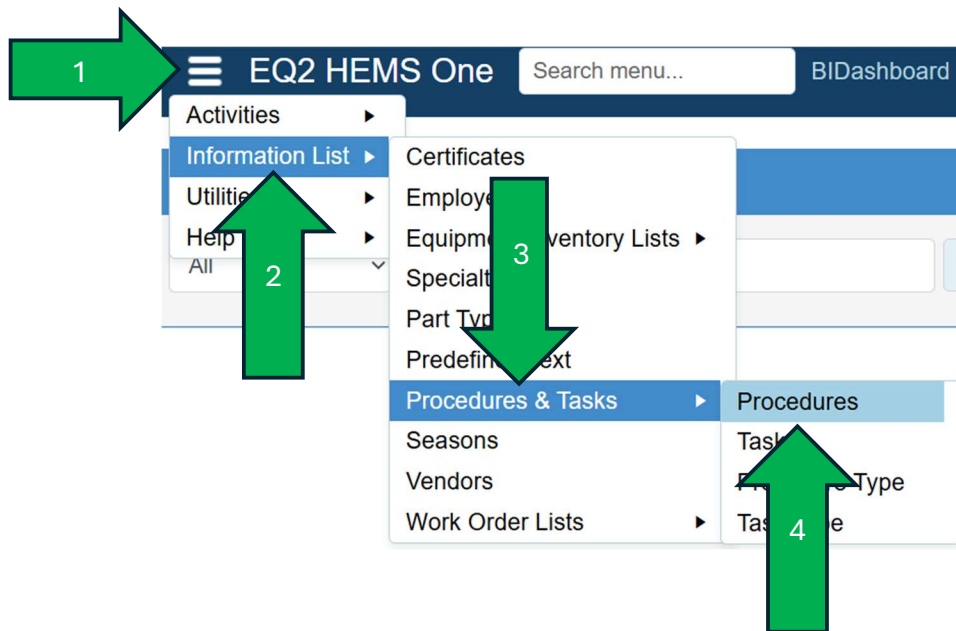


# HEMS One: How to Build a Procedure

*Note: Procedures can only be edited in the Best Practice service area.*

To access Procedure records, click on the hamburger menu in the upper left of the HEMS One window (1), followed by the Information Lists menu (2), then the Procedures & Tasks submenu (3) followed by Procedures (4).



Click on the New icon in the upper right of the Procedures module to create a new Procedure record.



# HEMS One: How to Build a Procedure

## Procedure Record

Procedures Add/Edit

Name

Not for PM?  Active

Type Season Specialty Number

NONE NONE NONE 3530

Compliance Code Source Notes

1. **Name:** The title of the Procedure.
2. **Not for PM? checkbox:**
3. **Active checkbox:** This checkbox is checked by default. To deactivate a Procedure, uncheck this box.
4. **Type:** The Procedure type is selected from a predefined list. This is a type-ahead field.
5. **Season:** If applicable, the Season associated with the procedure.
6. **Specialty:** The professional Specialty associated with the procedure selected from a predefined list. This is a type-ahead field.
7. **Number:** The system generated Procedure number.
8. **Compliance Code:** A field available for any organizational compliance code to be associated with the Procedure.
9. **Source:** The Procedure Source name (e.g. Baxter, Jim from the Basement, Manufacturer Manual etc.).
10. **Notes:** This is an open text field. Anything added to this field will appear in the system generated PM WO request text above the PM tasks.
  - a. To add a timestamp to the Notes field, use the clock icon to the right of the field
  - b. To expand the Notes field, use the Show Expanded View icon
  - c. To use predefined text in the Notes field, use the Predefined Text icon

# HEMS One: How to Build a Procedure

## Schedule Frequency

Click on the Add button on the right side of the Schedule Frequency section to add frequencies. All task frequencies should be included here.



*Note: If a procedure will be used by different service areas at different frequencies, make sure the Task frequency is set to Always and the Procedure frequency is set to Daily.*



The screenshot shows the 'Procedures Add/Edit' form. The 'Schedule Frequency' section is highlighted with a green box. A green arrow points to the add button (+) on the right side of the section. The form includes fields for Name, Type (NONE), Season (NONE), Specialty (NONE), Number (3530), Compliance Code, Source, Notes, and OneQA.

