

# I Swear I Looked! Documenting Unable to Locate Equipment

Friday, May 16<sup>th</sup>, 2025



# Today's agenda

1. Introductions
2. Reviewing the Code Language
3. Defining Your Organization's Policy
4. Asset Inventory and UTL
5. Summary and Q&A



# Meet today's speakers



## Joe Stockman

Director, Product Experience

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22 years with FSI

30 years with Healthcare CMMS

Works with customers to solve problems and improve the CMMS experience of healthcare services professionals



## Jen D'Alessio

Product Manager

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12 years with FSI

Focused on creating solutions to optimize our customers' workload and provide real value to their daily operations.

# Reviewing Code Language

- What do the requirements state?
- What do they *not* state?





# Choose Your Poison

Some of you don't really get to choose, but know which standards to reference. And don't forget state agencies and other authorities having jurisdiction (AHJs).



**1951**

TJC

**1965**

HFAP -> ACHC

**2008**

DNV

## Question

# Who are you using for accreditation?

- The Joint Commission
- DNV
- ACHC
- Other AHJs



# Multiple Authorities Having Jurisdiction

## **TJC - EC 02.04.03**

Inspects, tests, maintains medical equipment.

## **DNV - PE.7**

Medical Equipment Management System.

## **CIHQ - CE-8: Q**

The organization must assure that medical equipment used in patient care is safe.

## **Other AHJs**

Check Local and State requirements as well.



# TJC – EC 02.04.01

The hospital manages medical equipment risks.

EP 2: For hospitals that do not use Joint Commission accreditation for deemed status purposes: The hospital maintains either a written inventory of all medical equipment or a written inventory of selected equipment categorized by physical risk associated with use (including all life-support equipment) and equipment incident history. The hospital evaluates new types of equipment before initial use to determine **whether they should be included in the inventory.**

For hospitals that use Joint Commission accreditation for deemed status purposes: The hospital maintains a written inventory of all medical equipment.

# TJC – EC 02.04.03

The hospital inspects, tests, and maintains medical equipment.

EP 2: These activities are documented.

Note 1: **High-risk** equipment includes medical equipment for which there is a risk of serious injury or even death to a patient or staff member should it fail, which includes life-support equipment.

Note 2: Required activities and associated frequencies for maintaining, inspecting, and testing of medical equipment completed in accordance with manufacturers' recommendations must have a **100% completion rate**.

Note 3: Scheduled maintenance activities for high-risk medical equipment in an (AEM) program inventory must have a **100% completion rate**.

# TJC – EC 02.04.03

The hospital inspects, tests, and maintains medical equipment.

EP 3: The hospital inspects, tests, and maintains **non-high-risk** equipment identified on the medical equipment inventory. These activities are documented.

Note: Scheduled maintenance activities for non-high-risk medical equipment in an alternative equipment maintenance (AEM) program inventory must have a **100% completion rate**. AEM frequency is determined by the hospital's AEM program.

# Code Language Takeaways

TJC and DNV Code Language is very vague.

## ...whether to include in inventory

If it's not found, is it really in your inventory?

Use Asset Status and document changes.

## High Risk vs. Non-High Risk

Both are 100% Completion, so don't get too into the weeds on this one.

## 100% Completion

Complete 100% of the Assets you find and can perform an ITM.

# Defining the Policy

- It's YOUR Policy
- What's in it and should you change it



# Defining Your Organization's Policy

- Define "In Service" equipment and reporting needs
- How does the team document attempts to locate?  
How many attempts are required?
- How is missing equipment communicated to the owning cost center?
- When is the device marked as Inactive?
- What should be done when the device is found?
- How does this situation impact compliance reporting?



## Building an "Unable to Locate" Strategy

This document can be used to help develop a policy for "Unable to Locate" and "In Use - Unavailable" assets when assets due for testing cannot be found.

### When you cannot find an asset during the month it is due for testing:

- ✓ Search the potential locations where the asset may be stored/used.
- ✓ If not found, contact the department Director/Manager that owns the asset to ask staff to help search.
- ✓ If the asset is still not found at the end of the due month/beginning of the following month:
  - Change the Work Order Status to "Active - Unable to Locate."
  - Run a query/report listing the work order and asset information, like below, and send to the owner department Director/Manager. It is typically their responsibility to manage the location of their assets.

