BIOMEDICAL ENGINEERING

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Uploading Attachments to the CMMS: Biomedical Engineering   SOP # P-14-16-40010

UPLOADING ATTACHMENTS TO THE CMMS

1. Purpose

1.1   The purpose of this procedure is to define:

- What documents should be uploaded to the CMMS

- Who should upload the documents

- A common nomenclature for the naming of documents

- The most appropriate location in the CMMS to attach the document (i.e. Asset Record, Model, etc.)

2. Definitions

Acronym or Word	Definition
Attachment	An attachment can be any additional information stored as an electronic file that is uploaded to the CMMS for future reference.
CMMS	Computerized Maintenance Management System
File Name	Is the name of the file when stored on a PC hard drive (e.g., 510909a.jpg, or TSB40_neo.pdf)
File Description	Is the name given by the user to the File when uploaded to the CMMS (e.g., A17449 ECRI Alert for 8015 Alaris Pump)
File Location	Where in the CMMS the document is uploaded: Model#, Asset, Work Order or Procedure, etc.
WO	Work Order

3. Scope

3.1   Included:

3.1.1   All attachments uploaded to the CMMS.

3.1.2   All file attachment types.

3.2   Excluded:

3.2.1   Hyperlinks to attachment documents external to the CMMS are not permitted. Links may become broken with time.

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4. Procedure

4.1 All Staff

Attachments must abide by the following rules:

- To be uploaded to the CMMS, the general rule is that the document must be something that would be useful and complement information put into the CMMS (e.g., Work Order) for another person to interpret

- BCBME Privacy Policy POL001 strictly forbids the uploading of any documents containing patient or personal information. Any such information MUST be removed from documents before they are uploaded

- **Avoid uploading Word documents** that can be edited. Instead, save the Word file as PDF and upload the PDF file

- Follow the document nomenclature and file extension guidelines outlined herein (see Section 4.2)

- **Hardcopy documents should be scanned and/or saved as PDF files prior to uploading to the CMMS, so that they are read-only and cannot be edited**

- There is a maximum file size of 10 MB, but the file size should be reasonable (i.e. < 5 MB) (an error message appears if attempting to attach files bigger than 10 MB)

- There is no limit to the number of documents that can be uploaded to the CMMS

- There is no limit to the number of documents per model, asset, or WO. Some uploads, such as photos, will require multiple attachments.

4.2 Attachment Nomenclature:

Attachment Types: Shall be common document types that can be opened by a typical computer in the LMBME program that does not require the use of specialized software.

Document Types	File Extension
Microsoft Word (Avoid Word files, use PDF instead)	doc, docx
Microsoft Excel	xls, xlsx, xlsm, csv
PDF	pdf
Photos or Image	jpg, jpeg, png
Video	mov, mp4, avi
Text	txt

File Name shall match the File Description to allow for easier file identification when downloaded.

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File Description shall be written in a way the attachment can be identified at a glance by the file description. In general, file descriptions must include the following:
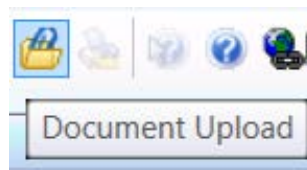
1) What the attachment is (short form): e.g., External Service Report = ESR, Purchase Order = PO, Image, etc. (see Table 1.0 in Section 4.3 for details)

2) If the document has a number, the number must be included (e.g., PO 213456)

3) If the file is attached to a <u>single</u> asset, a work order, or a device model, then the specific *asset number* (e.g., AA003125), *work order number*, or *model number* must be included in the description (Incorrect example: "Vendor report"; Correct example: "ESR C432661")

4) If the attachment may have regular updates (e.g., service manual) it is important to add the revision or version number in the file description so users know which is most current

5) Documents may include additional descriptions (e.g., front, report, checklist, form, etc.)

6) For each document type, follow both Standardized File Description Short Forms Guideline (see Table 1.0 in Section 4.3) and Naming Template Guideline (see Table 2.0 in Section 4.3).

File Location can be defined as any number of places in the CMMS. The most common locations to upload document attachments is to the Model, Asset, Work Order, or Procedure (see Table 2.0 – Naming Template Guideline).
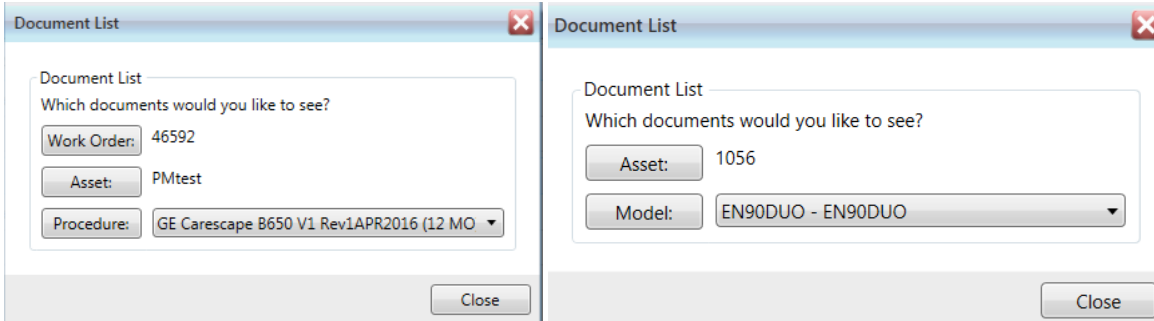
- **Model** – Files uploaded under the model will be accessible on every asset of this model

