User Manual

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1. Introduction

Primex Wireless, Inc. has designed "SNS Compliance Manager™", a web-based software program, to assist healthcare facility, security and life safety managers with their Joint Commission™ (TJC™) Statement of Conditions™ (SOC™) monitoring and reporting process.

This product includes features for creating Electronic Basic Building Information (eBBI), and Deficiencies based on the 2009 Life Safety Chapter of the Hospital Accreditation Standards (HAS). In addition, there are numerous reports for managing and presenting your information and a means to export that information for import into your Joint Commission Connect site.

1.1 Application Access and Overview

1) SNS Compliance Manager™ is a web-based hosted application which can be accessed through a secure login and password authentication at https://secure.snscompliancemanager.com. Please note the "s" in https://. This must be typed into the address line because Internet Explorer defaults to non-secure (http://) sites.

2) Navigating to this address takes you to a landing page with links to three Life Safety Code versions of SNS Compliance Manager™ (2000, 2003, and 2009). Selecting one of these links displays the SNS Compliance Manager™ logon page for that version. (Note: For purposes of this documentation, we are using the NFPA 101-2000 edition.) Enter your email address and password and click the "Log On" button to access the program.

If you are uncertain of your login and password, please contact your Primex Wireless consultant or call our technical support hotline at 1-800-404-8112, Option 4. Support Hours: Monday through Friday 8:00 am – 5:00 pm CST.
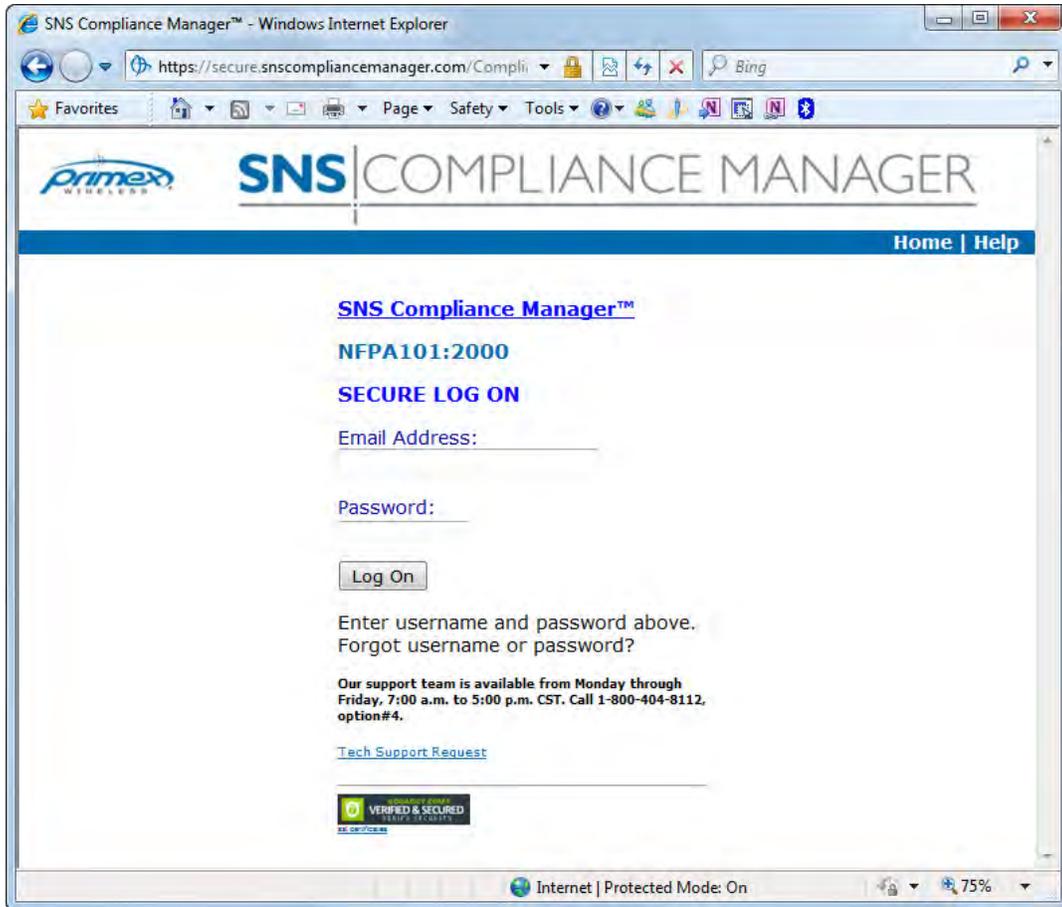
3) When first opened, SNS Compliance Manager™ defaults to the Deficiency Summary page. All program navigation is done from the sidebar menu which is divided into two sections: Compliance and System Admin. Each link under the two sections will display different pages. The sidebar menu is visible at all times.

4) At login, SNS Compliance Manager™ typically defaults to the "Deficiency Summary" page with no organization or building selected. After an organization and building are selected, the software will default to that organization and building until another organization or building are selected or for the remainder of the login session if no changes occur.

1.2 Filtering and Sorting

1) The Deficiency Summary Page, and eBBI, Organization, Building and User search pages all include options at the top for filtering displayed data. This is helpful in managing large amounts of data by grouping and displaying only items with similar information.

2) The "Search:", "OR" and "AND" text boxes are available on all the aforementioned pages. These are pattern searches, which means that only a portion of text needs to be entered to display the item in the search. In the example below, entering B5 into the "Search:" text box and clicking the "Apply Search/Filter" button would display items with any fields that have a pattern matching B5, in this case the "Room" field for rooms 2B5 and 2AB54. To clear this search and display all items again, simply clear the "Search:" text box and click the "Apply Search/Filter" button again.

3) Entering information in the "Search:" and "OR" text boxes will display a union of two different types of data. In the example below, entering room B5 in the "Search:" text box and room 2100 in the "OR" text box displays records with either of the two values. As before clearing both text boxes and clicking the "Apply Search/Filter" button will re-display all records.
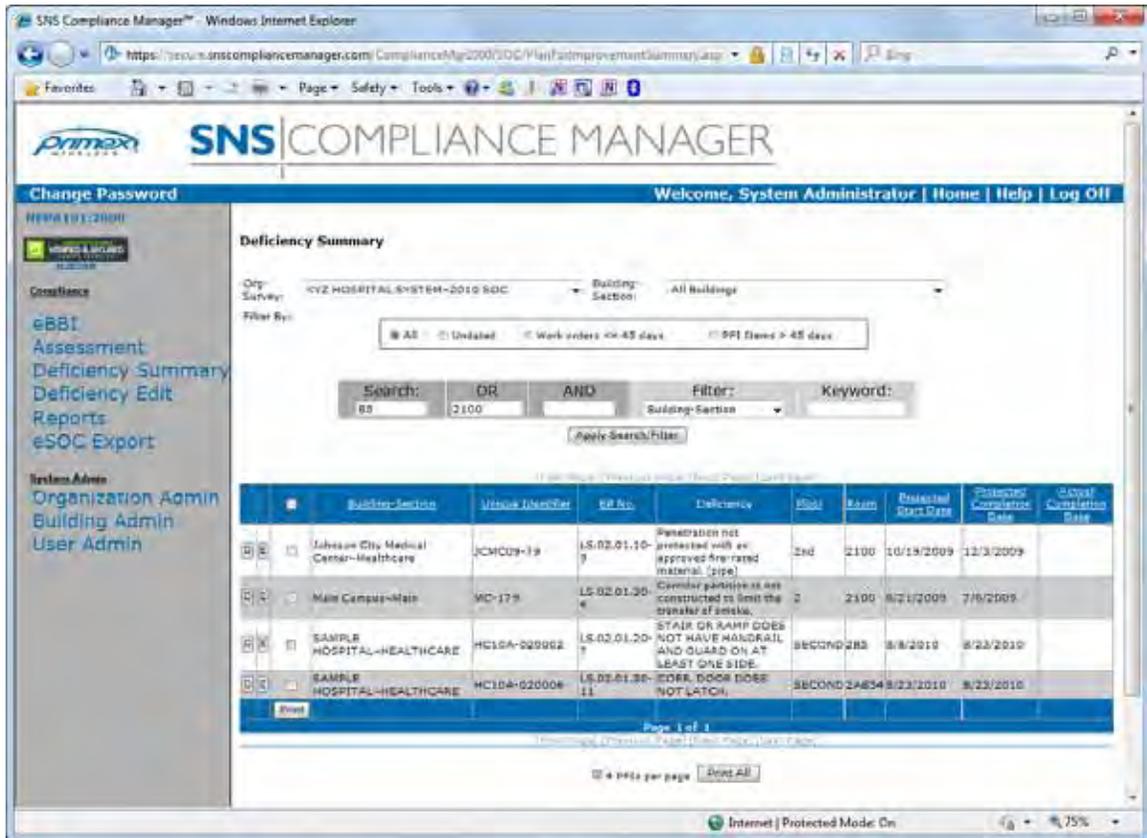
4) The "AND" text box will display records that contain two separate strings or pieces of information. In the example below, entering room 2B in the "Search:" text box and LS.02.01.30-23 in the "AND" text box displays records in room 2B with EP No. LS.02.01.30-23.
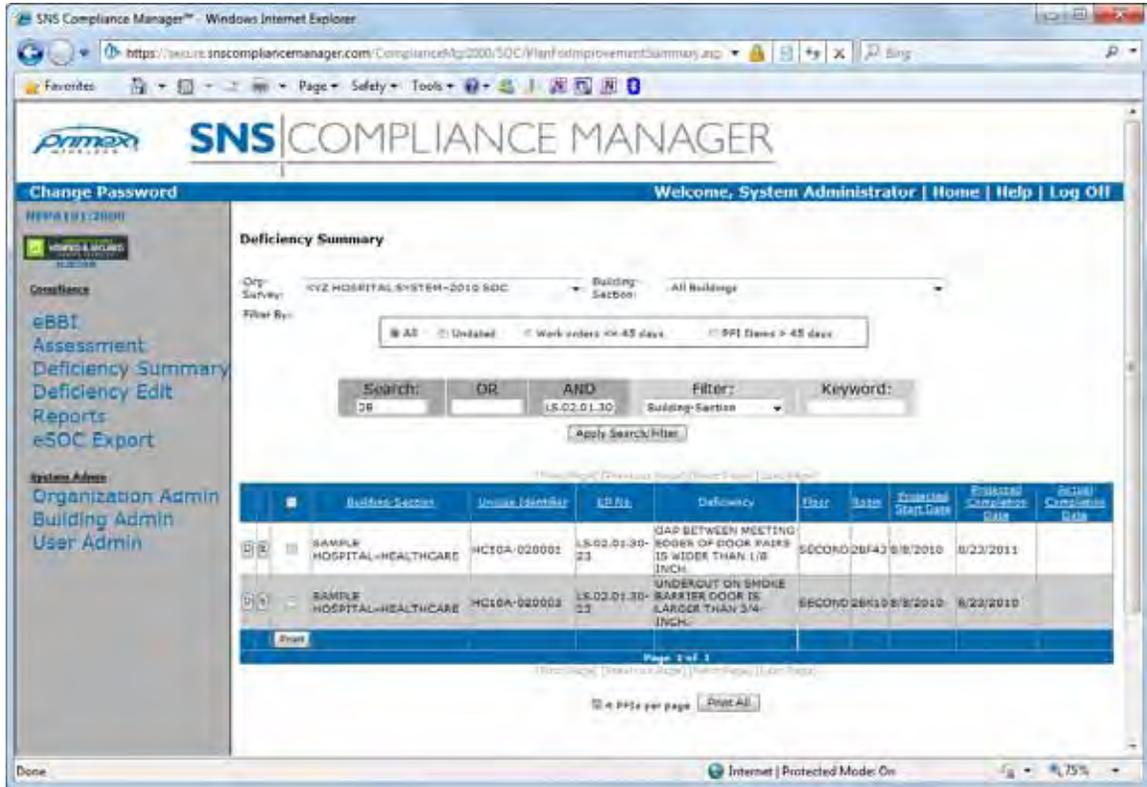
5) The "Filter" drop down list displays fields within the database to search. The "Keyword:" text box is used in conjunction with the "Filter" drop down list to display records matching exact full-string criteria. In the example below, selecting the "Projected Start Date" field in the drop down list and entering the date "2/18/2011", will display all records for projects starting on 2/18/2011. "Keyword:" is not case sensitive, but the string must be an exact match. The example would not have displayed anything if only "2/18" were entered.
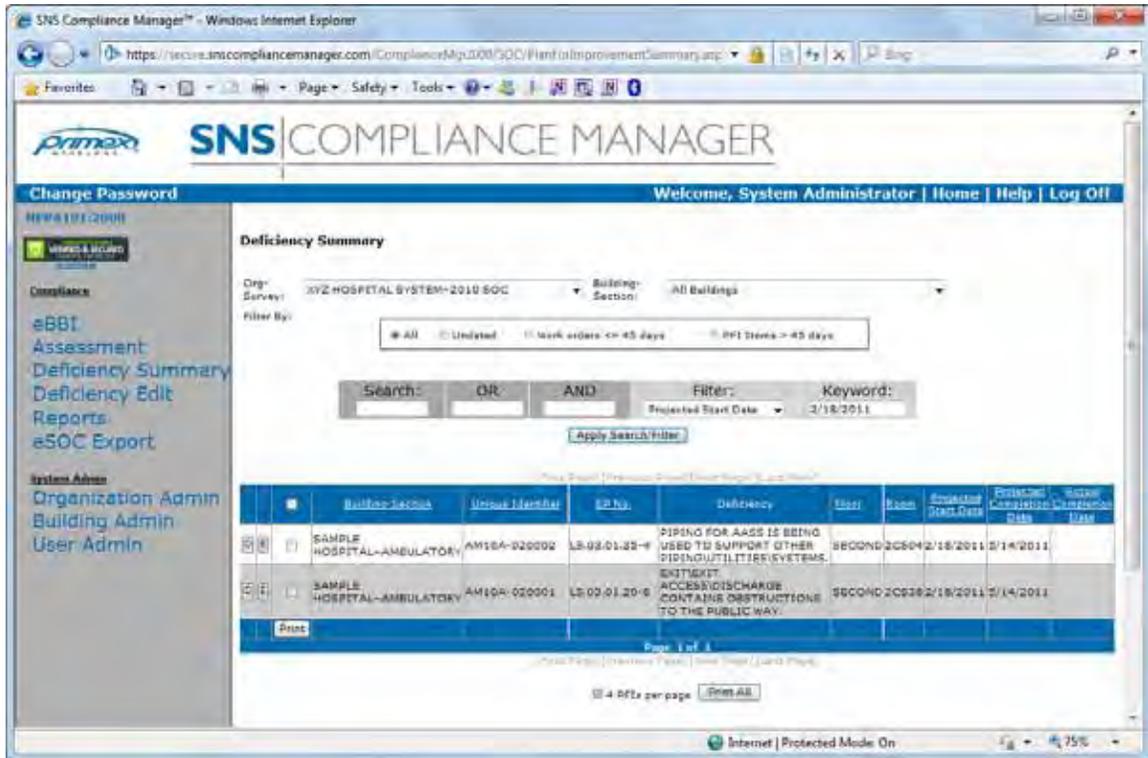
6) Any column can be sorted by simply clicking on the desired column heading. In this example, we clicked on the "EP No." column to sort which displays EP No's. LS.02.01.10-3, 10-4, and 10-9.
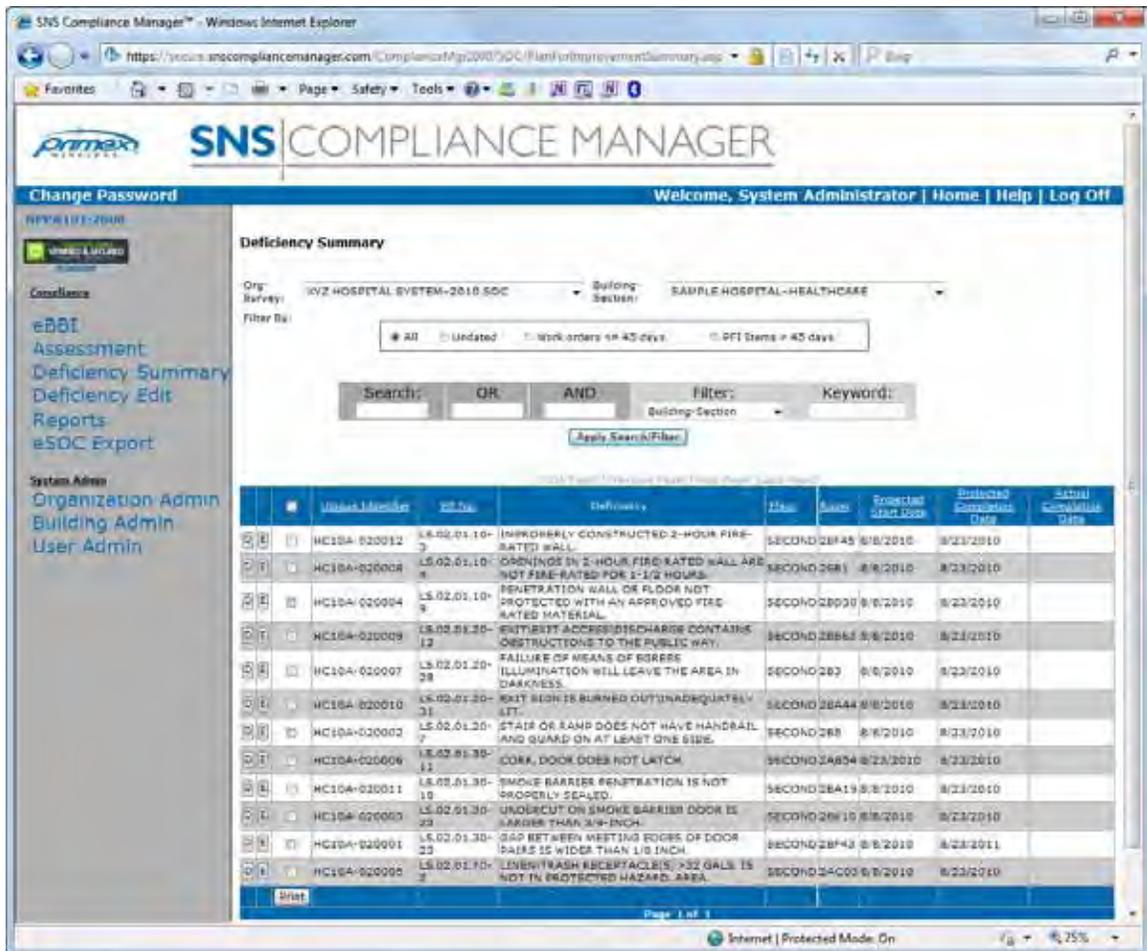
2. Setup and Administration

2.1 Organization Administration

1) Prior to entry of any deficiency data, the organizational structure must be created. This includes creation of organization, survey, building, section and user information. However, entering organizations, and buildings would not be necessary if data is uploaded directly from SNS Surveyor™. To create an organization, click on the "Organization Admin" link from the sidebar menu. The "Organization Search Page" lists all organization-surveys assigned to your user account. To search for specific organization-surveys review the "Searching and Filtering" section of this user manual.