Use the radio buttons (1) and the “Occurs every” field (2) to select the frequency for the Procedure. Enter the Estimated Hours (in decimal hours) needed to complete the Procedure (3). Check the Required for Compliance checkbox (4) if the completion of the Procedure is needed for compliance. Repeat these steps for each frequency added.

The screenshot shows the 'Edit' form for the 'Schedule Frequency' section. It includes radio buttons for frequency selection (1), an 'Occurs every' field (2) set to 1 Year, an 'Estimated Hours' field (3) set to 1.5, and a 'Required For Compliance' checkbox (4) which is currently unchecked.




# HEMS One: How to Build a Procedure

Once a frequency is added to a Procedure, it will appear on the Procedure record. Use the Edit or Delete buttons   on the right side of the frequency listing to alter or remove the frequency definition.


Procedures Add/Edit  









Name  
  Not for PM?  Active

Type: MANUFACTURER RECOMMENDE Season: NONE Specialty: BMET Number: 3530

Compliance Code: Source: MFR SVC MAN v1.2.3 Notes: Anything   

OneQA

Schedule Frequency 

Every Year	 
Every 3 Months (Quarterly)	 
Every 6 Months (Semi - Annual)	 
Every 3 Years	 



## Tasks

The Procedure Task section is made up of three Tabs, Tasks, Description, and Attachments.

Tasks **Description** Attachments

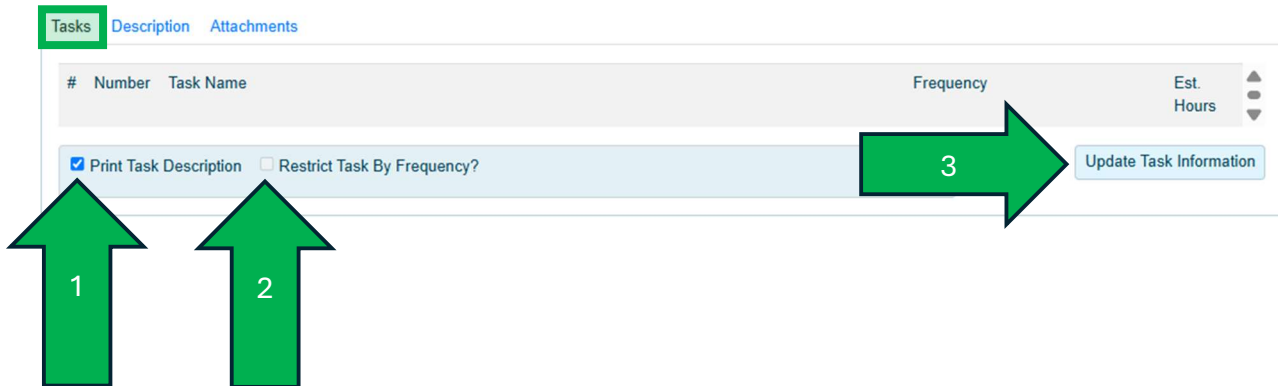
#	Number	Task Name	Frequency	Est. Hours
---	--------	-----------	-----------	------------

Print Task Description  Restrict Task By Frequency?

