS	British Columbia Clinical and Support Services
BCIT	British Columbia Institute of Technology
CMMS	Computerized Maintenance Management System, which is the database that houses all medical device records, including repairs, inspections, purchase information, warranties, parts, etc.
DBA	Database Administrator
DBM Team	Database Management Team
HA	Health Authority
LMBME	Lower Mainland Biomedical Engineering
SOP	Standard Operating Procedure
User	An individual with a need to access the BCBME CMMS on a regular basis. The profile has defined restrictions (e.g. one HA) for a defined period.
WO	Work Order
User Profile	Security clearance level in CMMS – what the user has access to read, query and edit and what they are not allowed access to.
CMMS Steering Committee	Group of Database Administrators, Management, and Engineering, and specialized users who meet twice monthly to discuss CMMS related business in BC.

3. Scope

3.1 Included:

3.1.1 This SOP applies to:

- a) All regular CMMS Users within BCBME

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- b) All BCBME students requiring access to CMMS during their practicum.
- c) All special access Users given temporary or defined access to the CMMS

4. Principles

This procedure highlights various needs for access, the length of time for temporary access and its renewal process, auditing, and any data restrictions imposed on CMMS accounts.

This policy abides by the following principles:

- Data in the Provincial CMMS is confidential, and access to this data is privileged.
- Maintaining regular audits to ensure BCBME assigns or revokes CMMS access privileges.
- Revisions are made as new decisions for User access and profiles are required for the CMMS.

5. Procedure

5.1 User Profile Access for the CMMS:

5.1.1 BCBME Regular Staff User Setup

New BCBME staff can be entered by clerical or Health Authority System Administrator, depending on local Health Authority policy. User profiles are defaulted to the Health Authority's generic profile based on their position in the organization.

Example: A new supervisor hired under FHA will receive the HA Supervisor profile.

5.1.2 BCBME Regular Staff, Additional User Profiles Required

If additional User Profiles are required for a User, contact your local HA System Administrator for further instructions.

5.1.3 Non-BCBME Staff User Setup

Requests can be emailed to the DBM team by leadership, and the information of the requestee is collected (Requestee name, title, email, Manager name, Manager email, purpose of request i.e. viewing of devices in department, development planning) and stored as a "User Access Request" sheet by the BC CMMS steering committee and used for User Access Renewal and Audits. Once Non-BCBME Staff are approved by the HA Leadership, the HA System Administrator will grant them access to CMMS either as Query User for Health Authority, or if approved by Executive Director, Query User for BC.

FOR LMBME: LMBME Directors review and approve access before implementation. If the user access spans beyond the Director's geographical area, then it goes to the LMBME Executive Director.

FOR VIHA, IHA, NHA: BCBME Manager/Director must review and approve the TMS access request for HA specific request before implementation.

5.2 User Profile Levels

All CMMS User Profiles edits, updates, and creations must be done by Database System Administrators. New User Profiles must be agreed upon by the CMMS Steering Committee and BCBME Directors Group before creation.

The following table lists agreed-upon User Profiles with predetermined defined access to the CMMS:

Regular BCBME Users			
TMS User Profile	User	Expiry	Restrictions
System Administrator	Database Administrator	Indefinite	Full Access (read-write) to entire database
HA Technologist	LMBME Education Coordinator BCBME Tech Summer Students	Indefinite for Full time staff, 4 months for Students	Full Access to Asset and WO in specific HA and Read-Only in other HAs Read only access to PM procedures and sub procedures.
HA Supervisor	BCBME Supervisor	Indefinite	Full Access to Asset and WO in specific HA and Read-Only in other HAs (Ability to change Asset Number, Asset Status, Schedule Status)
HA Manager	BCBME Manager/Director	Indefinite	Full Access to Asset and WO in specific HA and Read-Only in other HAs. LMBME allows Read only access to restricted reports. IHA allows Full access to Contracts Module
HA Clerk	BCBME Clerk	Indefinite	Full access to Work order, Assets, Resource updates, Procedures, Vendors, Departments. Contracts, Read only access to Data Sources, Reports, and Materials.
HA Engineer	BCBME Engineer	Indefinite	Full Access to Asset and WO in specific HA and Read-Only in other HAs. Full Access to PM Procedures, Read only access to Customer Module/Model table, and Full access to Provincial Alert Log