- **Asset** – Files uploaded under the asset will only be linked to that individual asset record

- **Work Order** – Files uploaded under Work Orders are only accessible in the that specific WO

- **Procedure** – Files uploaded under the Procedure are linked to the specific procedure number Note: if a procedure is updated to a new version (i.e., with a new procedure number), the attachments under the old procedure number are not automatically linked to the new procedure. Manually upload relevant attachments to the new procedure as needed
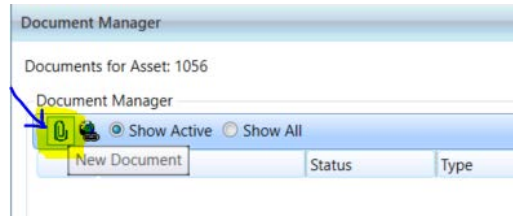
4.3   Procedure to Upload Attachments:

1) Login to TMS Online using your userID and password
2) Query the record the attachment needs to be associated with (Asset or WO)
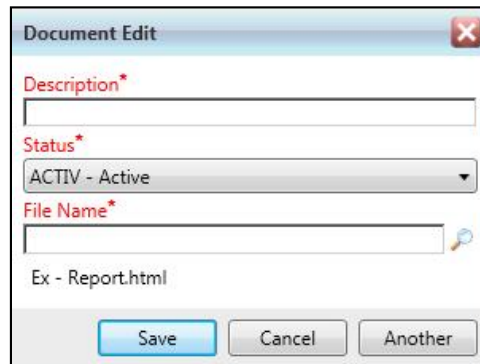3) With the record open, click on the Document Upload button (paper clip or folder with paper clip)

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4) SELECT the appropriate Module to attach the file to (e.g. Work Order, Asset, Procedure, or Model)

5) Click on the New Document button (paper clip) on the Document Manager child window

6) ENTER the Description (follow naming convention in Section 4.2)

7) LOCATE the file in your hard drive (click on magnifying glass under File Name)
8) Hit Save

Table 1.0 – Standardized File Description Short Forms Guideline

File Description	Short Form
Purchase Requisition	PR
Purchase Order	PO
Request for Proposal	RFP
Receiving Documents	RECV
Warranty	WRTY
External Service Report	ESR
PSLS Events Investigation Reports	PSLS
Service Manual	SRVMAN
User Manual	USRMAN
Service Bulletins	SRVBLT
Medical Device License	MDL
End of Support Letter	EOS
End of Life Letter	EOL
Alert/Recall	RECALL
Images	IMAGE
Videos	VIDEO
Service Contract	SRVCNT
PM Procedure	PMPROC
PM Checklist	PMCKLST
ECRI Report	ECRI
Revision X.X	REVX.X
Version X.X	VERX.X
Manufacturer Letter	MFR LTR

Table 2.0 – Naming Template Guideline

Document	Attach To	Responsibility	Naming Template	Naming Example	Instructions
Alerts Coordinator					
Alert/Recall	**Model**	Alerts Coordinator	ECRI + *Alert#* OR Vendor Letter# + Mfr + Model#	ECRIA20382 H220221 Philips V680	Send the information to BMEAlerts@vch.ca and they will attach
Service Bulletins	**Model**	Alerts Coordinator	SRVBLT + Date + *Model#*	SRVBLT July2013 G180	Send the information to BMEAlerts@vch.ca and they will attach
Document	**Attach To**	**Responsibility**	**Naming Template**	**Naming Example**	**Instructions**
BMET/Clerical					
External Service Reports	**Work Order**	BMET/Clerical	ESR + *Asset #*	*ESR C432661*	MUST attach for all external service vendor work
Document	**Attach To**	**Responsibility**	**Naming Template**	**Naming Example**	**Instructions**
BMET/Supervisor					
Purchase Request	**Asset**	BMET/Supervisor	PR + *PR#*	*PR2134450*	Attach to Asset
Purchase Order	**Asset**	BMET/Supervisor	PO + *PO#* + *Asset#*	*PO2134450 C432661*	Attach copy to one asset, check the "PM Attached" checkbox for that asset, and enter PO Number on every asset
RFP Quote	**Asset**	BMET/Supervisor	RFP + *RFP#* + *Asset#*	*RFP01137 C432661*	Attach to same asset as PO
Receiving Documents	**Asset**	BMET/Supervisor	RECV + *Asset#*	*RECV C432661*	Attach to same asset as PO
Warranty	**Asset**	BMET/Supervisor	WRTY + *Asset#*	*WRTY C432661*	Attach to same asset as PO, and enter Warranty info on every asset
Service Manual	**Model**	BMET/Supervisor	SRVMAN + *Model#* + REVX.X	SRVMAN G180 REV2.2	Only applies if New Model, or if manual has been revised.