2) Next click the "Add New Organization" button to access the "Organization Information" page. On this page you can enter your Organization and Survey name, address, city, state, zip code, TJC organization ID, contact name and phone number for the organization. Only the Organization and Survey fields are required. Click the "Add" button once the information has been entered, or cancel to return to the "Organization Search Page". Please note that as a general rule your Survey name should reflect the name of the assessment you are performing such as 2009 SOC.

3) Organization-Surveys can be deleted by clicking the "D" button or edited by clicking the "E" button next to that organization from the "Organization Search Page". You cannot delete an organization once buildings, floors and other information have been attached, without first deleting that information.
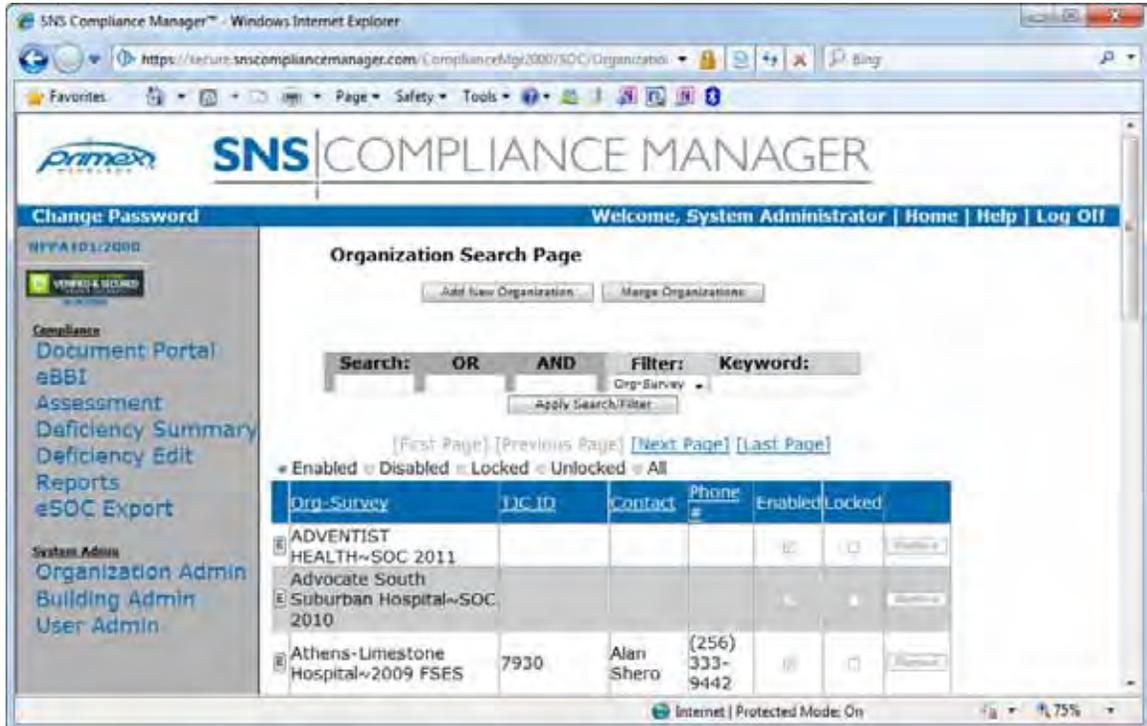
4) Organizations can also be disabled from the "Organization Information" page by SNS administrators and the System administrator only. This feature is used primarily to enforce hosting contracts. To disable an organization click the "E" button to edit that organization, click on the "Disable Organization" check box, and click the "Update" button to confirm the change.

5) Once an organization has been disabled it is displayed separately from enabled organizations on the "Organization Search Page". To display "Disabled" organizations only, click the "Disabled" pushbutton. To display "Enabled" organizations only, click the "Enabled" pushbutton. To display both "Enabled" and "Disabled" organizations click the "All" pushbutton. To enable an organization go to the edit screen and un-check the "Disable" checkbox.
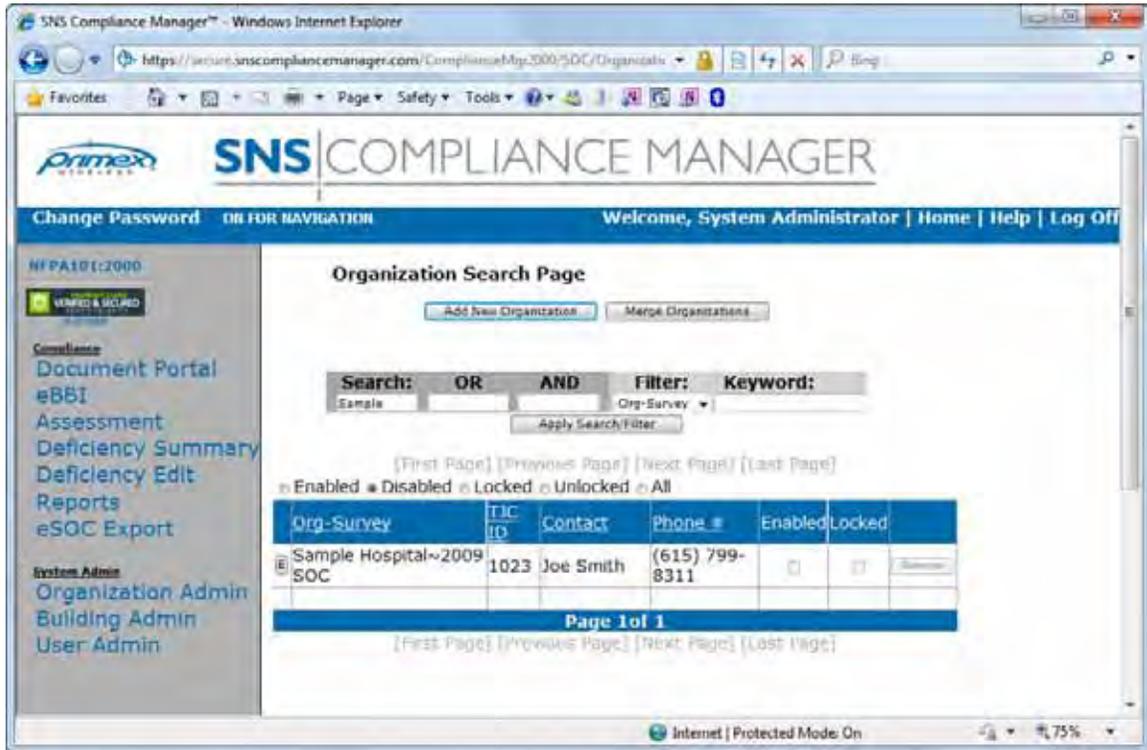
2.2 Building Administration

1) Once an organization has been established, the next step is to add buildings to that organization. To add buildings to an organization first click the "Building Admin" link on the sidebar menu, then choose an organization-survey from the "Organization-Survey" drop down box.

2) Click the "Add New Building" button to access the "Building Information" page. On the "Building Information" page enter the building name, section name, address, city, state, zip code, TJC building ID, contact name and contact phone number. You may also choose an automatically generated numbering scheme for your deficiency items. The "PFI UniqueID Prefix" combined with the "PFI UniqueID Separator" will precede any autogenerated number. For example,MHH-1000. Clicking the checkbox "Append Year to PFI UniqueID Prefix" will add the year to the prefix structure, i.e. MHH2007-1000. In addition, if you would like to export PFI's to the Joint Commission™ (TJC™) eSOC web site, you'll need to enter values from TJC™ eSOC for SiteID and BuildingID.

The building name and building section are required fields. Per TJC requirements on each hospital's Joint Commission Connect™ site, a building is defined by occupancy separations. For example, if a primary hospital building contains an appropriate separation between health care and ambulatory care occupancies, it should be treated as two separate, distinct buildings. To accommodate this separation while still identifying the actual building, we have included this section name field. However, since building section is not linked to any of the forms, it does not have to describe an

occupancy specifically, but rather the hospital's prescribed method for referring to an area such as wing, letter designation, function, etc.

Once all building information has been added you may click the "Add Building" button to create the building or enter information in the "New Floor" text box, and click the "Add Floor" button to add floors to a building. Then click the "Add Building" button to complete the process.
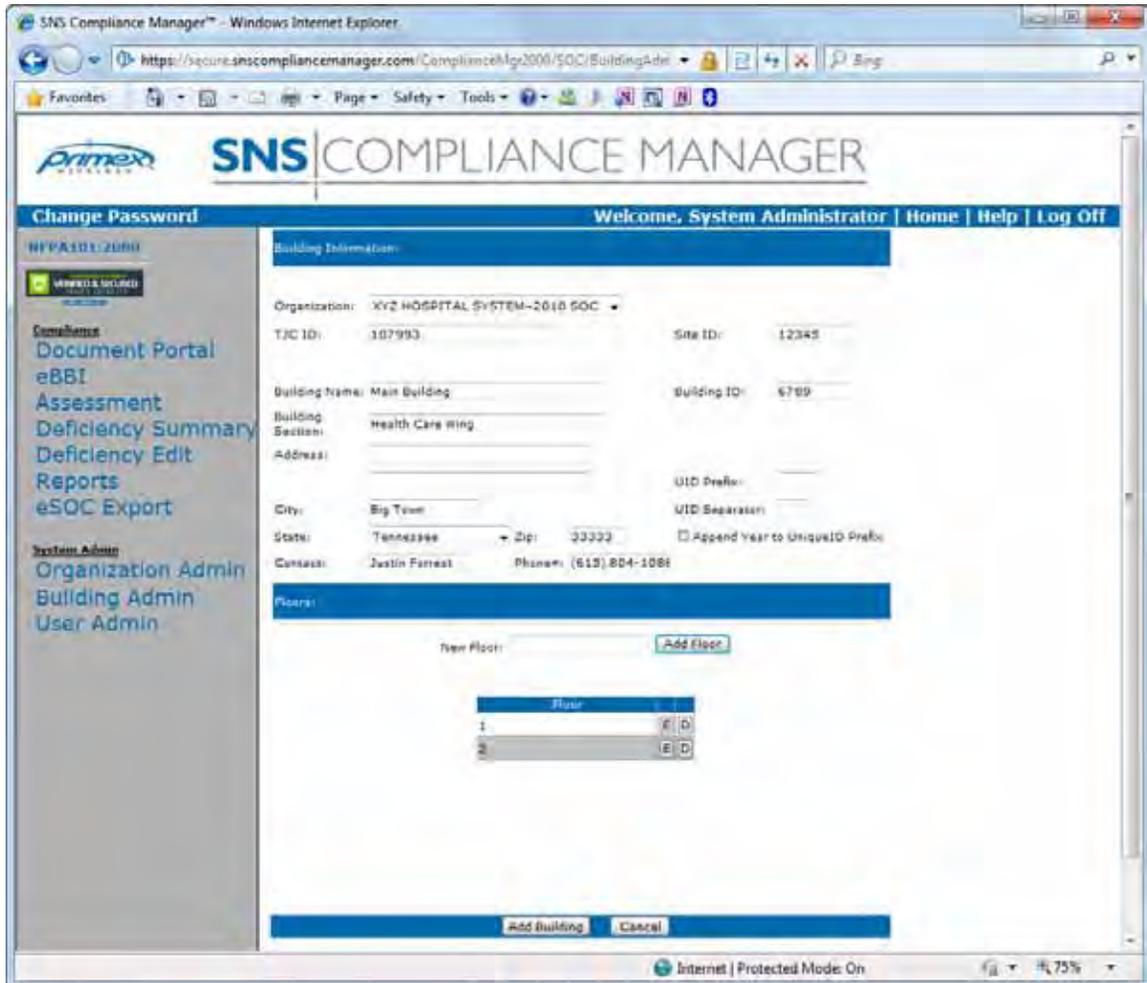
3) Building-sections can be deleted by clicking the "D" button or edited by clicking the "E" button next to that building from the "Building Search Page". You cannot delete a building once floors and other information have been attached, without first deleting that information.
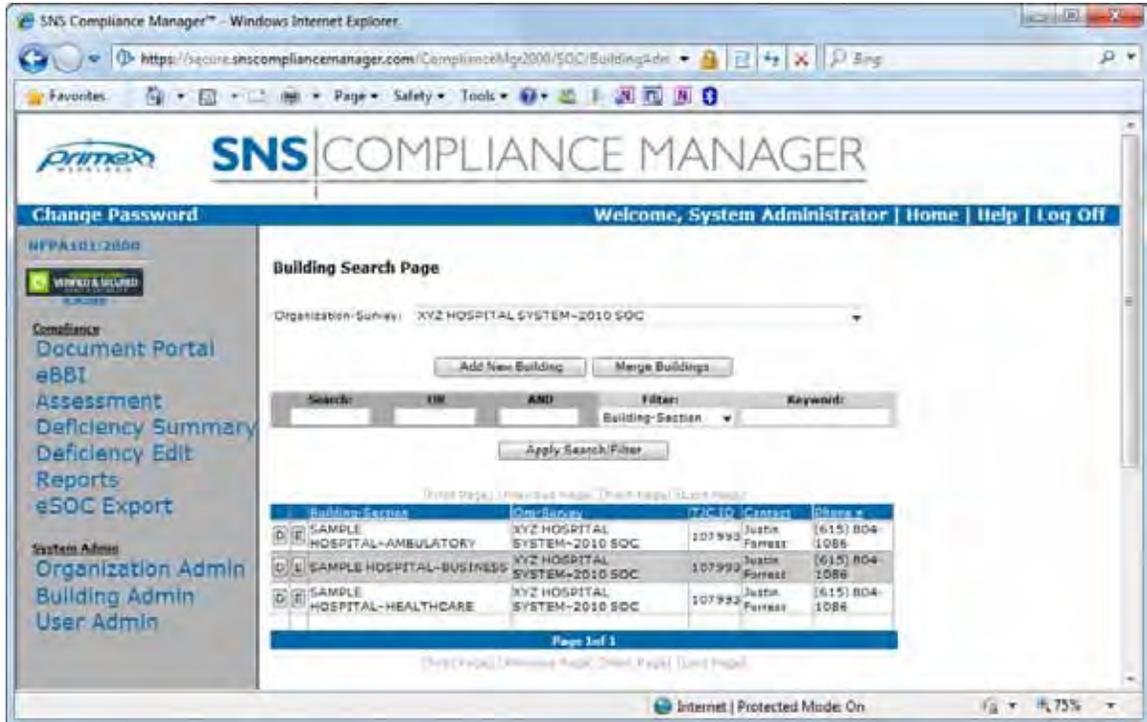
2.3 User Administration