### At the beginning of the following month:

Once all Work Order Statuses have been updated, including "Unable to Locate" and "In Use - Unavailable", run a report that will provide Monthly PM Completion Percentages, excluding the Work Orders with a Status of "Unable to Locate" and "In Use - Unavailable" for each Classification. This is also a good time to run other monthly reports.

### During or at the end of the following month, after sufficient time to finalize the search:

- ✓ Change the Asset Status to "Active - Unable to Locate."
- ✓ Complete the Work Order and assign an Action Code of "Unable to Locate."

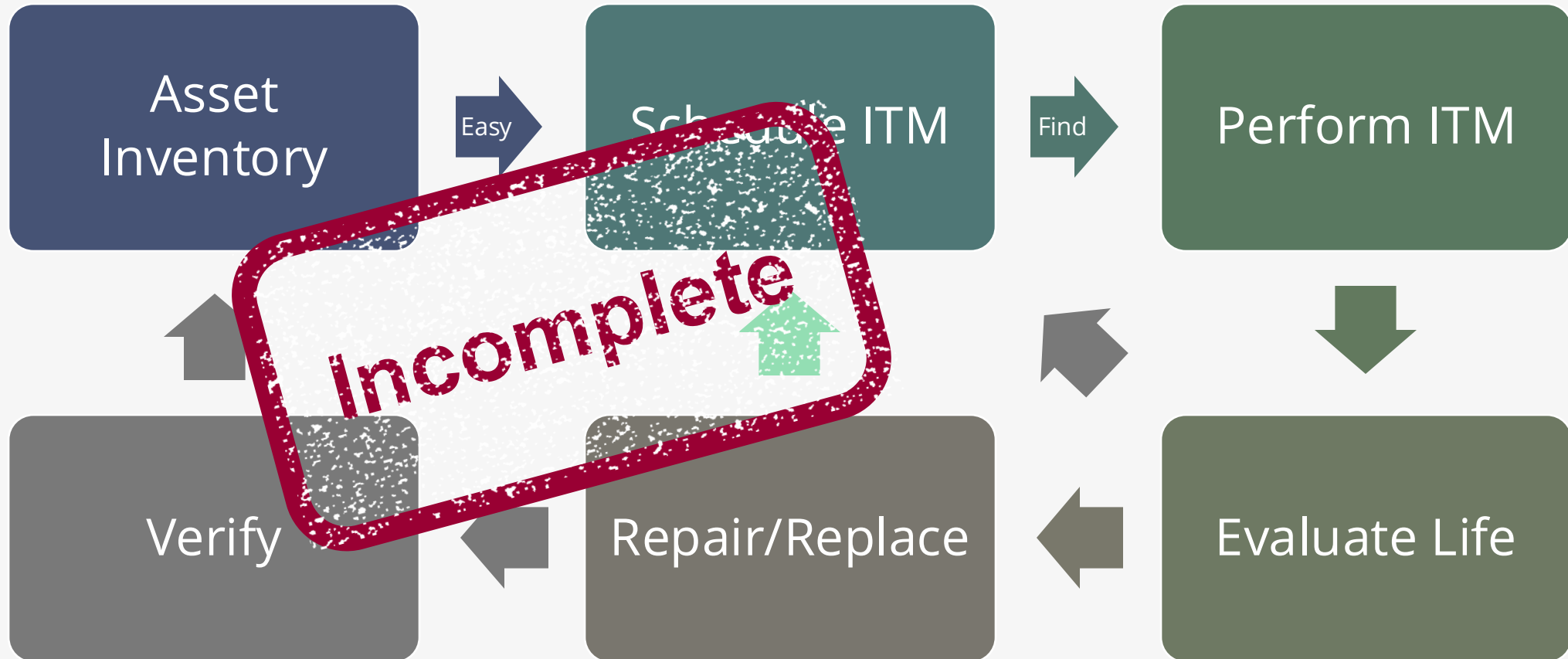
Work Order #	WOI Status	WOI Description	Category	Asset #	Asset Name	Asset Class	Manufacturer	Model Number	Cost Center	Location	Assignments	Date Created	Completed
210000	Active - Unable to Locate	Wagon Park High Voltage Transformers	210000	11000000	Active	PLUMP	ABB	11000000	PLUM 000	210000	Wagon Park High Voltage Transformers	210000	210000
210000	Active - Unable to Locate	Wagon Park High Voltage Transformers	210000	11000000	Active	PLUMP	ABB	11000000	PLUM 000	210000	Wagon Park High Voltage Transformers	210000	210000
210000	Active - Unable to Locate	Wagon Park High Voltage Transformers	210000	11000000	Active	PLUMP	ABB	11000000	PLUM 000	210000	Wagon Park High Voltage Transformers	210000	210000

