

UNABLE TO COMPLETE WO STATUS AND SUB-STATUS GUIDELINE

1. HA Applicability

This guideline applies to FHA, NHA, PHC, PHSA, VCH, and VIHA Biomedical Engineering departments.

IHA has a modified process, please check IHA guidelines.

2. Purpose

2.1.1 Determine a standard practice for dealing with devices/assets for which the work cannot be completed due to legitimate reasons, e.g. being unable to locate a device or a device in use.

2.1.2 Guide Technologists and Supervisors with standard functions/workflow in the CMMS system.

3. Definitions

Acronym or Word	Definition
CMMS	Computerized Maintenance Management System: database that houses all medical device records, including repairs, inspections, purchase information, warranties, parts, etc.
Corrective Work (CW)	Corrective Work (CW) Work Order is the official record that a repair was completed on a device.
Device in Use (DIU)	‘Device in Use’ applies to all of the following scenarios: <ul style="list-style-type: none"> • Device is in use on a patient • The room is in use and Biomed cannot access the device • Clinical has denied access to the device for any reason
PSLS WO	PSLS Work Order is the official investigation record for a device or accessory involved in a PSLs event (LM Only).
Retire Asset (RA)	Retire Asset work order is the official record that a device was pulled from service and lists all the required steps that are needed to dispose of a device.
Risk Management (RM)	Risk Management (RM) Work Order is the official record that an alert or hazard notification has been published for a device.
Unable to Locate (UTL)	A device is considered ‘unable to locate’ when a Technologist has done their due diligence in trying to find the device and was unsuccessful (see section 5.1.1)
Work Order (WO)	The official record of any work performed on, or for, an asset or series of assets.

4. Scope

4.1 Included:

4.1.1 All Biomed-supported medical devices/assets in the CMMS.

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4.2 Excluded:

4.2.1 Devices/assets not supported by Biomed and/or not in the CMMS.

5. Procedure

5.1 Unable to Locate Device (also see Appendix A – Workflow Diagram)

What to do when a device/asset requires a PM, has a Risk Management Alert or a Web Request BUT cannot be found

5.1.1 Technologists must do their due diligence to try to locate a device, which includes:

- Check 'Requester Details' tab and contact requester to ask about device location
- Check the location listed in TMS
- If applicable, check the location using RTLS
- For networked devices, check Medigate where available (connect with your HA Cybersecurity Lead or DBA) to find their last connection location
- Follow up with clinical staff to see if the device is in use or was moved
- Check other known storage locations, clean/dirty rooms, MDRD, etc.
- Email the department or equipment coordinator asking for assistance locating the device
- Ask device cleaning/redistribution teams if they can look for the relevant asset number

5.1.2 Once the Technologist has tried to locate the device and is unsuccessful, the Technologist must complete the following in TMS:

- **For PMs:**
 1. Open a PM WO in TMS (if not already done)
 2. Set WO Status to 'Unable to Complete'
 3. Set WO Sub-Status to 'Unable to Locate'
 4. Add relevant details, time charges, completion date, and save WO
- **For RM, CW (Web Requests), and PSLs (LM only):**
 1. Set WO Status to 'Unable to Complete'
 2. Set WO Sub-Status to 'Unable to Locate'
 3. Add relevant details, time charges, completion date, and save WO

WO Status (Status)

UTLCWO - 4. Unable to Locate - Close WO

Sub Status

CLWOUL - 4. Unable to Locate - Close WO

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The '**Unable to Complete**' WO Status and '**Unable to Locate**' WO Sub-Status close the WO with the device remaining on the overdue list. This creates a digital record that a genuine attempt has been made to locate the device, despite being unsuccessful

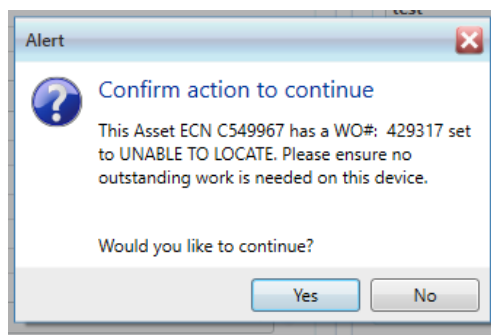
If I can't find the device, why can't I just put my time charge comments that the device could not be found and save the PM WO with the WO Status "Completed"?