1) The final step in program setup is to create users. First click on the "User Admin" link on the sidebar menu to display the "User Search Page". The user search page displays all users including their full name, phone, email and their assigned organizations. Since the system administrator and users who have been assigned the SNS Admin role have access to all organizations, their role is displayed in the "Assigned Organization(s)" column.
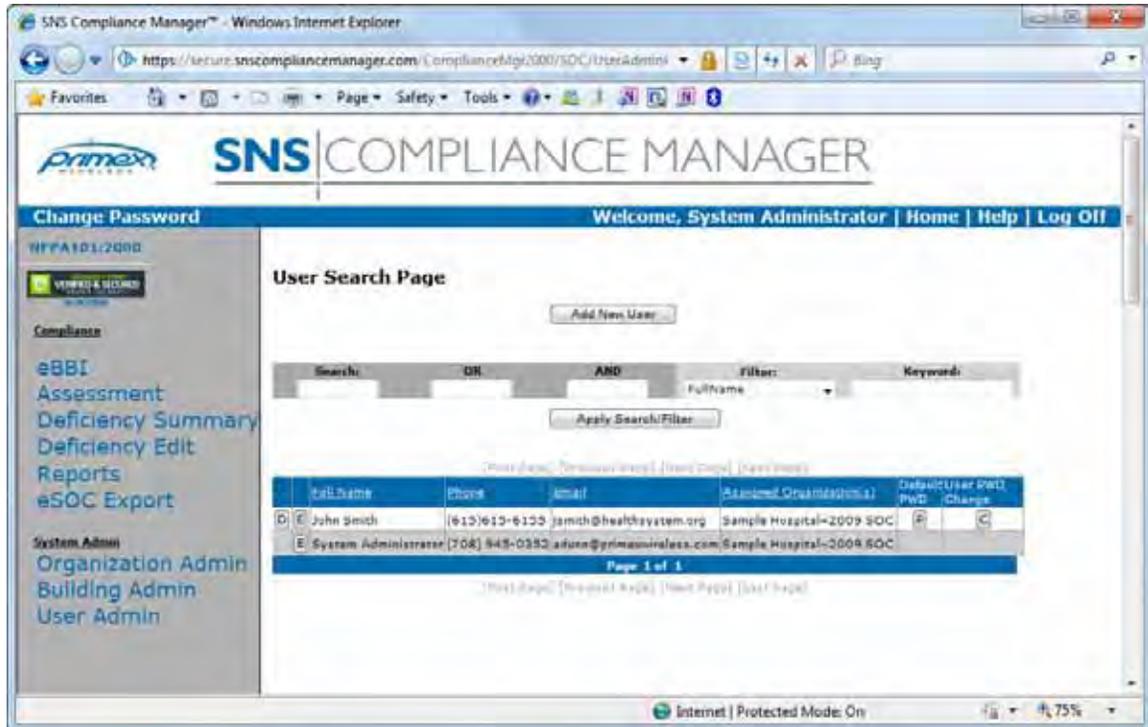
2) To add a new users click on the "Add New User" button to display the "User Information" page. Enter the user's first and last name, email address (login name), phone number, and any comments to describe this user, then select the group assignments by selecting the assignment name in the left-hand list box and clicking the "Add" button. The assignments for this user should appear in the right-hand list box. To remove group assignments simply reverse the procedure by selecting the assignment in the right-hand list box and clicking the "Remove" button. All current group assignments for a user appear in the right-hand list box. Assignments grant the user certain privileges as follows:

ORGANIZATION SPECIFIC GROUP ASSIGNMENTS
SOC Administrator: This should be the default for most of our smaller clients. SOC administrator gives access to add, delete, edit and print any part of the SOC. REMEMBER THAT USE OF MULTIPLE GROUP ASSIGNMENTS CAN ADD AND SUBTRACT

PRIVELEGES. IF YOU WANT SOMEONE TO HAVE FULL ACCESS DO NOT ASSIGN MULTIPLE GROUP ASSIGNMENTS SUCH AS SOC Administrator combined with SOC User.

SOC User Administrators: This group assignment grants access to the user admin section of the program so users can be added, edited or deleted from the users' assigned organizations. This group assignment can be added to any of the other roles.

SOC BBI Admin: This group assignment has the ability to add, edit or delete eBBI information, can view deficiencies without editing and run reports. This group assignment has no access to administrative functions or the eSOC export.
SOC PFI Admin: This group assignment has the ability to add, edit or delete deficiency information, can view eBBI information without editing and run reports. This group assignment has no access to administrative functions or the eSOC export.

SOC Users: This group assignment can view both eBBI and deficiency information and run reports. They have no other access rights.
After selecting group assignments for a user, specific organizations must be assigned. Unless a user is assigned to at least one organization, they will not be able to view or edit any information regardless of the group assignments they have been given. To assign an organization to a user, select the organization in the left-hand list box under "Organizations:" and click the "Add" button. The organization should appear in the right-hand list box. To remove organization assignments simply reverse the procedure by selecting the organization in the right-hand list box and clicking the "Remove" button. All current organization assignments for a user appear in the right-hand list box.

SNS ADMINISTRATOR and PASSWORDS
The system administrator has special privileges as follows:
- The SNS Administrator checkbox is a unique role that should only be given to SNS employees. It grants full access to all SOC information for all organizations and can only be assigned by the system administrator.
- A temporary default system password is automatically assigned for new users created by individuals with the SNS admin or SOC User admin roles. The first time the new user logs in, they must change this password. Only the system administrator has the option to create a specific password for a user.
- In the event an existing user forgets their password, users with the SNS Admin and SOC User Administrator roles may reset this user to the temporary default password, so that they may log in and reset their password. The system administrator may trigger a password change for one or more users. This will require these users to change their current password the next time they log in.

Once all user information has been completed, click the "Add" button at the bottom of the screen to create the new user. When a new user is created, the system automatically sends an email to the user's email address. The email contains the user's logon information and a randomly generated temporary password. The user will log on

as described in Application Access and Overview. They will then be required to create a new password.
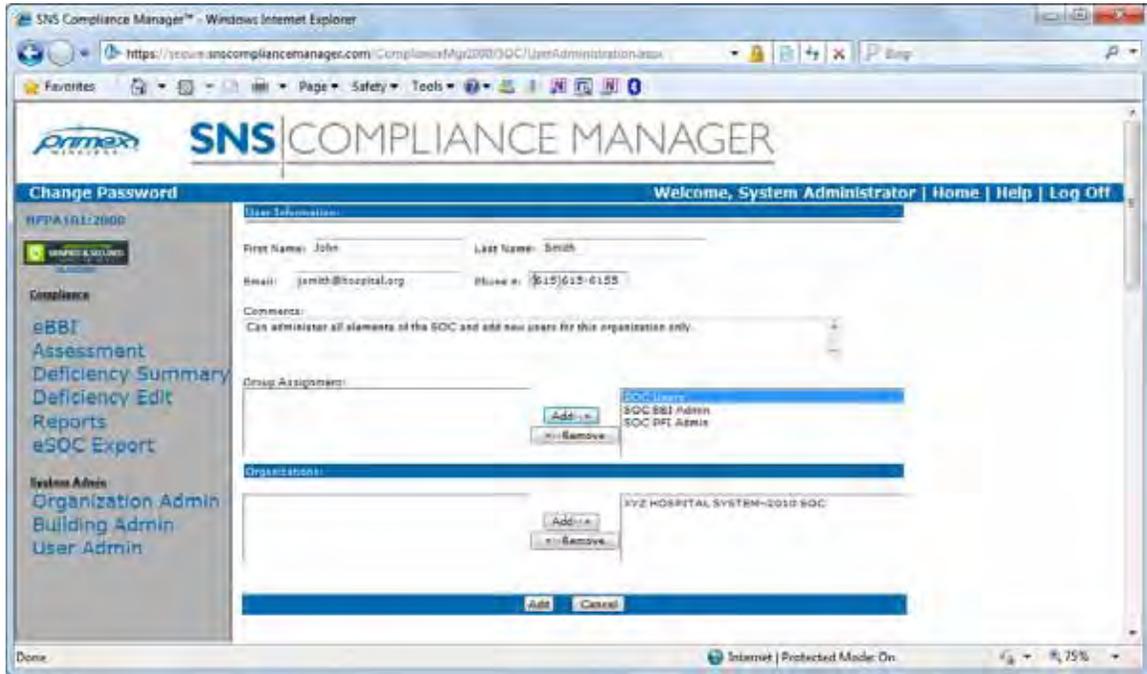
3) To edit existing user information click on the "E" button next to that user. The previous "User Information" screen will appear. Make any necessary changes and click the "Add" button to confirm these changes. To delete an existing user click on the "D" button next to that user. Note that the System Administrator cannot be deleted, and editing the administrator information is limited to changing the password, and minimal contact information.
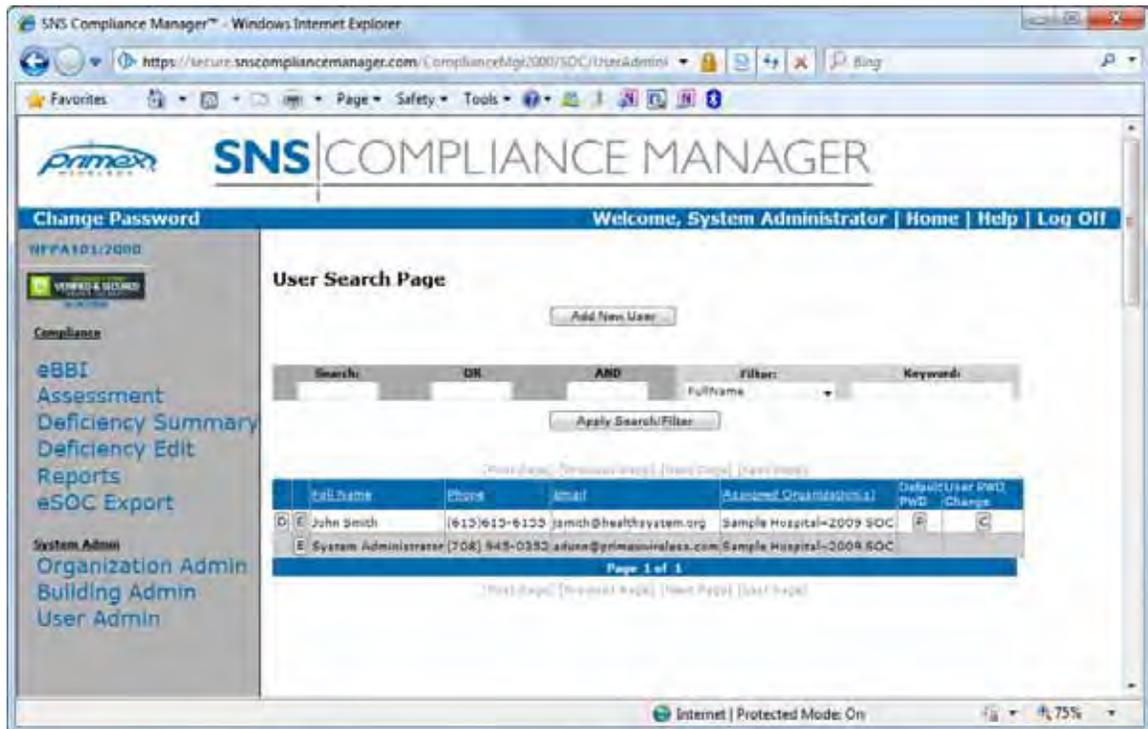
4) Users who have been assigned the "SNS Administrator", and "SOC User Administrator" roles and the "System Administrator" can force any user to change their password by clicking on either the "C" button in the "User PWD Change" column, or by clicking on the "P" button in the "Default PWD" column, next to that user. Clicking the "C" button forces the user to change their password upon logging in next with their existing password. Clicking the "P" button resets the user's password to a randomly generated temporary password and sends email to the user with the temporary password. When the user logs in with the temporary password, they will be required to set a new password.

5) The "System Administrator" has the added ability to force all users to change their password the next time they log in by clicking on the "Force All Users To Reset Their Password On Next Logon" button which appears on the User Search page only for System Administrator users.

3. Main Program

3.1 Electronic BBI

1) Once the organizations, buildings and floors have been created you can begin to enter your SOC™ information. SNS Compliance Manager™ can be used to create electronic Basic Building Information (eBBI) for entry into your "Joint Commission Connect™" site. eBBI information is not required here (and unlike deficiencies) cannot be exported directly to your TJC site, so you can choose NOT to maintain this information in our software to eliminate redundancy.

    Clicking on the "eBBI" link from the sidebar menu displays the eBBI Search Page. The eBBI Search Page lists all buildings created during building administration described previously under "Setup and Administration". To add eBBI information for each of these buildings, click the "E" edit button next to the desired building.
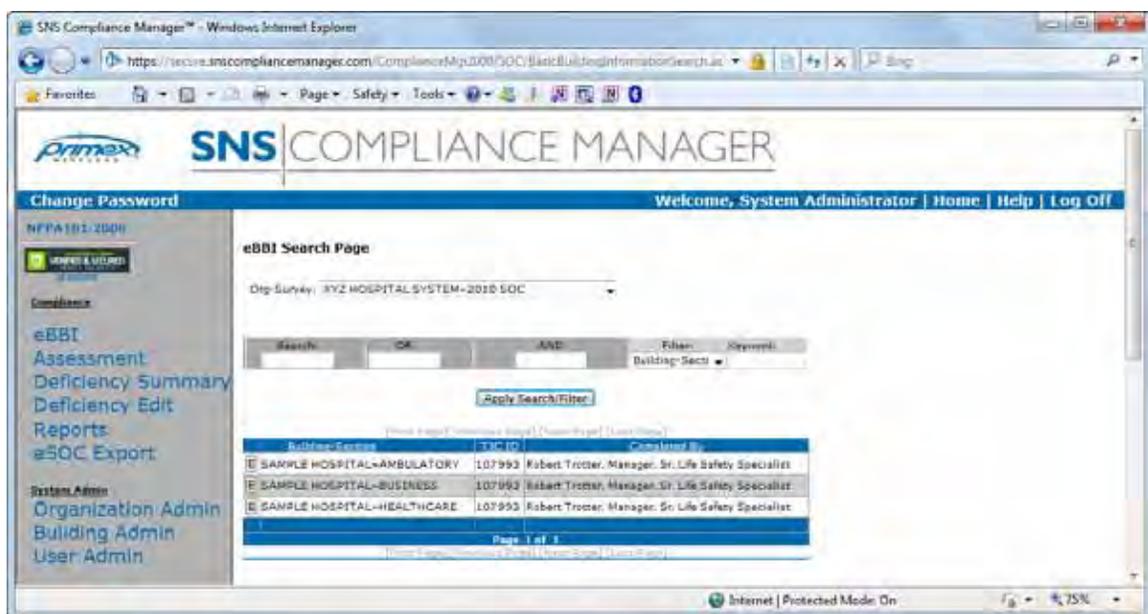
2) Because of inconsistencies in the occupancy descriptions and the inability to export this information mentioned previously, the eBBI form is no longer tied to the occupancies and new accreditation programs described in the assessment portion of the program.

    However if you choose to fill out the form you must complete all sections. Note the "Help: Mixed Occupancy?" link. As described under building administration, TJC treats each separate occupancy as a separate building regardless of building continuity. Therefore, you may only choose one occupancy type for each eBBI you create. To choose an occupancy type select one of the pushbutton's under "Occupancy Type". For

health care occupancies choose the "Hospital / Long Term Care" pushbutton. Also choose the approximate square footage for this portion of the building from the "Total Square Footage" dropdown list. "Site ID", "BuildingID", "Building Name" and "Building Address" are all filled in from information entered under the previous "Building Administration" section.

Electronic Basic Building Information

SiteID - 12345, BuildingID - 6789

Print Friendly

Building Name: Main Hospital~Health Care Wing

Building Address: 456 Main Hospital Street , Nashville TN 37204

Total Square Footage
<Select Square Footage>

Help:Mixed Occupancy?

Building Information   **Occupancy Type**

Hospital / Long Term Care

Render 4 or more incapable of self-preservation and overnight sleeping.
(NFPA 101-2000, 18/19)

Ambulatory

Render 4 or more incapable of self-preservation and no overnight sleeping.
(NFPA 101-2000, 20/21)

Number of Patients rendered incapable of self preservation through procedures or sedation/anesthesia:

If you are an Ambulatory Surgical Center (ASC) seeking CMS Medicare & Medicaid Deemed Status, an eBBI must be created.

Residential Treatment Center

16 or fewer in Treatment Program, Rooming & Lodging occupancy.
(NFPA 101-2000, 26)

17 or more in Treatment Program, Hotel & Dormitory occupancy.
(NFPA 101-2000, 28/29)

Free-Standing Hospice

11 or fewer are considered Rooming & Lodging occupancy.
(NFPA 101-2000, 26)

Business

0-3 rendered incapable of self-preservation are considered to be Business Occupancies.

No Statement of Conditions required.

Other(Industrial Assembly, Conference Center)

No Statement of Conditions required.

3) Fill out the remaining information in the form where applicable.