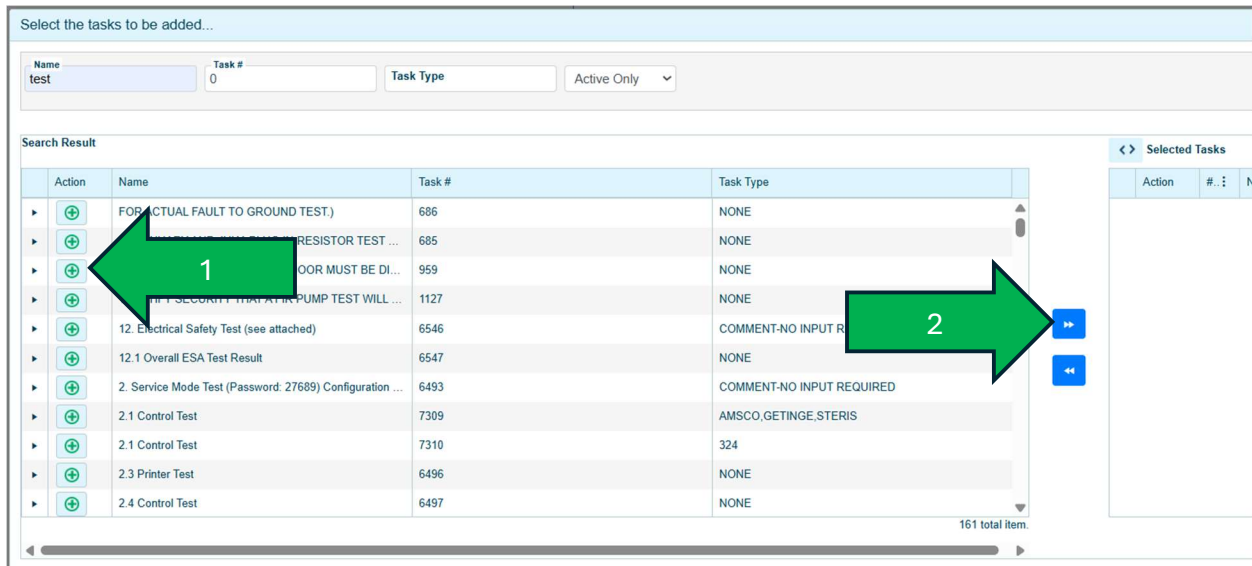
# HEMS One: How to Build a Procedure

## Task Tab

The “Print Description” checkbox (1) indicates if HEMS One will print the Task Text associated with the defined Tasks in the generated PM WO request text field. The Restrict “Task by Frequency?” checkbox (2) indicates if the tasks printed in the generated PM WO will be restricted by frequency. Click on the Update Task Information button (3) to update the Tasks associated with the Procedure record.

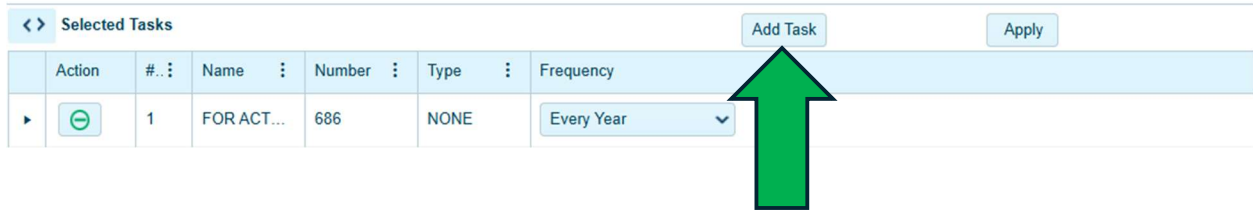


After clicking on the Update Task Information button, use the search fields to find the Tasks for the Procedure. Add the tasks individually using the Add buttons (1) to the left of the Task Names, or add all the search results at once using the double caret button (2) between the Search results and Selected Tasks sections.



# HEMS One: How to Build a Procedure

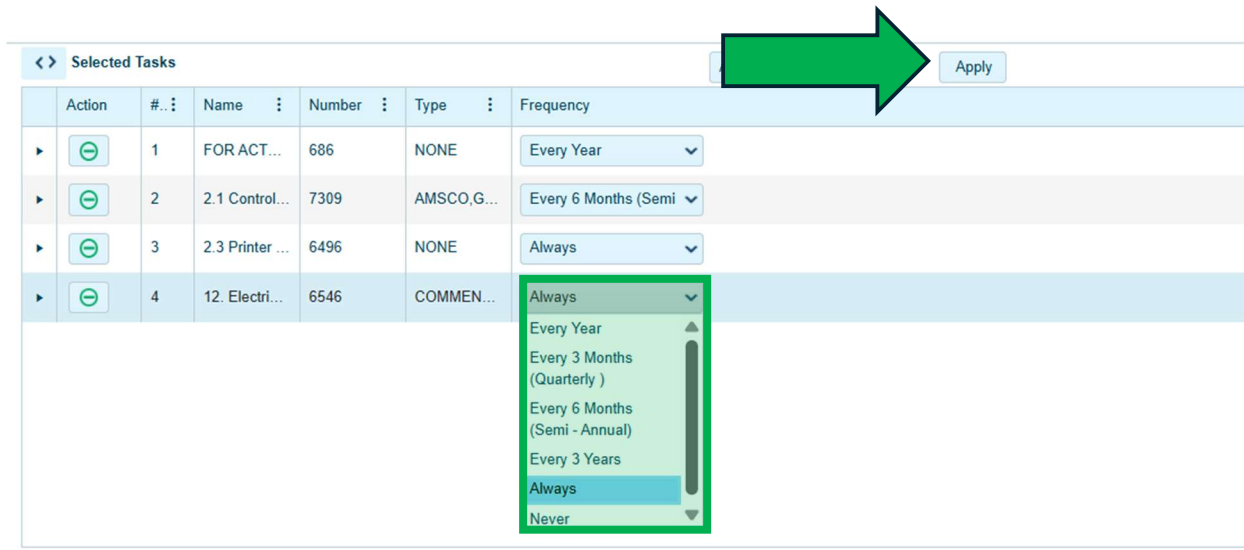
If the Task needed for the Procedure has not been defined previously, click on the Add Task button above the Selected Tasks section to create a new Task. For more information on how to create a task, see the “HEMS One: How to Build a Task” document.



