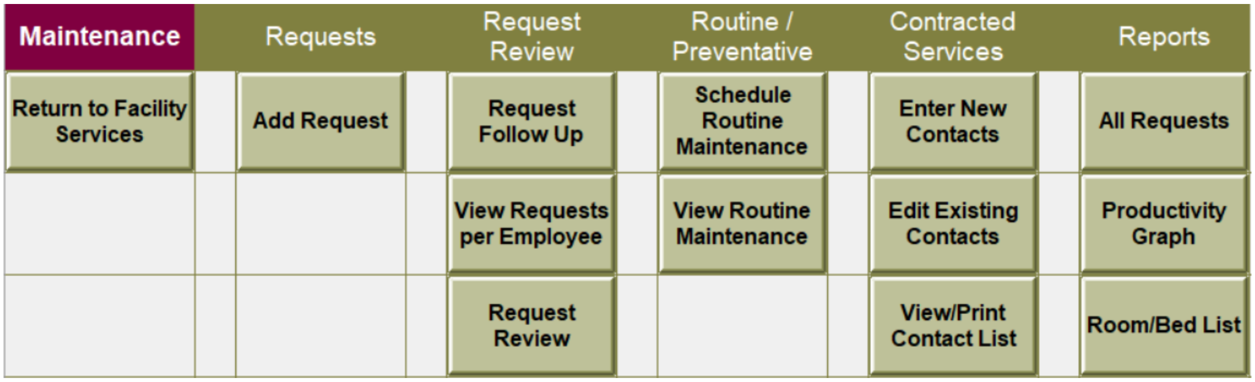
Maintenance

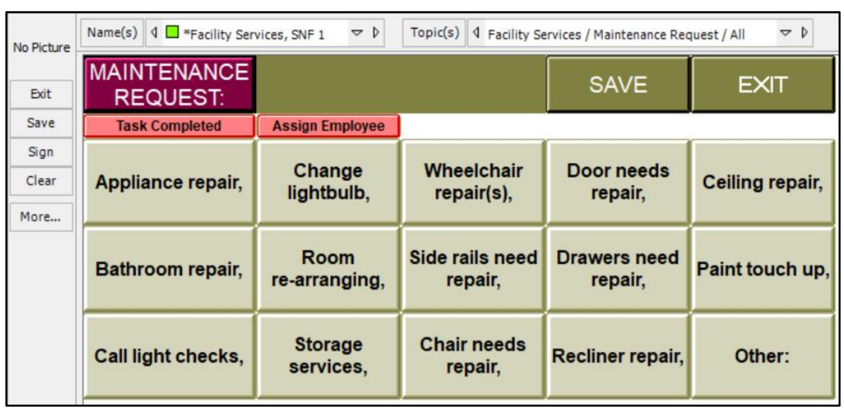


Maintenance Requests

Maintenance requests may be placed for items that staff notices within the facility that may need some attention. This includes appliance repair, room re-arranging, changing of light bulbs, etc. These requests are then sent directly to the maintenance team for them to follow up on. Also, each maintenance request put into ECS is automatically assigned a work order number. With this feature, a user can then search specific free text if they want to search for a request. Requests may also be sorted based on dates, the user who is assigned to that task, and/or the user who input the request.

Add Maintenance Requests

1. Click the **Add Request** button. A write screen will display.
2. Click onto the issue needing repair. (If prompted with a keyboard, type in detailed information regarding the repair).
3. Click on the location of the repair needed.
4. When you are finished writing the maintenance request, you may chart another request by clicking on the ADDITIONAL MAINTENANCE NEED button.
5. After all entries are entered, click on the SAVE button to save the request, and exit back to the Maintenance Main Access screen.



Assign Maintenance Requests

Requests may be assigned to specific employees if this feature makes sense to the facility's current department workflow. They can either be assigned as they are entered in initially (such as by a Director/Supervisor) or can be assigned after they have been entered in initially by a staff who does not work in the maintenance department.