Patients

Total Licensed Beds	[____]
Total Monitored Critical Care Beds (OR, ER, ICU, PACU, Telemetry)	[____]
Total OR Suites	[____]

Building Size and Type

Total stories or levels occupied by the organization that are classified for healthcare delivery

- ○ 1   ○ 4
- ○ 2   ○ 5
- ○ 3   ○ >5

Exits - Please indicate the number of stairs that serve upper floors that do not exit directly to the public way at grade (for example, interior stair discharge to interior exit passageway)

- ○ 0 (or N/A)   ○ 3   ○ 5
- ○ 1   ○ 4   ○ >5
- ○ 2

Building Construction Type - Is there more than one building construction type present in this building, or is the building construction one homogenous type throughout

- ○ One building construction type throughout
- ○ More than one building construction type used in adjacent buildings or other years of construction

Building Age / Renovation

Original Construction - Construction date of oldest portion currently being used for healthcare

- ○ <1945
- ○ 1945-1967
- ○ 1968-1990
- ○ 1991-2003
- ○ >2003

Recent Renovation - Percentage either "new" or major renovation since 1991

- ○ <20%
- ○ 20-50%
- ○ 50-90%
- ○ >90%

Suppression

Percentage of facility used for healthcare that is sprinkled (i.e. protected by an Approved Automatic Suppression System (AASS))

- ○ <20%
- ○ 20-50%
- ○ 50-90%
- ⦿ >90%

Life Safety Features

Addressable Fire Alarm Devices

- ○ No
- ○ Partial
- ⦿ All

Smoke Detection - Connection

- ☑ Throughout
- ☐ Sleeping Rooms
- ☐ Corridors
- ☐ Limited areas / functions
- ☐ None

Emergency Power

Emergency Electrical Power System

- ☑ Diesel
- ☐ Natural Gas
- ☐ Other
- ☐ None

Special Features

Dietary Facilities - Institutional cooking including grease producing devices or deep fat fryers

- ○ Yes
- ○ No

Building Maintenance Program (BMP)

- ○ Yes
- ⦿ No

Locked (secured) units

- ☐ NICU
- ☐ Peds
- ☑ Psych
- ☐ Forensic
- ☐ Alzheimer's Units

Laundry or Trash Chutes

- ☑ None
- ☐ Operational Laundry
- ☐ Operational Trash
- ☐ Present but not operational

4) One advantage to completing your eBBI information here before transferring to your TJC site is that certain fields have been added to our form in order to provide guidance for information that TJC <u>requires</u> in the catch-all "Additional Comments and Notes" memo box at the bottom of their form. Information regarding the consultant who completed the information, and a description of the mixed occupancy for the building-section in question where applicable are actually required and hospitals have been cited for not providing this information. We also provide suggested language for some of this information in the "Additional comments and notes" memo box. When the form is printed this information is all combined into the "Additional comments and notes" memo box so that it closely resembles what you need to enter on your TJC site.

Completed By

Preparer Name and Title

Preparer Phone Number
615-383-1113

Mixed Occupancy? ⦿ Yes ○ No

Describe the mixed occupancy (if applicable this is required information):

Additional comments and notes:

Additional comments and notes, including location of life safety drawings, granted or requested equivalencies, eSOC preparers name and qualifications, any other relevant historical information.

Hard copy versions of all equivalency information and Life Safety Drawings are kept at the facility engineering office. Electronic versions are stored on-line using a web-based SOC software. This Statement of Conditions was prepared by Smith Seckman Reid, Inc. whose qualifications include 100's of SOC's at hospitals nationwide, expertise in the life safety code (NFPA 101) and intimate knowledge of the facility.

Save   Cancel

5) One other recent addition is the question regarding government suspension. Where mandated by state or federal agencies, a hospital may be required to suspend testing such as those requiring an excessive use of water during a drought period. When the pushbutton is selected for this, information describing the nature of the suspension must be provided in the memo box below.

6) To provide a method for storing and centralizing information associated with a building, we recommend posting drawings and other attachments to AutoCAD WS.
7) To print the eBBI form click on the "Print Friendly" button at the top of the form.

8) A dialog box checking to make sure you've saved changes to the form will appear. If you have saved the form you may click the "OK" but to continue to the print friendly view or the "Cancel" button to go back and save your changes first.
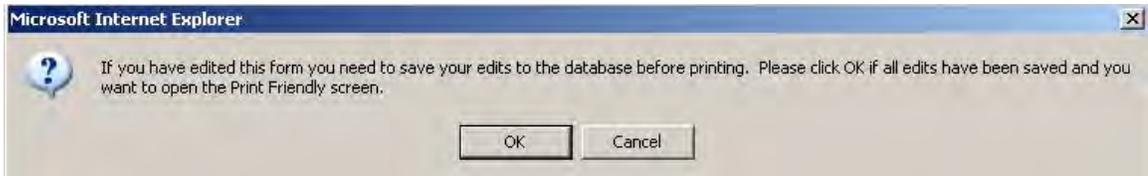
9) If all required fields have been completed a "Print Friendly" view will pop up in a separate window.
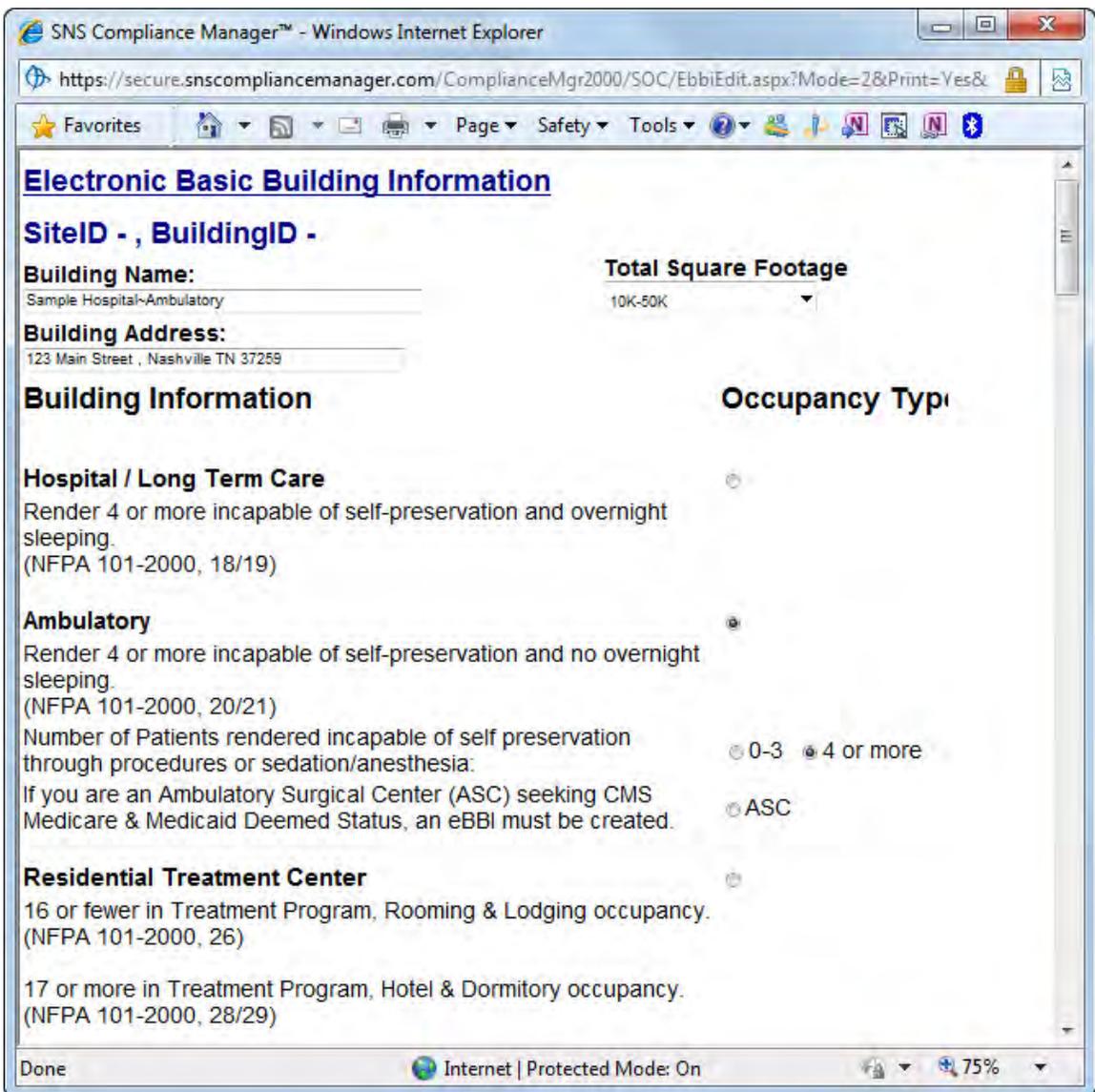
10) This print friendly view can be used to complete the form on your Joint Commission™ Connect site. Note the "Additional Comments and Notes" contains a collection of information entered into the SNS Compliance Manager™ eBBI form.

3.2 Assessment

1) The next step in the process of completing the SOC™ is to review the 2009 Life Safety Chapter requirements and add deficiencies where necessary. Clicking on the "Assessment" link from the sidebar menu displays the "Life Safety Chapter Assessment" page. This page is used to create new deficiencies associated with each of the requirements for the Life Safety Chapter of the Hospital Accreditation Standards. Each requirement is listed based on the "Accreditation Program", "Occupancy" and "Chapter Section". Per "The Joint Commission™" standards there are several different types of accreditation programs which you may have chosen for your organization.

2) The accreditation program you choose determines what occupancies are available, consequently accreditation programs that don't match the occupancy of the building in question cannot be used. In addition, choosing an occupancy determines what chapter sections must be reviewed for compliance. We have also added an option for LSA Only (No Accreditation) to cover review of Business occupancies. Standalone Business occupancies are not required for Statement of Conditions inspections. However, per EC.02.03.01 Business occupancies that are used as a means of egress from another occupancy that is required, must comply with NFPA requirements for a business occupancy. In this case we have included relevant sections of NFPA10, NFPA13, NFPA80

and NFPA101 as chapter sections for review. Note that while other occupancies are not currently available under this section, they will be added in the future to cover the new Det Norske Veritas (DNV) National Integrated Accreditation for Healthcare Organizations (NIAHO) requirements and other authorities having jurisdiction.
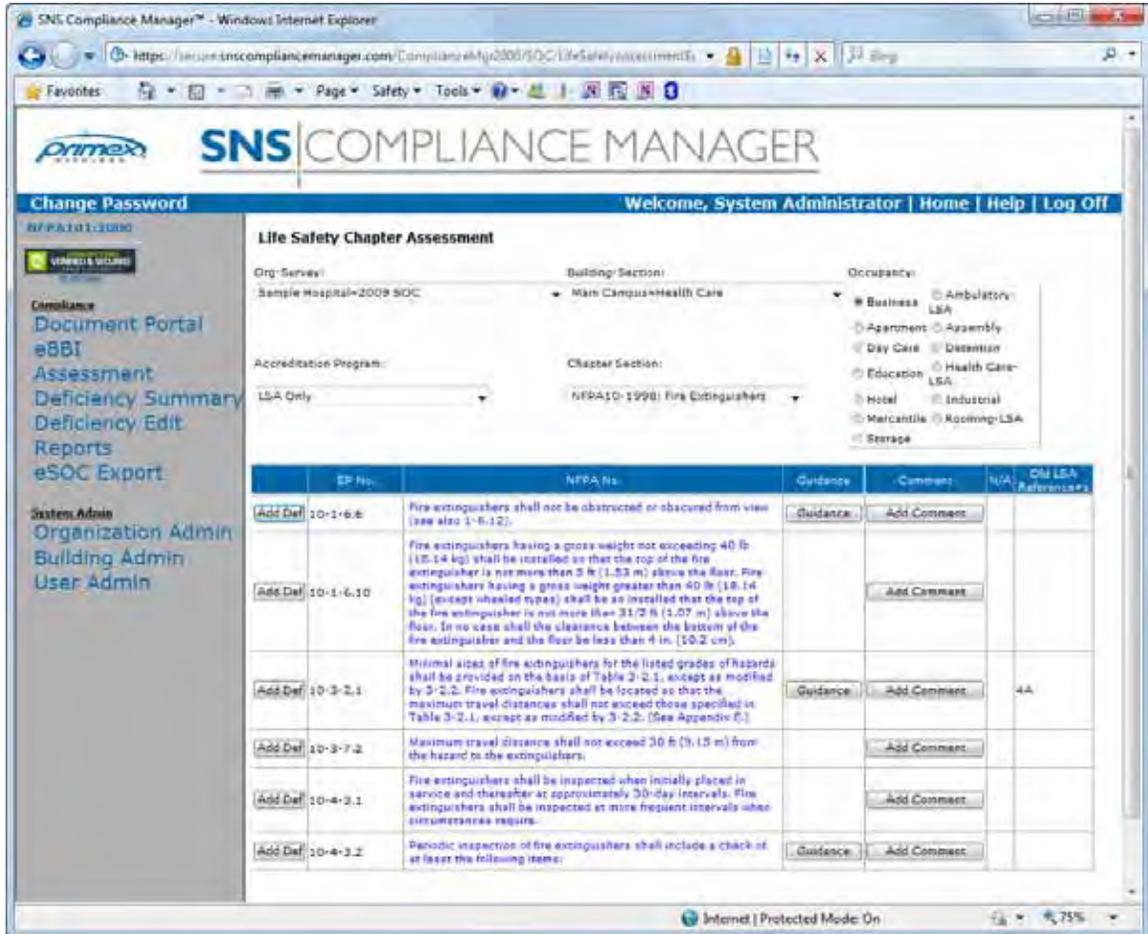
3) WARNING!!! Once you begin to add deficiencies to requirements, any changes to accreditation program or occupancy will DELETE those deficiencies. If you attempt to make this change the following prompt will appear. To keep the current settings and prevent deletion of deficiencies select the "Cancel" button.
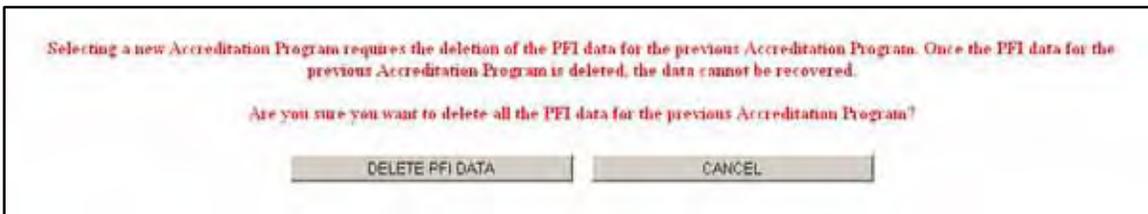
4) Once an accreditation program and occupancy are chosen you should review compliance for the selected building on each of the life safety chapter requirements by selecting each chapter section from the "Chapter Section" dropdown list.
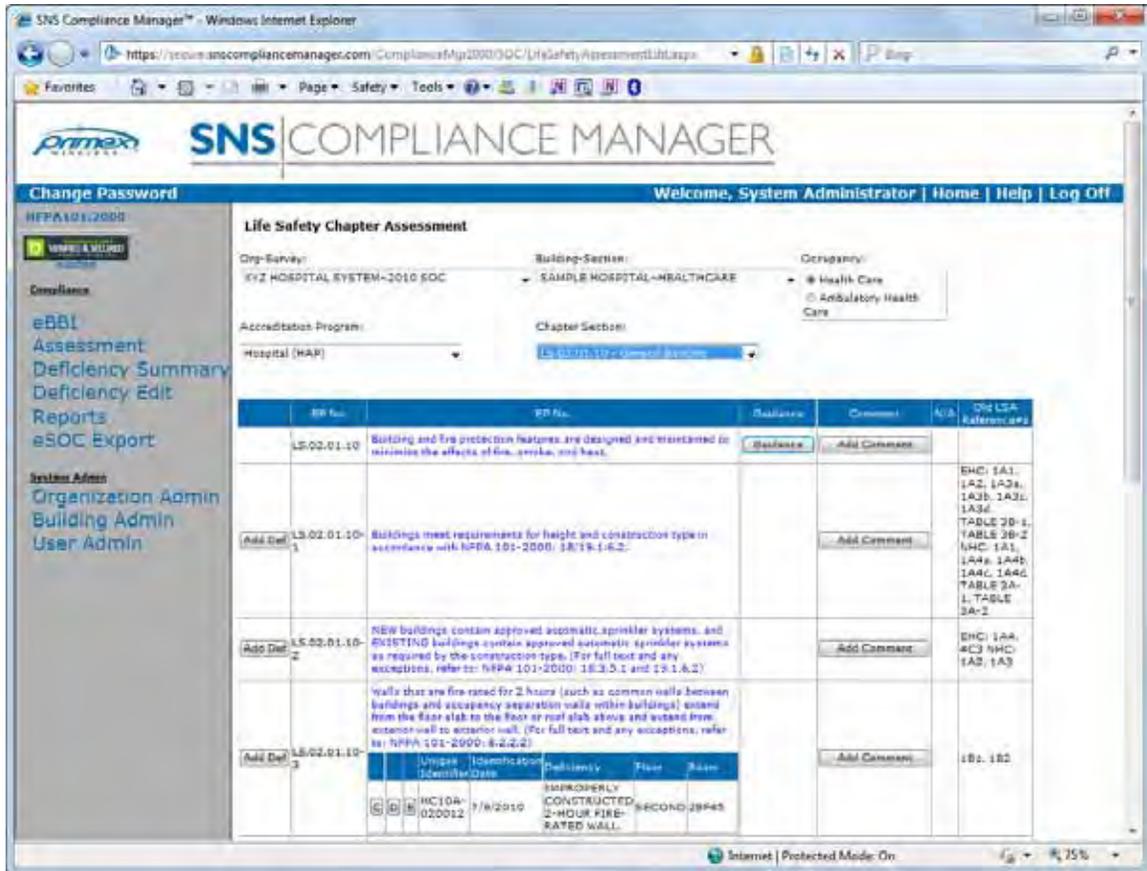
5) For each chapter section review the requirements. If the building is in compliance with a specific requirement, nothing needs to be done. If the requirement does not apply to the building click the checkbox in the not applicable (N/A) column next to that requirement. Items in "Blue" are chapter section headings and are provided for information only. Requirements with "Guidance" buttons to the right contain additional guidance for reference. You can quickly view this guidance information by hovering over the associated requirement. A tooltip will appear showing the additional guidance.
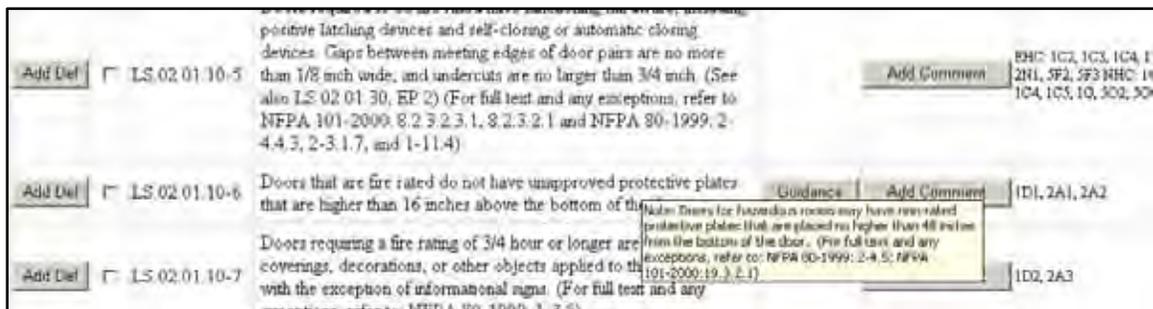
6) Sometimes the guidance provided may exceed the space available in a tooltip, so only a portion of the guidance is displayed. To view the full guidance, click on the "Guidance" button next to the associated requirement. The "Life Safety Assessment Guidance" page displays the full test of the selected requirement and associated guidance. Click the "Close" button to return to the previous assessment screen.

