Procedure #		Date Created:		
Model:			Subcategory:	
Manuf:			Manual version:	

PM Form Instructions & Reminders:

PM Developer Instructions

1. Complete the PM Developer Header on Page 2
   - Find an example Asset Number & Indicate from which Segment/Health Authority
   - Locate the Service Manual & Find the PM Frequency
   - AEM Modification Details – Details modifications/changes from the original manufacturer procedure
2. Use Appendix A to Build PM Procedure
   - Appendix B lists of all the different types of sub-procedures available to use in TMS.
   - Please copy and paste the types you will be using to develop the procedure.
   - The Sub-procedure number (SP#) will be filled in later by the CMMS PM Writer as they upload the steps to TMS.
   - Keep sub-procedure instructions short (max 10 lines) to avoid scroll bars in the sub-procedure in TMS.

CMMS PM Writer Instructions:

1. Complete the CMMS PM Writer Header on Page 2
2. Ensure the PM form reflects what is in the CMMS (Spelling, 10 line Limits, etc.)
3. Fill in the SP#s with the CMMS Sub-Procedure numbers
4. Delete PM Form Instructions & Reminders, Appendix B, and Appendix C.
5. Save the file name as
   - "Manufacturer Model Name Rev DDMMMYYYY M-#"
   - "Subcategory Name (Generic) Rev DDMMMYYY S-#"
   - *Note Manufacturer, Model Name, & Subcategory should be the same as it is in TMS. Use Example asset.*

Sub-Procedure Types

- **Test Equipment**
  - Step should be included in all procedures where equipment is required – ECNs not mandatory in most cases.
- **Parts Replacement**
  - One step for each part – DO NOT use a checkbox list with all parts
- **Comment box**
  - Example in Appendix B shows the Test Equipment step which should be included on all procedures where test equipment is needed
- **Yes/No**
  - Used to indicate completion of a step that does not have a Pass/Fail/Corrective Action component.
  - E.g. "Restore Clinical Default Settings"
- **Choice list** (Usually used for pass/fail questions using radio buttons)
  - Radio buttons
    - Preferred
    - Only one answer/Mutually Exclusive
  - Dropdown list
    - Only one answer/Mutually Exclusive
    - Not Commonly used
  - Checkbox
    - allows multiple options to be selected –
    - Not Recommended/Avoid Using
    - Responses selected will not be visible on the TMS summary screen
  - Standard Responses:
    - ☐ Pass
    - ☐ Pass with Corrective Action (see comments)
    - ☐ Fail – Unable to repair (see comments)
  - Add N/A for steps that may or may not have a particular option
    - ☐ N/A
- **Data Readings for non-test items**
  - Ex. Meter Reading
- **Data Reading for test items**
  - Needs both a Pass/Fail question and the data field - include the range)
- **Workflow**
  - If Yes/No Questions can be a combination of different Sub-Procedure types
  - Use to differentiate between PM Year/Types
  - Use to differentiate between purchased options/features to be PM'd/Tested

Procedure #		Date Created:	
Model:		Subcategory:	
Manuf:		Manual version:	

PM Procedure Header:

To be Completed by PM Developer:

☐ Attach service and / or operators manual
☐ Attach vendor procedure or section of the service manual with vendor procedure
☐ Confirm preventative maintenance frequency from manual
☐ Did you modify this procedure in any way? If so, please see AEM instructions below to determine if it meets the criteria for AEM.

Example Asset #		Example Serial #		Segment number (HA) for example asset:	
PM Developer Name:		Contact Info:		Date of completion:	
Subcategory:		Manufacturer:		Model Name:	
PM Frequency		Manual Revision:			
Alternate Equipment Maintenance (AEM) Modified?	☐ Yes ☐ No	**If yes is selected, please contact clinical engineer for review.** An AEM Procedure is the modification of an OEM Procedure by adding, deleting, or changing steps to either streamline the PM procedure, remove unnecessary/ redundant steps, or improve the reliability or safety of medical equipment using risk-based assessments. Re-ordering or consolidating steps is not considered AEM. See SOP # P-14-16-40006 for details.			
AEM – Modification Details					