# Asset Inventory and UTL

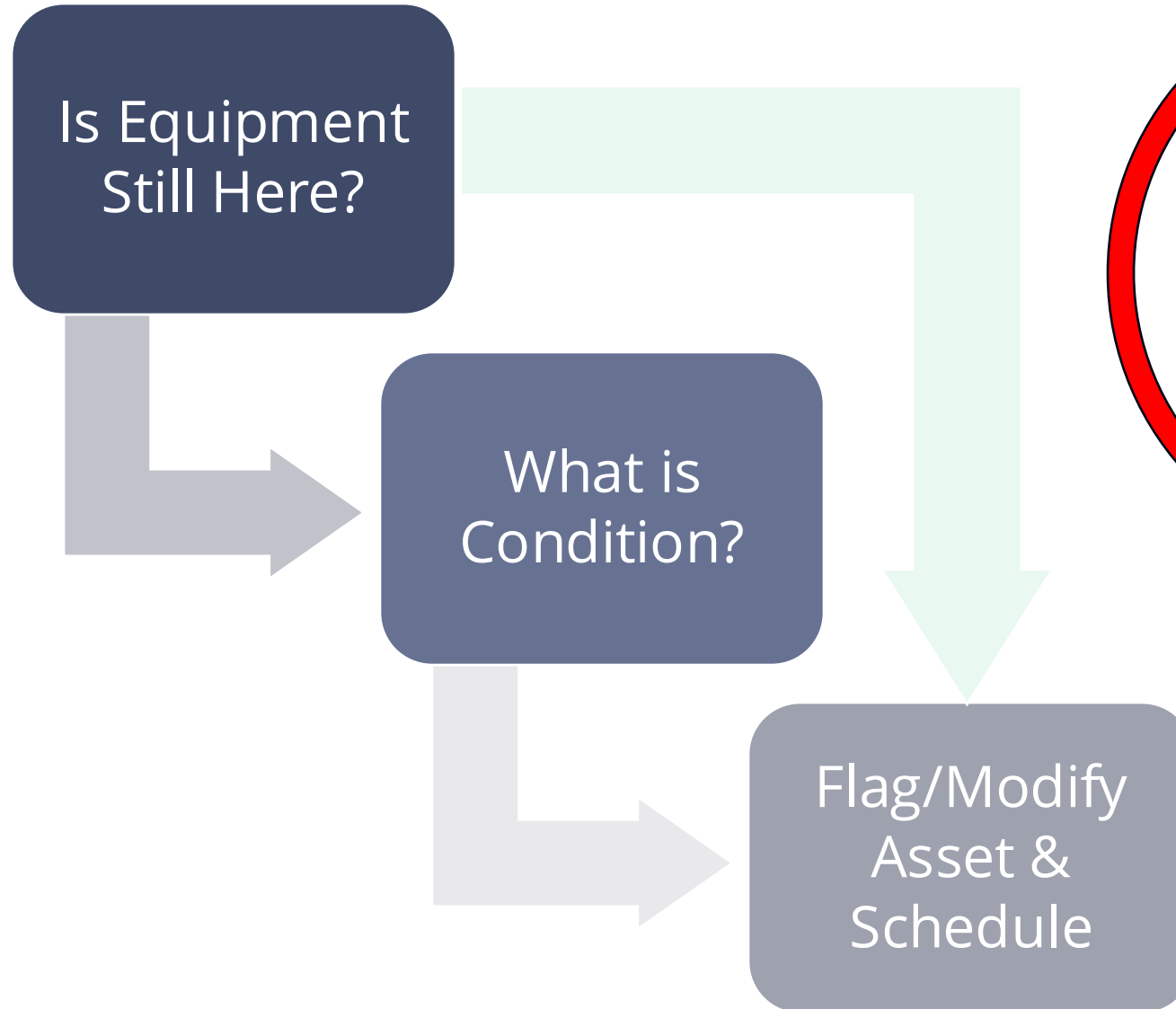
- Maintaining
- Inspection, Testing, and Maintenance (ITM)
- Best Practices