7) If a requirement is found to be non-compliant for one or more deficient items, click the "Add Def" button for that requirement to display the "Deficiency Description" page.

8) The "Deficiency Description" page is used to create "Plan For Improvement" items that can be imported into your Joint Commission™ Connect site and other deficiencies. Templates have been provided for common deficiencies that populate both the "Deficiency" and "Proposed Action" fields by simply selecting from the "Deficiency:" drop down list.
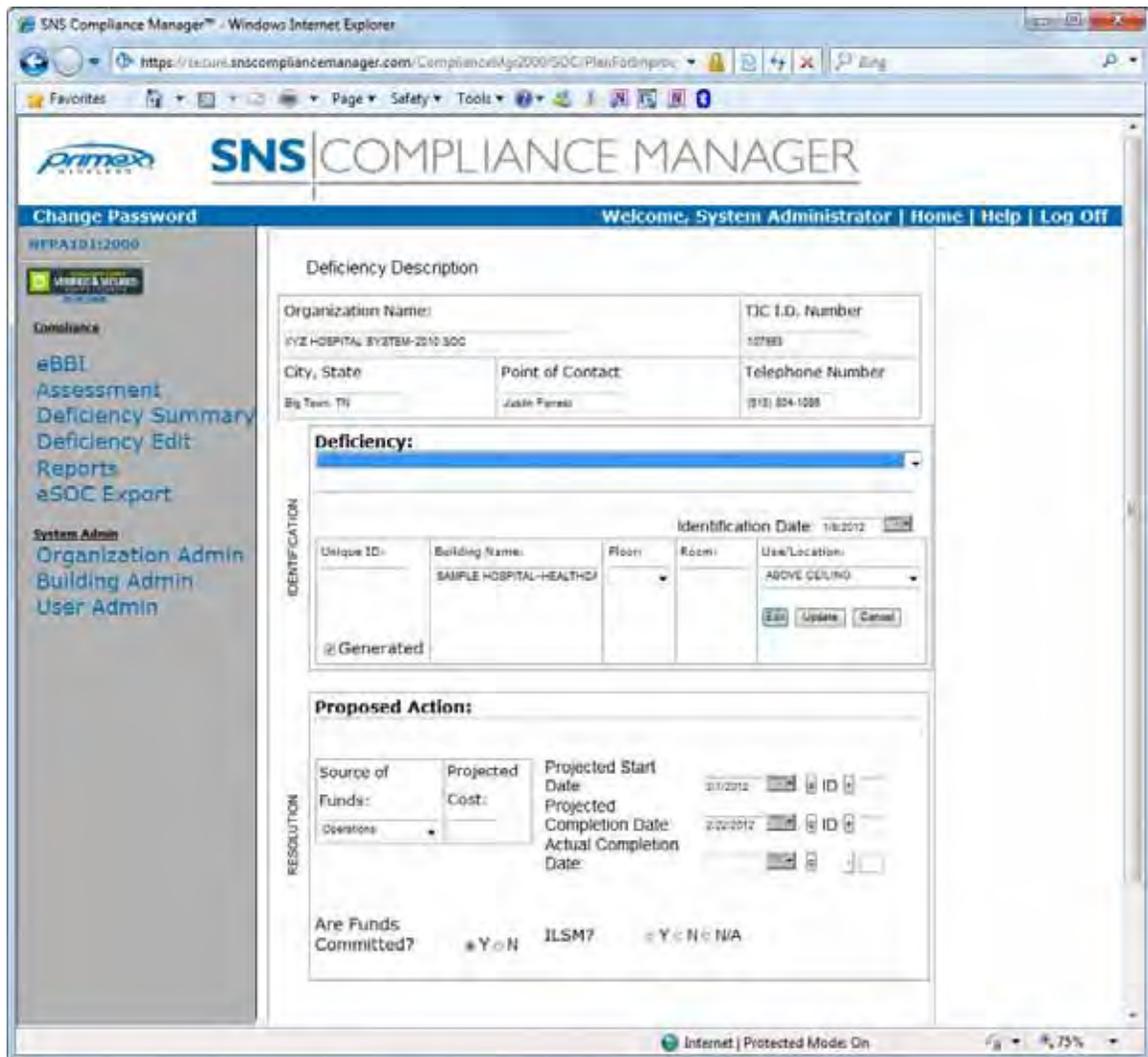
9) Fill in the remaining required fields. The organization information comes from the information you entered in the "Organization Admin" section previously described.

Unique Identifiers (uid)s are set by default to automatically generate sequentially based on the last deficiency entered. To manually created unique identifiers un-check the "Generated" checkbox and enter your own uid in the "Unique Identifier:" text box. It is recommended that auto-generation be used in most cases, however, if manual entry is required, it is better to do manually entry for the entire building since numerical sorting can be affected by mixing the two methods. Keep in mind that prefixes, suffixes, separators and tagging by year do not need to be entered here. These can be added at

Project Start and Projected Completion Dates can be challenging to enter since most people think in terms of man hours or days to complete a task and then have to calculate the date manually. The problem becomes more challenging because The Joint Commission™ (TJC) requires deficiencies not repaired within 45 days to be added to a hospital's Joint Commission™ Connect site as Plan For Improvement items. Any items that can be fixed within that timeframe do not need to be reported to TJC and can be repaired through a hospitals work order process. The ID "+" button takes some of the work out of this calculation process. For example, if you know that it takes 15 days to order and replace a missing escutcheon from a sprinkler head and you can do this as part of your internal work order process, subtract 15 from 45 days. Enter 30 days in the "Projected Start Date" and 45 days in the "Projected Completion Date" and click the "+" button to automatically calculate these dates.

With regard to "Projected Cost", this field requires numerical entry only. Do not use a $ sign or comma separators in your number.

10) If an Interim Life Safety Measure (ILSM) is required based on your organizations policies for a specific deficiency, you should indicate that ILSM's are required by clicking on the "Y" pushbutton next to the "ILSM?" item. A text box and "Add ILSM" button should be displayed on the screen.
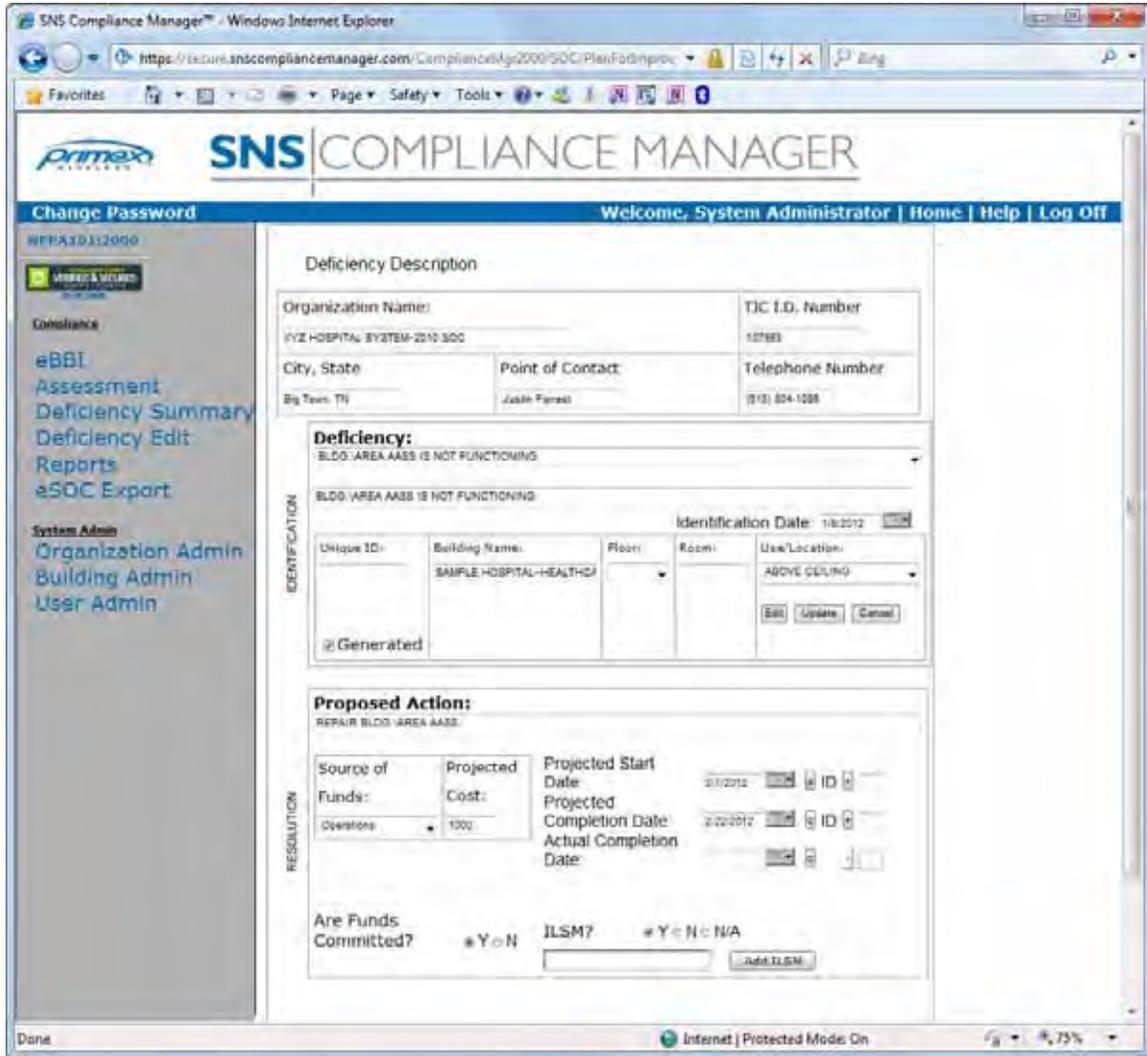
11) Click on the "Add ILSM" button to display a list of the 14 possible ILSM's. Select the checkbox next to each ILSM you want applied to this deficiency and click the "Save" button at the bottom of the screen to return to the "Deficiency Description" page.
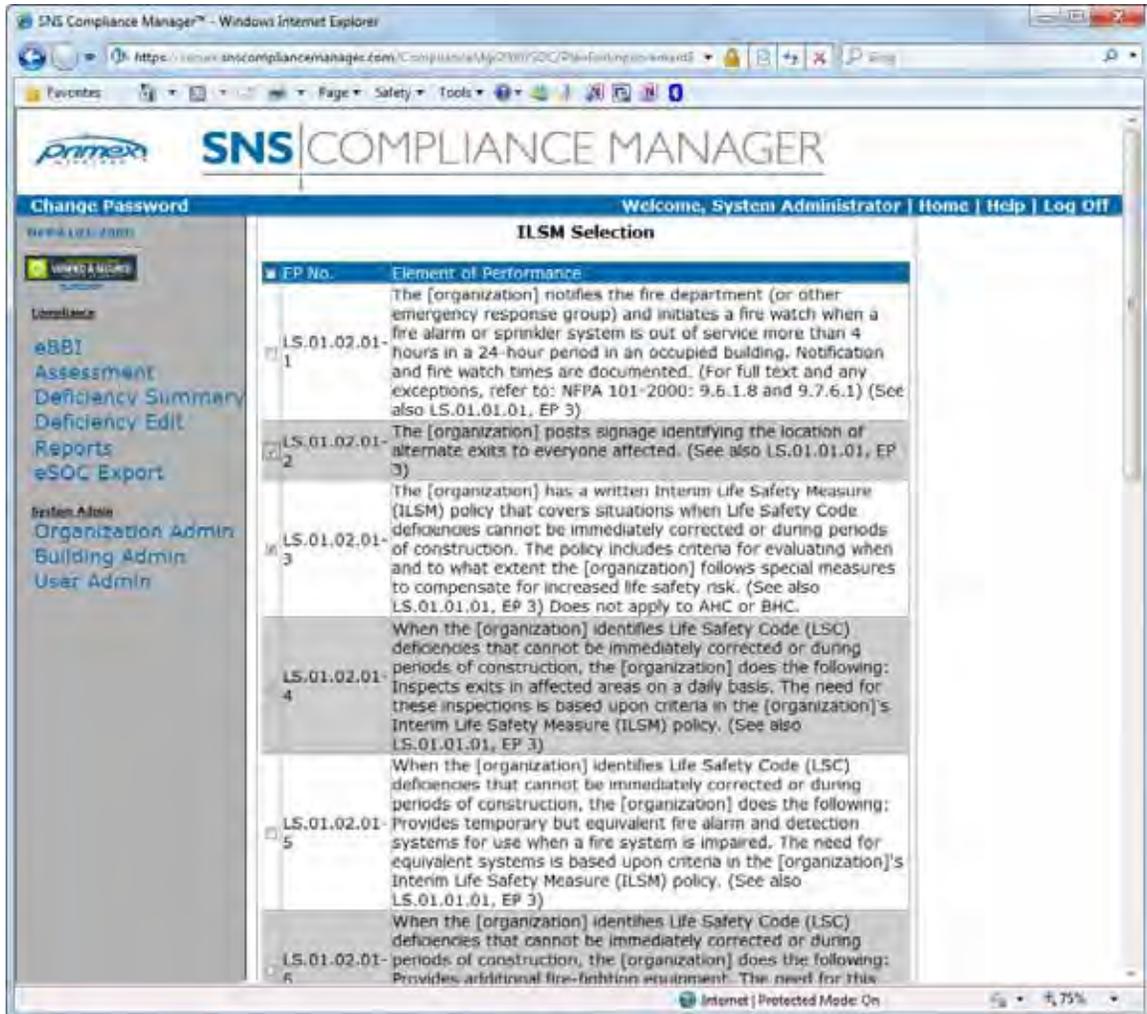
12) The ILSM numbers you selected should now appear in the ILSM text box next to the "Add ILSM's" button. You can add, edit or clear ILSM's by clicking on this button again.
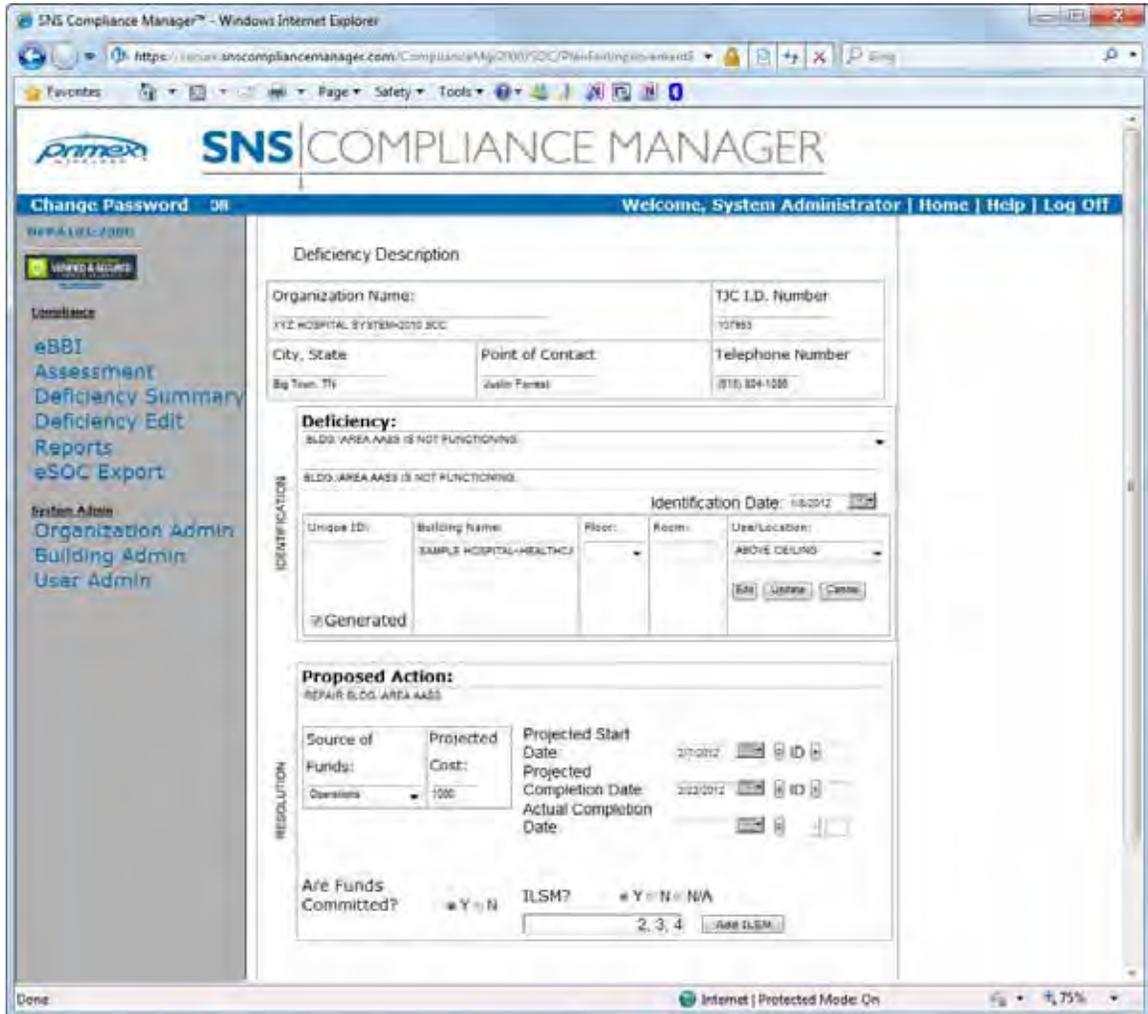
13) Click the "Save" button to add the deficiency item to the requirement you originally selected. Any deficiency item can be copied, edited or deleted by clicking on the "C", "D" or "E" buttons next to that deficiency.

