

BCBME	Business Area: CMMS	Document Name: WO Recording		Document #: SOP007
Revision #: 1.7	Revision Date: February 15, 2017	Prepared By: D King, A Ibey	Approved By: BCBME Directors	Page 1 of 6

Purpose

This procedure defines the standard operating procedures for work order recording in the CMMS, including:

1. What constitutes a work order
2. Who records information in a work order
3. When to open, edit, and complete the work order
4. What information to record in a work order
5. Auditing of work order recording

Definitions

Acronym or Word	Description
Asset	Any device approved and entered in the CMMS.
Work Order	The official record of any work that is performed on, or for, an asset or series of assets.
Job	A Job refers to all the work that is related to one activity e.g. upgrading the software version for all monitors in ICU

Scope

Included

- All work that pertains to a specific asset or series of assets, for all assets in the CMMS.

Excluded

- Work not attributable to a specific asset or series of assets.
- Work performed on assets not in the CMMS.

Procedure

What Constitutes a Work Order

Generally, there are 4 work order types:

1. Preventive Maintenance (PM or PM1)
2. Corrective Work (CW)
3. Incoming Inspection (II)
4. Risk Management (RM)

A work order should be created only if the work is directly related to a specific asset or a series of assets. The purpose of the work order is twofold:

- To capture the life history and legal record of the asset
- To capture the direct costs of owning the asset.

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The following table is a guide for when and when not, to create a work order:

Under What Situations to Create a Work Order	
Activity	Yes/No
Incoming Inspection of an asset	Yes
Installation of an asset (only the actual install time, not planning meetings)	Yes
Preventive Maintenance of an asset	Yes
Repairing an asset	Yes
Repairing the accessories that are specific to an asset	Yes
Troubleshooting an asset	Yes
Resolving a problem with an asset	Yes
Responding to a customer request that is specific to an asset	Yes
Training a customer how to use a specific asset	Yes
Upgrading an asset e.g. software/hardware upgrades, drug library updates, etc	Yes
Incident Investigation for an asset	Yes
Actions or Investigation related to an alert or recall on an asset	Yes
Renewing a contract for an asset	No
General education of BME staff	No
General education of Clinical staff	No
Training courses	No
Evaluating devices in preparation to purchase	No
Capital , technology, or space planning activities	No
Research & Development	No
General shop activities (cleaning, organizing, etc)	No
Non-Productive activities (vacation, sick time, breaks)	No
Working on accessories that are not assets or not tied to a specific asset e.g. ECG cables	No
Working on assets that are not in the CMMS e.g. a stretcher, wheelchair, etc.	No

Table 1 – When to Create a Work Order

When to Open, Edit, and Complete the Work Order

Work orders should be created as soon as possible after you are aware of the request or need. The work order should be edited as the work is done (e.g. add time charges as you progress through the work). The work order should be completed when the work is complete and the asset is available for use.

Who Records Information in a Work Order

Work orders should be opened, populated, and closed by the technologist who performed the work on a device. Under no circumstances should a technologist record information in the database in regards to another technologist's work. In the event that a work order involves more than one technologist working on a device, a time charge can be added by the additional technologists to account for their work.

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What to Record in a Work Order

There are six principle elements to the work order, along with some ancillary elements.

Principle Elements

These apply all the time and are mandatory (in the case of parts, only if parts are used and meet the criteria for recording).