Document	Attach To	Responsibility	Naming Template	Naming Example	Instructions
User Manual	**Model**	BMET/Supervisor	USRMAN + *Model #* + REV X.X	USRMAN G180 REV1.0	Only applies if New Model, or if manual has been revised.
PM Job Procedure Completed (paper version)	**Procedure**	BMET/Supervisor	PMCKLST + *ECN* + *WO#*	PMCKLST C432661 WO239949	Only required when the paper version of the BCBME PM Procedure is used.
PSLS Event Images	**Work Order**	BMET/Supervisor	PSLS + PSLS ID# + IMAGE + Description	PSLS 1234567 IMAGE Post-it from Clinical Staff	Attach all relevant images to PSLS WO (NHA/IHA CW WO with PSLS flag)
PSLS Event Videos	**Work Order**	BMET/Supervisor	PSLS + PSLS ID# + VIDEO + Description	PSLS 1234567 VIDEO Infusion Set Leaking	Attach all relevant videos to PSLS WO (NHA/IHA CW WO with PSLS flag)
PSLS Event Investigation Report	**Work Order**	BMET/Supervisor	PSLS + PSLS ID# + DATE + SITE + Description of issue	PSLS 1234567 YYYY-MM-DD VGH Alaris Pump Over-infusion	Only required for events involving severe harm or death. Otherwise, simply fill out PSLS Procedure in WO "Procedures" tab
Document	**Attach To**	**Responsibility**	**Naming Template**	**Naming Example**	**Instructions**
Supervisor/Manager					
Service Contract	**Contract**	Supervisor/Manager	SRVCNT + End Date + *Model#*	SRVCNT NOV2015 G180	Attach to contract and link contract to all assets. Note: Contract end dates should be managed appropriately in the CMMS.
Document	**Attach To**	**Responsibility**	**Naming Template**	**Naming Example**	**Instructions**
System Admin					
Medical Device License	**Model**	System Admin	MDL + *MDL#* + *Model#*	MDL9673 G180	Send the MDL PDF to the system administrator, they will attach.
End of Support Letter	**Model**	System Admin	EOSL + *Model#*	EOSL G180	Send the received letter to the system administrator, they will attach.
End of Life Letter	**Model**	System Admin	EOLL + *Model#*	EOLL G180	Send the received letter to the system administrator, they will attach.
Device Images	**Model**	System Admin	IMAGE + *Model #* + Image Description	IMAGE G180 Front View	Only applies to New Model.

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Document	Attach To	Responsibility	Naming Template	Naming Example	Instructions
					MUST submit 2 pictures minimum (Mfr plate and front view with Model Info). Writing must be legible, and front picture must show whole device. Send the received images to the system administrator, they will attach.
Engineer/CMMS PM Writer					
ECRI Reports	**Work Order**	Engineer	ECRI + Description	ECRI GE Panda Overheating	All reports submitted to ECRI should be attached to the relevant WO
PM Job Procedure Mfr	**Procedure**	Engineer/CMMS PM Writer	PMPROC + *Mfr* +*Model#* + *Rev#*	PMPROC CAREFUSION 8015 Rev1.0	These are manufacturer detailed documents showing "how" to perform Procedures attached to PM Work Order types.
PM Job Procedure BCBME	**Procedure**	Engineer/CMMS PM Writer	PMPROC + *Mfr* +*Model#* + *Rev#*	PMPROC CAREFUSION 8015 Rev1.0	These are the BCBME detailed documents showing "how" to perform Procedures attached to PM Work Order types.
PSLS Event Investigation Report	**Work Order**	Engineer	PSLS + PSLS ID# + DATE + SITE + Description of issue	PSLS 1234567 YYYY-MM-DD VGH Alaris Pump Over-infusion	Only required for events involving <u>severe harm or death</u> (if not already uploaded by BMET/Supervisor)

5. Reference Documents

BCBME Privacy Policy POL001

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	1.3	26-OCT-2015	Draft for BCBME	LM Manager
	1.4	20-ARP-2016	Updated to include Job Procedures	LM Technologist
	1.5	09-NOV-2016	Updated Procedure Rules	LM Engineer
	1.6	10-MAR-2023	Revised file examples and guidelines	LM QI Leader