A PM WO cannot be completed with a time charge and a comment stating that the medical 'device could not be found' for a couple of reasons:

1. Actual PM has not been performed. Documenting it this way would affect PM completion statistics.
2. Completing a PM WO updates the Last Completed Date and the Next Due Date on the PM Schedule. This action would move the PM due date to a future date, which is incorrect as the device is still due for PM.

5.2 What happens after a WO Status is set to 'Unable to Complete' with Sub-Status 'Unable to Locate'?

- 5.2.1 If a Technologist tries to open a new WO on a device that had a previous WO with 'Unable to Locate' sub-status, they will get a pop-up message letting them know this device may have outstanding work needed. The Technologist should check the 'Asset WO History' tab and ensure completion of all outstanding work before creating a new WO (see section 5.3 if device was found)



- 5.2.2 If a device has a WO with 'Unable to Locate' sub-status for 6 months, at that point TMS will add the device to the new 'Unable to Locate for 6+ Months' Dashboard tab. On the first Monday of the month, the supervisor will receive an email reminder of the list of devices that are outstanding on the dashboard:

1. Supervisors need to review TMS and see if the device still has outstanding work required
2. If the device is still due for service, the Supervisor will assign the device to a Technologist to look for the device and complete all the outstanding work if found

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- If the device is still not located, open another WO of the same type (for RM WO, contact the relevant Alerts Coordinator/Handler for assistance opening another RM WO) and again set its status to 'Unable to Complete' and sub-status 'Unable to Locate'
- Creating a new 'Unable to Locate' sub-status WO will remove the device from the dashboard for another 6 months

5.2.3 Three attempts will be made to locate the device.

5.3 **If at this point the device is still not found, the Technologist and Supervisor can now discuss modifying the Asset status (see section 5.4 for details). What if the 'Unable to Locate' device/asset is found?**

If a device is found, a new WO of the correct WO type will need to be created and completed as per usual processes. If the work required was a RM WO, connect with the relevant Alert Coordinator/Handler to create a new RM WO for the found device.

5.4 **For assets that have not been located in years, what Asset Status should I choose?**

Depending on the device, a Technologist should discuss with their Supervisor to make a decision on modifying the asset status to inactive or retired. It is not uncommon for some devices, e.g. IV Pumps, to disappear for a while and then reappear, whereas a lost Anesthetic Gas Machine can likely be directly retired if not found.

With these 2 examples, a supervisor has 2 options:

1. IV Pumps have a greater likelihood of being relocated so the Asset Status could be set first to 'Unable to Locate'
 - This keeps the asset on the PM Overdue list in case it shows up again
 - After a few more attempts to find it, it can eventually be made inactive or retired
 - Supervisors will need to review their 'Unable to Locate' status devices and decide when to officially retire a device that has not been found
2. An Anesthetic Gas Machine is more likely to have been removed from service/site. Hence, its Asset Status could be set to 'Inactive' or 'Retired' upon not being found

Most Supervisors may refrain from retiring assets (or making them inactive) in TMS for the following reasons:

- Retiring an asset or making it inactive deactivates its PM schedule. If the device is subsequently found, the device and the PM schedule need to be set back to 'Active' in TMS (see Table 1)
- If there is doubt the device has "disappeared" and there is a desire to keep the device "on a list," retiring an asset removes the device from the PM Overdue list, whereas the 'Unable to Locate' asset status does not
- Using the 'Unable to Locate' asset status instead of retiring a device allows supervisors to query 'Unable to Locate' equipment periodically to aid conversations with clinical users on potentially

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lost devices. This query can be done with either the 'Unable to Locate' Asset Status or the 'Unable to Locate' WO sub-status

Table 1: Definitions of asset statuses and their associated PM Schedule mechanics in the CMMS.