14) Comments can also be added to requirements by clicking the "Comments" button next to the requirement. Enter your comment in the memo box on the "Life Safety Assessment Comment" page and click the "Save" button to return to the assessment page.

15) The comment will now be displayed below the requirement. To delete or edit the comment click the "Delete Comment" or "Edit Comment" buttons.

16) Each requirement includes references to old "Part 3: Life Safety Assessment" numbers as an aid for learning the new system. The easiest way to search for an old LSA number is to use the "Find (on This Page)" or CTRL+F feature from the "Edit" pull down menu in Microsoft® Internet Explorer.
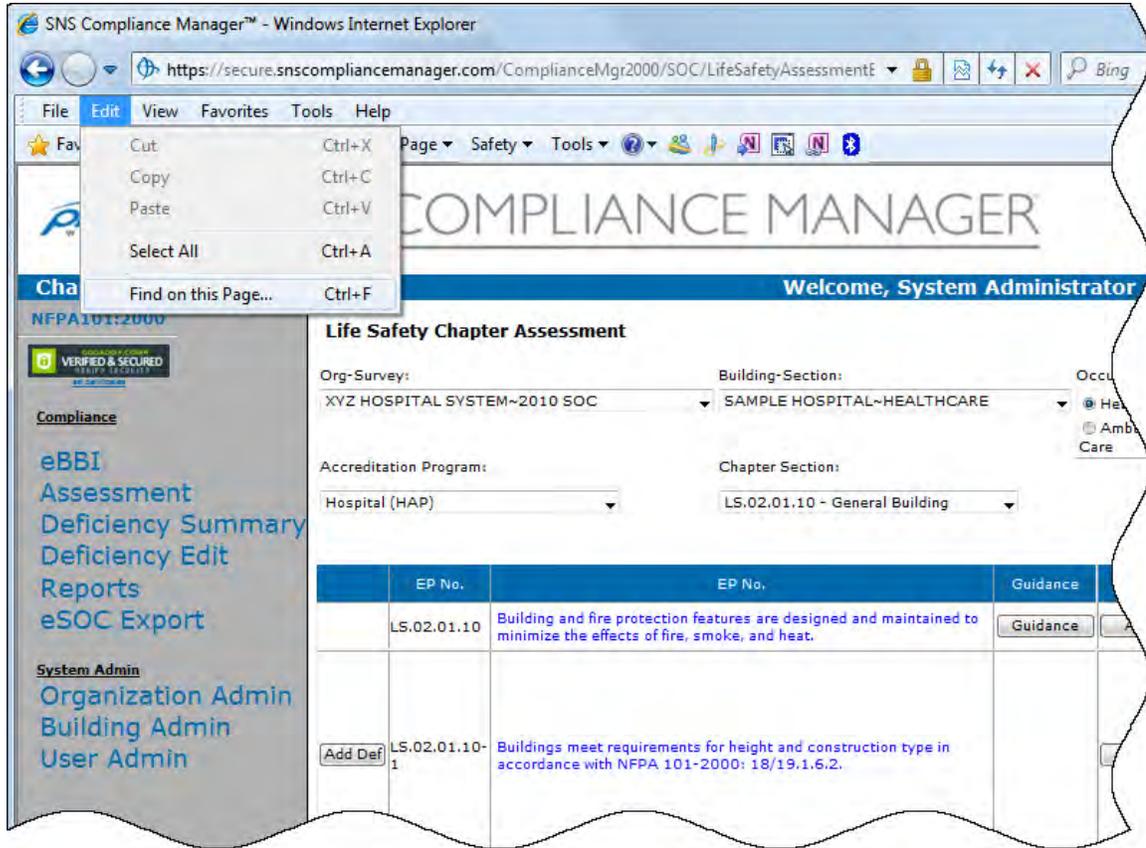
17) Enter the old LSA question number in the "Find" dialog and click the "Find Next" button. Repeated clicking of the "Find Next" button will display any requirements that reference this old number.

3.3 Deficiency Summary

1) In addition to searching and filtering discussed previously under "Navigating, Filtering, and Sorting", the "Deficiency Summary" page includes filters based on deficiency identification and projected completion dates. If the difference in days between a deficiency's identification and projected completion dates is greater than 45 days, these items are considered Plan for Improvement (PFI) items by The Joint Commission™. Clicking on the "PFI Items > 45 days" pushbutton displays all deficiencies that meet this condition.

2) Selecting the "Work orders <= 45 days" pushbutton displays all deficiencies where the identification and projected completion dates are less than or equal to 45 days.

3) Choosing the "Undated" pushbutton displays any deficiencies where the projected completion date has not been entered.
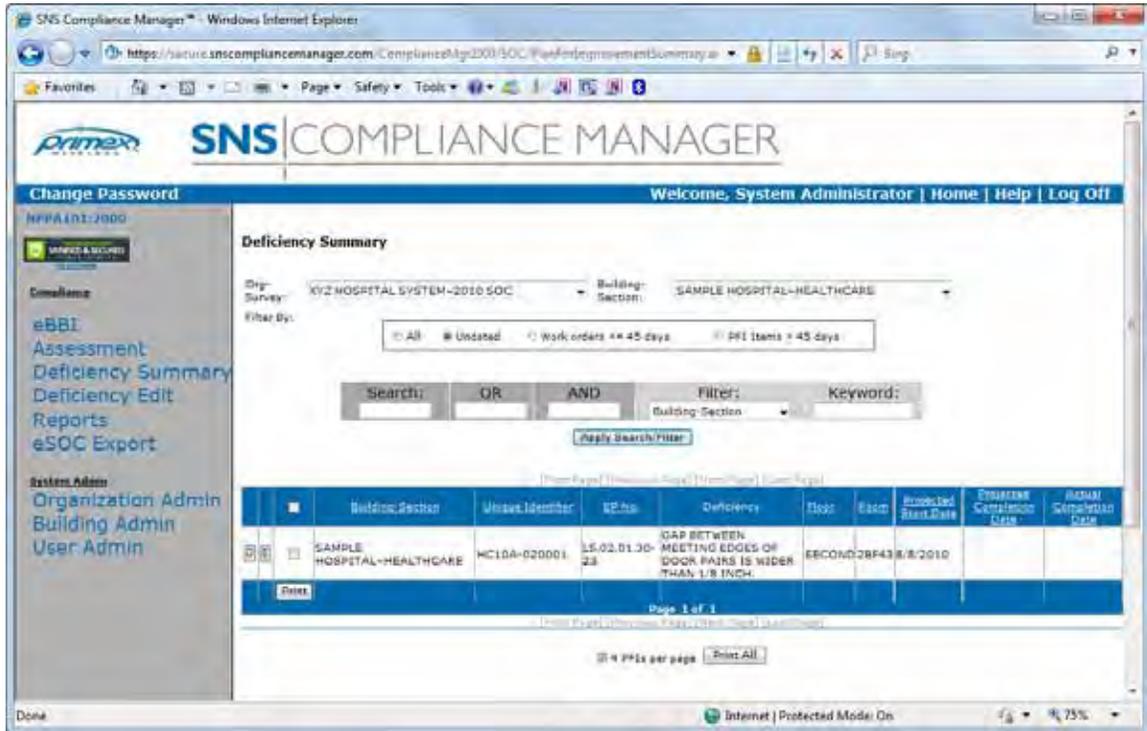
4) Finally, choosing the "All" pushbutton will display all deficiencies regardless of dates.

5) Any deficiency can be deleted or edited from the "Deficiency Summary" screen by clicking on the "D" or "E" buttons respectively. Editing a deficiency in this manner is the same as the "Deficiency Description" page described in the previous example. Clicking the "Save" or "Cancel" button will return to the "Deficiency Summary" page.
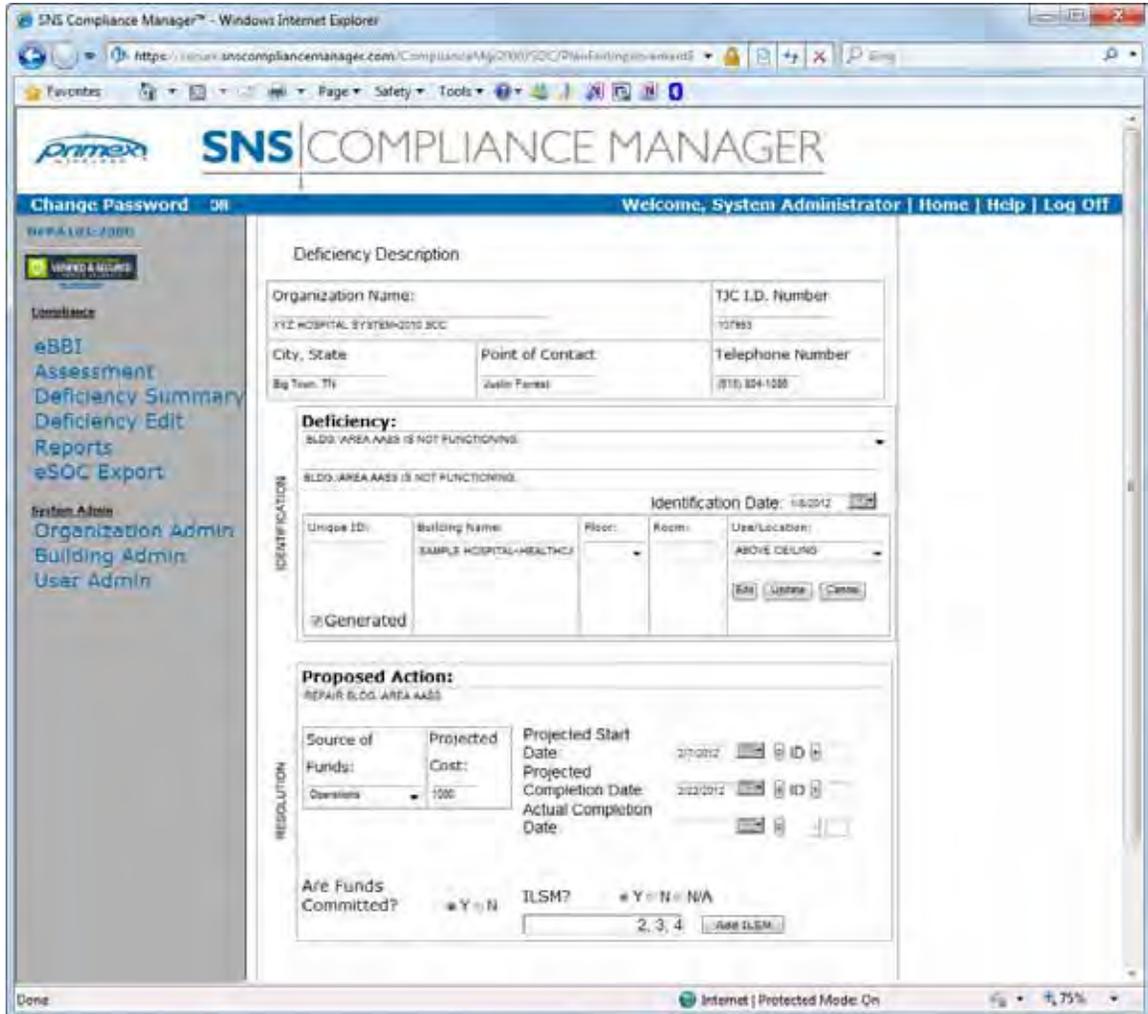
6) In addition to filtering and editing, deficiencies can be printed from the "Deficiency Summary" screen either separately or in groups. To print one or more specific deficiency items, select the print checkbox next to the deficiencies you'd like to print then click the "Print" button at the bottom of the column. In the Report server popup window you can choose to print or export the report to several different formats including PDF and Excel. To print an entire page of deficiencies you can select the checkbox at the top of the print column.

To print all deficiencies click the "Print All" button at the bottom of the screen. You may also choose to print 4 deficiencies per page (the default) or just one by un-checking the "4 Deficiencies per Page" checkbox.
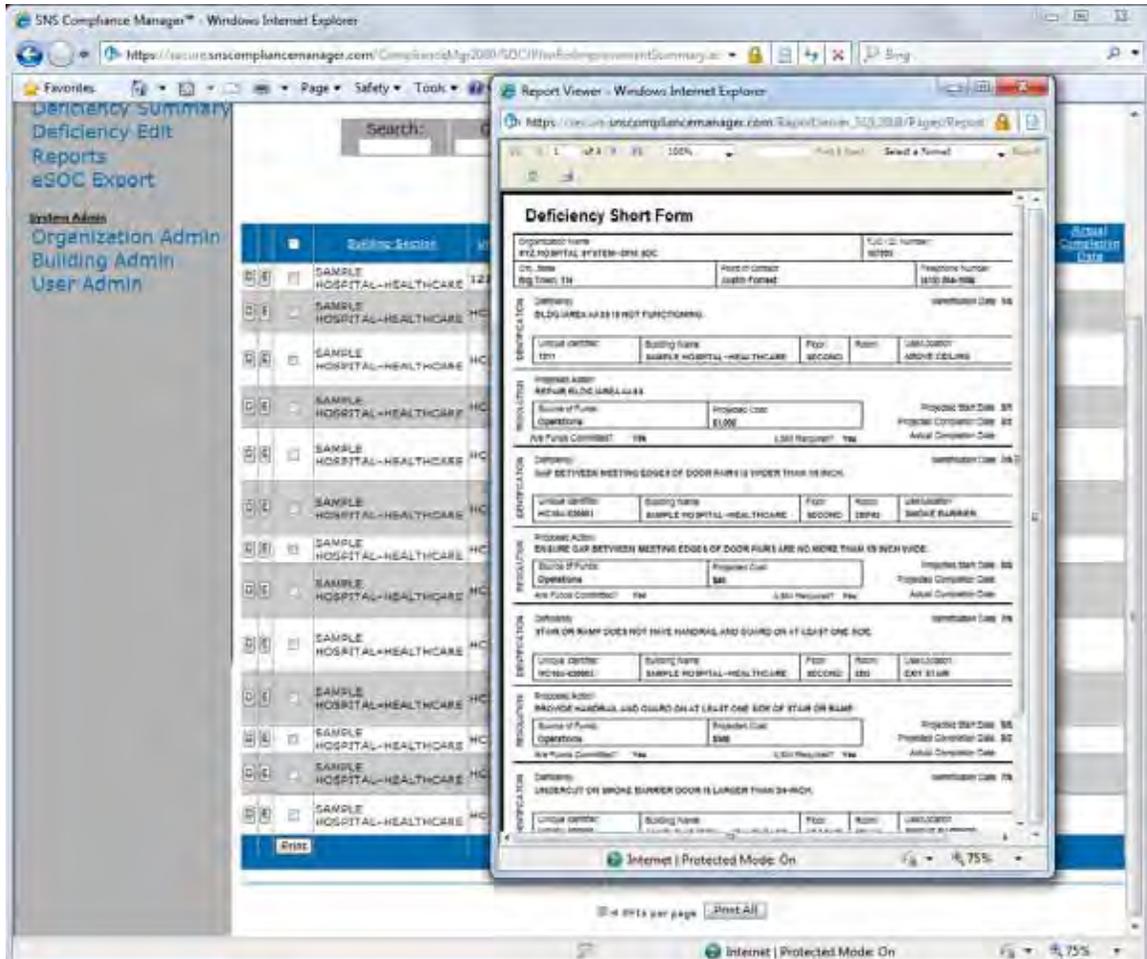
3.4 Deficiency Edit

1) Select the "Deficiency Edit" link from the sidebar menu to view the "Deficiency Edit" page. Deficiency editing is best understood after reviewing the main program functions. Its primary purpose is to manage and enhance the creation and editing of existing deficiency information in groups rather than one at a time.