To assign employees upon entering the initial request

1. Click the **Add Request** button. A write screen will display.
2. Click onto the issue needing repair. (If prompted with a keyboard, type in detailed information regarding the repair).
3. Click on the location of the repair needed. Once the Location has been selected, click onto the **Assign Employee** button. A list of employees will display. Select which employee the task should be assigned to and click **OK**.
4. When you are finished writing the maintenance request, you may chart another request by clicking on the **ADDITIONAL MAINTENANCE NEED** button.
5. After all entries are entered, click on the **SAVE** button to save the request, and exit back to the Maintenance Main Access screen.

To assign employees after the initial request has been entered

1. From the Maintenance access screen, click **Request Follow Up.**
2. A View screen appears with all current requests that have not yet been completed. Highlight an entry, click **Edit** and select **Append**.
3. Click **Assign Employee** button. A list of employees will display. Select which employee the task should be assigned to and click **OK**.
4. After done documenting, click **Next** (in the lower portion of the screen) to save the entry and **Go** to see the updated Request Follow up list.

Task Completed

After a task has been completed, it is important to append the original entry so that the request will be removed from the lists.

1. From the Maintenance access screen, click **Request Follow Up** or **View Requests per Employee**.
2. A View screen appears with all current requests that have not yet been completed. Highlight an entry, click **Edit** and select **Append**.
3. Click **Task Completed.** The user will need to document what was completed and the amount of time it took.
4. After done documenting, click **Next** (in the lower portion of the screen) to save the entry and **Go** to see the updated Request Follow up list.

Request Review

Utilize this task to view all requests made within a specific time frame. Requests that were entered or completed during this time frame will display. Once a task has been marked as complete via the above "Task completed" steps, it will no longer appear on that screen. Therefore this screen can be utilized for auditing or data mining of tasks.

1. From the Maintenance access screen, click **Request Review.**

2. A **Control** screen appears, allowing the user to select a Start/End Date or Time Period (Current Month, Last Month). Once a period has been selected, click OK.
3. Click **Go** to view the data.
4. A View screen appears with all requests made or completed in that time frame.

To search for a specific work order number

1. Click onto the **Control** button.
2. In the **Free Text Highlighter** box, enter in all or part of the work order number.
3. Click **OK**.
4. Click **Go** to view the results.

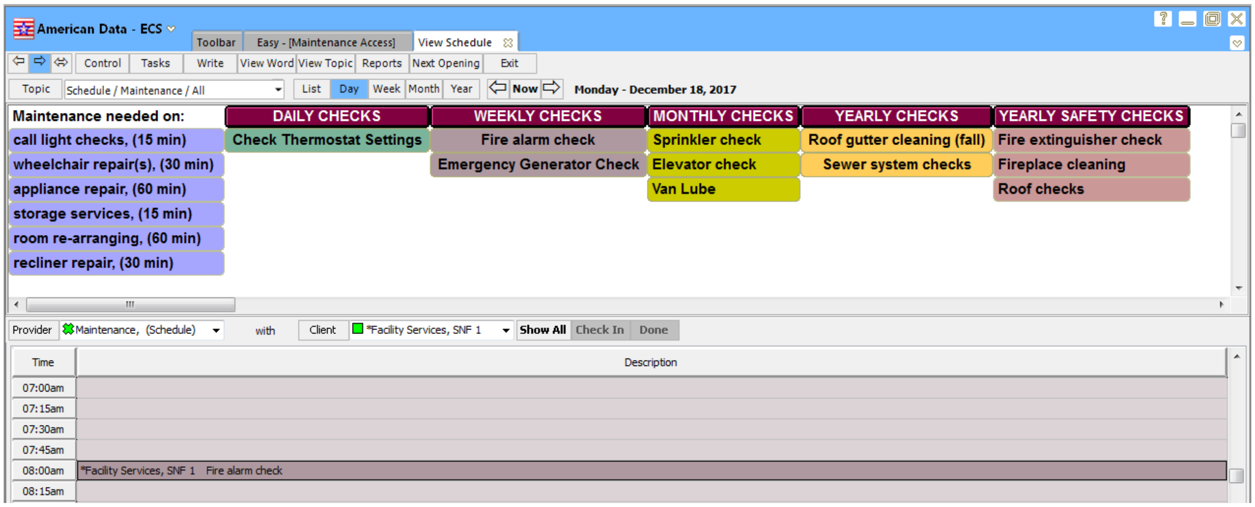
To search for entries made by specific user(s)

