



*Working together for a healthier world*

## Effective documentation of Critical Clinical and technical Services

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# Why is Clinical and Technical Documentation so Critical



It can prevent patient safety and potential injuries  
malfunction equipment



Documentation can highlight unfavorable or unsafe  
equipment operational trends



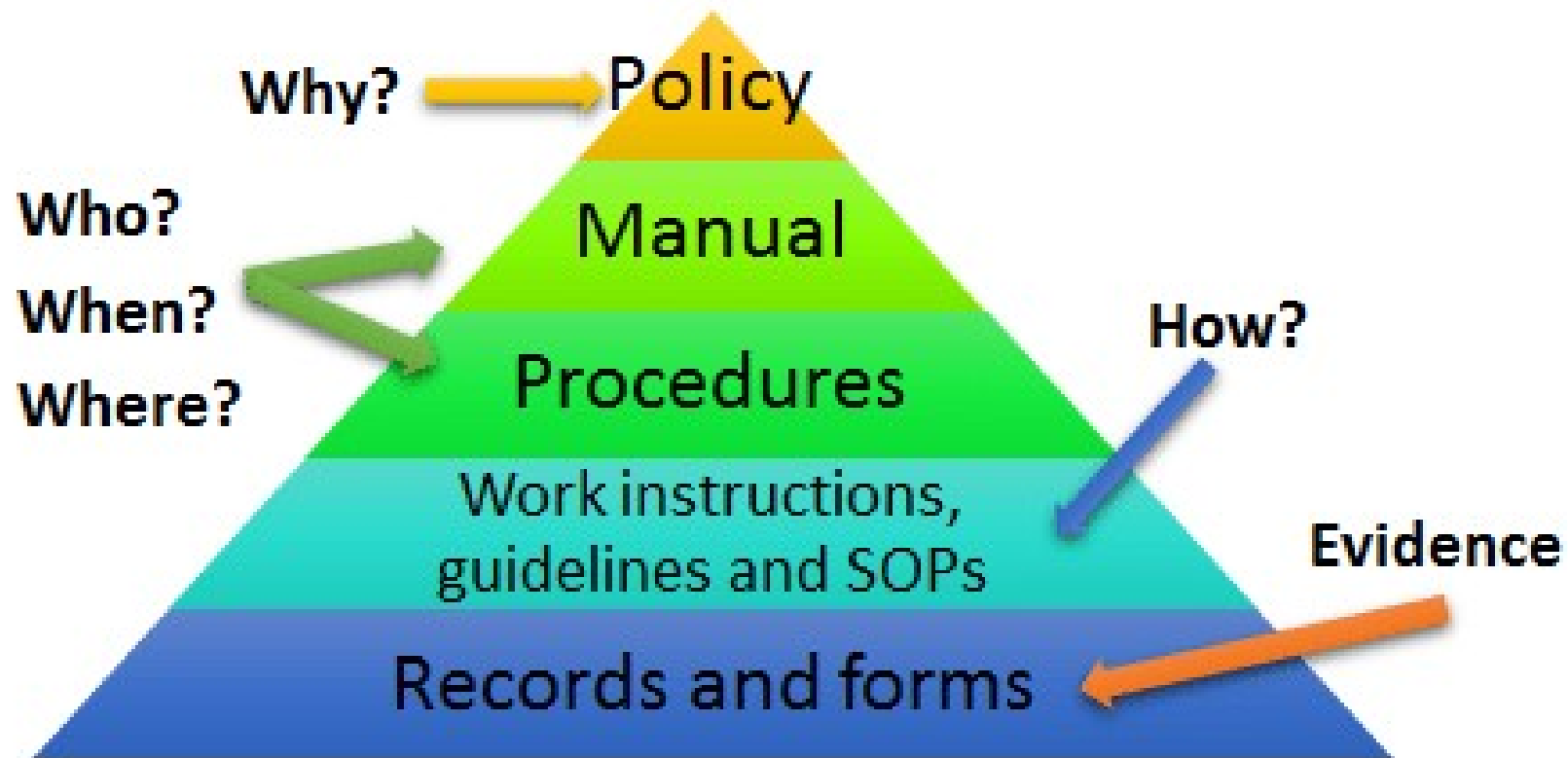
Documentation will aid us during compliance or patient  
injury event



Put the clinical and technical team in proactive instead of  
reactive operational state



# Documentation Hierarchy Pyramid?



# Problem Reporting Process



How are equipment or water treatment system problems reported or communicated to Technical or Biomed team?



How does the Technician or Biomed confirm or communicate/confirm problem or issue repair/resolutions?



How, when and where is the problem or issue documented?



Is there a policy and procedure that provides guidance for the process?



# Clinical and Technical Communication



It is critical that Clinical teammates maintain good communications with Technical or Biomed teammates in regard to problem reporting and observation



Assumption is never a solid plan within the dialysis center



# Technical Communications and Follow-up



It is critical that Technical or Biomed communicate with Clinical teammates regarding all Technical related problems and issues



Root cause troubleshooting and repairs



Detailed and timely documentation of technical services performed in the center will decrease repeat equipment failures



It is better to overcommunicate regarding an issue than under communicate and “assume”



# Equipment Reporting Process

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Clinical Team Experiences a problem with patient treatment

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Machine is removed from service and a back-up is used continue the treatment (Note: Back-up machine was not tagged as Okay for Use or Down-Do Not Use)

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Back of machine does not function once placed online so the patient treatment is further delayed

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Where was the communication breakdown?

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What are some solutions?

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## Technical and Equipment Services Document

Facility		Was this Service Scheduled? <input type="checkbox"/> YES <input type="checkbox"/> NO	
Equipment Type		<input type="checkbox"/> PM	<input type="checkbox"/> Diasafe Filter
Manufacturer		<input type="checkbox"/> Electrical Safety	<input type="checkbox"/> Repair
Model		<input type="checkbox"/> Installation	<input type="checkbox"/> Inspection
Serial Number		<input type="checkbox"/> Culture Collection	<input type="checkbox"/> Modification
Machine Software Version		<input type="checkbox"/> Disinfection	<input type="checkbox"/> Other
Machine Service Hours			

Service Requestor (Name)		Hours Worked			
Date Service Requested		Hours Traveled			
Date Service Began					
Date Service Completed					

Service Requested	
Findings	

Does the Service Requested match the Findings? ☐ YES ☐ NO

Service Performed	
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Equipment Operational/Functional Test Performed and Passed? ☐ YES ☐ NO

Part#	Vendor	Part Name	Date Installed	Price	Quantity

	(PM Interval)
Does the service merit a CQI process or complaint? <input type="checkbox"/> YES <input type="checkbox"/> NO	Qualification Checklist Complete? <input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> N/A

Technician Name	Technician Signature



# Questions

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