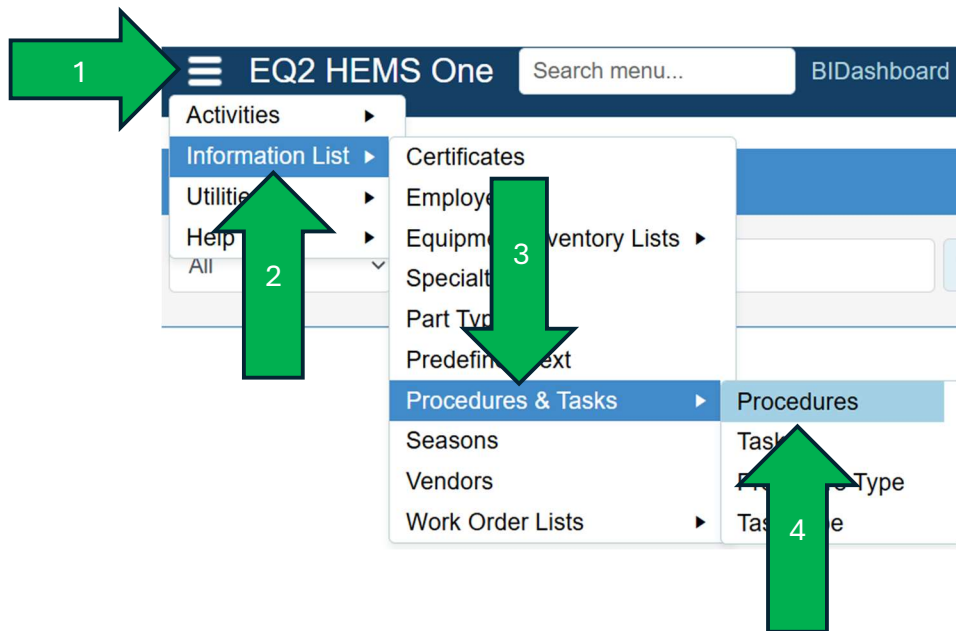


HEMS One: How to Build a Procedure

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

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 large green arrow points to the '+' button on the right side of the section.

Procedures Add/Edit

Name: [Text Field] ☐ Not for PM? ☒ Active

Type: NONE Season: NONE Specialty: NONE Number: 3530

Compliance Code: [Text Field] Source: [Text Field] Notes: [Text Field]

OneQA: [Text Field]

Schedule Frequency [Section Header] [Add Button (+)]

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 a procedure frequency. It includes radio buttons for frequency selection (1), the 'Occurs every' field (2), the 'Estimated Hours' field (3), and the 'Required For Compliance' checkbox (4).

Edit [Accept] [Cancel]

☒ Annually ☐ Semi Annually ☐ Quarterly ☐ Monthly ☐ Weekly ☐ Daily ☐ OneQA Frequency

Occurs every 1 2 Year

Estimated Hours 1.5 3

☐ Required For Compliance

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

Procedure Example

☐ Not for PM?

☒ Active

Type

MANUFACTURER RECOMMENDED

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

Description

Attachments

#

Number

Task Name

Frequency

Est. Hours

☒ Print Task Description

☐ Restrict Task By Frequency?

Update Task Information

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?

Update Task Information

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.

The screenshot shows the 'Tasks' tab in the HEMS One interface. It features a table with columns: #, Number, Task Name, Frequency, and Est. Hours. Below the table, there are two checkboxes: 'Print Task Description' (checked, labeled 1) and 'Restrict Task By Frequency?' (unchecked, labeled 2). To the right of these checkboxes is a green arrow labeled 3 pointing to the 'Update Task Information' button.