1. Click onto the **Control** button.
2. Below the **Users** box, click onto the **Add** button. Select user or multiple users.
3. Click **OK**.
4. Click **Go** to view the results.

Routine Maintenance

Add Routine Maintenance

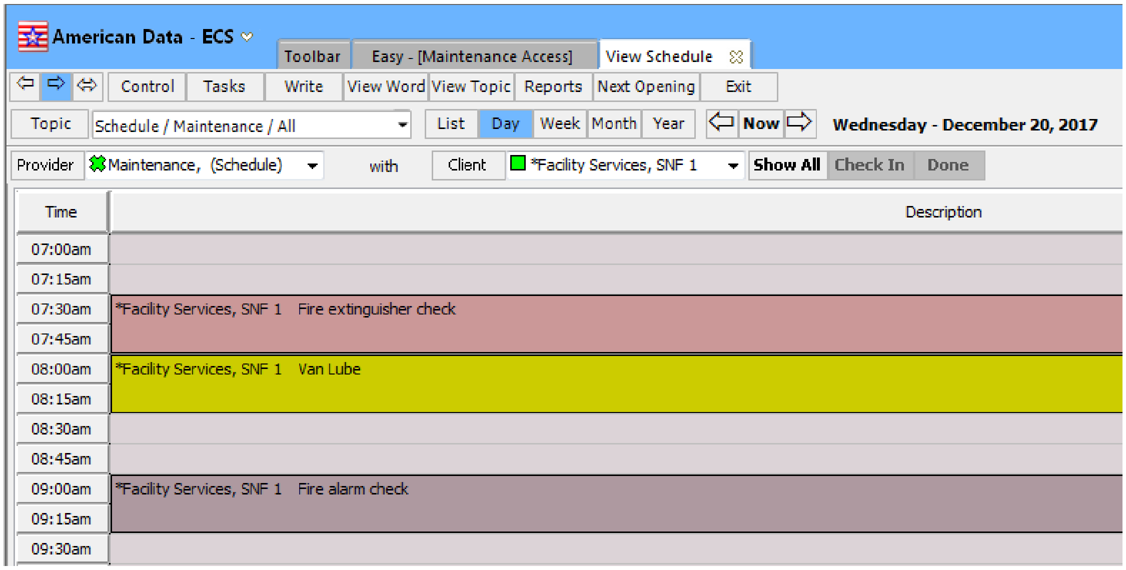
1. Click the **Add Routine Maintenance** button. A scheduling screen will appear.



2. If necessary, use the Day/Week/Month buttons at the top of the screen to change the view, and use the forward/back arrows next to Day to move between dates.
3. Click on the desired event in the top portion of the screen that you would like to schedule (e.g., Fire Alarm checks).
4. Click the desired time slot underneath the provider schedule of when you would like the task to be completed.
5. An Appointment Details window will appear. Enter any appropriate details:
    a. **Notes:** In this box you may type in special notes regarding the task (if desired).
    b. **Time:** You may adjust the start/end time as desired by clicking on the picklist box next to the time. Choose a time from the clock and click OK.
    c. **Reminder:** If you would like an alarm to pop up in ECS prior to the task being due, then you may place a checkmark in the box next to Reminder. Then click on the Reminder Setup button and select when you want the alarm to pop up and who you like the alarm sent to.
    d. **Recurring Event:** Put a check in this box if you would like the event to recur on the schedule. Then click on the Recur Setup button and select the frequency.
    e. **Recurring Event:** Put a check in this box if you would like the event to recur on the schedule. Then click on the Recur Setup button and select the frequency in which you would like the event to appear. This pattern will occur indefinitely unless a date in end date is put into place.
    f. **Appointment Color:** You may click the picklist box next to appointment color to change the appearance of the event on the schedule.
6. Click **OK** to save your settings.
7. Click **Exit** to return to the Maintenance Main Access screen.