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Special Access Users			
TMS User Profile	User	Expiry	Restrictions
HA Query User	Finance, Planning and Development, Clinical Teams	2 years	HA specific Query use only (no read-write rights)
BC Query User	Finance, Project Planning	2 years	BCBME Query use only (no read-write rights)
VCH Tech with Create Asset Group	VGH White Team	Indefinite	Generic HA Technologist rights with the ability to edit, remove, and add Asset Groups
DI Supervisor	LMBME DI Supervisors	Indefinite	Same as HA Supervisor but allows DI Supervisors access across all LMBME
IHA Engineer	IHA Engineer	Indefinite	Full access to Work orders, Assets, Schedules, Procedures, Materials, Resources, Vendors, Contracts, Web Requests, Dashboards, Reports, and Read only access to Data Sources
HA Power User	Engineering or Cybersecurity Individuals who require to make or grant access to Dashboards, reports, and modify in Model table.	Indefinite	Full Access for PM Procedure, M3, Dashboard, Data Sources, Asset, and WO
HA Query User	Masters Student	4 months	Read-Only Access to Asset, WO, Procedures, and Materials at a Provincial level
BC Alert Log Admin	BCBME Provincial Alert Team	Indefinite	Full Access to PHSA segment Provincial Alert Log
Clerical Administrator	Clerical help for DBA	Indefinite	Same as the HA Clerk with addition to Full Material Access, Purchasing, Requisition, Dashboards, User Password, User Preference
PHSA Clerk	BC Children's Clerk	Indefinite	HA Clerk rights plus Warehouse access for ordering parts and inventory management.

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HA PM Writer	PM Writer	During PM Procedure Development	Full Access to Asset and WO, HA-specific. Full Access to Procedure Development module.
BCIT Student	BCIT Student	Indefinite	NOT TO BE USED IN PRODUCTION – profile is hidden and used on Quarterly Test site for education purposes (Partnership with BCIT)
BC Vendor Connection	Accruent	Indefinite	Background access for troubleshooting in Production
Work Request Group	Web Request Clinical	Indefinite	Used to review Web Requests on BCBIOMED.org website
Web Request User VCH	Web Request Clinical	Indefinite	Generic user account for Clerical and Biomed to view dashboards of web requests
VIHA Imaging Physics	Clinical (Imaging Physics)	Indefinite	HA Query User plus uploading documentation. Used for DAP requirements in VIHA
IHA Finance	IHA Finance	Indefinite	Query Access for Work Orders, Full access to Document upload and Asset Editing.
FHA Dashboard Access	Web Request Clinical	Indefinite	Generic user account for Clerical and Biomed to view dashboards of web requests

Justifications for the above table can be found in Appendix A.

5.3 Training/In-Service

CMMS training can be accessed by Youtube, on the BCBiomed FAQ site, or by contacting the LMBME Education Coordinator, HA System Administrator, or HA Manager to set-up 1:1 training.

5.4 Auditing

At least once a year (January), local Database Administrators will audit all **User Profiles** and **User Groups**.

The **Resource Module** is updated by Clerical Administrator during termination of employees and is used as the point of reference for all **User Profiles** and **User Groups** for auditing purposes.

Data Sources are used to monitor:

1. **User Profiles** that have not been accessed over 2 years.
2. “Inactive” **User Profiles** with access to **Forms** and **Dashboards**

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3. “Active” **User Profiles** but **Resource Module** is “Inactive” - **User Profile** will be inactivated immediately.

4. **User Group** access for **User Profile** – specific focus on timed renewal User Groups (e.g. Query Users, Summer Students). Expired User Profiles must be forwarded to HA Manager/Director for reactivation approval.

5.5 Inactivation of User Access

User Profiles are not deleted, but user will be marked as “Inactive” which blocks access to the CMMS.

HR staff changes in a HA will be inactivated by Clerical Administrator or System Administrator upon notification.

During System Administrator Audits, if CMMS accounts have been found requiring review (expired account, uncertainty of whether the account is still required) the following steps are required:

1. Verification that email is still active – if email is no longer usable, the access is deactivated
2. If User has moved to another department – user account is deactivated.
3. Remaining users found in audit will have the application information (name, email, manager name, manager email, department, and why TMS access requested) + the CMMS User profile(s) level and User name to the HA leadership for re-approval. HA leadership can approve or deny access, and will communicate back to the HA DBA, which will be updated in the “User Access Request” sheet as a renewal.

If Leadership find that the account is no longer required, the System Administrator will mark the user as "inactive" at the user login and in resource module, and marked as “cancelled” in the “User Access Request” sheet.