2) There are two primary options on the "Deficiency Edit" page: "Advance All Deficiency Dates" and "Select Deficiencies" for group editing.

3) When the "Advance All Deficiency Dates" pushbutton is chosen, the "Deficiency Edit" page changes as indicated below. Enter the number of days to advance the id date, projected start, projected completion, and actual completion dates, then click the "Update" button to complete the process.
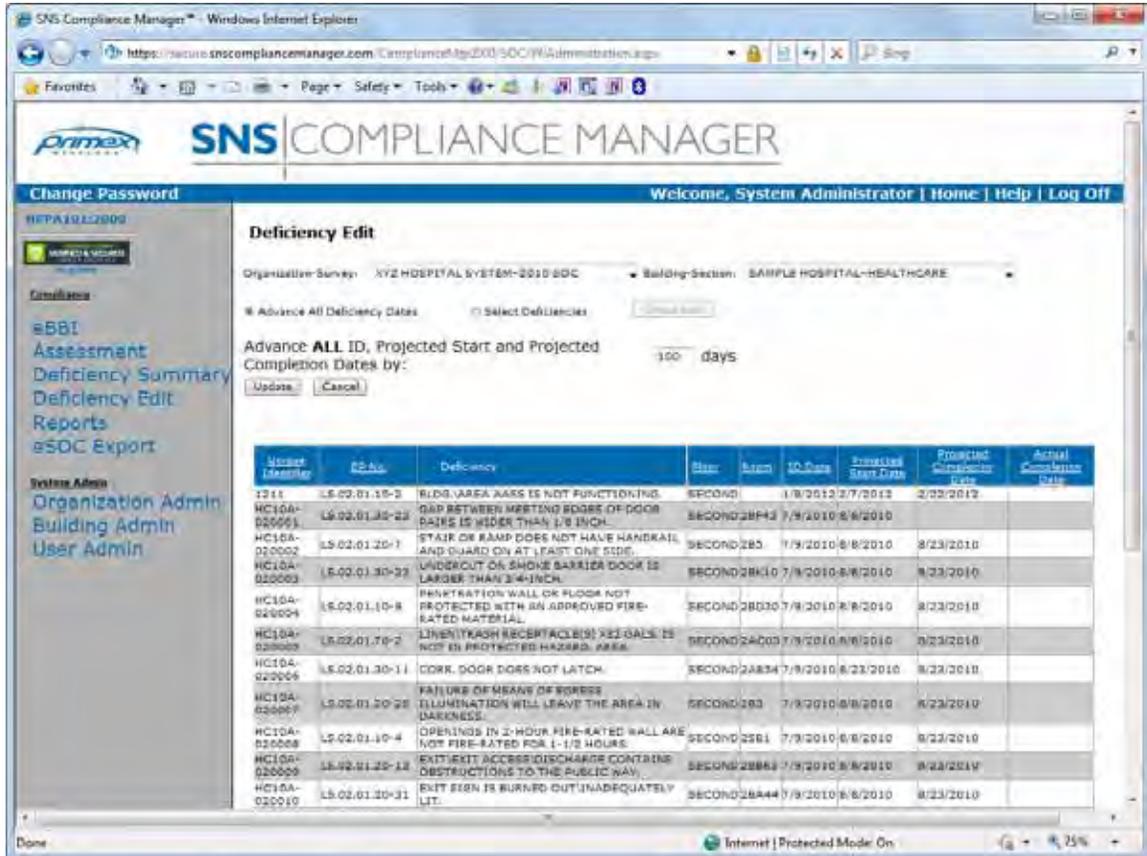
4) To use the "Select Deficiencies" for group editing option, first choose the "Select Deficiencies" pushbutton. Checkboxes should now be displayed for each deficiency item. Click the deficiencies to apply the group editing to, then click the "Group Edit" button.
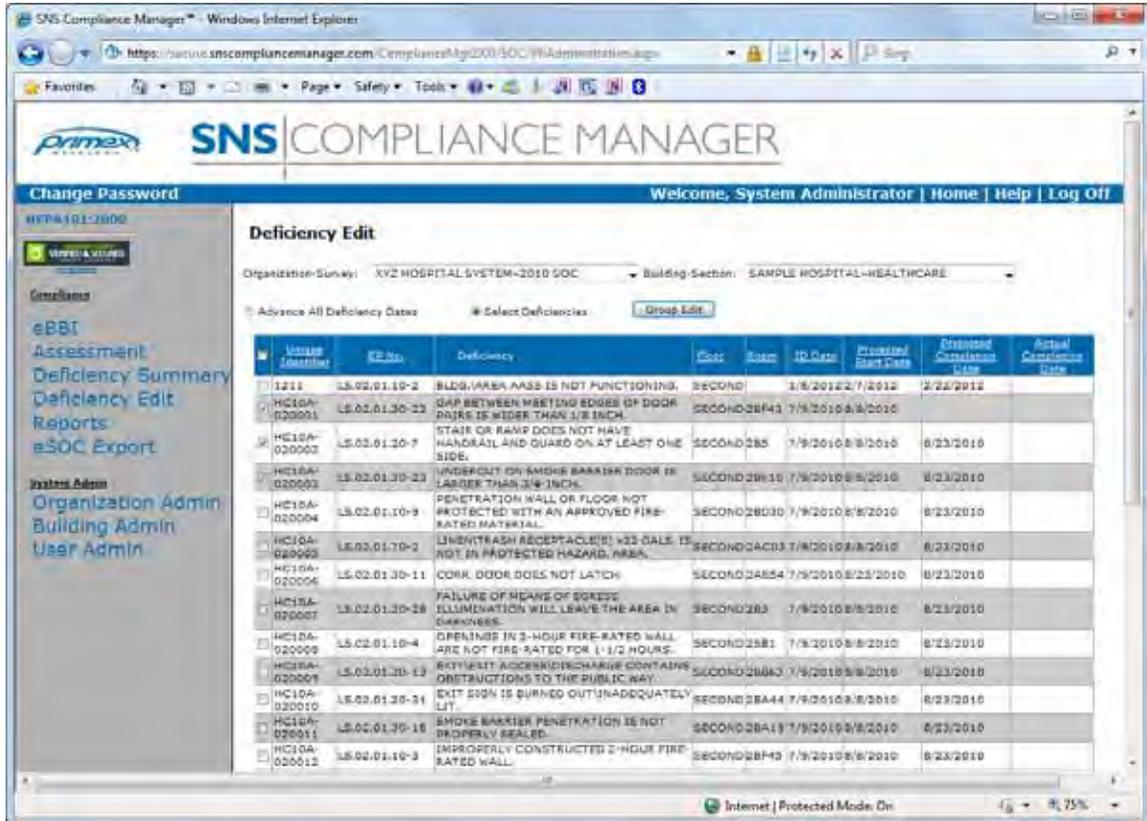
5) A "Deficiency Description" page will appear. Shared fields such as "Organization", "City/State", and "Building Name" are edited through Organization or Building Administration and are unavailable for edit here. In addition, certain unique fields such as "Unique Identifier", "Floor", and "Room" are locked and cannot be edited.   All these fields appear in gray. Fields that can be edited such as "Deficiency", "ILSM?", and "Proposed Action" will be applied to all selected deficiencies when the "Apply Changes" button is clicked.
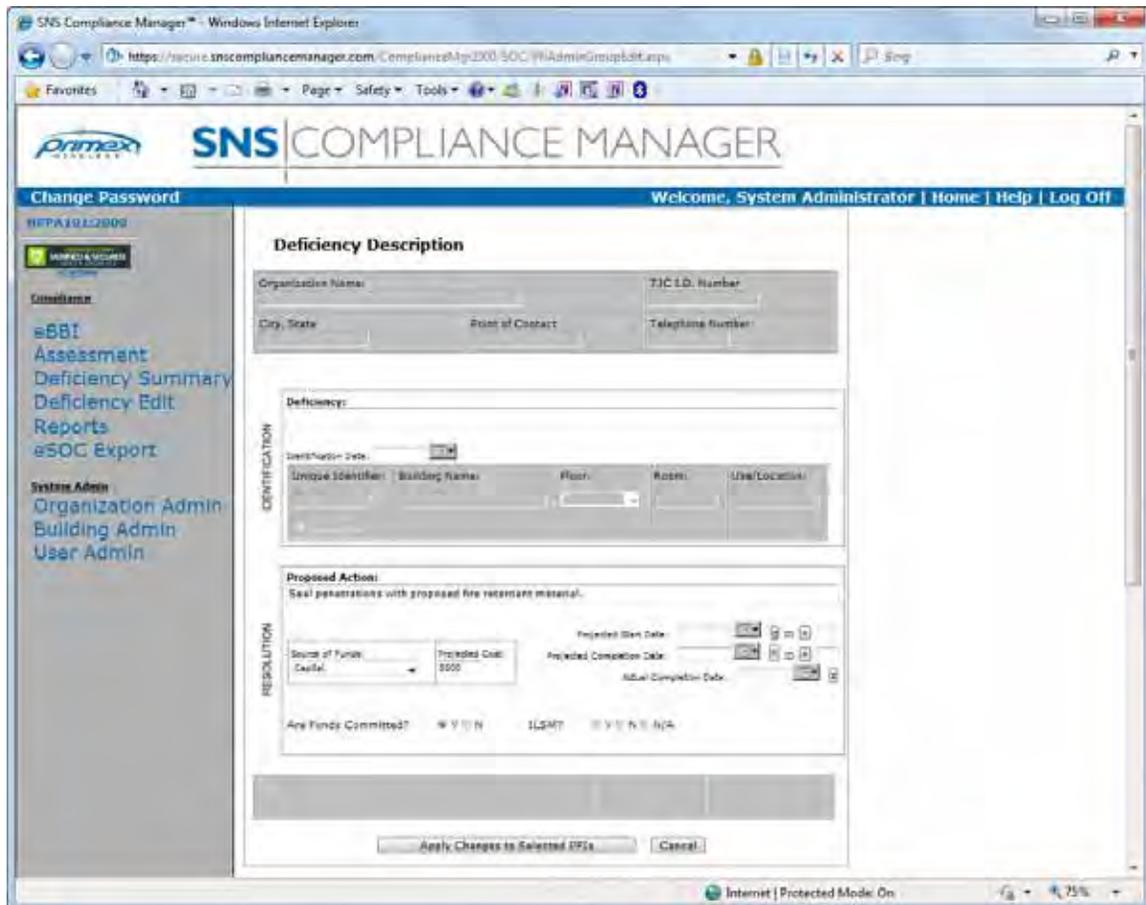
6) Note the changes applied to the selected deficiencies.
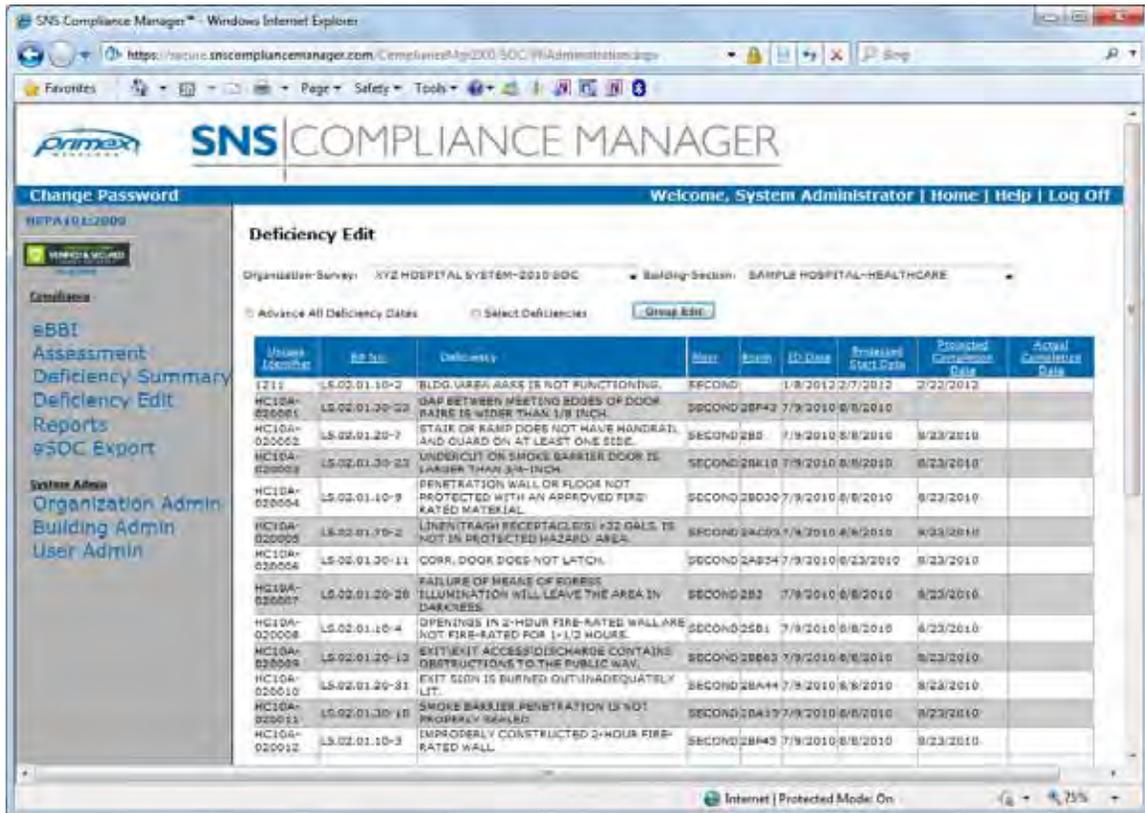
3.5 Reports

1) While there are a few areas within the program for creating other reports, the primary report location can be accessed by clicking the "Reports" link on the sidebar menu. This will display the "Reports" page. Next, select the Organization, and Building for the report. You may then choose to print all floors or a specific floor by selecting from the "Floor:" drop list.

To print any of the six listed report types you must first choose one by clicking the associated pushbutton for that report under the "Assessment Reports:", "Deficiency Reports:", or "Quality Control Reports:" sections. If you are running a deficiency report you should adjust your date filter to print the desired range of deficiencies. The default range is > 45 and <= 365 days. This prints any deficiencies with a duration to completion between 45 days and one year. Other examples include the following: To print work order items that will take less than or equal to 45 days to complete, enter a 0 in the greater than text box and a 45 in the <= text box (>0 and <= 45). To print all deficiencies out to 2 years, enter a 0 in the greater than text box and 730 days in the less than or equal to text box (> 0 and <= 730).

Once you've made these selections, click the "Run Report" button to create the report.

2) After a brief moment of processing the report preview will appear on the screen. From the report preview you may choose the following options from the top bar:

   a. Move from page to page <> or from first to last page and back |<>| using the appropriate arrows.
   b. Zoom in and out of the report by choosing a zoom percentage or fit option from the drop-down list.
   c. Search for text within a report by entering text within the text box and using the "Find | Next" links.
   d. Export to PDF format or Excel by selecting from the drop down list.
   e. Refresh the report if information has changed by clicking the refresh icon.
   f. Print to any windows printer by clicking the print icon.

3) The sample report below is for the "Life Safety Chapter Assessment Report". Samples of the other 5 reports are also shown below.

4) The "Deficiency Report" is a compact listing of all deficiencies sorted by EP ID, LSA question number, and floor.

5) The "Executive Summary" report is a comprehensive report of all deficiency information in a spreadsheet format sorted by EP ID#, and building.

6) The "PFI - Summary Report" lists most of the PFI deficiency fields and is sorted by Unique Identifier.

