MEDICAL CENTER PLANT SERVICES – PREVENTIVE MAINTENANCE POLICY

Purpose: The purpose of this policy is to more clearly define the Plant Services preventive maintenance (PM) process by establishing standards for identifying and defining assets, generating PM tickets, completing PM tasks and reviewing PM work by key stakeholders.

Policy: This policy consists of several parts:
1. Asset Definition
2. PM Setup
   a. Task Definition
   b. Interval Definition
   c. Manufacturer's Recommendations
3. PM Ticket Generation
4. PM Task Completion
   a. Multi-Asset Ticket Completion Process
5. PM Task Review
6. PM Ticket Closeout
7. Third Party PM Inspection Documentation

Procedure: ASSET DEFINITION PROCESS
All equipment that has a preventive maintenance task must first be registered in the Plant Services Work Management System (WMS) as an "Asset". An asset is merely another term for a piece of equipment. There are several ways for an asset to be registered in the WMS:

1. A piece of equipment is purchased new for use by Plant Services or some other group within the medical center (ex: Construction project or individual department). New equipment information must be provided to the Plant Services PM Coordinator within 30 days of installation. That information must include, at a minimum, the following:
   a. Equipment Name
   b. Equipment Manufacturer
   c. Equipment Model Number
   d. Equipment Serial Number
   e. Equipment Location
f. Shop and Skill Responsible for the Equipment.
g. PM Interval(s)
h. PM Task(s)

2. An existing piece of equipment is replaced with a new piece of equipment by Plant Services or some other group within the medical center (ex: Construction project or individual department). The replacement equipment information must be provided to the Plant Services PM Coordinator within 30 days of installation. That information must include, at a minimum, the following:
   a. Equipment Name
   b. Equipment Manufacturer
   c. Equipment Model Number
   d. Equipment Serial Number
   e. Equipment Location
   f. Shop and Skill Responsible for the Equipment.
g. PM Interval(s)
h. PM Task(s)

3. Existing equipment not previously identified or for which the PM task or interval has been changed in some manner. In this case, the updated information must be provided to the Plant Services PM Coordinator as soon as the updated information is received.

PREVENTIVE MAINTENANCE DEFINITION PROCESS
Once an asset has been properly defined within the WMS, preventive maintenance information may be registered. Preventive maintenance information consists of:
1. Preventive Maintenance Intervals.
2. Preventive Maintenance Tasks
3. Preventive Maintenance Group Definition.
4. Critical/Non-critical Decision Information.

1. Preventive Maintenance Intervals: Preventive maintenance intervals must be set using the original equipment manufacturers (OEM) recommendations. Any preventive maintenance intervals that do not follow the OEM’s guidelines must be accompanied by a documented risk analysis approved at the Plant Services director level. The Risk
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analysis must be kept on file in Plant Services for the entire life of the equipment.

2. Preventive Maintenance Tasks: Preventive maintenance tasks are those maintenance activities of an asset that are required to be performed at the OEM recommended intervals in order to insure proper equipment operation and longest possible operating time between failures. For critical and/or life support equipment, preventive maintenance tasks must follow the OEM recommendations. Any preventive maintenance tasks that do not follow the OEM’s guidelines must be accompanied by a documented risk analysis approved at the Plant Services director level. The Risk analysis must be kept on file in Plant Services for the entire life of the equipment.

3. Preventive Maintenance Group Definition: Preventive maintenance group information allows assets to be “Grouped” with other similar or identical assets that are common equipment types. Thus making the preventive maintenance activity more efficient for the maintenance staff. Care must be taken to avoid grouping assets:
   a. Whose preventive maintenance tasks are not similar.
   b. Whose physical locations are not sufficiently close to permit performing maintenance work efficiently.
   c. In groups that are so numerically large that the group PM ticket is too long to easily work with by maintenance staff.

4. Critical/Non-critical Decision Information: Assets that are considered “Critical” or “Life Support” are those assets whose primary function is to ensure the safety of our patients, staff, and visitors. Or, whose failure may adversely affect patient care outcomes. Determining whether or not an asset is critical or not is based upon the following criteria:
   1. Location of the equipment.
   2. The occupancy classification of the building in which the equipment is located.
   3. The service for which the equipment is used.
   4. The physical risk posed by the equipment’s failure.
   It is imperative that this information be provided with each asset.