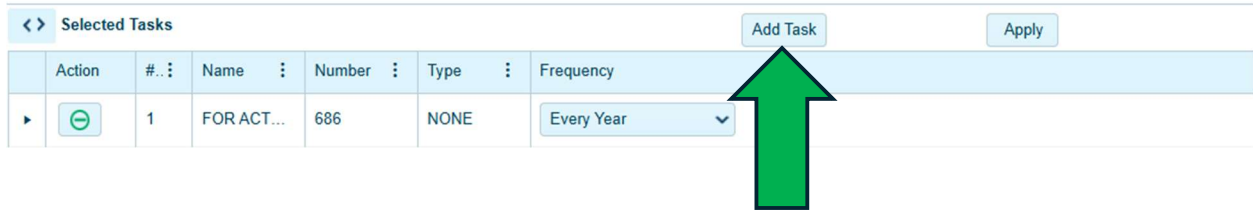
After clicking on the Update Task Information button, use the search fields to find the Tasks for the Procedure. Add the tasks individually using the Add buttons (1) to the left of the Task Names, or add all the search results at once using the double caret button (2) between the Search results and Selected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

The screenshot shows the 'Select the tasks to be added...' dialog. It includes search fields for Name, Task #, Task Type, and Active Only. Below the search fields is a 'Search Result' table with columns: Action, Name, Task #, and Task Type. To the right of the search results is a 'Selected Tasks' section. A green arrow labeled 1 points to the '+' buttons in the 'Action' column of the search results. A green arrow labeled 2 points to the double caret button (») between the search results and the selected tasks section.

Action	Name	Task #	Task Type
+	FOR ACTUAL FAULT TO GROUND TEST.)	686	NONE
+	RESISTOR TEST ...	685	NONE
+	DOOR MUST BE DI...	959	NONE
+	PUMP TEST WILL ...	1127	NONE
+	12. Electrical Safety Test (see attached)	6546	COMMENT-NO INPUT R
+	12.1 Overall ESA Test Result	6547	NONE
+	2. Service Mode Test (Password: 27689) Configuration ...	6493	COMMENT-NO INPUT REQUIRED
+	2.1 Control Test	7309	AMSCO.GETINGE.STERIS
+	2.1 Control Test	7310	324
+	2.3 Printer Test	6496	NONE
+	2.4 Control Test	6497	NONE

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.

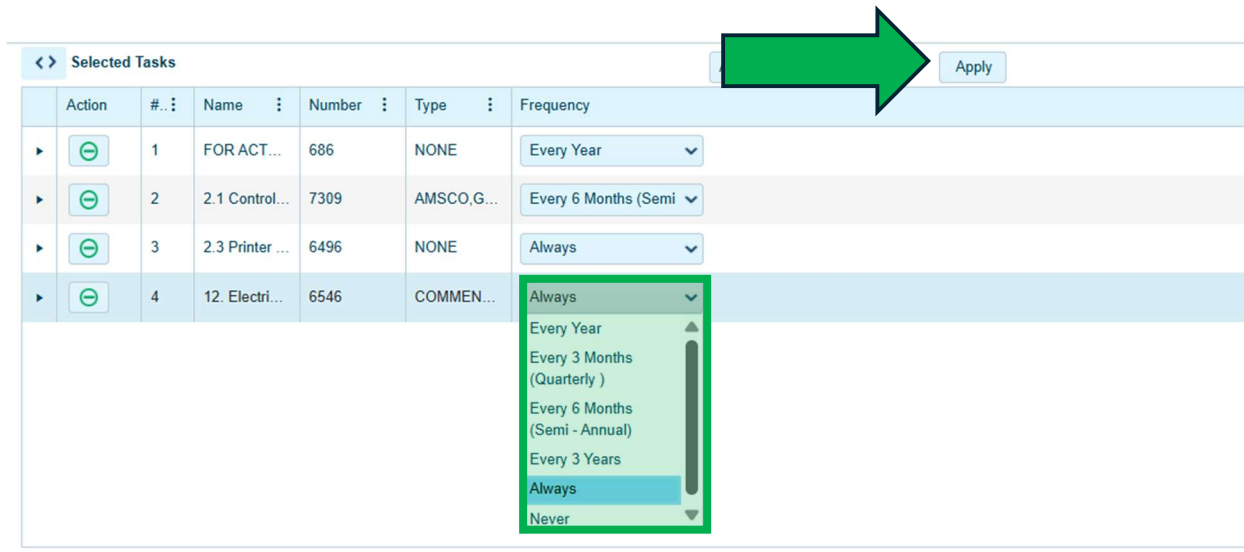


The screenshot shows the 'Selected Tasks' section of the HEMS One interface. At the top right of this section are two buttons: 'Add Task' and 'Apply'. A large green arrow points directly to the 'Add Task' button. Below the buttons is a table with columns: Action, #, Name, Number, Type, and Frequency. The first row of the table contains the following data: Action (a minus icon), # (1), Name (FOR ACT...), Number (686), Type (NONE), and Frequency (Every Year).