View/Follow up on Routine Maintenance

1. Click the **View Routine Maintenance** button. A scheduling screen will appear.



2. If necessary, use the **Day/Week/Month** buttons at the top of the screen to change the view, and use the forward/back arrows next to **Day** to move between dates.
3. Double click an event to view the event details. Click the **X** in the upper right corner to close the details box.
4. To follow up with an event, highlight the event and click on the **Write** button.
5. A write screen will load. Document the follow up using the appropriate heading words and canned phrases.
6. When finished, click the **Sign** button on the left side of the screen to save the entry and exit out to return to the Scheduler.
7. Continue to document completion of other cleaning tasks by selecting the next task on the scheduler, clicking the **Write** button at the top of the screen, and following steps above.
8. If desired, you can mark items as "Done" on the scheduler to help you keep track by highlighting the event and click the **Done** button. This will place a blue box in the event signifying the task was completed.
9. When finished with all scheduled tasks, click **Exit** in the scheduler screen to return to the Maintenance Access screen.

Edit Routine Maintenance Events

1. Click the **Add Routine Maintenance** button. A scheduling screen will appear.
2. If necessary, use the **Day/Week/Month** buttons at the top of the screen to change the view, and use the forward/back arrows next to **Day** to move between dates.
3. Right-click the appointment that needs to be edited and select **Edit Appointment**.
4. Make the desired changes and click **OK**.
   a. If the appointment is a recurring event a selection box appears. Select the appropriate choice – the choices include editing the one appointment, editing the appointment selected and all future appointments, or editing all past, present, and future appointments.

5. Click **Exit** to return to the Maintenance Access screen.

Delete Routine Maintenance Events

1. Click the **Add Routine Maintenance** button. A scheduling screen will appear.
2. If necessary, use the **Day/Week/Month** buttons at the top of the screen to change the view, and use the forward/back arrows next to **Day** to move between dates.
3. Right-click the appointment that needs to be deleted and select **Delete Appointment**.
4. Make the desired changes and click **OK**.
    a. If the appointment is a recurring event a selection box appears. Select the appropriate choice – the choices include delete the one appointment, delete the appointment selected and all future appointments, or delete all past, present, and future appointments.
5. Click **Exit** to return to the Maintenance Access screen.

Contracted Service Contacts

Add a Contracted Service Contact

1. Click the **Enter New Contacts** button. A write screen will display.
2. Click on **Company/Client Name:** Follow the prompts and enter in the appropriate information. If desired add additional information and any special notes.
3. After all the desired information is entered, click on the **Save** button to save the request and exit the write screen.

Edit a Contracted Service Contact

1. Click the **Edit Existing Contacts** button. A view screen will display with all documented contract service contacts.
2. Highlight the contact you would like to edit. This will turn the entry red.
3. Click on the **Edit** button and choose the option **Discontinue and Copy.**
4. A message will appear asking "Are you sure you want to DC selected entry?" Click **Yes** to proceed.
5. You will be flipped to the contracted service contact write screen with a copy of the entry in the middle portion of the screen.
6. Edit the entry as desired and then click **Next** to save your entry and return to the view screen.
7. Click **Go** to see the updated changes.
8. Click **Exit** to exit the view screen and return to the Maintenance Main Access Screen.