To be completed CMMS PM Writer:

☐ Test procedure on test asset (contact DBM for test asset number if unknown)
☐ The Procedure title should be following format. Use this procedure title when implementing the procedure in TMS.
   - Model Specific: Manufacturer Model Name Rev DDMMMYYYY M-#
   - Subcategory Name (Generic) Rev DDMMMYYY S-#
☐ Fill in the PM Change/Request Details & History – the PM request details can be found in the PM Change Log
☐ Fill in the PM Ticket # - this can be found in the PM Change Log
☐ Determine if a model procedure or subcategory procedure?
   - Find the Model ID/SubcatID using "TMS Admin Get Model ID, SubCat ID Number By Asset Number By Segment EXCEL or PDF" report

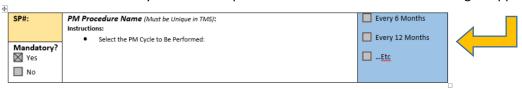| CMMS PM Writer Name:		Contact Info			
Procedure #:		Model ID:		Subcat ID:	
Procedure Title:			Date of completion:		
PM Change Ticket #:					
PM Change/Request Details & History : *(Provide the reason for the PM Change as outlined in the PM Ticket).*					

Procedure #		Date Created:	
Model:		Subcategory:	
Manuf:		Manual version:	

PM Procedure Template Instructions:

- Enter a check box for each PM Cycle to be completed as shown in the Blue Box starting in Appendix 'A':

- Add a Corresponding Blue Section for Each PM Cycle using copy and past & Update the Blue Section's Name to correspond with the PM Cycle as demonstrated in Appendix 'A':

  - *Not Required if the Section only has a single PM Cycle*

- Within each PM cycle, use the Sub-procedures templates from Appendix 'B' to build the steps required within each PM Cycle.
  - If steps are repeated within different PM Cycles (e.g. 12 month steps also include the 6 month steps)
    - Copy and Paste the steps required to be completed within each PM Cycle.
    - Result is that each PM cycle contains the complete steps to complete the cycle.
    - Ensures that the steps can be followed using both the paper & electronic forms.

- Do not forget to include Service Manual Page Numbers where appropriate

- Test Equipment required to complete the PM Procedure should be detailed within the relevant PM Cycle.

- PM Steps should detail any necessary consumables required to complete the step.

Procedure #		Date Created:	
Model:		Subcategory:	
Manuf:		Manual version:	

Appendix 'A' – PM Procedure Template

SP#:	*PM Procedure Name* (Must be Unique in TMS):	☐ Every 6 Months
Mandatory? ☒ Yes ☐ No	**Instructions:** • Select the PM Cycle to Be Performed:	☐ Every 12 Months ☐ Every 24 Months

If Every 6 Months:		
SP#: **Mandatory?** ☐ Yes ☐ No	**List Test Equipment <model name> (Service Manual page number)** 1. 2.	**ECNs/optional:** _____
SP#: **Mandatory?** ☐ Yes ☐ No		

If Every 12 Months:		
SP#: **Mandatory?** ☐ Yes ☐ No	**List Test Equipment <model name> (Service Manual page number)** 1. 2.	**ECNs/optional:** _____
SP#: **Mandatory?** ☐ Yes ☐ No		

If Every 24 Months:		
SP#: **Mandatory?** ☐ Yes ☐ No	**List Test Equipment <model name> (Service Manual page number)** 1. 2.	**ECNs/optional:** _____

Procedure #		Date Created:	
Model:		Subcategory:	
Manuf:		Manual version:	

Appendix 'B' - Sub-procedure Type Templates:

Test Equipment:

- A List of required Test Equipment should be included in all PM Procedures & PM Cycles when equipment is required.
- ECNs are not mandatory in most cases unless required for Accreditation Purposes.
- Include at the top of each blue PM Cycle Header

SP#:
 	