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.



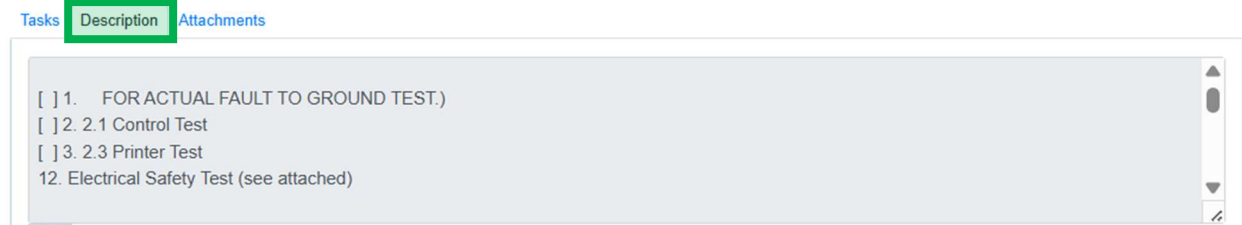
This screenshot shows the 'Selected Tasks' section with four tasks listed in the table. A large green arrow points to the 'Apply' button at the top right. The fourth task's frequency dropdown menu is open, showing a list of options: Always, Every Year, Every 3 Months (Quarterly), Every 6 Months (Semi - Annual), Every 3 Years, Always (highlighted in blue), and Never. The table data is as follows:

Action	#	Name	Number	Type	Frequency
▶	1	FOR ACT...	686	NONE	Every Year
▶	2	2.1 Control...	7309	AMSCO,G...	Every 6 Months (Semi
▶	3	2.3 Printer ...	6496	NONE	Always
▶	4	12. Electri...	6546	COMMEN...	Always

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.

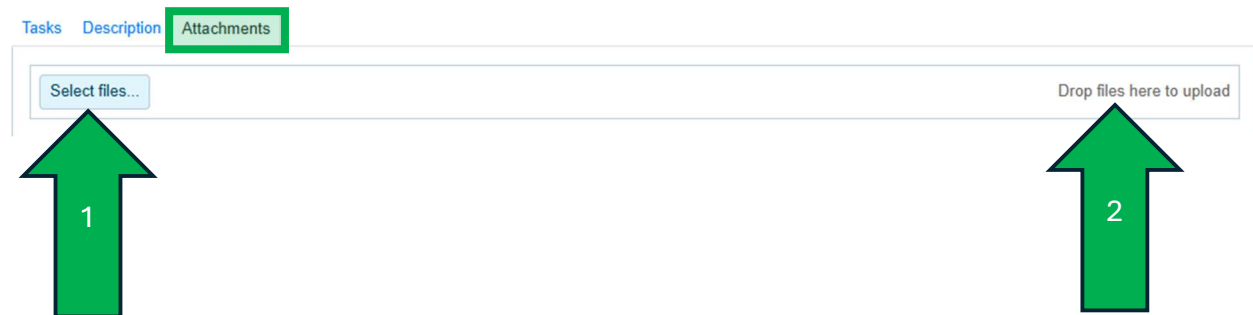


The screenshot shows the 'Description' tab selected in a software interface. The tab is highlighted with a green box. Below the tab, there is a text area containing a list of tasks:

- [] 1. FOR ACTUAL FAULT TO GROUND TEST.)
- [] 2. 2.1 Control Test
- [] 3. 2.3 Printer Test
- 12. Electrical Safety Test (see attached)

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).



The screenshot shows the 'Attachments' tab selected in a software interface. The tab is highlighted with a green box. Below the tab, there is a large rectangular area for attachments. On the left side of this area, there is a button labeled 'Select files...'. A green arrow with the number '1' points to this button. On the right side of the area, there is text that says 'Drop files here to upload'. A green arrow with the number '2' points to this text.

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.