5.4 Regular BCBME Users:

This is inclusive of BCBME Techs, Supervisors, Managers/Directors, CMMS administrators, and Clerks

- a) All BCBME staff is automatically given a CMMS User Profile as identified by a Supervisor, Manager or Director. The following applies:
 - i) Rights are restricted based on their job description (e.g. Supervisor, Tech, Manager, etc.)
 - ii) Restrictions are HA-specific

- iii) If a user changes roles requiring a higher level of access or additional HAs, their Supervisor, Manager or Director must contact the DBM team to request access upgrade

5.5 Practicum Students

Students in BC hospitals fulfilling requirements for a Diploma program (e.g. BCIT Biomedical Engineering Technology students). These students are in hospitals for a maximum of 5 weeks at a time. Practicum Students do **not** receive personalized logins to the CMMS.

Rationale:

- The main reason is liability and responsibility for Practicum Students:
 - They are not contracted (i.e. not paid employees)
 - They shadow HA Technologists and are not eligible to assume responsibility for their work
 - They do not create their own WO time charges.
- Practicum Student placements benefit the student and their institution. Their placement is short-term and the logistics of creating accounts for them outweigh the benefits that would bring to BCBME.

Procedure:

Practicums Students are given a generic read-only login. Their profile is unable to create WOs. If a HA Technologist wants to document a Practicum Student, they should add the student's initials in the WO comments.

Note: Do not create individual time charge for Practicum Students. If a Supervisor would like a Practicum Student to learn how to document work on the CMMS, they can be given permission to do so on one of the CMMS test sites.

5.6 Summer Students

Students in BC hospitals for summer employment. These students are in hospitals for a maximum of 16 weeks at a time. Summer Students will have individual logins to the CMMS.

Rationale:

- The main reason is liability and responsibility for Summer Students:
 - They are contracted (i.e., paid employees).
 - They are expected to work independently and assume responsibility for their work.
 - They are required to create their own time charges for the work they performed.

Procedure:

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Summer students are given individual logins. Their profiles will be equivalent to a “HA Technologist” profile.

5.7 Masters Students (Clinical Engineering Interns)

Students in BC hospitals for temporary employment. These students are in hospitals typically for 16 weeks at a time, with the possibility of extension. Masters Students will have individual logins to the CMMS.

Rationale:

- Masters Students require read-only and query capability to the CMMS for Asset and WO.
- Masters Students have Provincial access as their projects may require data at this level.
- Masters Students are expected to work independently and assume responsibility for their work.

5.8 Finance

Employees who require read-only and query access to the CMMS for Asset and WO. In special cases, they may be granted read-write access to specific asset financial fields. Individual logins will be created after granted approval using the “Non-BCBME Staff User Setup”

Rationale:

- Often Finance requires reconciliation with their database. Real-time access is much better than email reports.

5.9 Planning and Development (PD)

Employees who require read-only and query access to the CMMS for Asset and WO at a Provincial level. Individual logins will be created after granted approval using the “Non-BCBME Staff User Setup”

Rationale:

- PD requires access to make lists of equipment that will be migrated to a new build/renovation vs. new purchases.

5.10 PM Developers

BCBME staff assigned with temporary responsibility for developing procedures in the CMMS as required. This role is only available for Regular BCBME Users.

Rationale:

- PM developers need the access to complete their PM Procedure writing tasks.

5.11 Clinical Teams

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Clinical teams requesting access to BCBME CMMS, e.g., ICU leaders and clerks. They may want to have read-only and query access so to review data or access Dashboards.

Rationale:

- Clinical teams may need to review and verify the accuracy and completeness of asset data in their clinical area

6.10 System Administrator

The CMMS Steering Committee must agree before assigning System Administrator User Profile to a Regular BCBME User due to the security clearance associated with this User Profile. System Administrators must attend CMMS Steering Committee meetings to be updated on all changes and testing underway.

Rationale:

- System Administrators are a back-up to the primary HA DBA
- System Administrators perform Admin functions: security clearance and database audits, testing, and troubleshooting.

6.11 HA Power User

HA Power User profile is one step below a System Administrator profile. HA Power User is granted if a user has shown the required CMMS knowledge, requires Power User abilities, and can be supported by their local DBA.

HA Power User profile has Full Access to PM procedures, M3, dashboard editing, without administrator functionality (i.e. no security clearance to edit profiles and tools that require significant System Administrator knowledge).

6. Reference Documents

None

Effective Date:	17-JAN-2024
First Released:	30-MAY-2016
Last Revised:	17-JAN-2024
Last Reviewed:	17-JAN-2024
Approved By:	BCBME Federated Directors

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Owners:	BCBME Federated Directors			
Revision History:	Version	Date	Description/ Key Changes	Revised By
	1.0	30-MAY-2016	Draft	PM Manager
	1.1	12-APR-2016	Review	Manager
	1.2	21-NOV-2022	Review	BCBME DBM Team
	1.3	21-FEB-2023	Approval	Federated Directors
	1.4	17-JAN-2024	Added new PM form view	BCBME DBM Team

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