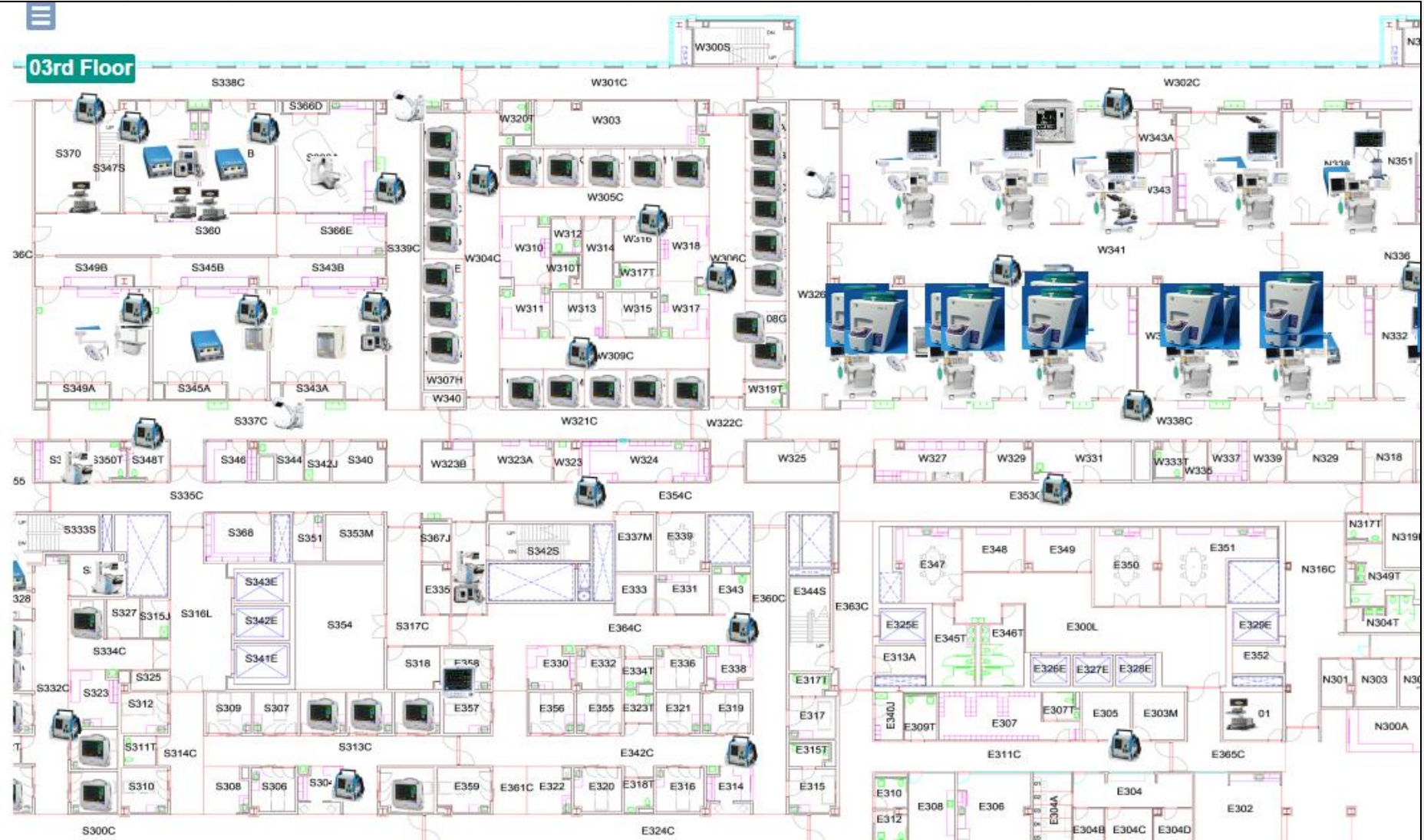
# Asset Inventory and ITM Cycle



# Asset Inventory and ITM Feedback Loop



# Using Technology to Assist



## RTL

An RTL (Real Time Location System) can help support your organization in meeting the 100% compliance goal with a lower number of "Could Not Locate" assets. This also adds efficiency and cost savings to your HTM department.