Asset Status	When to use <u>Asset Status</u>?	Effect on PM Schedule	Changing asset status back to Active
Active	In service, in a clinical environment	PM schedule remains active	Not Applicable
Unable to Locate	Unaware of the location, temporary asset status until a decision is made to either retire the device, make it 'Inactive', or make it 'Active' again if located	PM schedule remains active	Doesn't affect PM schedule
Inactive	Either: 1) Aware of the asset location, removed from clinical service for a reason, temporary until a decision is made to either retire the device or make it Active again 2) Unable to locate device for 18+ months and at least 3 attempts have been made to locate the device in the interim	PM schedule is deactivated	The PM schedule will need to be reactivated by the DBM team
Retired	Decision was made to permanently retire an asset from CMMS because the device no longer provides service in a clinical environment	PM schedule is deactivated	The PM schedule will need to be reactivated by the DBM team

5.5 Retiring an Asset

When retiring an asset in TMS, Technologists need to complete a RA WO following the retire asset procedure in TMS. This ensures all necessary steps are taken before disposing of devices.

Devices with 'Unable to Locate' asset status will not have all patient data removed from them because the Technologist does not have access to the device. When completing the RA WO, **DO NOT** check the boxes confirming this step has been completed. Document in the comments that the device was not located and the proper process could not be followed.

Refer to your local HA process for any further steps needed for retiring a device.

5.6 Device in Use (also see Appendix A – Workflow Diagram)

What to do when a device/asset requires a PM, has a RM WO or a CW (Web Request) BUT is not accessible

5.6.1 'Device in Use' applies to all of the following scenarios:

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- Device is in use on a patient
- The room is in use and there is no access to the device
- Clinical has denied access to the device for contamination or investigation reasons

5.6.2 Once the Technologist has tried to access the device and is unsuccessful, the Technologist must complete the following in TMS:

- **For PMs:**
 1. Open a PM WO in TMS (if not already done)
 2. Leave WO Status as 'In Progress'
 3. Set WO Sub-Status to 'Device in Use'
 4. Add relevant details including when the device may be accessible and save WO
- **For RM and CW (Web Requests):**
 1. Change WO Status from 'Pending' to 'In Progress' if not yet done
 2. Set WO Sub-Status to 'Device in Use'
 3. Add relevant details including when the device may be accessible and save WO

WO Status (Status)*
ACTIV - 2. In Progress
Sub Status*
DIU - Device in Use

The '**Device in Use**' WO Sub-Status leaves the WO open and visible on the Open WO Dashboard. This creates a digital record that a genuine attempt has been made to access the device, despite being unsuccessful.

If I can't access the device, why can't I just put my time charge comments that the device was in use and save the PM WO with the WO Status "Completed"?

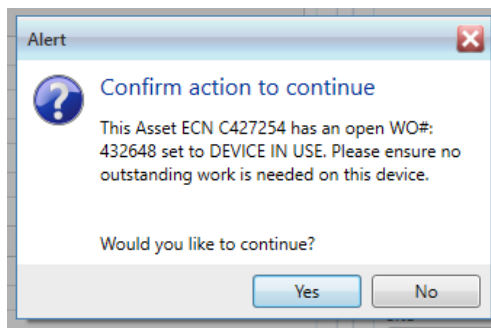
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1. Actual PM has not been performed. Documenting it this way would affect PM completion statistics.
2. Completing a PM WO updates the Last Completed Date and the Next Due Date on the PM Schedule. This action would move the PM due date to a future date, which is incorrect as the device is still due for PM.

5.7 If a Technologist tries to open a new WO on a device that had a previous WO with 'Device in Use' sub-status, they will get a pop-up message letting them know this device may have outstanding work needed. The Technologist should check the 'Asset WO History' tab and

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ensure completion of all outstanding work before creating a new WO (see section 5.3 if device was found)



5.8 What to do when the 'Device in Use' device/asset becomes accessible?

When the device/asset becomes accessible, open original WO (with 'Device in Use' sub-status), complete work as per usual processes, and set WO Status to 'Complete'.