Resource

The Resource is the person who does the work. This is done via time charges. The rules for resources and time charges are:

- Each separate person who works on a work order must have their own time charge(s) with themselves selected as the resource
- A person can enter one time charge or multiple time charges for themselves
- External work must be recorded (as per SOP001 – External Work) and must use one of the selectable External Resources

Time

Record all the time, and only the time, it takes to complete the “job”. Record in increments of 15 minutes (0.25 hour) or less. Costs are calculated based on hours entered and need not be populated unless you are overriding the calculated amount. Some Health Authorities are not using this field so it populates to 0.0. Typical recording time includes:

- Time to repair
- Time to inspect or complete a PM
- Time to investigate problem or request
- Time ordering parts
- Time discussing problem or request with customer
- Time discussing problem with other staff or with vendors
- Time installing
- Time investigating the incident
- Time investigating and acting on an alert or recall
- Time upgrading
- Time travelling (between sites)

Travel Time

Record any travel time within a site (walking time) as part of the asset time and travel time between sites (vehicle time) as travel time. For the latter, divide the time appropriately between assets if a work order is created for more than one asset.

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Comments

Record comments clearly and professionally. The comments should be focused on the following question “***What would someone need to know about the work I did, at a later time, if they were looking at the work order?***” For example, if a different technologist at a later time needs to look back to see what was done; the comments should assist them in understanding what work was done.

NOTE: No private information is to be recorded in the CMMS under any circumstances. This includes such things as patient names, medical record numbers, addresses, phone numbers, etc. Refer to POL001 - BCBME CMMS Privacy Policy.

Parts

All parts that meet one or both of the following criteria should be added to the work order:

1. It would be valuable to others at a later time to know that this part has been replaced and when it was replaced.
2. The parts cost is > \$100.

In the CMMS, parts can be added to a work order by selecting from a parts list, or manually as a material-on-the-fly. If the latter is used, employ the following nomenclature:

- Part #, Part Description, Mfr, PO# (PO# is optional)
 - e.g. 12345, ECG Connector, Philips

Status and Completion Date

- All work order must have the appropriate status, at all times, that reflects the state of the work
- All work orders must have a completion date that reflects the date when the work was completed. Note: the created date is populated by THE CMMS.

Ancillary Elements

These apply some of the time and/or are optional.

Requestor Details

The Requestor details are auto-populated from Web Request, which is used by the customers to submit an online request. If the work order is created by the technologist, the Requestor Details are optional.

If you are recording the request, do so in the Requestor Comments.

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Incident Investigations

If a work order is for an Incident Investigation, then you must record it on the Incident Investigation tab, including:

- Is it an Incident
- PSLS Number
- Degree of Harm

Multi Asset Work Orders

Multi asset work orders can and will be used, but only when ***“the work on all assets is essentially the same”***. It is preferable to capture all the work related the “Job” on one order, rather than on multiple work orders. The work orders should be kept in Status = In Progress until all work is completed on all assets.

Auditing of Work Order Recording

Work orders will be audited on a regular basis to ensure they are accurate, complete, and consistent. This will employ the following strategy (refer to SOP009 – BCBME CMMS Work Order Auditing):

1. The CMMS team will regularly review and follow up on a series of automatic audit reports that are intended to catch obvious and potential inaccuracies in the data
2. The supervisors will regularly review their team’s work orders until such time they are satisfied that the work orders are accurate, complete, and consistent on a regular basis. Once they reach that goal, they will view randomly or when requested by the CMMS Team because an audit has found inaccuracies



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Revision History

Revision No.	Date of Issue	Revised By	Comments
Version 1.0	Oct 1, 2013	Doug King, Vaun Malo	Draft, Reviewed
Version 1.1	Oct 7, 2013	Doug King, Vaun Malo	Reviewed
Version 1.2	Oct 16, 2013	Andrew Ibey	Approved
Version 1.3	Nov 20, 2013	Doug King	Active
Version 1.4	Sep 14, 2014	Doug King	Revised Draft for Province
Version 1.5	Oct 26, 2015	Doug King, Andrew Ibey	Final Draft for Province
Version 1.6	Jan 21, 2016	Andrew Ibey	Issued for Province
Version 1.7	Feb 15, 2017	Brendan Gibbons	Added "who records information section". Active.

References

POL001 – BCBME CMMS Privacy Policy
SOP008 – External Service
SOP009 – BCBME CMMS Work Order Auditing