# Using Humans to Assist

*When you can't find an asset during the month it's due for testing:*

- Consider "In Use" equipment.
- Search the potential locations where the asset might be stored/used.
- Search for Service Requests on that particular asset? (Is it in the shop?)
- Contact the department director/manager that "owns" the asset to ask staff to help locate. □
- Check with any vendors that may take items off site for repair.
- Check other hospital locations in the same network.

## Document

### Each UTL Asset:

- Change WO Status
- Change Asset Status
- Create Follow Up Plan for Finding It (WO, ITM)
- Retire if N Attempts

### Next Month:

- Report on Completion for Previous Month
- Include Numbers (%) of Unable to Locate

# I found it!!!

- You found it after months!!!
- Retest it
- Document it
- Put back in Service



# Unable to Locate Perform Recommendations

Look for the Equipment (Where should it be?)

Use Technology (RTLS)

Create Follow Up Work (Change ITM, Create WO, etc.)

Change Equipment Status (Take it "Out" of Inventory)

Look again and again and again and again... (3 Strikes?)

Deactivate Equipment after N Attempts



**DOCUMENT  
IT ALL!**

# Bringing it Together: Reporting

- Reports around Completion should include:
  - Multiple facilities
  - Groups by risk classification
- A filtering capability to exclude the appropriate statuses from percent completion calculations.

Level: Level 1 | Location: Medical Center, Medical Center Of

Status Exclusions: Active - Unable to Locate, Complete

Year: [ ]

Classification(s): [ ]

WO Category(s): 01 - PREVENTIVE MAINTENANCE

Month: January

	Month Totals	YTD Totals
# WO Issued	535	7172
# WO Completed	535	6931
# WO Cancelled	0	0
Average Days to Complete	20.36	16.07
Average Labor Hours	1.34	1.28
Percent Completed	100.00%	96.64%

## Clinical Engineering Work Order Completion Percentages by Classification and Location

\*Months selected are used in the Month Totals column

Summary for Year: 2025		
CMS - Pittsburgh HTM		
Summary	Month Totals	YTD Totals
# WO Issued	535	7172
# WO Completed	535	6931
# WO Cancelled	0	0
Average Days to Complete	20.36	16.07
Average Labor Hours	1.34	1.28
Percent Completed	100.00%	96.64%

Classifications		
High Risk - AEM		
01 - PREVENTIVE MAINTENANCE	Month Totals	Totals YTD
# WO Issued	23	2095
# WO Completed	23	1890
# WO Cancelled	0	0
Average Days to Complete	16.65	16.42
	1.83	1.35
	100.00%	90.21%

High Risk - OEM		
MAINTENANCE	Month Totals	Totals YTD
	245	1260
	245	1240
	0	0
complete	18.42	16.07
rs	1.65	2.01
	100.00%	98.41%

High Risk - Vendor - OEM		
MAINTENANCE	Month Totals	Totals YTD
	7	133
	7	133
	0	0



# Summary Checklist

Define your Policy

Maintain Asset Inventory

Ensure Procedures cover **ALL** AHJ's, not just national

Implement ITM Strategy including documenting UTL

Document Everything with Work Orders

Track Progress throughout the month... and year!

# FSI: A Brief Introduction

## Healthcare-centric CMMS, built for, and by, Healthcare professionals

- Scalable, robust platform designed to address the complex, evolving needs of independent hospitals to large nationwide IDN's.
- Industry leading tools to ensure TJC and DNV compliance.
- Direct healthcare experience in Facilities and HTM/Biomed.
- A robust community; an extension of your team
  - Monthly support and educational webinars
  - Annual on-site User Conference – free for all customers
  - FSI Neighborhood – 24/7 learning community



**99.4%**  
Customer  
Retention

**1200+**  
Hospitals  
Using CMS

**10.6 Million**  
Work Orders  
Closed in 2024



# Questions?



Joe Stockman

Director, Product Experience



Jen D'Alessio

Product Manager