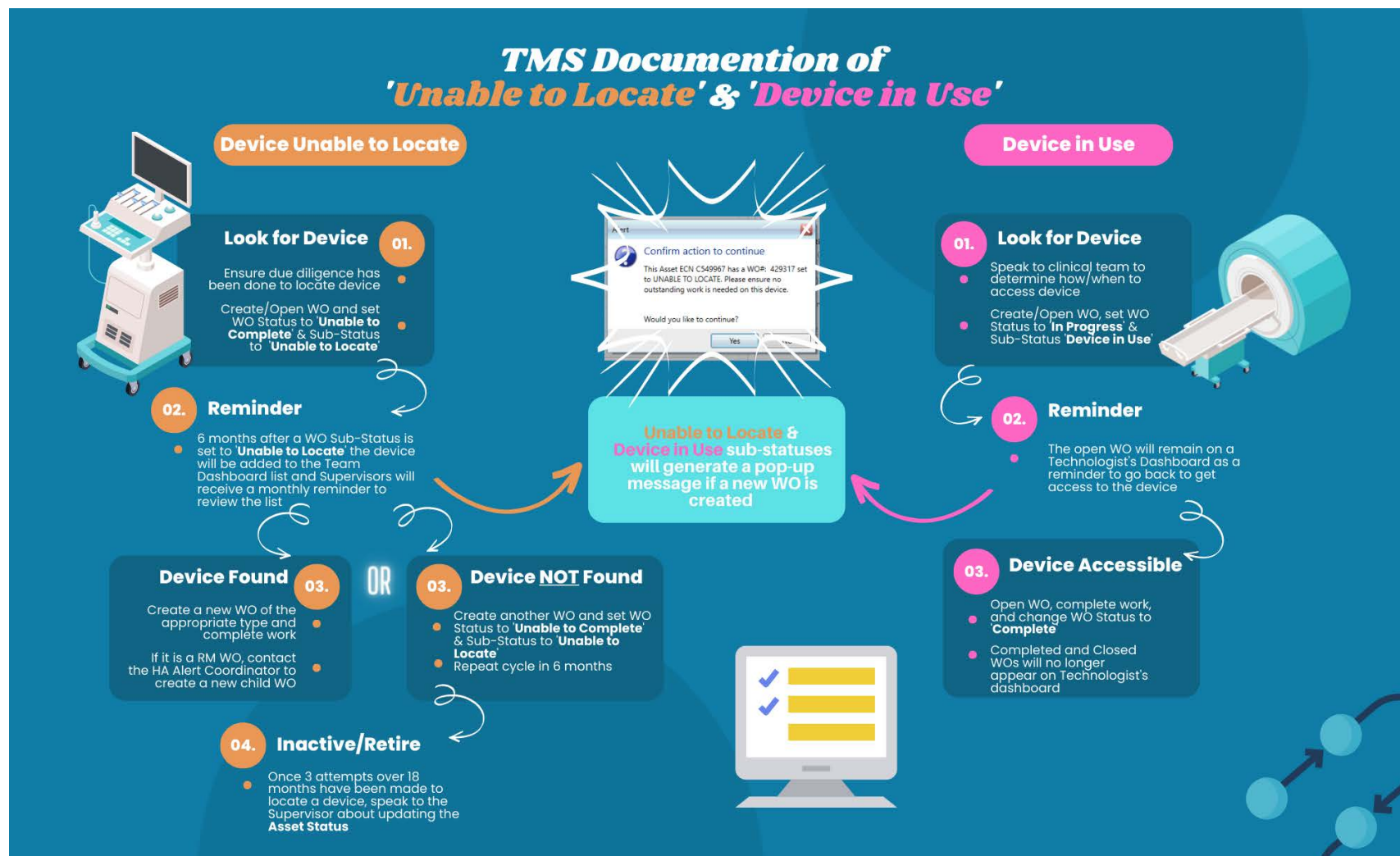
6. Reference Documents

BCBME SOP007 – Work Order Recording

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APPENDIX A – WORKFLOW DIAGRAM



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