Remove a Contracted Service Contact

1. Click the **Edit Existing Contacts** button. A view screen will display with all documented contract service contacts.
2. Highlight the contact you would like to edit. This will turn the entry red.
3. Click on the **Edit** button and choose the option **Discontinue**.
4. A message will appear asking "Are you sure you want to DC selected entry?" Click **Yes**.
5. Click **Go** to see the updated changes.
6. Click **Exit** to exit the view screen and return to the Maintenance Main Access Screen.

View/Print Contact List

1. Click the **View Contracted Service** button.
2. A name selection screen will appear. Select the "Facility Services" name. Click **OK**.
3. A report will display with all documented contract service contacts.
4. You may print the contact list if desired by clicking on the **Print** button.
5. Click **Exit** to exit the view screen and return to the Maintenance Access Screen.

Maintenance Requests for: 06/25/2013 - 07/25/2013

Work Order #	Request	Location	High Priority	Employee Assigned	Time Estimate	Completed
0000021	07/11/2013 Drawers need repair,	Resident Room 3299		Employee 5		
0000022	07/11/2013 Chair needs repair,	North Hall	X	Employee 3	00 hours 30 minutes.	
0000023	07/11/2013 Call light checks, 100 hall appear to be having problems with them working off and on	South Hall				
0000024	07/12/2013 Wheelchair repair(s),	sitting outside of maintenance storage room on lower level	X	Employee 3	00 hours 25 minutes.	X
0000025	07/12/2013 Change lightbulb,	Main Entrance		Employee 2		
0000026	07/12/2013 Chair needs repair,	Dining Room	X	Employee 3	00 hours 10 minutes.	
0000027	07/15/2013 Paint touch up,	Main Entrance		Employee 3	01 hours 00 minutes.	
0000028	07/15/2013 Storage services, dresser	Resident Room 123		Employee 1	00 hours 15 minutes.	

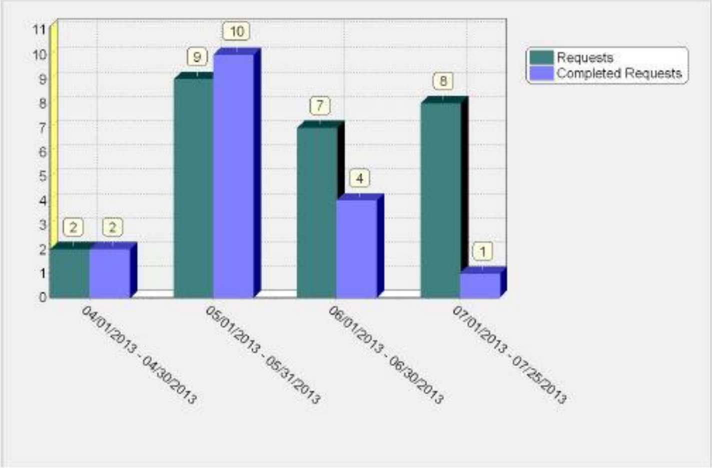
Maintenance Reports

All Requests

1. From the Access screen, click the **All Requests** button.
2. A name selection screen will appear. Select the "Facility Services" name. Click **OK.** Next, select dates. Click **OK** to run the report.
3. All maintenance requests display sorted by work order number. It will state whether the task was completed was or not.
4. Click **Exit** to close out of the report preview.

Productivity Graph

1. From the Access screen, click the **Productivity Graph** button.
2. A name selection screen will appear. Select the "Facility Services" name. Click **OK.**
3. Two graphs will display. One will display all requests entered in in the past four months as well the total amount of requests which were completed. The other graph will display total number of outstanding requests per employee.
4. Click **Exit** to close out of the report preview.



Room/Bed List

1. From the Access screen, click **Room/Bed List**.
2. From the Name Selection screen, select all resident names. Click **OK**.
3. The Room/Bed List report will appear with all rooms and the resident who is currently in each one. Empty rooms will also display.
4. Click **Exit** to close out of the report preview.