7) The "Completeness" report is a management tool for tracking missing information within each deficiency. In many cases this is the project start or completion dates, but other information can be missed as well. When choosing the "Completeness" report from the "Reports" page, additional options are available prior to running the report. You may choose to select the "Room", "ILSM Required", or "Actual Completion Date" check boxes under "Also check:" As indicated, this would check deficiencies to see that all rooms have numbers or descriptions, whether or not an ILSM is required, and whether an actual completion date has been added.
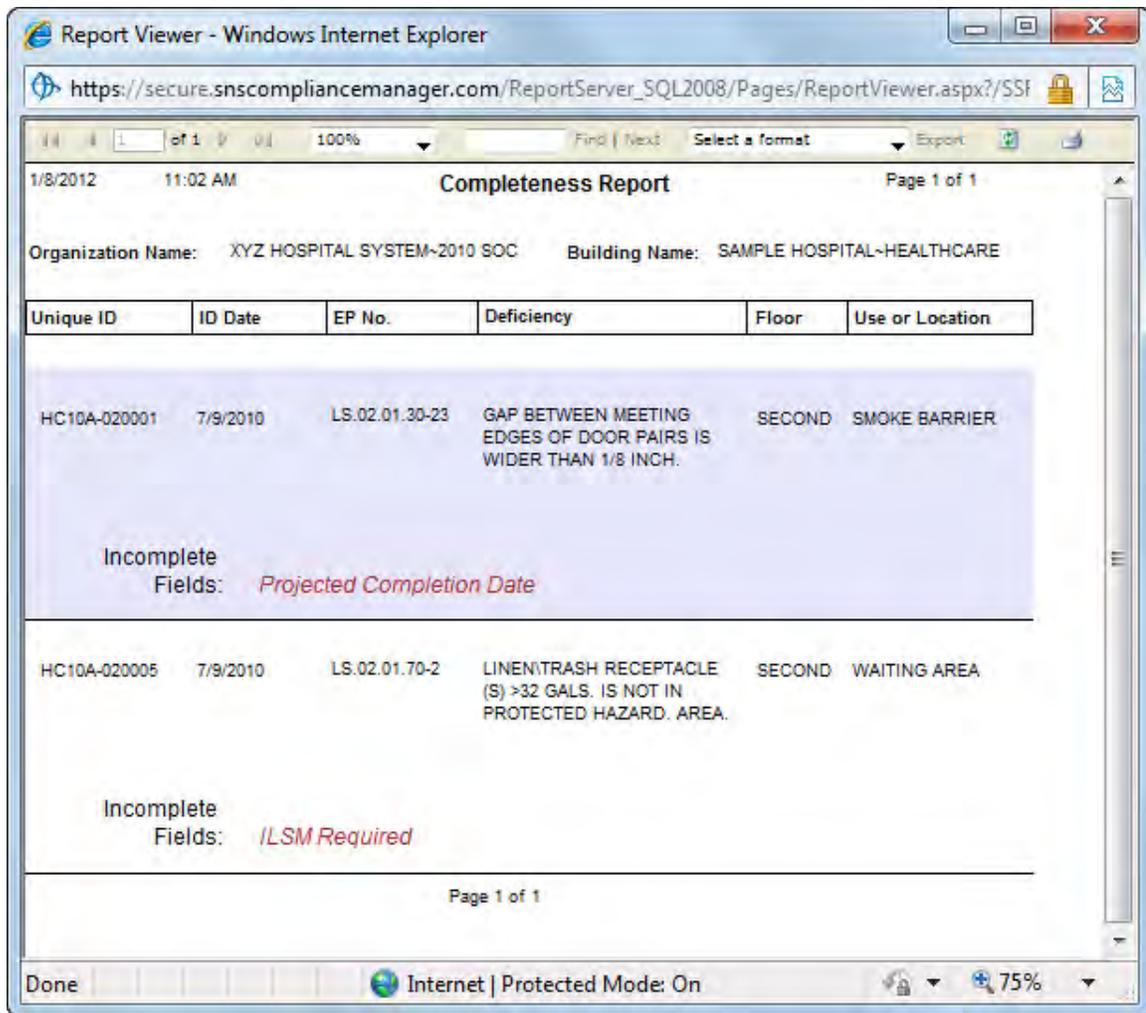
3.6 eSOC Export

1) The eSOC Export page is used to produce an Excel compatible comma separated file (CSV) of PFI deficiencies that can be imported into your Joint Commission™ Connect site. To access the eSOC Export page click on the "eSOC Export" link on the sidebar menu.

2) By default, deficiencies are filtered by those with a duration to completion of greater than 45 days. Per The Joint Commission™ (TJC) requirements, these could not be completed through a facility's work order process and must be electronically submitted to TJC as Plan For Improvement items.

3) To export deficiencies for a specific buildings, check the checkboxes in the "Select" column next to the desired buildings and un-check those you wish to exclude from the export. Buildings listed as unavailable have already been exported. While it is possible to reset and re-export these buildings it is not recommended since your connect site will not except buildings with duplicate unique identifiers.

4) Click the "Export" button to create the file.
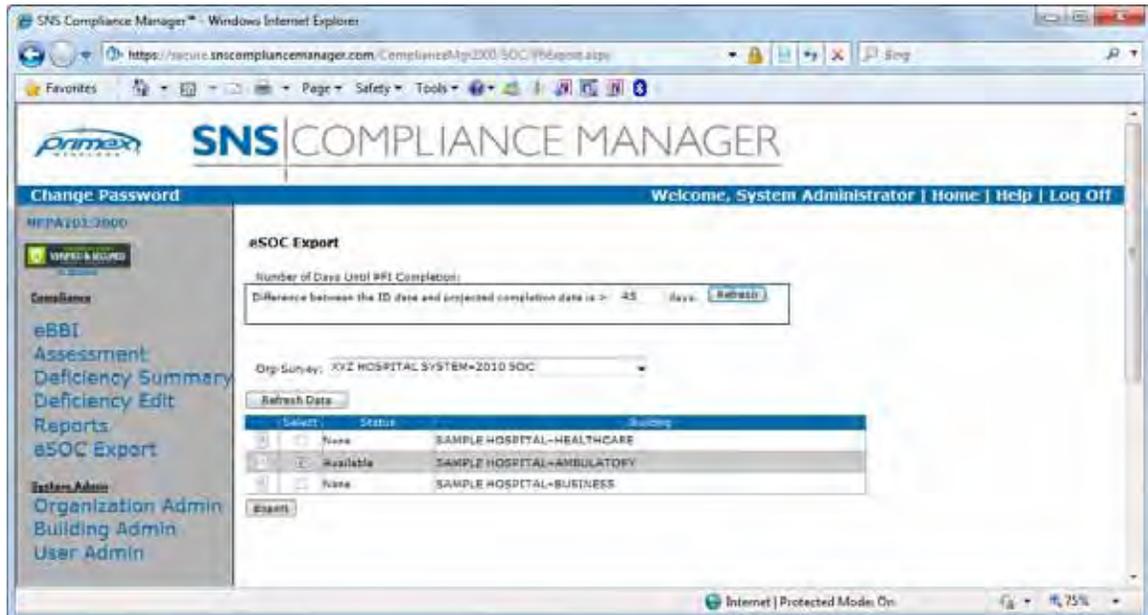
5) Click the "Save" button in the "File Download" popup dialog.
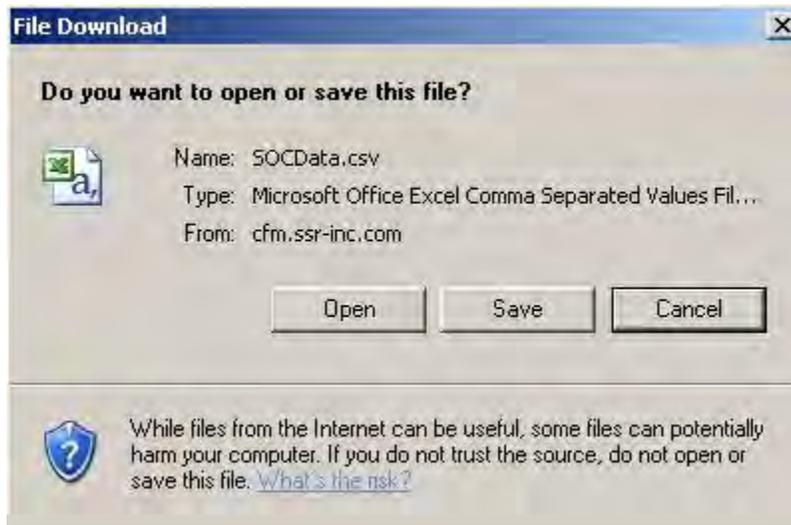
6) Choose a location to save the "SOCData.csv" file to. It is recommended you not change the name of this file until after the file has been saved.
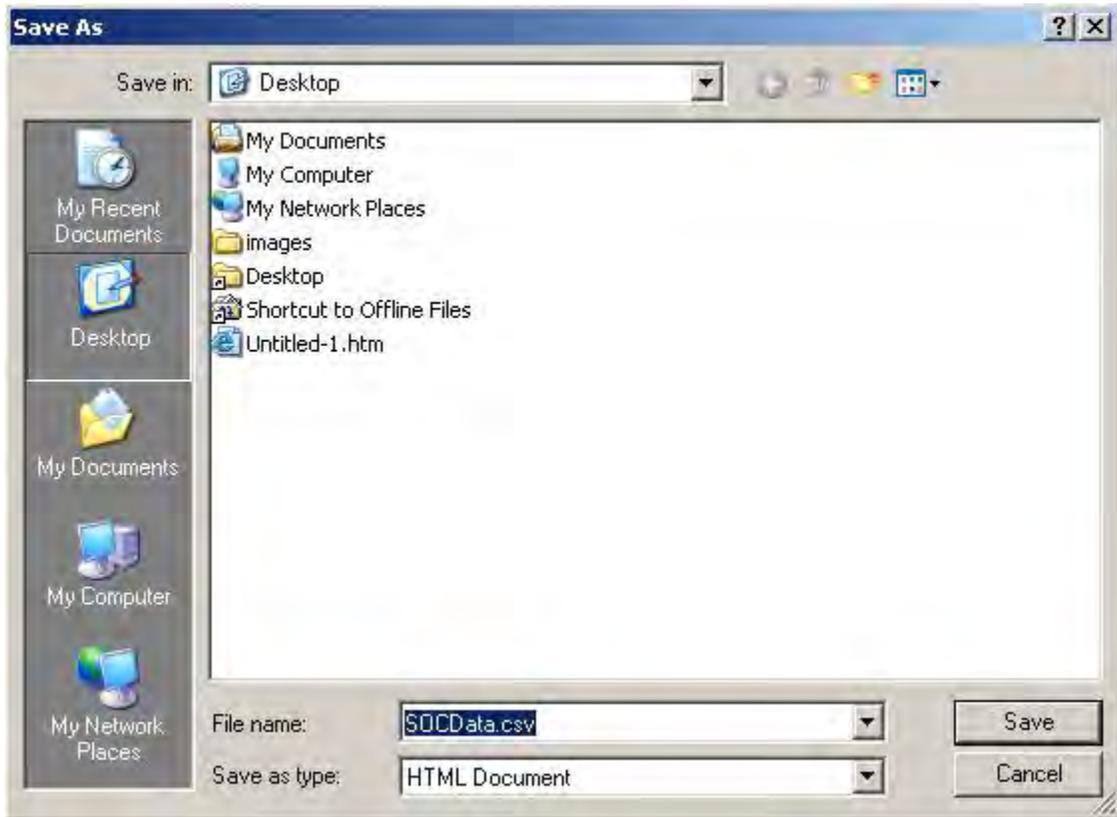
7) If the export fails this is typically due to missing information. This missing information is reported below the export information in red. Some of the most common failures include missing projected dates and missing SiteID and BuildingID. Without this information you will not be able to successfully import the file into your Joint Commission™ Connect site.
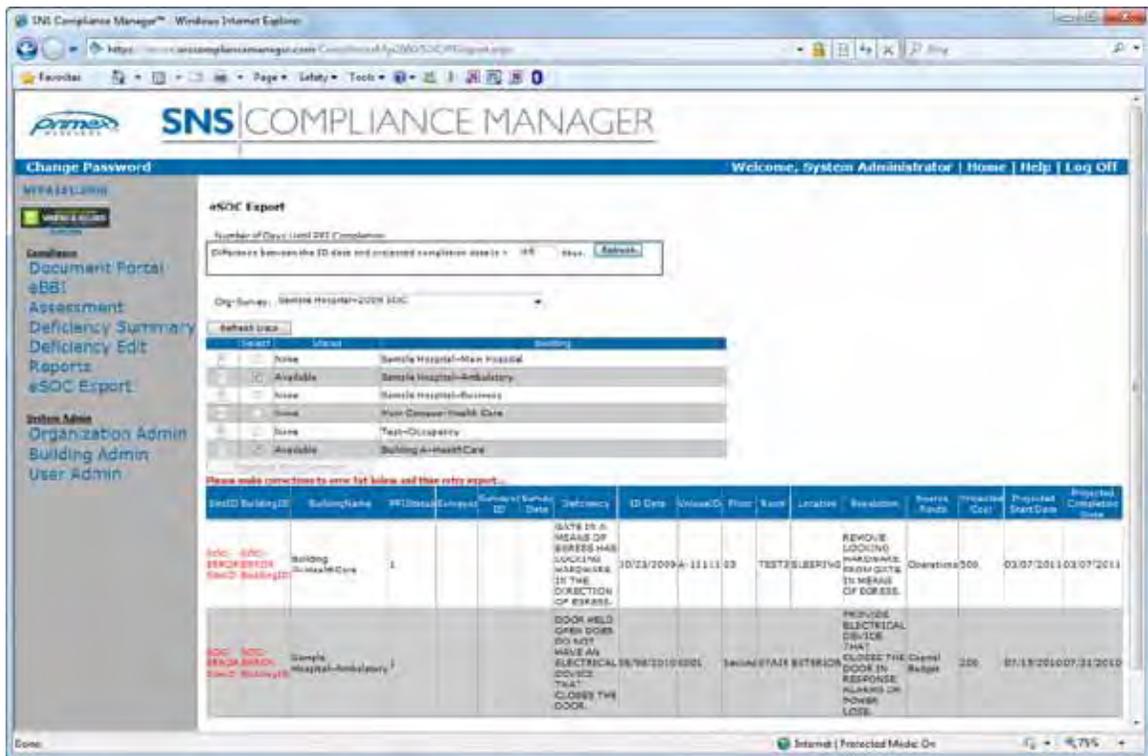
8) The Joint Commission™ Connect site contains a button on the "Import PFI" page for retrieving site and building ID's for your facility.
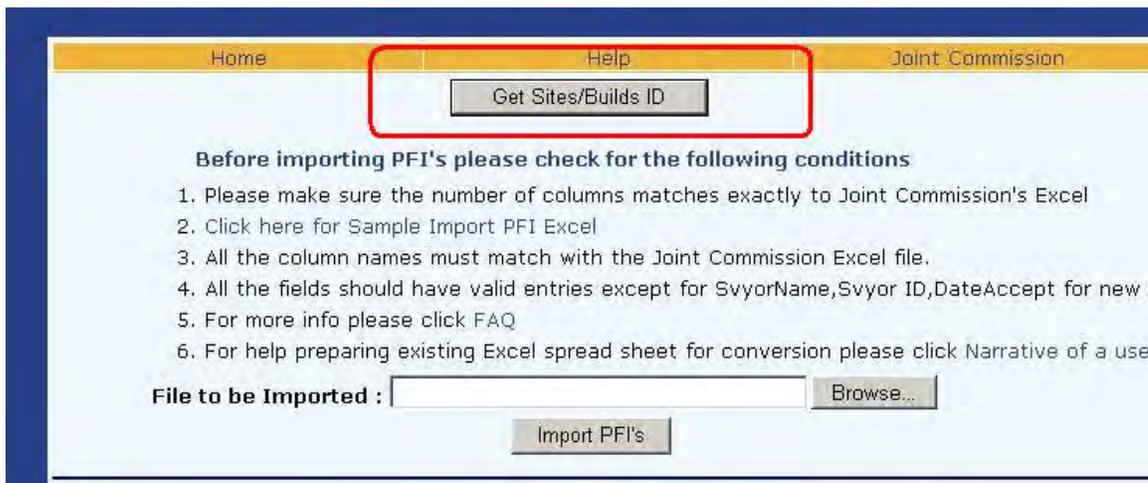
9) Clicking this button will produce an excel file that contains the site and building ID's for all your buildings.
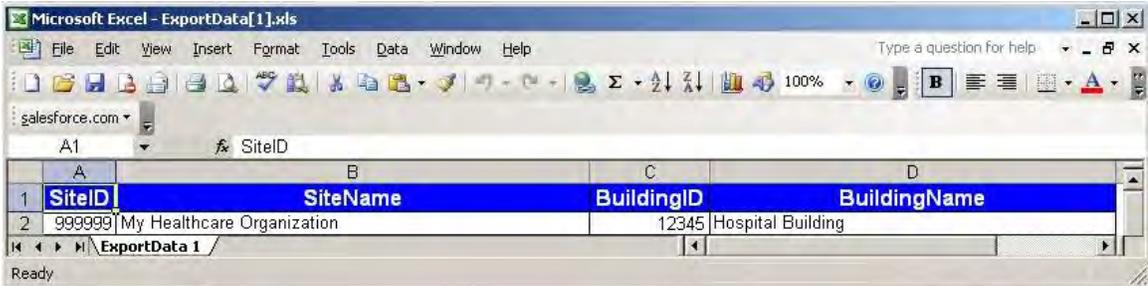
10) These ID's must be entered into SNS Compliance Manager™ for each building in the "Building Information" page under "Building Admin" for the eSOC export process to be successful.