Once the Tasks have been selected, use the Frequency drop-down list to define task specific frequencies if needed. The frequencies available in this list are the frequencies defined in the Schedule Frequency section of the Procedure.

*Note: If a procedure will be used by different service areas at different frequencies, make sure the Task frequency is set to Always and the Procedure frequency is set to Daily.*

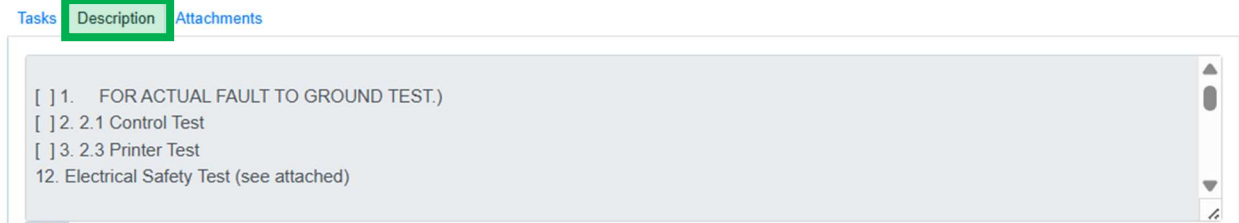
When the Tasks have been selected, and the frequency/ies defined, click on the Apply button to add the Tasks to the Procedure.



# HEMS One: How to Build a Procedure

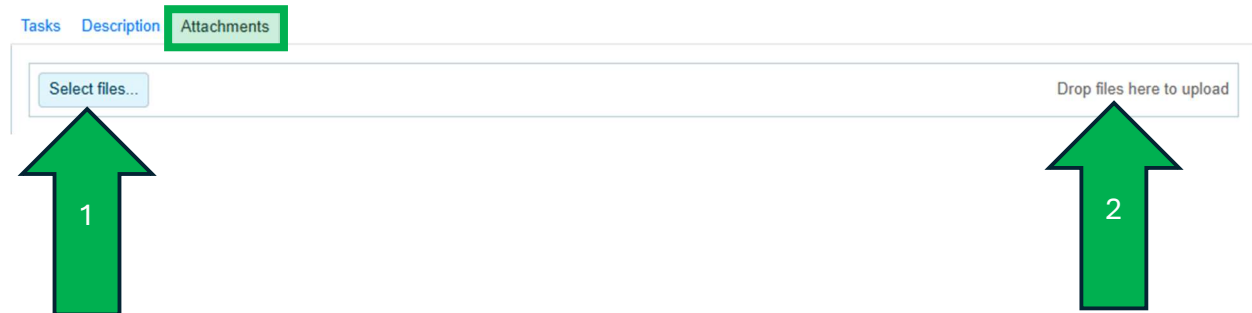
## Description Tab

This tab will show the description of what the PM WO request text will look like. To view the Description of a Procedure, the Procedure must first be saved.



## Attachments Tab

Attach documents to the Procedure on the Attachment Tab by either browsing for files using the “Select files...” button (1) or drag and drop files into the attachment field (2).



After the Procedure is saved, it can be associated with any Equipment Type, Equipment Model, Equipment Inventory, Service Area, or Groups that require the Procedure.