PREVENTIVE MAINTENANCE WORK PROCESS DEFINITION
Once an asset has been properly set up in the preventive maintenance system and the proper preventive maintenance intervals and tasks are in place; PM work tickets will begin to be issued at the appropriate intervals. When a PM work ticket has been issued, it is important that the following work processes take place:

1. Preventive maintenance work tickets are printed out **45 DAYS** before the preventive maintenance tasks are to be completed (regardless of the preventive maintenance interval). After printing, the preventive maintenance work tickets are distributed to the appropriate shops or satellite shops per the instructions from each shop manager. The shop manager or their designee will review the preventive maintenance work ticket for accuracy and note any errors or inaccuracies on the ticket (taking care to initial and date any notations they make on the ticket).

2. The preventive maintenance work tickets are then distributed to the staff or staffs who will be performing the work for scheduling and completion. As before, the shop staff members performing the work will review the preventive maintenance work ticket for accuracy and note any errors or inaccuracies on the ticket (taking care to initial and date any notations they make on the ticket).

3. If, while performing the preventive maintenance tasks, the maintenance staff observe:
   a. Information about the asset that has changed,
   b. The asset has been retired, relocated, removed, etc.,
   c. The preventive maintenance task description is inaccurate or no longer applies, or
   d. The group to which the asset belongs in no longer appropriate,
   The maintenance staff is required by this policy to (1) note the inaccuracy on the preventive maintenance work ticket, (2) initial and date any notations they make on the ticket, and (3) report the errors to their shop supervision.

4. When performing preventive maintenance tasks, maintenance staff must follow the guidelines below when completing the preventive maintenance work ticket:
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a. Only assets for which ALL tasks have been completed are to have a check mark in the box next to the asset on the work ticket. All other assets are to be left unchecked until all the tasks for that asset have been completed. By checking the box next to the asset, the maintenance staff is indicating that the preventive maintenance tasks are complete for that asset.

b. For those assets which the preventive maintenance tasks could not be completed due to some issue that is not in the control of the maintenance staff (such as inaccessible equipment), the reason for not completing the preventive maintenance tasks must be clearly written on the work ticket (taking care to initial and date any notations they make on the ticket).

c. After all maintenance work that has been called for on the preventive maintenance work ticket has been completed (with the exception of items noted in section “b” above; each staff member charging time to the work ticket must (1) print their name, (2) sign the ticket, (3) record their employee number, and (4) write the date that the ticket was completed. Using the back of the ticket for extra room is acceptable.

d. Each staff member signing a preventive maintenance work ticket must record their time for the maintenance work on their Daily Activity Card (DAR). Failure to record their time could result in disciplinary action.

e. Finally, before any preventive maintenance work ticket is returned to the office for processing, that ticket must be reviewed by shop management or their designee. The purpose of this review is to check that the work ticket has been properly completed and that any issues preventing the completion of all assets have been addressed. The completion of this review will be indicated on the preventive maintenance work ticket by the shop leadership by indicating the following on the signature page of the work ticket:

   REVIEWED BY THE #### SHOP
   Reviewer’s Initials:
   Review Date:

f. Preventive maintenance office staff shall review each preventive maintenance work ticket for proper completion and maintenance
staff notations. Improper documentation on the work ticket will result on the ticket being returned to the shop manager for proper completion. Additionally, asset or maintenance information corrections indicated on the work ticket by the maintenance staff will be updated in the Plant Services work management system as appropriate.

The Preventive Maintenance Tech or their designee will indicate that each correction has been properly recorded in the work management system by placing their initials and date next to those of the maintenance staff person who made the original notation.

THIRD PARTY PM INSPECTION DOCUMENTATION
Due to the requirement for specialized training, certification, etc., not all preventive maintenance work is done by Plant Services staff. Examples of this include, grease hood fire suppression systems, FM200 fire suppression systems, automatic sprinkler system inspections, to name a few. In these cases, the following steps must be taken for each type of third party inspection:

1. Each inspection type must be brought to the attention of the Plant Services Preventive Maintenance Coordinator. The purpose for this is to insure that a preventive maintenance work ticket is set up for all third party inspection for Joint Commission reporting purposes.
2. A preventive maintenance work ticket will be issued to the appropriate shop at the appropriate intervals for each third party inspection. This ticket should be used to remind the shop staff that the inspection has to be scheduled and a report submitted by the third part preventive maintenance company.
3. Once the preventive maintenance/inspection work is completed, the report (or a copy of the report) issued for the work must be sent to the PM Coordinator for archiving purposes.
4. The preventive maintenance work ticket must be processed by the shop in the manner described previously in this policy.

Responsibility: It is the responsibility of every individual who contributes in any manner to the preventive maintenance processes within Plant Services to insure that this policy is adhered to. Our preventive maintenance
processes will only be successful if each one of us is evaluating all parts of the maintenance process at every step along the way.