Mandatory?
☐ Yes
☐ No
	List Test Equipment <model name> (Service Manual page number)
	    1.
	    2.
		ECNs/optional:
		
		_____

Parts Replacement:

- **One** sub-procedure for each part
  - **DO NOT** use a checkbox list with all parts together
- Do not include Part #s because they change frequently

SP#: **Mandatory?** ☐ Yes ☐ No	**Part Replacements (manual page number):** List part and frequency (1 part per check box) •	☐ Yes ☐ No

Yes/No:

- Used to indicate or verify completion of steps that do not have a Pass/Fail/Corrective Action component
  - E.g. "Restore Clinical Default Settings"

SP#: **Mandatory?** ☐ Yes ☐ No	**Step Title (manual page number):** Instructions: •	☐ Yes ☐ No

Pass/Corrective Action/Fail:

- Used to indicate completion of steps that have a Pass/Fail/Corrective Action component.
  - May be used to group/combined multiple steps together to streamline & reduce clicks
  - Include Test Ranges as applicable
- Other Standardized Choices:
  - ***Option/Feature Not Installed Choice***
    - Used to Indicate if a step or group of steps are not required because a particular device option or feature is **not** installed.
    - E.g. Lifepak 15 – NIBP Option
  - ***NA – Not applicable*** may be a valid choice
    - Avoid use unless a step can be truly NA
    - E.g. Part Replacement based on hours meter reading
- If Pass/Corrective Action/Option Not Installed/NA applicable does not apply:
  - Customized Choice List may be created
  - PM Developers are encouraged to avoid customized list to encourage standardized responses for reporting purposes

SP#: **Mandatory?** ☐ Yes ☐ No	**Step Title (manual page number):** Instructions: •	☐ Pass ☐ Pass with Corrective Action (see comments) ☐ Fail – Unable to repair (see comments)

or

SP#:	**Step Title (manual page number):** Instructions: •	☐ Pass ☐ Pass with Corrective Action (see comments) ☐ Fail – Unable to repair (see comments) ☐ Option/Feature Not Installed

or

SP#: **Mandatory?** ☐ Yes ☐ No	**Step Title (manual page number):** Instructions: •	☐ Pass ☐ Pass with Corrective Action (see comments) ☐ Fail – Unable to repair (see comments) ☐ NA – Not Applicable

	Procedure #		Date Created:		
Model:				Subcategory:	
Manuf:				Manual version:	

Data Reading & Pass/Corrective Action/Fail:

- Data Recording for measured items
  - Must have a Pass/Corrective Action/Fail/Option Not Installed/NA (Optional) choices
- Include Test Ranges
- E.g. Values required for Accreditation/DAP

SP#: **Mandatory?** ☐ Yes ☐ No	**Data Reading Title (manual page number):** Instructions: •	☐ Pass ☐ Pass with Corrective Action (see comments) ☐ Fail – Unable to repair (see comments)
SP#:	**Data Reading Title:**	**\<Insert Range\>:** _____

or

SP#:	**Step Title (manual page number):** Instructions: •	☐ Pass ☐ Pass with Corrective Action (see comments) ☐ Fail – Unable to repair (see comments) ☐ Option/Feature Not Installed
SP#:	**Data Reading Title:**	**\<Insert Range\>:** _____

or

SP#: **Mandatory?** ☐ Yes ☐ No	**Data Reading Title (manual page number):** Instructions: •	Pass ☐ Pass with Corrective Action (see comments) ☐ Fail – Unable to repair (see comments) ☐ NA – Not Applicable
SP#:	**Data Reading Title:** •	**\<Insert Range\>:** _____

Procedure #		Date Created:	
Model:		Subcategory:	
Manuf:		Manual version:	

Comments box:

- Provides a text box and allows a technologist to input plain text into a procedure
    - Rarely used but available for special circumstances

SP#:	Step Title (manual page number)	Comments:
	Instructions:	
Mandatory?	•	_____
☐ Yes		
☐ No		

Appendix 'C' – Sample Completed PM Form:

📄 PDF

Procedure 1174
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